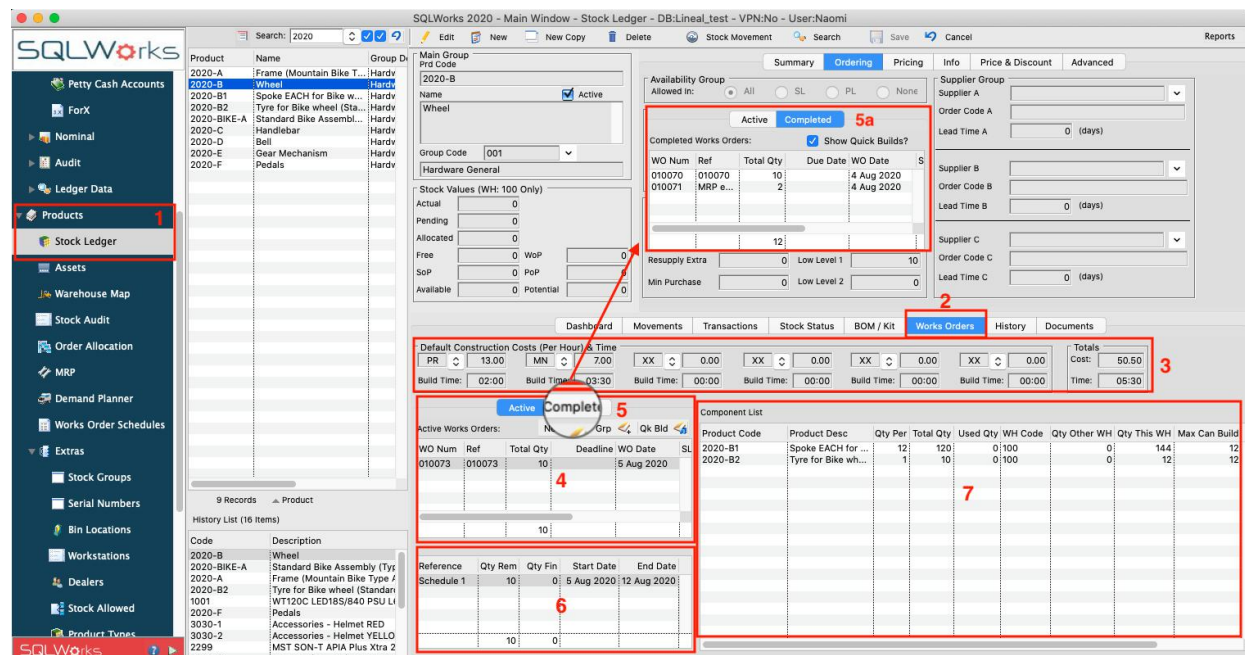# Introduction to Works Orders



To compliment SQLWorks manufacturing and BOM/Kits, Stock Ledger allows users to create and manage manufacturing works orders to different degrees of detail.

Terminology used within the Works Order process are detailed below:

**Build product** - the product that you want to build in a WO.

**Component** - products used to make the build product in a WO.

**BOM** - the list of components for a product.

**Take Stock** - allocating/reserving stock qty of component stock by transferring it into a 'build bin'.

**Build bin** - the area of a warehouse that contains products being used for manufacturing.

**Build Stock** - the process of removing stock qty for component products in a build bin, and creating stock qty for a build product.

**Schedule** - A dated body of work that is used to generate then build product, each schedule may have its own start/finish dates, component list and pricing details. All schedules in a WO are for the same build product.

(For an introduction to BOMs, click here and SQLWorks MRP, click here)

1. Works Orders are accessible from the Stock Ledger screen, under the 'Products' module, in the main NavBar.

2. By clicking the 'Works Orders' tab for a chosen stock item.

3. Here we have our default build costs set in our work centres; you can have up to 6 centres. We have utilised two so far for this item, we have PR - PREP and MN - Manufacture. You can set a labour rate and build time; this will feed up into the pricing of your BOM.
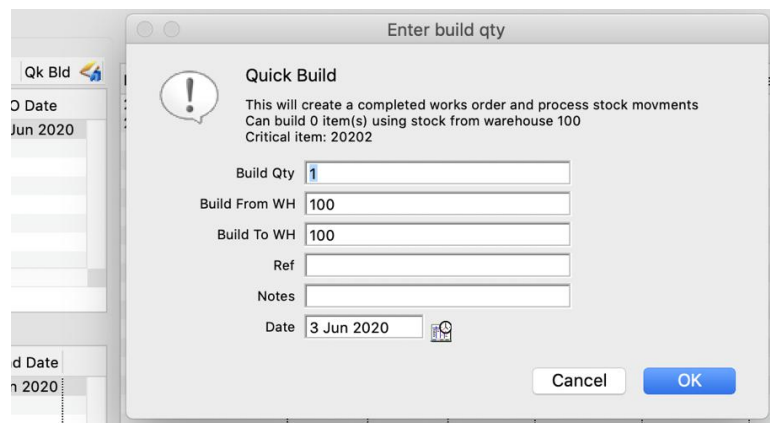
   These can be configured via the 'Workstations' option in the Nav bar and added to the works order by simply clicking on 'Edit' at the top of your and selecting the workstation from the dropdown list and typing in the labour rate and build time. Once these have been entered, they will be set by default and available on the next WO created for this item.

   All build times associated with the work centres will be accounted for in the Works order schedule, and the finish date adjusted to account for the duration of time needed at each work centre.

4. The tables below on the left-hand side show 'Active' works orders still being worked upon, and,

5. 'Completed' works orders which have been finished, which can be switched between using these 2 tabs
   a. Within the 'completed' orders tab there is a tick box which allows you to 'Show Quick Builds' as well as manually raised works orders.

6. The box underneath on the left shows the schedules that have been raised for these Active works orders.

7. To the right the 'Component list' Panel shows the parts needed for that stock item, how many are available in the default warehouse to use for this works order, and the maximum finished items that can be built from these parts.

## Quick Build

Users can complete a simple works order by right clicking in the 'Active Works Orders' and choosing 'Quick Build,' or you can also click on 'Qk Bld' logo. This simplified option checks the correct parts out of stock from their default warehouses, completes a Works Order immediately, and checks in the finished item into stock in its default warehouse.



Quick Build Options explained;

| | |
|---|---|
| **Build Qty:** | How many items to build |
| **Build From WH:** | Which warehouse to take component stock qty from |
| **Build To WH:** | Which warehouse to build finished item qty in |
| **Ref (optional):** | Populates the WO reference field (i.e. a client ref number) |
| **Notes (optional):** | Populates the WO notes field (i.e. design notes) |
| **Date:** | Populates the main WO date and schedule start date |

This is useful for simple builds where no extra works order detail is required, and the works order doesn't need to be drafted in advance.  To view the created works order, select the works order from the Active orders window.

# Full Works Order

Users can create a full new works order by right clicking in the 'Active Works Orders' and selecting 'New Works Order'. This opens a new works order window for the chosen stock item as above.



1. Here top left, you can enter a Deadline and Total Build Quantity.

2. Parts for kitting will be taken from the 'Take Stock From' Warehouse code, and (via the designated build bin) the finished item will be checked into the 'Build Product Where?' Warehouse code and Bin number.

3. There is a thumbnail menu on the left for choosing the schedule line you want to view. Once selected this opens the Schedule Plan window for building a given quantity – with the quantity of that schedule enterable on the left-hand side.

   Here you can also see the start date and no. of hours/days required to make this item if this has been set in your prefs. The start and finish date will amend automatically if you amend the Deadline date.

4. Under the 'Components' tab to the right - is a component list to help inform production numbers and availability of stock items required for this BOM. On this tab you can Take stock to make your item.

   At the top of this section is a slider showing how many items can be Built from available stock. Dependent on the stock Type if set to 'S = Standard' this will fill in the 'Take box' with this Qty. If set to 'B = Backflush' or 'R=Return' you will be prompted to take the stock upon clicking Build.

5. You can choose to select 'Take Stock Now' at the bottom of this screen or move to Build and take the stock then.  The quantity in the 'Take' field removes the required parts from the 'Take Stock From' warehouse.

6. Under the Progression tab is where you can progress to Build your item.  It will prompt you to take the stock if you haven't done so already in point 5.

   By clicking 'Build' this assembles the new item and moves it to your designated 'Build Product Where?' Warehouse and Bin.  The Active order will also be moved to the completed orders tab.

7. Under the Evaluation tab you can add an 'Inspection Group'.  This allows you to enter up to four custom quality testing/inspection checkpoints for each works order schedule, date-stamped for approval.

Works Orders can be saved without being built (to schedule future work), but when the 'built' quantity within the works order and any cancelled quantity added together equal the 'Total Quantity' required, the works order will automatically be moved to the 'Completed Works Order' list.

You can also cancel quantities from the Works Order by typing a quantity into the 'Cancel Qty' field. If after having created a WO you want to cancel the remaining unbuilt qty you can add cancel Qty to an outstanding schedule. You should manually return any taken stock that will not be used before cancelling by taking a negative qty