

Quality Management

- Part 2





Overview

Welcome Back! Quality Management Part 1 covered:

Inspection Routing Steps

Inspections

NCRs

CARs

Process Docs

A weird Twilight Zone reference



Overview

Receiving Inspections

Locked & Expired Floor Inventory

Tool Management

ECOs

Quality Alerts



Receiving Inspections

Receiving parts may be inspected at time of receipt, or at a later time.

“set received parts to pending” is a configuration that allows the user to shift inspection from the receiving clerk to the inspection employee.

The parts received but not inspected get ‘locked’. Meaning, they are displayed in inventory, but not pickable/usable for orders.

Receive Parts

[Back to Pending Put Away](#)

PO	<input type="text" value="20.1"/>	<input type="button" value="Q"/>	PO Line	<input type="text" value="3 Part PRT2 (C"/>	Packing Slip #	<input type="text"/>		
Prcpart	<input type="text" value="PRT2"/>	<input type="button" value="Q"/>	Unit Cost	<input type="text" value="0.00000000"/> USD	<input type="button" value="Landed Cost"/>	Quantity	<input type="text" value="20"/>	<input type="button" value="+ Pieces/Serials"/>
Location	<input type="text" value="Main"/>	<input type="button" value="v"/>	Date	<input type="text" value="2021-10-14"/>				
Date Code	<input type="text" value="0013"/>		Lot Code	<input type="text" value="8239224"/>	Revision	<input type="text" value="1"/>	<input type="button" value="Q"/>	
Expires On	<input type="text" value="2021-12-29"/>		Lock Bin	<input type="checkbox"/>			<input type="button" value="Receive"/>	<input type="button" value="Receive & Keep PO"/>
Receipt Is For Order! 7.1								
Part Image								
PO Due Date	<input type="text" value="2021-09-2"/>		PO Buyer	<input type="text" value="Tanner Rogers"/>				
PO Comments								
Inspection Instructions								
Qty Accepted	<input type="text"/>		Qty Rejected	<input type="text"/>				

Leave Blank!

Leave Blank!

Receive Parts

[Back to Pending Put Away](#)

PO	<input type="text" value="PO or RMA ID"/> <input type="button" value="Q"/>	PO Line	<input type="text" value="(select po line"/> <input type="button" value="v"/>	Packing Slip #	<input type="text"/>
Prcpart	<input type="text" value="Search parts..."/> <input type="button" value="Q"/>	Unit Cost	<input type="text"/> USD <input type="button" value="Landed Cost"/>	Quantity	<input type="text"/> <input type="button" value="+ Pieces/Serials"/>
Location	<input type="text" value="Main"/> <input type="button" value="v"/>	Date	<input type="text" value="2021-10-14"/>		
Date Code	<input type="text"/>	Lot Code	<input type="text"/>	Revision	<input type="text"/> <input type="button" value="Q"/>
Expires On	<input type="text"/>	Lock Bin	<input type="checkbox"/>	<input type="button" value="Receive"/>	<input type="button" value="Receive & Keep PO"/>

Parts Received, PO Line Receipt. 112 (ID: 36).

Receipt Label - Serial Labels

Inspection 33

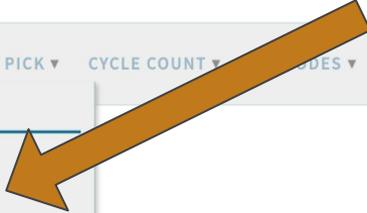


RECEIVING ▾ RELEASE TO PICK ▾ CYCLE COUNT ▾

RECEIVE PARTS

PUT AWAY

INCOMING INSPECTIONS



Back to Pending Put Away

PO	<input type="text" value="PO or RMA ID"/> <input type="button" value="Q"/>	PO Line	<input type="text" value="(select po line"/> ▾	Packing Slip #	<input type="text"/>
Prcpart	<input type="text" value="Search parts..."/> <input type="button" value="Q"/>	Unit Cost	<input type="text"/> USD <input type="button" value="Landed Cost"/>	Quantity	<input type="text"/> <input type="button" value="+ Pieces/Serials"/>
Location	<input type="text" value="Main"/> ▾	Date	<input type="text" value="2021-10-14"/>		
Date Code	<input type="text"/>	Lot Code	<input type="text"/>	Revision	<input type="text"/> <input type="button" value="Q"/>
Expires On	<input type="text"/>	Lock Bin	<input type="checkbox"/>	<input type="button" value="Receive"/>	<input type="button" value="Receive & Keep PO"/>

Parts Received, PO Line Receipt. 112 (ID: 36).
Receipt Label - Serial Labels
Inspection 33

Incoming Inspections

Date Inspected: 2021-10-11 - 2021-10-14

Prcpart: Search parts...

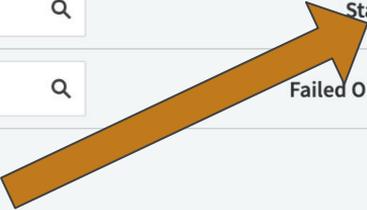
PO:

Vendor: Search vendors...

Location: All

Status: Pending

Failed Only?



Displaying 1 - 1 of 1 [Export](#) +/- Columns

Inspection	Loc	PO	Line	Vendor	Vendor #	Prcpart	Qty Inspected	Qty Passed	Qty Failed	Inspected On	Status
33	MN	20.1	3	Digi Key	4	PRT2	20	0	0	2021-10-14	Pending

Displaying 1 - 1 of 1 [Export](#) +/- Columns

▼ WAREHOUSE SPECIFIC DATA FOR MN - MAIN 

Warehouse Transfer Vendor Return

Avg Cost	\$2.00				
Cost For Loc	\$2.00	Resale For Loc		MOQ	(1)
QOH	9950	QR	259	Qty Avail	9691
QOO	0	Total Backlog	217	Activity End Qty	9676
Std Cost	\$0.00	Std Package		Lead Time (in weeks)	0
Commodity Code		ABC Code		Country of Origin	
Tariff (HTS)		Purchasing MOQ		Purchasing Std Package	
Last Updated	N/A	Last Counted	N/A	ROP	0
Primary Bin	A-12-2				

Part Bin Data

Bin	Receipt	Date	Total Bin Qty	Date Code	Lot Code	Revision	Expand All
A-12-2 (History)	2- (label) (Move)		9930		889023423		Edit
			2	Picked on 13.1 Line: 1 - Unpick			
Bin Cost 	<input type="text" value="\$2.00"/>	Actual Shelf Qty	<input type="text" value="9928"/>	(Reason C )	<input type="text" value="Reason Comments"/>		<input type="button" value="Set Qty/Cost"/>
NEW (History) LOCKED	112-101421 (label) (Move)	2021-10-14	20	0013	8239224	1	Edit
Bin Cost 	<input type="text" value="\$0.00"/>	Actual Shelf Qty	<input type="text" value="20"/>	(Reason C )	<input type="text" value="Reason Comments"/>		<input type="button" value="Set Qty/Cost"/>



Receipts Pending Put Away

View Pending Receipts For Warehouse:

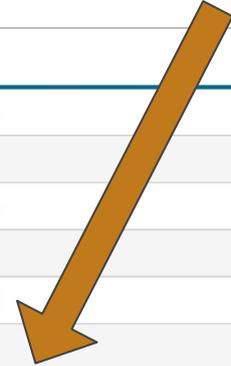
Main



Submit

+/- Columns

Receipt	Prctpart	Lotcode	Received On	Put Away Qty	
15	RAW1	122831	2021-09-29	98	Put Away
17	RAW1	88829743	2021-09-29	50	Put Away
19	RAW2	0934244	2021-09-29	100	Put Away
24	RAW1	90823233	2021-09-29	10000	Put Away
25	RAW2	009232	2021-09-29	10000	Put Away
33	BOM1001	2140001	2021-10-09	1	Put Away
36	PRT2	8239224	2021-10-14	20	Bin locked/Inspection pending



Edit Incoming Inspection 33

VIEW & EDIT [Back To List](#)

DOCUMENTS (0)

NOTES (0)

PO 20.1

PO:	MN 20.1-3	Receipt:	36
Part	PRT2	Vendor	Digi Key
Qty Accepted	<input type="text" value="0"/>	Qty Failed	<input type="text" value="0"/>
Comments	<input type="text"/>		
Status	<input type="text" value="Pending"/>	Return Tracking Info	<input type="text"/>
Resolution Comments	<input type="text"/>		
Returned To Vendor On	<input type="text"/>	Return To Vendor	<input type="button" value="Update"/>
NCR	(none)	<input type="button" value="Edit"/>	Inspected At 2021-10-14 By Tanner Rogers

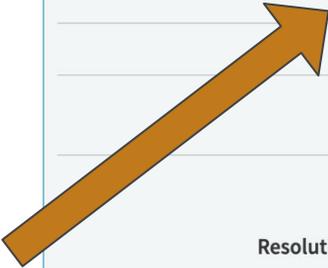
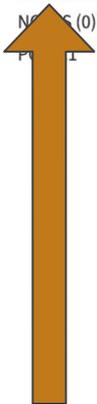
Edit Incoming Inspection 33

Success: Updated Inspection

VIEW & EDIT [Back To List](#)

DOCUMENTS (1)

NOTES (0)



PO:	MN 20.1-3	Receipt:	36
Part	PRT2	Vendor	Digi Key
Qty Accepted	20	Qty Failed	0
Comments	No Issues. See Doc Attached for Pass.		
Status	<input type="text" value="Closed"/>	Return Tracking Info	<input type="text"/>
Resolution Comments	<input type="text"/>		
Returned To Vendor On	<input type="text"/>	Return To Vendor	<input type="button" value="Update"/>
NCR	(none)	<input type="button" value="Edit"/>	Inspected At 2021-10-14 By Tanner Rogers

WAREHOUSE SPECIFIC DATA FOR MN - MAIN 

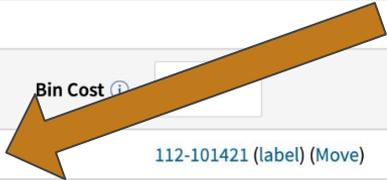
Warehouse Transfer

Vendor Return

Avg Cost	\$2.00			
Cost For Loc	\$2.00	Resale For Loc	MOQ	(1)
QOH	9950	QR	259	Qty Avail 9691
QOO	0	Total Backlog	217	Activity End Qty 9676
Std Cost	\$0.00	Std Package		Lead Time (in weeks) 0
Commodity Code		ABC Code		Country of Origin
Tariff (HTS)		Purchasing MOQ		Purchasing Std Package
Last Updated	N/A	Last Counted	N/A	ROP 0
Primary Bin	A-12-2			

Part Bin Data

Bin	Receipt	Date	Total Bin Qty	Date Code	Lot Code	Revision	Expand All
A-12-2 (History)	2- (label) (Move)		9930		889023423		Edit
			2	Picked on 13.1 Line: 1 - Unpick			
	Bin Cost 		Actual Shelf Qty	9928	(Reason C )	Reason Comments	Set Qty/Cost
NEW (History)	112-101421 (label) (Move)	2021-10-14	20	0013	8239224	1	Edit
	Bin Cost 	\$0.00	Actual Shelf Qty	20	(Reason C )	Reason Comments	Set Qty/Cost



Receipts Pending Put Away

View Pending Receipts For Warehouse:

Main



Submit

+/- Columns

Receipt	Prcpart	Lotcode	Received On	Put Away Qty	
15	RAW1	122831	2021-09-29	98	Put Away
17	RAW1	88829743	2021-09-29	50	Put Away
19	RAW2	0934244	2021-09-29	100	Put Away
24	RAW1	90823233	2021-09-29	10000	Put Away
25	RAW2	009232	2021-09-29	10000	Put Away
33	BOM1001	2140001	2021-10-09	1	Put A
36	PRT2	8239224	2021-10-14	20	Put Away





Receiving Inspections -Failure?

Create an NCR

- Config: create_ncr_from_failed_inspection

Return to Vendor

Edit Incoming Inspection 34

VIEW & EDIT

[Back To List](#)

DOCUMENTS (1)

NOTES (0)

PO 20.1

PO: [MN 20.1-2](#)

Receipt: 37

Part [PRT111](#)

Vendor [Digi Key](#)

Qty Accepted

0

Qty Failed

20

Comments

Does not pass calibration test. see doc attached.

Status

Open

Return Tracking Info

203849203422

Resolution Comments

Returning to Vendor. Expedited shipping is needed on this.

Returned To Vendor On

2021-10-14

[Return To Vendor](#)

[Update](#)

NCR [NCR 10](#)

[Edit](#)

Inspected At 2021-10-14 By Tanner

Rogers

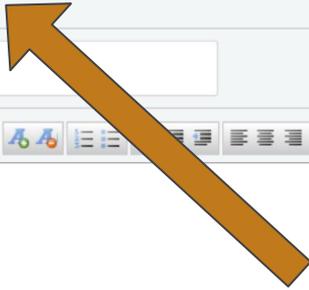
NCR 10

Creation: ▼

- VIEW NCR
- DOCUMENTS (0)
- NOTES (0)
- HISTORY

[Back To All](#)

NCR Type	Vendor/Supplier (External) ▼ Edit Types	Title	<input type="text"/>
Order/Line	(342.1-1) or (customer)	Prcpart	PRT111 🔍 (Qty: <input type="text" value="20"/>)
Assigned To	Edit Assignments	Initiated By	On 2021-10-14 Critical? <input type="checkbox"/>
Source	IncomingInspection 34		
Vendor	<input type="text" value="4"/>	PO	<input type="text" value="20.1"/>
Source Desc	<div style="border: 1px solid #ccc; padding: 5px;"><p>B I U S x x² </p><p>P H1 H2 H3 H4 H5 H6 </p></div>		
Due Date:	<input type="text"/>	Image:	<input type="button" value="Choose File"/> No file chosen



[Details](#)

Edit Incoming Inspection 34

VIEW & EDIT

[Back To List](#)

DOCUMENTS (1)

NOTES (0)

PO 20.1

PO: [MN 20.1-2](#)

Receipt: 37

Part [PRT111](#)

Vendor [Digi Key](#)

Qty Accepted

0

Qty Failed

20

Comments

Does not pass calibration test. see doc attached.

Status

Open

Return Tracking Info

203849203422

Resolution Comments

Returning to Vendor. Expedited shipping is needed on this.

Returned To Vendor On

2021-10-14

[Return To Vendor](#)

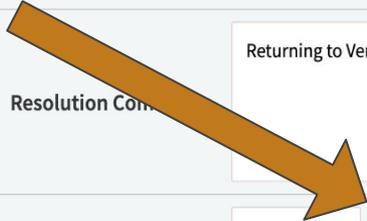
[Update](#)

NCR [NCR 10](#)

[Edit](#)

Inspected At 2021-10-14 By Tanner

Rogers



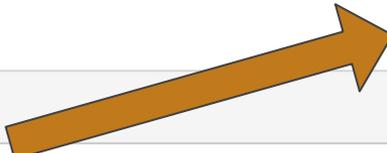
Part PRT111

- VIEW
- EDIT
- REVISIONS
- BOM USE (2)
- PRICE/COST +
- SALES +
- PURCHASING +
- ACTIVITY +
- QUALITY +
- MAINT +
- DOCUMENTS (0)
- NOTES (0)

Vendor Return From Location: MN

Return To Vendor

Bin	Receipt	Date	Available Bin Qty	Return Qty
F-9-11	47-092921	2021-09-29	80	<input type="text"/>
B-10-34	47-092921	2021-09-29	20	<input type="text"/>
NEW	121-101421	2021-10-14	20	<input type="text" value="20"/>



Vendor Return 2

EDIT

PACKING SLIP

ORDER MN1039.1

INVOICE 1039.1

DOCUMENTS (0)

NOTES (0)

[Back To All Vendor Returns](#)

Vendor Return Closed, Updates Will Be Ignored

Vendor	Digi Key	Internal Customer	Internal Account
Vendor Address	External Remit Address 1234 RemitRemit Austin, Tx 78744	Created On	2021-10-14
		Created By	tanner
Description	<input type="text" value="(short desc)"/>	Location	MN
Comments	<input type="text"/>		
Total Value	\$14.00	Debit Memo ⓘ	Create
	Returned by tanner on 2021-10-14	Return Parts	Parts Returned (Invoice 1039.1)
	Closed by tanner on 2021-10-14	Close Vendor Return	Closed

#	Prcpart	Bin	Unit Value	Return Qty	Line Comment	Delete Line
1	PRT111	F-9-11 (qty 80) ▼	<input type="text" value="\$0.70"/>	20		
(New)	<input type="text" value="(prcpart)"/>	ⓘ				



Receiving Inspections -Reporting!

Incoming Inspections

Date Inspected	2021-01-01 - 2021-10-14	Prcpart	Search parts... <input type="text"/>	Status	All <input type="text"/>
	<input type="text"/>	Vendor	Search vendors... <input type="text"/>	Failed Only?	<input checked="" type="checkbox"/>
Location	All <input type="text"/>			<input type="button" value="Submit"/>	

CLICK 'SUBMIT' TO VIEW RESULTS



Receiving Inspections

- Per Part?

Great feature! But what if I want to do that per part?

Disable 'set received parts to pending'

Enable 'DTS - Enable Dock To Stock Mode'

- There are a few pairing configs with DTS, ignore them.

Purchasing / Receiving Information

Purchase UOM

UPC

Preferred Vendor

Preferred Manufacturer

Require Receipt? 

Default Receiving Location

Incoming Inspection Instructions (shows at receiving)

Shipping/Packing Instructions (shows at shipping/invoicing)

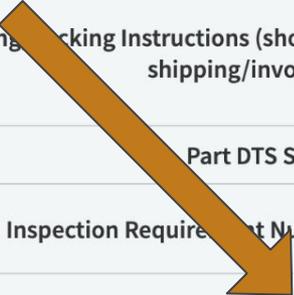
Part DTS Status: N/A

Inspection Requirement Number

Passing Inspections: 0 of 0

Permanent Inspection Lock

Permanent Inspection Lock Notes



Update



Receiving Inspections -Questions?



Locked & Expired Floor Inventory

When receiving inventory, you can set the expiration date as well as 'manually' locking inventory to a bin.

Notably, manually locking inventory still allows users to put it away, but it won't be available to pick on work orders or sales orders.

Receive Parts

[Back to Pending Put Away](#)

PO	<input type="text" value="58.1"/>	<input type="text" value="58.1"/>	PO Line	<input type="text" value="1 Part PRT4 ("/>	Packing Slip #	<input type="text"/>
Prcpart	<input type="text" value="PRT4"/>	<input type="text" value="PRT4"/>	Unit Cost	<input type="text" value="4.00000000"/> USD <input type="button" value="Landed Cost"/>	Quantity	<input type="text" value="1"/> <input type="button" value="+ Pieces/Serials"/>
Location	<input type="text" value="Main"/>	<input type="text" value="Main"/>	Date	<input type="text" value="2021-10-14"/>		
Date Code	<input type="text" value="1014"/>	<input type="text" value="1014"/>	Lot Code	<input type="text" value="310982"/>	Revision	<input type="text" value="1"/> <input type="text" value=""/>
Expires On	<input type="text" value="2021-12-31"/>	<input type="text" value="2021-12-31"/>	Lock Bin	<input checked="" type="checkbox"/>	<input type="button" value="Receive"/>	<input type="button" value="Receive & Keep PO"/>
PO Due Date	<input type="text" value="2021-10-02"/>	<input type="text" value="2021-10-02"/>	PO Buyer	<input type="text" value="Jordan Jolly"/>		
Inspection Instructions						
Qty Accepted	<input type="text" value="1"/>	<input type="text" value="1"/>	Qty Rejected	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>



Locked & Expired Floor Inventory

- Reporting

Parts > Lists > List by Bin

Filter by 'Expired' date range

Filter by 'Locked/Unlocked'

Part List By Bin

Prcpart
 Bin
 Location

Description
 Expires (from) -
 Created (from) - (to)

Lot Code
 Is Locked
 BOMs

ABC Code
 Include Total Value?

Displaying 1 - 3 of 3 [Export](#) [+/- Columns](#)

PRC	Part	Prcpart	Receipt	Bin	Loc	Bin Qty	UOM	Bin Cost	Bin Ext Value	Pick Qty	Shelf Qty	Expires On	Lot Code	Info
PRT	1	PRT1	70	A-1-3	MN	1	Meters	\$1.00	\$1.00	0	1	2021-10-04	336427	i
PRT	1	PRT1	1	Short Length	MN	4000	Meters	\$1.00	\$4,000.00	0	4000	2021-10-05		i
PRT	1	PRT1	59	A-1-2	MN	25	Meters	\$1.00	\$25.00	0	25	2021-10-12	999812	i
									\$4,026.00					

Part List By Bin

Prcpart
 Bin
 Location

Description
 Expires -
 Created -

Lot Code
 Is Locked
 BOMs

ABC Code
 Include Total Value?

Displaying 1 - 6 of 6 [Export](#) [+/- Columns](#)

PRC	Part	Prcpart	Receipt	Bin	Loc	Bin Qty	UOM	Bin Cost	Bin Ext Value	Pick Qty	Shelf Qty	Expires On	Lot Code	Info
RAW	1	RAW1	66	NEW-3	MN	10000		\$0.56	\$5,600.00	0	10000	2021-11-06	90823233	i
PRT	2	PRT2	112	NEW	MN	20		\$0.00	\$0.00	0	20	2021-12-29	8239224	i
PRT	33	PRT33	18	A-12-18	MN	6000		\$1.33	\$7,980.00	5	5995	2021-12-30	123123	i
PRT	33	PRT33	18	A-12-18-1	MN	39		\$1.33	\$51.87	5	34	2021-12-30	12314121	i
PRT	1	PRT1	84	A-1-4	MN	10	Meters	\$0.10	\$1.00	0	10	2021-12-31	234832	i
SUB	500	SUB500	122	NEW	MN	10		\$2.00	\$20.00	0	10	2021-12-31	0398204	i
									\$13,652.87					

Part PRT33

Flouride Solution

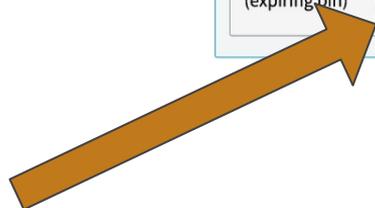
- VIEW
- EDIT
- REVISIONS
- BOM USE (1)
- PRICE/COST +
- SALES +
- PURCHASING +
- ACTIVITY +
- QUALITY +
- MAINT +
- DOCUMENTS (0)
- NOTES (0)

Toggle Waterfall

WATERFALL FOR LOCATION MN

Entries will appear in the list below for each instance they are used in a BOM on that order.

Order	Customer	Qty Need	Piece	Picked	Entry Date	Work Start Date	Date	Projected QOH	PO	Supplier	Qty Gain	Piece
							Starting	7039				
				10			Picked	10				
27.1-7	Schrute Farms (5)	660	0	0	2021-09-29	2021-09-29	2021-09-29	6369.00				
1015.1-1	Vance Refrigera... (3)	10	0	10	2021-10-05	2021-10-05	2021-10-05	6369.00				
1020.1-1	OxEon Energy, L... (27)	1	0	0	2021-10-08	2021-10-08	2021-10-08	6388.00	65.1-1	Master Distributor (2)	+ 20	0
(expiring bin)	(A-12-18)(A-12-18-1)	(5995) (34)			2021-12-30		2021-12-30	359.00				





Locked & Expired Floor Inventory

- Questions?



Tool Management

Creating Tools

Maintenance Schedule

Linking Tools to Parts

Check In & Check Out



Tool Management

- Create a Tool!

Tool List

Asset #	<input type="text"/>	Serial #	<input type="text"/>	Part #	<input type="text"/>	
Description	<input type="text"/>	Cal. Control #	<input type="text"/>	Model	<input type="text"/>	
More Options ▾					<input type="button" value="Submit"/>	<input type="button" value="Add New Tool"/>

Add/Edit Asset Owners, Asset Types, Maint. Frequencies, Maint Types, Manufacturers, Work Locations, Vendors, and Warehouse Locations.

Displaying 1 - 2 of 2 [Export](#) [+/- Columns](#)

Asset #	Partnum	Serial Number	Work Location	Warehouse Location	Owner	Next Maint Date	Maint Vendor	Model	Checked Out To	Active
1	cpn1239122	10298312	Big Saw	MN	Owned	2022-10-14	Bob's Welding	X4-1000	N/A	Active
2	4321	1234	At Vendor Outsourcing	MN	Borrowed	2021-11-14	Bob's Welding	not-a	N/A	Active

Displaying 1 - 2 of 2 [Export](#) [+/- Columns](#)



Tool Management

- Create a Tool!

Tool: 1

[VIEW](#)

[CHECK IN/OUT](#)

[EDIT](#)

[PERFORM](#)

[MAINTENANCE](#)

[PARTS/EQUIVALENTS](#)

[LABEL](#)

[DOCUMENTS \(0\)](#)

[NOTES \(0\)](#)

[Back To Tool List](#)

Tool Attributes			
Serial #	10298312	Part #	cpn1239122
Description	Trim Saw	Model #	X4-1000
PO #	20.1	PO Line	1
Value	2000	Cal Value	1.95600000
Box or Bin	A-11-10	Cal Control #	77
Work Location	Big Saw	ID Of Replacement	0
Type	Trim Saw	Maint User	
Manufacturer	Craftsman	Maintained By (vendor)	Bob's Welding
Owner	Owned	Acquired On	2021-08-02
Last Maint		Next Maint/Cal Date	2022-10-14
Notes		Picture	
Warehouse Location	MN		

Help



Tool Management

- Maintenance Schedule

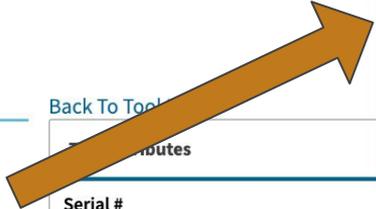
Maintenance Schedule				
Maint Type	Maint Frequency	Next Maint Date		
Validation <input type="checkbox"/>	1 <input type="text"/> Yea <input type="checkbox"/>	2022-10-14	Drop? <input type="checkbox"/>	
Instructions	Review Doc Attached. 			
Next Maint: 2022-10-14				
Calibration <input type="checkbox"/>	1 <input type="text"/>	(Add)	<input type="button" value="Add"/>	

- None
- Years
- Months
- Weeks
- Days

Tool: 1

- [VIEW](#)
- [CHECK IN/OUT](#)
- [EDIT](#)
- [PERFORM MAINTENANCE](#)
- [PARTS/EQUIVALENTS](#)
- [LABEL](#)
- [DOCUMENTS \(0\)](#)
- [NOTES \(0\)](#)

[Back To Tool](#)



- TOOL LIST
- TOOLS NEEDING MAINT
- TOOL CHECK IN/OUT HISTORY
- TOOL ON-TIME MAINT OVERVIEW
- TOOL ON-TIME MAINT DETAILS
- TOOL EQUIVALENTS

Serial #	10298312	Part #	cpn1239122
Description	Trim Saw	Model #	X4-1000
PO #	20.1	PO Line	1
Value	2000	Cal Value	1.95600000
Box or Bin	A-11-10	Cal Control #	77
Work Location	Big Saw	ID Of Replacement	0
Type	Trim Saw	Maint User	
Manufacturer	Craftsman	Maintained By (vendor)	Bob's Welding
Owner	Owned	Acquired On	2021-08-02
Last Maint		Next Maint/Cal Date	2022-10-14
Notes		Picture	
Warehouse Location	MN		



Tool Management

- Linking Tools To Parts

At the bottom of the Tool Edit screen, you'll see the 'Parts Needing This Tool'. Add parts (raw material, finished goods, sub assemblies) to display on work orders where the part is used.

PARTS NEEDING THIS TOOL

<input type="text" value="BOM1000"/>	<input type="button" value="Add"/>	
BOM1001		×
BOM1000		×



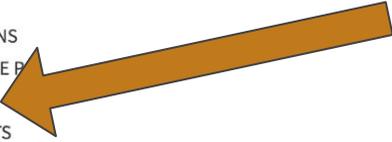
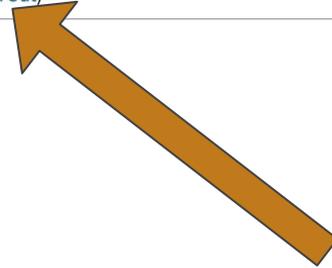
Tool Management

- Linking Tools To Parts

Workorder (Build): 27.1 Line: 7 name

- WORKORDER
- OVERVIEW
- INVOICE/SHIP
- HISTORY
- PICK PARTS
- DEKIT PARTS
- MAINT/ETC +
- SERIALS
- INSPECTIONS
- OUTSOURCE P
- TOOLS (1)
- DOCUMENTS

Tools Required
Part BOM1001 Needs Tool 1 (cpn1239122 Trim Saw X4-1000 Type: Trim Saw 10298312) (Check Out)





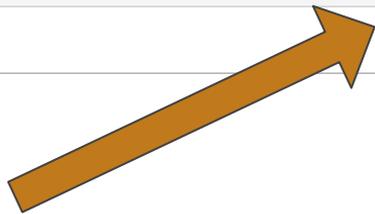
Tool Management

- Check Out

Tool: 2

- VIEW
- CHECK IN/OUT
- EDIT
- PERFORM
- MAINTENANCE
- PARTS/EQUIVALENTS
- LABEL
- DOCUMENTS (0)
- NOTES (0)

Check Out	
Check Out To:	<input type="text" value="justin"/>
Clerk:	Tanner Rogers
To Location:	<input type="text" value="Location D"/> <small>(describe other location)</small>
Order:	<input type="text" value="20.1-1"/>
<input type="button" value="Check Tool Out"/>	





Tool Management

- Check In

Tool: 2

- VIEW
- CHECK IN/OUT
- EDIT
- PERFORM MAINTENANCE PARTS/EQUIVALENTS LABEL
- DOCUMENTS (0)
- NOTES (0)

Check In				
Out To	Out On	Check Out Clerk	To Location	Order
justin	2021-10-14 10:11:49	Tanner Rogers	Location D	20.1 Line: 1 (Wkcnter:)
Check In By:	<input type="text" value="Tanner Rogers"/>			
Put Away To:	<input type="text" value="bin1"/>			
Notes:	<input type="text" value="no issues"/>			
<input type="button" value="Put Tool Away"/>				



Tool: 2

Information: Tool 2 Checked In



- VIEW
- CHECK IN/OUT
- EDIT
- PERFORM MAINTENANCE PARTS/EQUIVALENTS LABEL
- DOCUMENTS (0)
- NOTES (0)

Help

Check Out

Check Out To:

All

Clerk:

Tanner Rogers

To Location:

None

(describe other location)

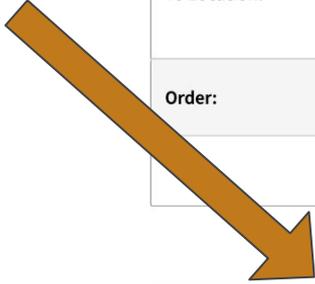
Order:

(order-line)

Check Tool Out

Tool Check In/Out History

Out To	Out On	Clerk	In By	In On	Clerk	To Location	Put Away Location	Order
justin	2021-10-14 10:11:49	Tanner Rogers	Tanner Rogers	2021-10-14 10:14:07	Tanner Rogers	Location D	bin1	20.1 Line: 1
Notes no issues								





Tool Management

- Questions?



ECOs

Initial Process for Creation

BOM Management

Assignment of Tasks

Workflow



ECOs

- Creation

Production>Orders> ECO / ECR

- ECOType is a data maintenance table

ECO/ECR

Create New ECO/ECR:

- ✓ (set eco type)
- Component End-of-life (EOL)
- Cosmetic Improvement
- Customer Driven

[View ECO/ECR Changes](#)

ECO/ECR 2

ECO/ECR Initiator: Tanner Rogers ▾

- EDIT
- DOCUMENTS (0)
- NOTES (0)
- HISTORY

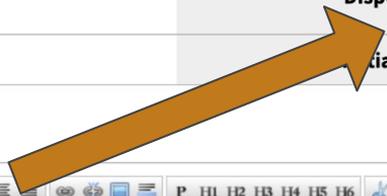
[Back To All](#)

i Completing ECO will update the "To Revision" to be the current revision.

Priority 3 Cancel ECO/ECR

Prcpart	BOM1001 <input type="text"/> View Part	Regulated Application?	No <input checked="" type="radio"/> Yes <input type="radio"/>
From Rev	Rev 2.0 (current) ▾	Add Rev To Rev	Rev 3.0 ▾
ECO/ECR Type	Component End-of-life (EOL) ▾ Add or Edit ECO/ECR	Title	<input type="text"/>
Current QOH	12	Disposition	<input type="text"/>
Assigned To	Tanner Rogers	Initiated By	<input type="text"/>
Affected Customer(s)	Internal Account (1) Schrute Farms (5)		

- ✓ (none)
- Burn it in the fires of Mount Doom**
- Return To Stock
- Return To Vendor
- Rework
- Scrap
- Use As Is



Rich text editor toolbar with icons for Bold (B), Italic (I), Underline (U), Strikethrough (ABC), Text Color (x), Background Color (x²), Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, Print (P), and Font Size (H1-H6).

Help



ECOs

- BOM Management

When changing Revs, the biggest impact is the BOM. What components/quantities change and how does that impact open orders?

How should I intervene?

BOM CHANGES

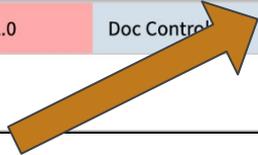
From Revision BOM (Edit)		To Revision BOM (Rev Rev 3.0) (Edit)	
Prcpart	Qty	Prcpart	New Qty
7 : PRT1	1	7 : PRT1	1
:	0	8 : PRT3	1

OPEN QUOTES FOR THIS PART

Quote	Customer	Revision
-------	----------	----------

OPEN ORDERS FOR THIS PART

Order	Customer	Revision	Location	Frozen Pending ECO/ECR?	Rev Roll	Set By
				Check All? <input type="checkbox"/>	Check All? <input type="checkbox"/>	Update
17.1 Line: 1	Internal Account (1)	Rev 2.0	Shipping	Tie To ECO/ECR?: <input type="checkbox"/>	Unreleased Orders only!	
17.1 Line: 2	Internal Account (1)	Rev 2.0	Inspection	Tie To ECO/ECR?: <input type="checkbox"/>	Unreleased Orders only!	
27.1 Line: 7	Schrute Farms (5)	Rev 2.0	Doc Control	Tie To ECO/ECR?: <input checked="" type="checkbox"/>	Rev Roll? <input checked="" type="checkbox"/>	Set By Tanner Rogers On 2021-10-14
				Check All? <input type="checkbox"/>		Update



WORK

INSTRUCTIONS

ORDER INFO

PARTS

SCHEDULE

COMMENTS (0)

HISTORY

Labor Time

Start Work

Time Logged: 0.0 Min

Est Needed: 2.0 Min

Order Linked To ECO 2

Order Progress ▾
(Total Labor Min.)

0.0 0.1 0.2 0.3 0.4 0.5 0.6 0.7 0.8 0.9 1.0 1.1 1.2 1.3 1.4 1.5 1.6 1.7 1.8 1.9 2.0

+/- Open Work

No Open Work

Order Work Location

Doc Control **Location Change Not Available Until ECO 2 Completed**

Work Location Group (All) ▾ **Next Up:** Location A

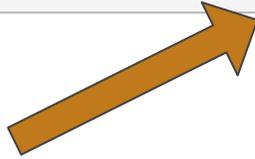
Override Requirement?

(override comments)

Set

BOM CHANGES

From Revision BOM (Edit)		To Revision BOM (Rev Rev 3.0) (Edit)	
Prcpart	Qty	Prcpart	New Qty
7 : PRT1	1	7 : PRT1	1
:	0	8 : PRT3	1

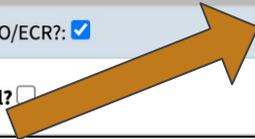


OPEN QUOTES FOR THIS PART

Quote	Customer	Revision
-------	----------	----------

OPEN ORDERS FOR THIS PART

Order	Customer	Revision	Location	Frozen Pending ECO/ECR?	Rev Roll	Set By
				Check All? <input type="checkbox"/>	Check All? <input type="checkbox"/>	Update
17.1 Line: 1	Internal Account (1)	Rev 2.0	Shipping	Tie To ECO/ECR?: <input type="checkbox"/>	Unreleased Orders only!	
17.1 Line: 2	Internal Account (1)	Rev 2.0	Inspection	Tie To ECO/ECR?: <input type="checkbox"/>	Unreleased Orders only!	
27.1 Line: 7	Schrute Farms (5)	Rev 2.0	Doc Control	Tie To ECO/ECR?: <input checked="" type="checkbox"/>	Rev Roll? <input checked="" type="checkbox"/>	Set By Tanner Rogers On 2021-10-14
				Check All? <input type="checkbox"/>		Update



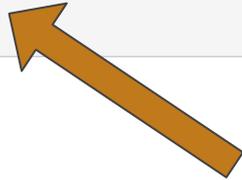
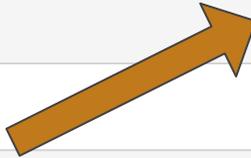


ECOs

- BOM Management

RESPONSIBILITIES AND REQUIREMENTS

Required?	Task	Ownership	Completed On
<input checked="" type="checkbox"/>	BOM Changes	<input type="text" value="justin"/>	<input type="text"/>
<input checked="" type="checkbox"/>	Labor Minutes	<input type="text" value="taylor"/>	<input type="text"/>
<input type="checkbox"/>	Cost Impact Notification	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	Item Master	<input type="text" value="brent"/>	<input type="text"/>





ECOs - Workflow

ECO/ECR 2

EDIT
DOCUMENTS (0)
NOTES (0)
HISTORY

[Back To All](#)

i Completing ECO will update the "To Revision"(Rev Rev 3.0) to be the current revision.

Priority 3 Cancel ECO/ECR	
Prcpart	BOM1001 <input type="text"/> View Part
From Rev	Rev 2.0 (current) <input type="button" value="v"/>
ECO/ECR Type	Component End-of-life (EOL) <input type="button" value="v"/> Add or Edit ECO/ECR Types
Current QOH	12
Assigned To	Tanner Rogers
Affected Customer(s)	Internal Account (1) Schrute Farms (5)

ECO/ECR Initiator: Tanner Rogers

ECO/ECR INITIATOR

Assigned to Tanner Rogers for 9 minutes

Move To

Tanner Rogers <input type="button" value="v"/>	Put ECO/ECR On Hold
Tanner Rogers <input type="button" value="v"/>	Back To Application Engineering
Tanner Rogers <input type="button" value="v"/>	To MFG Engineering
Tanner Rogers <input type="button" value="v"/>	To Purchasing
Tanner Rogers <input type="button" value="v"/>	To Quality
Tanner Rogers <input type="button" value="v"/>	To Sales
Tanner Rogers <input type="button" value="v"/>	To Doc Control
Tanner Rogers <input type="button" value="v"/>	Complete ECO/ECR
Tanner Rogers <input type="button" value="v"/>	(Reassign, Keep ECO/ECR Initiator)

Help





ECOs

- Questions?



Quality Alerts

On a part record, you can add a Quality Alert to display on work orders, packing slips, labor plans, and other custom docs.



Quality Alerts

BOM1001

- VIEW
- EDIT
- REVISIONS
- BOM DATA +
- PRICE/COST +
- SALES +
- PURCHASING +
- ACTIVITY +
- QUALITY +
 - NCRS (0)
 - ECOS (0)
 - QUALITY ALERTS (1)**
- MAINT +
- DOCUMENTS (0)
- NOTES (0)

All Quality Alerts

Create New Quality Alert:

Create

Name

Submit

Displaying 1 - 1 of 1 +/- Columns

Id	Name	Created By	Created On	Expires On	Documents	Delete
1	<input type="text" value="Review BOM!"/>	tanner	2021-10-11	<input type="text" value="2021-10-31"/>	83-label-89962814.pdf (drop) <input type="button" value="Choose File"/> No file chosen	Delete

Displaying 1 - 1 of 1 +/- Columns

Update

Workorder 27.1 Line: 7 name

Pre-Release: Tanner Rogers ▼

- WORKORDER
- OVERVIEW
- INVOICE/SHIP
- HISTORY
- PICK PARTS
- DEKIT PARTS
- MAINT/ETC +
- SERIALS
- INSPECTIONS
- OUTSOURCE PO
- TOOLS (1)
- DOCUMENTS

Build Process 1 2 3 4 5
3. Pick Parts/Material **Line 1, Line 2, Line 3, Line 4, Line 6, Line 7, Line 8** (See Rest On Workorder)

Build Order For BOM1001 (Rev Rev 2.0)
CUSTOMER: **SCHRUTE FARMS (5)** QTY: 2 SHIP DATE: **2021-09-29**

Quality Alert: Review BOM!



- WORK**
- INSTRUCTIONS**
- ORDER INFO
- PARTS
- SCHEDULE
- COMMENTS (0)
- HISTORY

Labor Time

Start Work Time Logged: 0.0 Min Est Needed: 5.0 Min

Order Progress (Total Labor Min.)

0.0 0.2 0.4 0.6 0.8 1.0 1.2 1.4 1.6 1.8 2.0 2.2 2.4 2.6 2.8 3.0 3.2 3.4 3.6 3.8 4.0 4.2 4.4 4.6 4.8 5.0

+/- Open Work No Open Work

Workorder 27.1 Line: 7 name

Pre-Release: Tanner Rogers ▼

- WORKORDER
- OVERVIEW
- INVOICE/SHIP
- HISTORY
- PICK PARTS
- DEKIT PARTS
- MAINT/ETC +
- SERIALS
- INSPECTIONS
- OUTSOURCE PO
- TOOLS (1)
- DOCUMENTS

Build Process 1 2 3 4 5
3. Pick Parts/Material **Line 1, Line 2, Line 3, Line 4, Line 6, Line 7, Line 8** (See Rest On Workorder)

Build Order For BOM1001 (Rev Rev 2.0)
CUSTOMER: **SCHRUTE FARMS (5)** QTY: 2 SHIP DATE: **2021-09-29**

Quality Alert: Review BOM!



- WORK**
- INSTRUCTIONS**
- ORDER INFO
- PARTS
- SCHEDULE
- COMMENTS (0)
- HISTORY

Labor Time

Start Work Time Logged: 0.0 Min Est Needed: 5.0 Min

Order Progress (Total Labor Min.)

0.0 0.2 0.4 0.6 0.8 1.0 1.2 1.4 1.6 1.8 2.0 2.2 2.4 2.6 2.8 3.0 3.2 3.4 3.6 3.8 4.0 4.2 4.4 4.6 4.8 5.0

+/- Open Work No Open Work



Quality Management

- Final Questions?