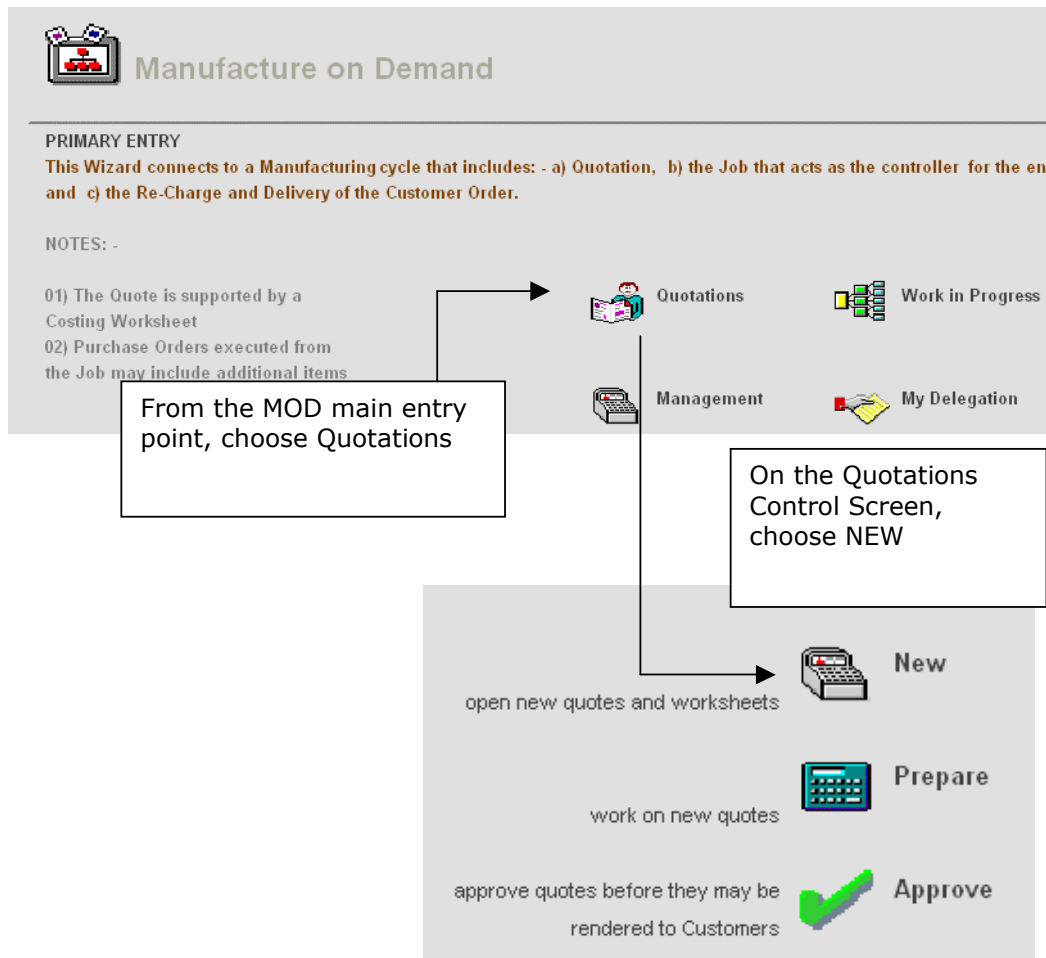**INFOLAB**

ENTERPRISE SERVER 👁

MOD: CREATING A NEW SHEET

What is a new Sheet?

A new MOD Sheet starts life as a Quotation Sheet, with the capacity to transform itself into a Work and Costing Sheet, then into a Control and Work in Progress (WIP) Sheet. It does not matter whether a given Manufacture Task really requires a Quotation or not, it must still be done, because Costing is an essential component to proper Manufacture control. Manufacture, as explained in the Overview User Manual, can include almost any Task or Assignment where the purpose include the production or procurement of Goods and Services to be delivered or rendered.

How to create a new Sheet

You can only create new Sheets if your Manufacture Profile lists that privilege against your name. If so, you enter from the Quotations Control Screen, into the step: New

From the MOD main entry point, choose Quotations

On the Quotations Control Screen, choose NEW

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On Demand Manufacture Work Sheet [1] ( )

1 Headers | 2 Quote Items

MOD: Manufacture Control Sheet : NEW SHEET

Control Parameters

Sheet # 000043
Status New Sheet
Age (Days) 0
Controller *

Expected Margin 0.00
Actual Margin

Opened By phr Philip Quatro
On 21/08/2004
At 23:01

For Approval By
Approved By *
On
At

Last Upd By Philip Quatro
On 21/08/2004

Overview and / or Primary Notes

(this is internal info only)

Capture at least some Notes, and
select a Customer before using CREATE

(Select the Customer on the
QUOTE page ...)

Create new Quote and Sheet

If you use EXIT at this stage, then
no new Quote or Sheet is created ...

EXIT

The Control Parameters on the left display useful indicators. At this stage, it shows that the Sheet is new, who opened it, when and at what time, and so on. These Control Parameters are always visible on the MOD Sheet, right up to the WIP stage and for Queries afterwards. As the Sheet progresses through the Manufacture cycle, more of the parameters are updated, e.g. who Authorized the Quotation for release, who is the Controller, etc. At the end, when the Sheet is closed, the Actual Margin achieved versus the original Margin Budgeted is also shown.

Before you can use the CREATE button, some minimum indicators must be fulfilled: -

- Some text must be typed in the 'Overview / Primary Notes' area. Even a minimum of 1 character will be accepted, but clearly the idea is to describe briefly what the task is about, and any critical notes that need to be recorded if perhaps speaking to a Customer on the phone and taking down instructions.
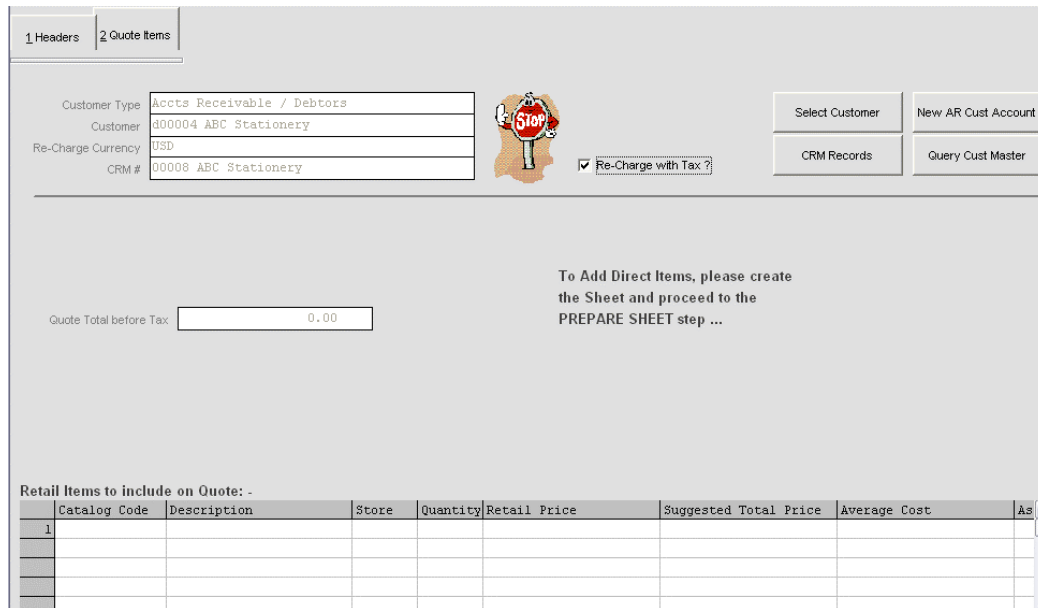- A Customer must be selected (see below)

A Customer, in the MOD sense, can be Commercial (Accts Receivable / Debtor), or internal (Ledger CC, Inventory or Job). When you do the initial selection of a Customer, a mandatory step in order to create the Sheet, this is not an irreversible step, i.e. the Customer Selection can still be changed during the Preparation stage, and up to approval for release of the Quotation.

What needs to be understood though, is that the 'Customer' is the Account that will ultimately pick up the charges for the Manufacture Task, and the Currency in which that Account is managed, will determine pricing for the Quotation. If you

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change the Customer selection after some Quoted Items have been included, the system will automatically adjust the pricing, if necessary, where a new Currency is implied.

At the bottom of this Screen picture, we see a grid where you may list Retail Items to be included on the Quotation. During the 'Prepare' step, you will also be able to specify Direct Items, i.e. Items not in the Retail Catalog. However, it is not mandatory to list any Items at this stage, but you must select some Customer, which is done by choosing the 'SELECT CUSTOMER' button, and the system will then prompt you for further details, e.g. for a Commercial Customer, you will be assisted in identifying the Customer Account.

Once a Customer has been selected, the system will indicate the managed Currency for the Quotation, and will check the Tax (collection) indicator, as applicable. Generally, Tax will be collected when the Customer is Commercial, but not for Internal Customers. However, the default Tax setting is merely a default, and may be changed if necessary.

We may now return to the 1st page of the Screen (shown higher up), and choose 'Create', and the system will generate a new Sheet, and give it a unique MOD control number.

The next encounter after this will be the 'Prepare' step, and the Sheet will automatically be available on the Queue of the User who created it in the 1st instance.

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