

# WORK IN PROCESS OVERVIEW

One of the major problems in managing the unique orders in the promotional products industry is keeping track of where each order is in the production process at any given time to make sure that the proper follow up is done at each step. If you are the one doing the decoration of the item, you may also want to capture the time required as well as labor and material costs.

The Work in Process system is designed to let you do one or both of these tasks.

## Defining the steps you want to track

To use this feature in Lakeshore, you will first define the steps or **processes** you want to track. Some examples of processes are Art, Art Approval, Confirm Ship Date, Press, Assembly, and Shipping. The steps you define will depend on the types of orders you will be tracking and the work flow that is unique to your operation. It is usually better to start with a few basic steps and add additional steps later as needed.

When you set up a process, you can indicate how it should be scheduled. For example, Art might be scheduled to be completed within 2 days of the order date. Or, an Assembly step might be scheduled to be done 1 day before the ship date.

If it is a production process, you can also set up a run rate, set up time and clean up time and the system will calculate an estimated time required to complete the process for the specific quantity on the order.

## Process groups

You may find that you need one list of steps for some types of orders and a different list of steps for others. You can handle this by setting up **process groups**. Each process group would have a list of just the steps needed for that type of order. For example, you might need one process group for orders that require new art and another for repeat orders that do not require new art. Or, you might need one list of processes for Screen Printing and another for Embroidery.

## Tracking the order

When you enter an order, you specify the process group that is appropriate for that type of order. A preliminary schedule will be automatically generated. You may adjust those dates manually when appropriate.

As you finish each step, you mark it as complete. Anyone can call up the schedule for the order including the steps generated for that particular order and the status of each step.

## **Capturing time and cost information**

If you want to record the time worked on any of the processes, there is a time clock function that lets you log in and out of the job. You may associate a labor and/or overhead rate for the time worked or simply capture the amount of time required to do that step on the job.

For production systems, you may record the cost of both inventory and non-stock material.

## **The next step**

If the tracking feature looks interesting, call for additional information and help in setting up your processes and process groups.

Here are some screen shots showing the information available through the Work in Process system.

## Sample list of processes for a distributor

### Job status



Order Number: **002341**    
 Reference Data:  
 Ship date: 11/30/09  
 In Hands Date:

Order Status: Open  
 Ship to: WHITMAN LIGHTING CENTER  
 2555 Broad Street  
 Lake Charles, LA 70601

Process	Dates scheduled		Priority	Estimated Time Required	Actual Time	Status	Date Completed	By
	Begin date	End date						
ART PREPARATION 	10/13/09	10/13/09		1:00		Complete	10/13/09 8:57 AM	KK
ART APPROVAL 	10/19/09	10/19/09				Complete	10/13/09 8:57 AM	KK
SALESMAN APPROVE ART & ORDER 	10/19/09	10/19/09				Open		
ORDER TRANSMITTED 	10/19/09	10/19/09				Open		
ACKNOWLEDGEMENT TO CLIENT 	10/19/09	10/19/09				Open		
FACTORY RECEIVED ORDER 	10/20/09	10/20/09				Open		
REQUEST SHIP DATE 	11/23/09	11/23/09				Open		
CONFIRM SHIP DATE 	11/26/09	11/26/09				Open		
ORDER SHIPPED 	11/30/09	11/30/09				Open		
CLIENT NOTIFIED OF SHIP 	12/ 1/09	12/ 1/09				Open		
CLIENT APPROVED 	12/ 4/09	12/ 4/09				Open		
VENDOR INVOICE RECEIVED 	12/ 7/09	12/ 7/09				Open		
VENDOR INVOICE APPROVAL 	12/10/09	12/10/09				Open		
<b>Total</b>				<b>1:00</b>				



## Sample list of processes for a supplier

### Job status



Order Number: 002345   

Reference Data:

Ship date: 10/ 1/09

In Hands Date: 9/30/09

Order Status: Open

Ship to: Sam Whitman  
 WHITMAN LIGHTING CENTER  
 1222 City Service Highway  
 Sulphur, LA 70663

Process	Dates scheduled		Priority	Estimated Time Required	Actual Time	Status	Date Completed		By
	Begin date	End date							
ART PREPARATION 				1:00		Complete	9/15/09	9:15 AM	KK
ENGRAVING 	9/30/09	9/30/09				Complete	9/15/09	1:12 PM	KK
ASSEMBLY 	9/30/09	9/30/09		:51	:59	Open			
INSPECT & PACK 	10/ 1/09	10/ 1/09		:04		Open			
SHIPPING 	10/ 1/09	10/ 1/09				Open			
<b>Total</b>				<b>1:55</b>	<b>:59</b>				



## List of jobs by customer showing status information

### Quick order look up

Customer: **900000** Whitman Lighting Center



Order Number	Customer's Order Number	Ship Date	Current Process	Job ID Reference Data	Reschedule Order	Review Job Status	Review Art	Review Work Order
<a href="#">002363</a>	WCI100909	10/22/09	Office	Whitman shirts				
<a href="#">002362</a>	wlc093009	10/ 6/09	FACTORY RECEIVED ORDER					
<a href="#">002361</a>	wlc093009	10/ 6/09	ENGRAVING					
<a href="#">002360</a>	wlc092309		ART APPROVAL					
<a href="#">002359</a>	wlc092309		CONFIRM SHIP DATE					
<a href="#">002358</a>	wlc092309	9/23/09	SALESMAN APPROVE ART &					
<a href="#">002357</a>		10/20/09	ART PREPARATION					
<a href="#">002355</a>	091809	9/30/09	ACKNOWLEDGEMENT TO CLIE					
<a href="#">002354</a>		9/30/09	PULL INVENTORY					
<a href="#">002352</a>		9/30/09	ART PREPARATION					
<a href="#">002345</a>	WLC091509	10/ 1/09	ASSEMBLY					
<a href="#">002342</a>	WLC082409	8/26/09	ART	WLC Shirts				
<a href="#">002341</a>		11/30/09	SALESMAN APPROVE ART &					

Exit

# Job Cost Detail

*Display job cost detail*



Order Number: **002345**  

Who	When		What	Time	Cost
	Date	Time		HH:MM	
00022 ASSEMBLY					
KK	9/15/09	1:14 P	Kaye Keady	:04	2.80
KK	9/15/09	1:14 P	Kaye Keady	:55	36.40
KK	10/13/09	9:05 A	Soccer Figure		1.00
KK	10/13/09	9:05 A	Trim - 2009		.30
KK	10/13/09	9:05 A	BASE 3X6-3H-CS		.04
KK	10/13/09	9:05 A	Brass plating		1.80
KK	10/13/09	9:05 A	Soccer Figure		1.00
KK	10/13/09	9:05 A	Trim - 2009		.30
KK	10/13/09	9:05 A	BASE 3X6-3H-CS		.04
KK	10/13/09	9:05 A	Brass plating		1.80
KK	10/13/09	9:05 A	Soccer Figure		1.00
KK	10/13/09	9:05 A	Trim - 2009		.30
KK	10/13/09	9:05 A	BASE 3X6-3H-CS		.04
KK	10/13/09	9:05 A	Brass plating		1.80
Total Process				:59	48.62
Total Job				:59	48.62

Exit