AUTOPOWER

Hose Assembly in Order Entry

HOW-TO WORKBOOK

Flexible Software Solutions For The Truck Parts Industry

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TRAINING OBJECTIVE

The purpose of this workbook is to help you the AutoPower end-user master the basic elements of Purchasing. It is designed as a self-help tool, consisting of step-by-step explanations and examples. Fill-in-the-blank and multiple-choice exercises will follow each topic. This will help emphasize the knowledge that is needed to get your job done accurately and quickly.

You are encouraged to use this training book in combination with your AutoPower applications database, or by using the examples in this workbook. However, all the examples may not be hands-on. I will let you know what these examples are when we get to them.

In combination with this workbook, you will have in class a PC or thin client to follow along with the exercises in this workbook.

When you have completed the exercises in this AutoPower Hose Assembly Workbook you will be able to complete all the modules below with 100% accuracy. You will be measured by completing short fill-in the blanks or multiple-choice questions at the end of each lesson with results provided to management upon completion of training.

Tasks

Create a New Hose Assembly
Add Components to an Existing Hose Assembly
Edit a Hose Assembly
Lookup Inventory Inquiry

Section 1.1 SYSTEM OVERVIEW

Before we get started there are only a few areas of the system that the Escape key, Backspace key, Space Bar and the Delete key can be used. When we get to these areas of the application they will be pointed out to you. These keys cause control characters in some of the data records and should not be used except where we tell you they can be used.

Keep a copy of this guide handy for day-to-day processing challenges. This workbook may be ordered from AutoPower, as you need them for training others throughout your business for a nominal fee.

In AutoPower Order Entry the counterman has the capability to instantly build a hose assembly from within the Line Item Entry screen.

As the hose assembly is being built an assembly number is assigned to the hoses components. This hose assembly is then stored into a History file for later recall. This assembly history will allow the counterman to be quite productive in determining future hose assembly requirements. With the hose assembly components stored in the history file, any specific assembly can be recalled, displayed on the Hose Assembly screen showing all the appropriate part numbers required.

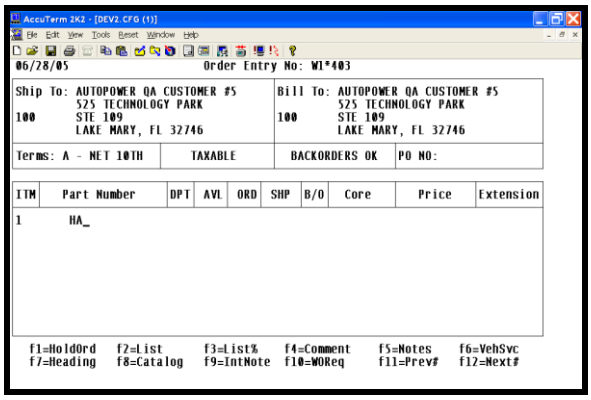
Once the Hose Assembly has been recalled and displayed, the counterman can modify the assembly by entering a different hose length, couplings or other parts of the hose part numbers. This modified assembly now can be given a new assembly number and placed into the Hose Assembly History file.

The Hose Assembly program is interfaced from within the Line Item Entry Screen in Order Entry.

How to build a new hose assembly?

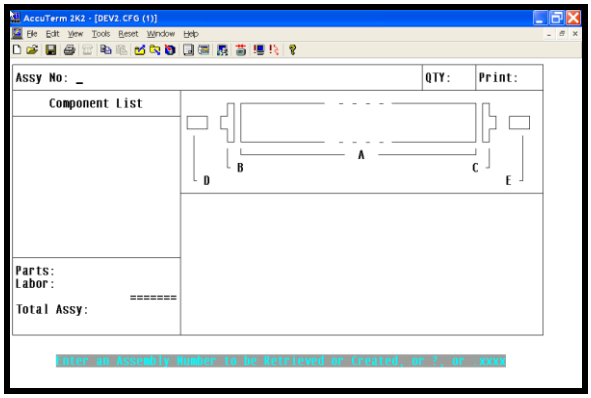
The hose part number and the components must exist in the Inventory file maintenance.

When you first access Order Entry, the first step would be to enter the "HA" to access the Hose assembly program.

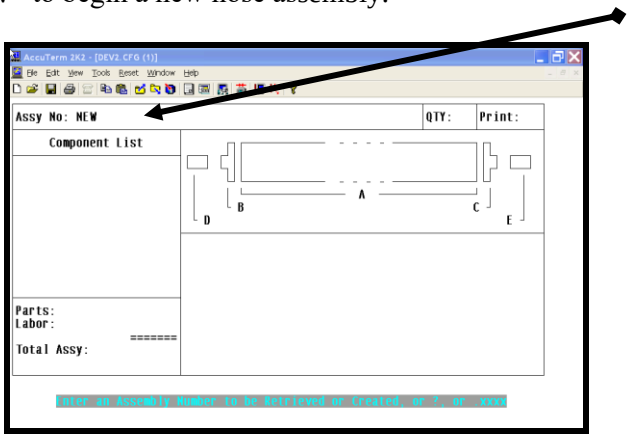


The Hose Assembly screen will display with the next prompt.

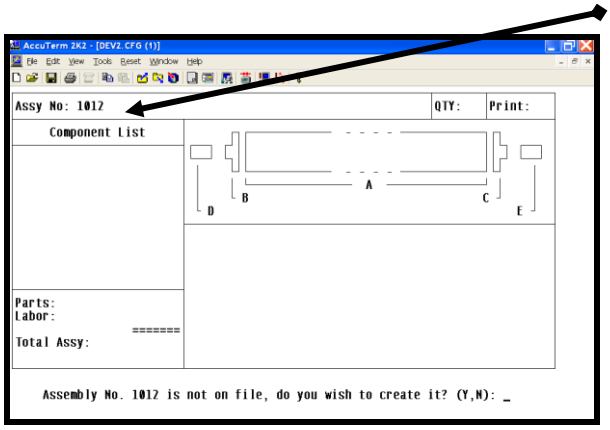
Enter an Assembly Number to be Retrieved or Created, or ?, or .xxxx. This option will allow you to display an existing hose assembly that was created in the past. You could also type in a "?" to view all assemblies or type in a "." followed by the existing assembly name to initiate a search. To enter a new assembly type in the word "NEW" in the Assy No: field.



Type in the word "**NEW**" to begin a new hose assembly.



The next available Assembly Number will display in the Assy No. Field.



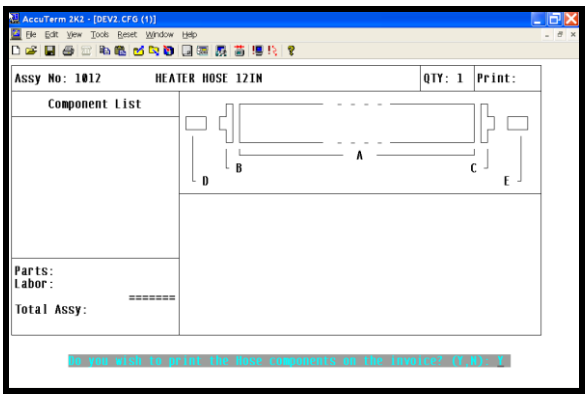
In our example the message prompt "**Assembly No. 1012 is not on file, do wish to create it**? (Y/N)" displayed.

Type in "Y" and press **ENTER**. If you type in "N" you will be prompted again to either create a new assembly or search for existing assemblies.

Then you will type in the description of the new hose assembly that is being built. This description of the hose assembly will be later printed on the customer's invoice.

Press **ENTER**.

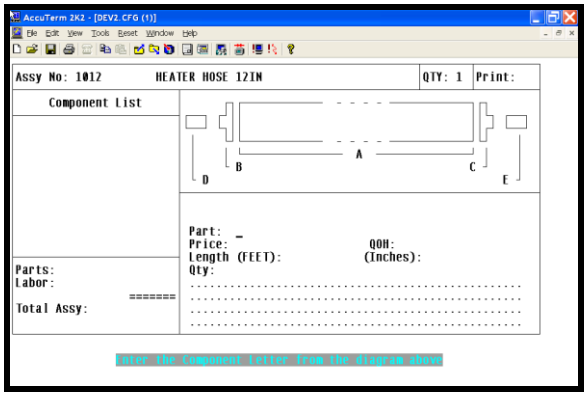
Type in the Qty of hoses that will be built and press **ENTER**. For hoses, the quantity may be entered in feet or inches. If entered in feet, it will be converted to inches



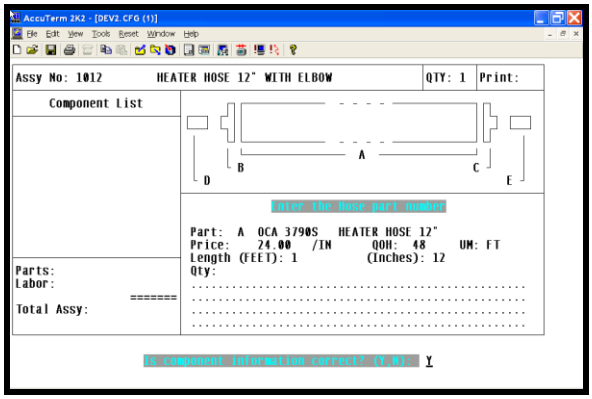
The next prompt will be "**Do you wish to print the Hose components on the invoice? (Y,N): Y**

The default is **Y**, press **ENTER**. If you do not want the components to print on the invoice type in **N** and press **ENTER**.

The cursor will advance to the message prompt.



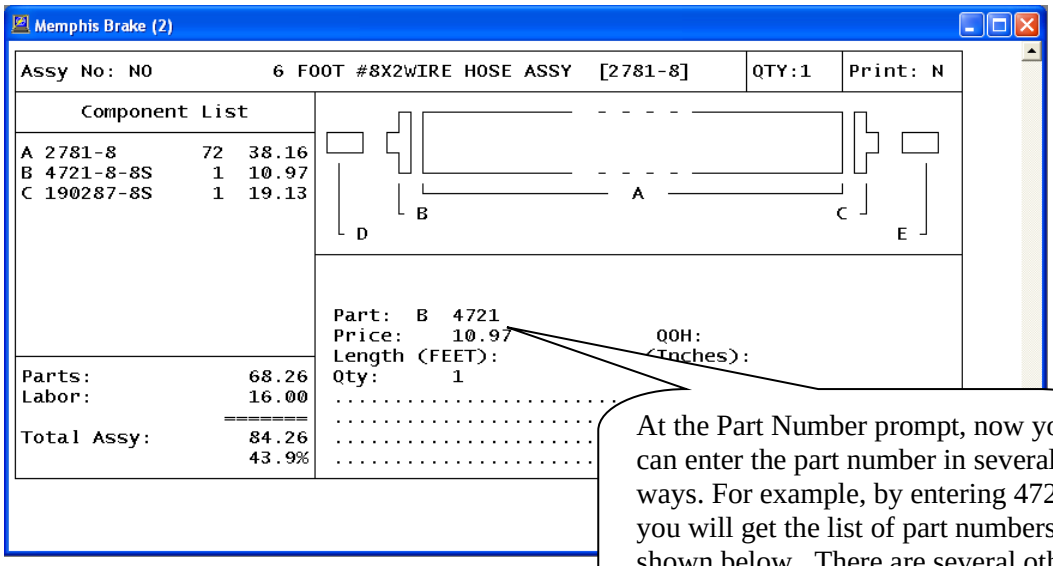
The next prompt is "**Enter the Component Letter from the diagram above**".



Type in the component letter for the part of the hose you are entering and press **ENTER**. In our example, I typed in the component letter A and then part number OCA3790S and press **ENTER**. The component letter A is always the hose because it will prompt you for feet or inches.

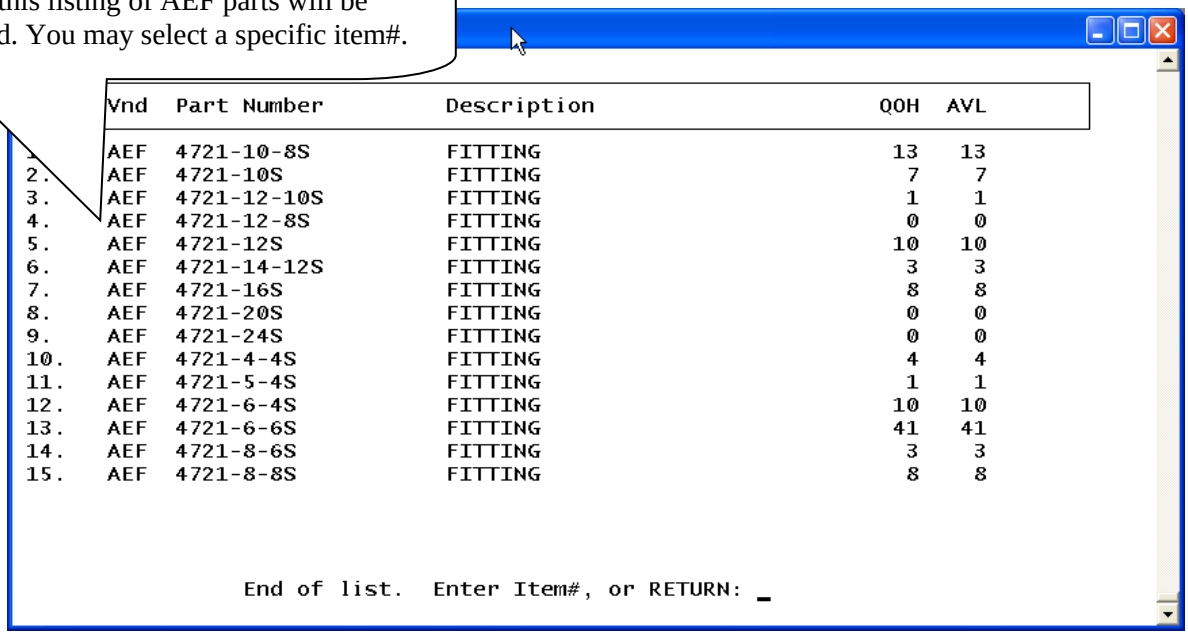
At the Part Number prompt in the Hose Builder program, the entry of part numbers has been improved to accept a variety of entries.

Partial Part Number Entry



At the Part Number prompt, now you can enter the part number in several ways. For example, by entering 4721 you will get the list of part numbers shown below. There are several other part number formats you can use.

By entering 4721 at the part number prompt, this listing of AEF parts will be displayed. You may select a specific item#.

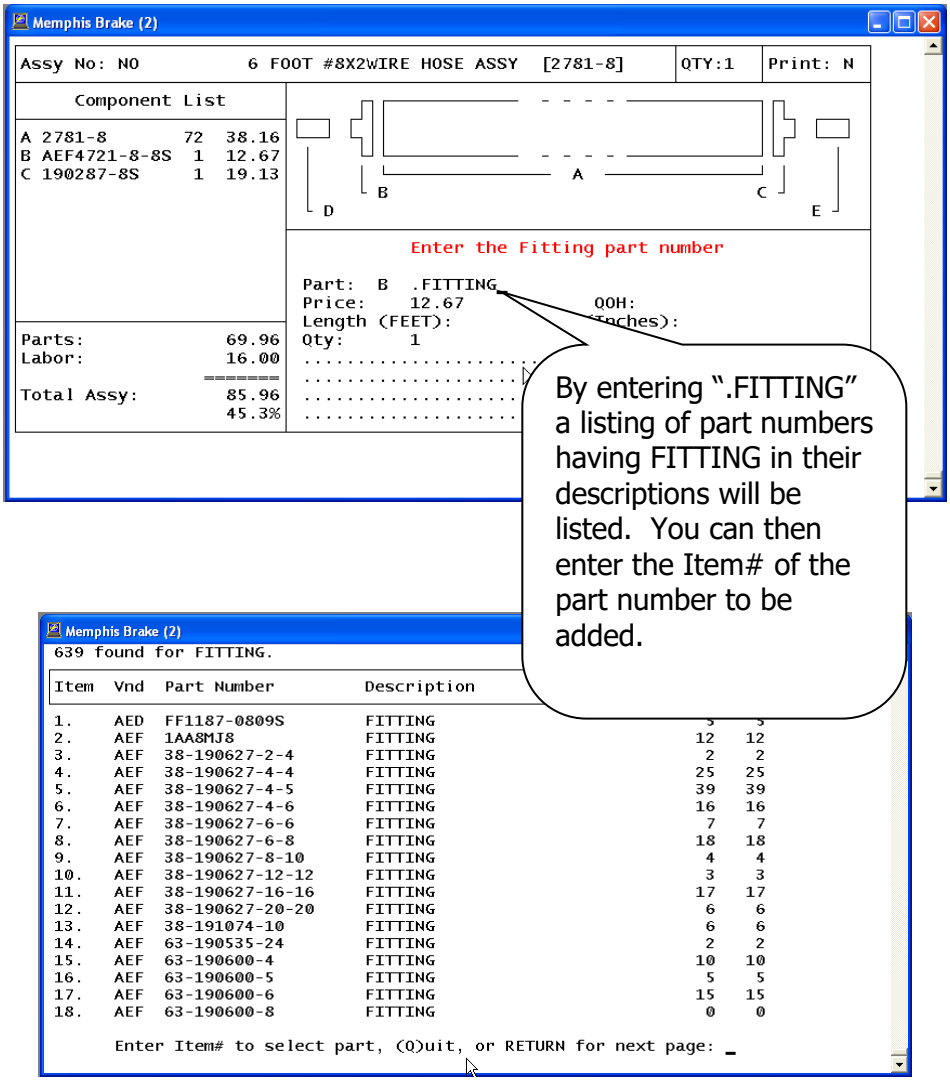


	Vnd	Part Number	Description	QOH	AVL
1.	AEF	4721-10-8S	FITTING	13	13
2.	AEF	4721-10S	FITTING	7	7
3.	AEF	4721-12-10S	FITTING	1	1
4.	AEF	4721-12-8S	FITTING	0	0
5.	AEF	4721-12S	FITTING	10	10
6.	AEF	4721-14-12S	FITTING	3	3
7.	AEF	4721-16S	FITTING	8	8
8.	AEF	4721-20S	FITTING	0	0
9.	AEF	4721-24S	FITTING	0	0
10.	AEF	4721-4-4S	FITTING	4	4
11.	AEF	4721-5-4S	FITTING	1	1
12.	AEF	4721-6-4S	FITTING	10	10
13.	AEF	4721-6-6S	FITTING	41	41
14.	AEF	4721-8-6S	FITTING	3	3
15.	AEF	4721-8-8S	FITTING	8	8

End of list. Enter Item#, or RETURN: _

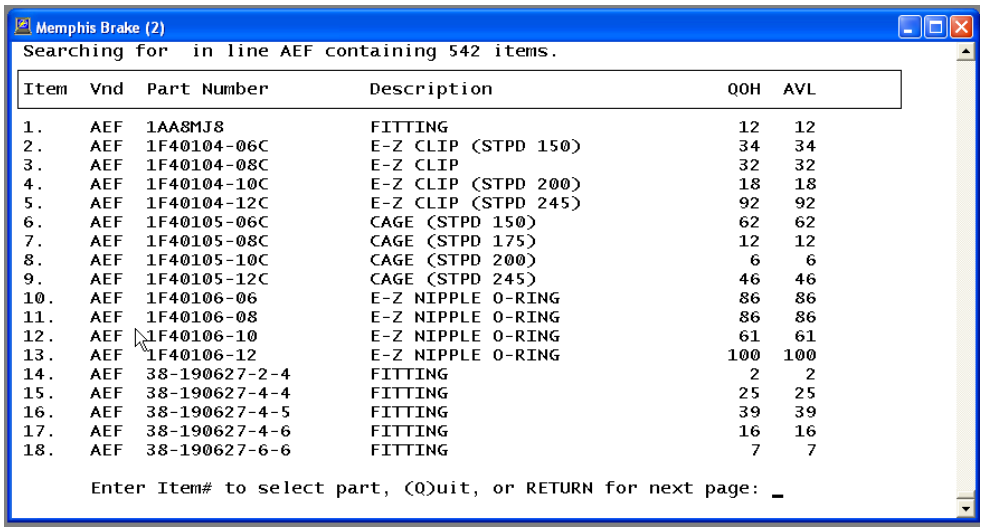
Dot-Search

Use the Dot-Search Method. Enter a dot (period) followed by any word of the part's description. Enter FITTING and the result is a listing of parts that have the work 'FITTING" in their descriptions.

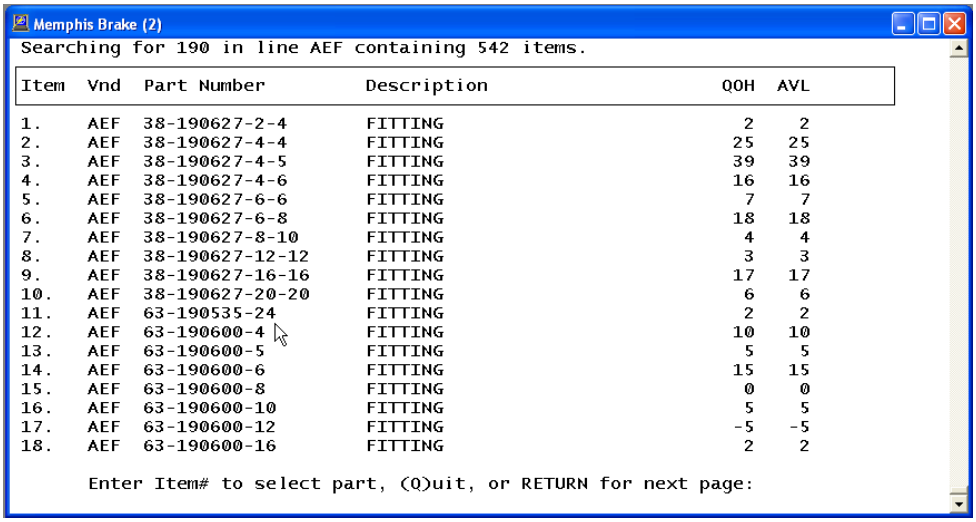


Other ways for searching for part numbers are shown below. At the Part Number prompt, you can enter:

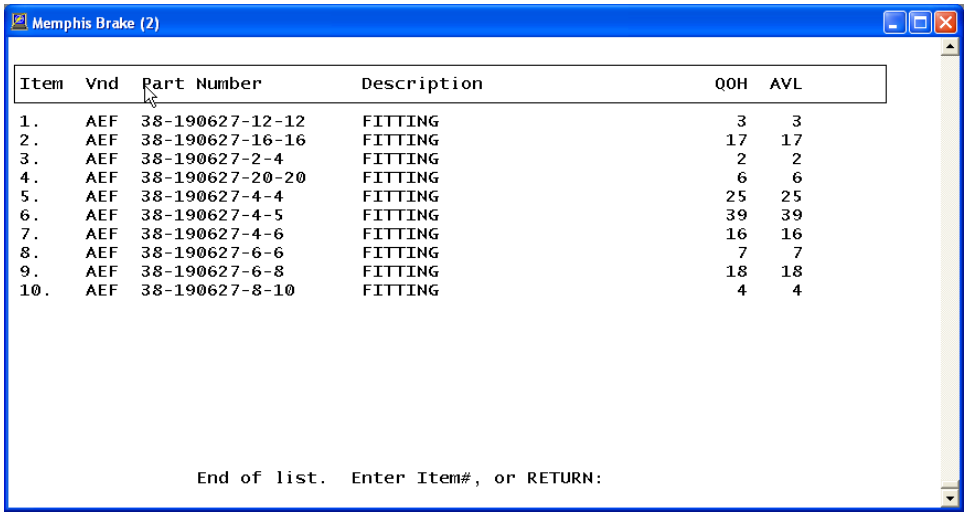
AEF/ this will produce a list of all the parts in the AEF product line.



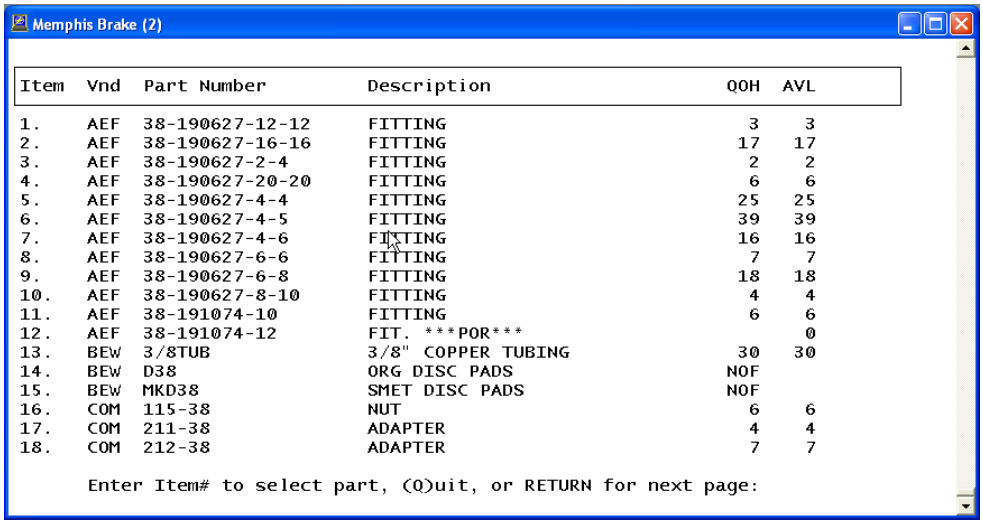
AEF/190 this will produce a listing of AEF part numbers having **190** anywhere in the part#.



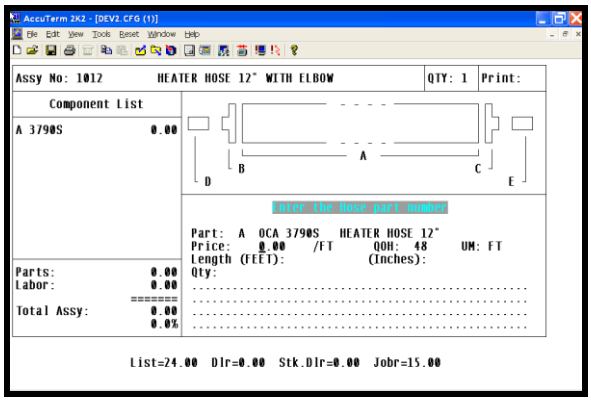
190627 this will produce a listing of part numbers having **190627** separated by a dash.



38 this will produce a list of part numbers having **38** separated by a dash or any part number having just a **38** in the part number.

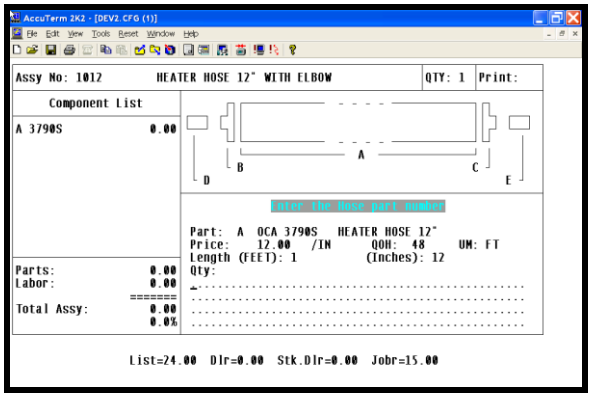


Your cursor will now be in the Price field. You will see at the bottom of your screen the customer pricing levels for the component.



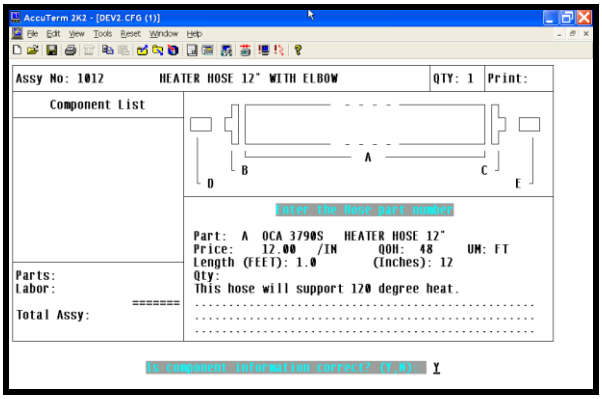
Type in the price amount and press **ENTER**.

You will then be prompted to enter the length of the hose in feet that you are building. I typed in 12 and press **ENTER**. Then the QOH and Unit of measurement will display. You will see the conversion of feet to inches.



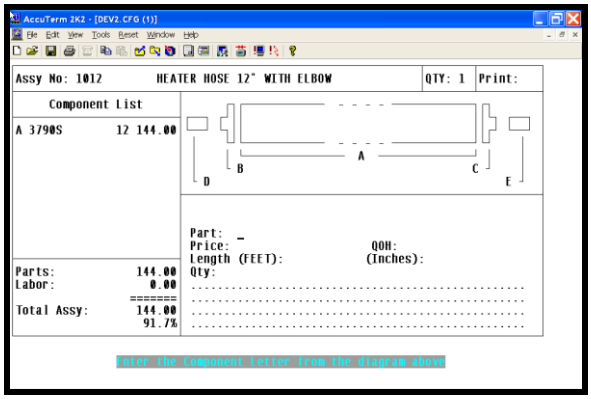
You will then be prompted to enter a component message. This is not required.

Press **ENTER**.



The next prompt is "**Is component information correct? (Y/N)? Y**

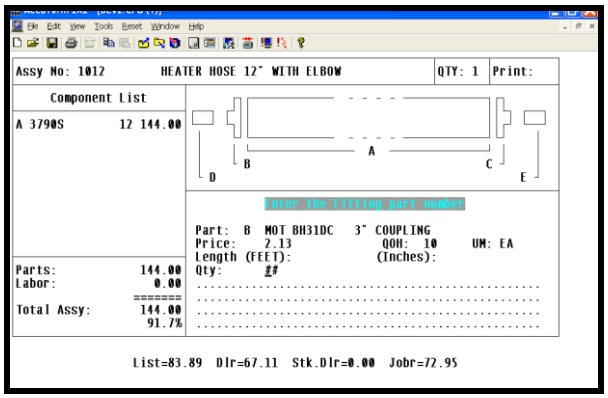
Press **ENTER** to default of Yes or Type in N and press **ENTER** to correct the component information.



The next prompt is **"Enter the Component Letter from the diagram above."** Type in the next letter for the component and press **ENTER**. This is letter B it is not the hose part number it is a coupling or fitting.

Type in the price of this component and press **ENTER**.

Type in the Qty that is needed to build this hose and press **ENTER**.

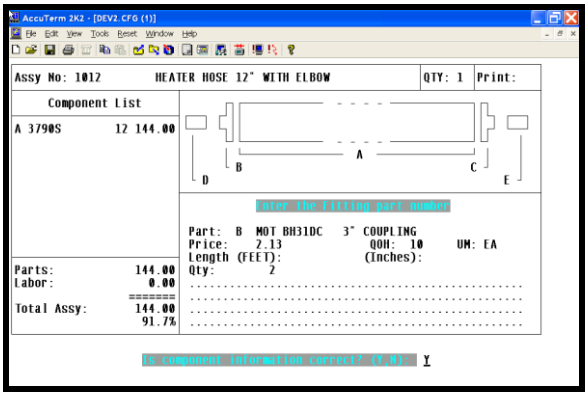


The next prompt will be to **enter a component message if desired**.

As the components are added in the Component List on the left of the screen, the components are listed with the qty and the total price.

After the last component has been added press **ENTER** to be prompted to enter the labor amount.

The labor amount may have a default pricing to display. You can override this amount or press **ENTER** on the default.

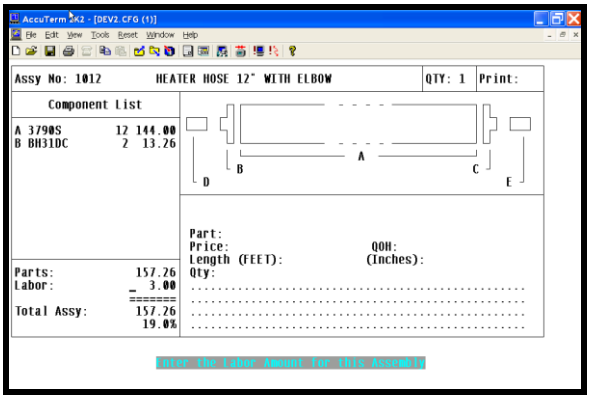


The next prompt is **"Is component information correct? (Y/N): Y**. Press **ENTER** if the component information is correct. Type in **N** and press **ENTER** if the component information is not correct and then type in the correct information.

Then start the process again of entering the next letter for the next component.

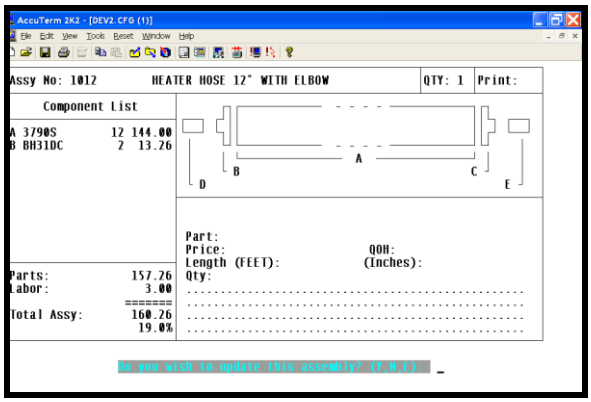
Press **ENTER**.

You will now be prompted to enter the labor. **"Enter the Labor Amount for this Assembly."**



In our example there is a $3.00 amount entered in this field. This is a default dollar amount that the AutoPower Programmer has hard coded. You can add to this amount.

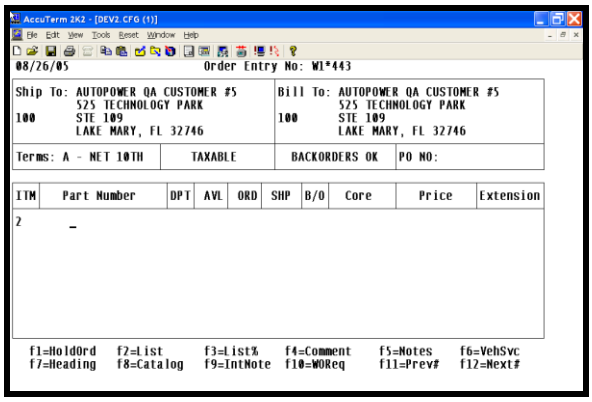
Press **ENTER**.



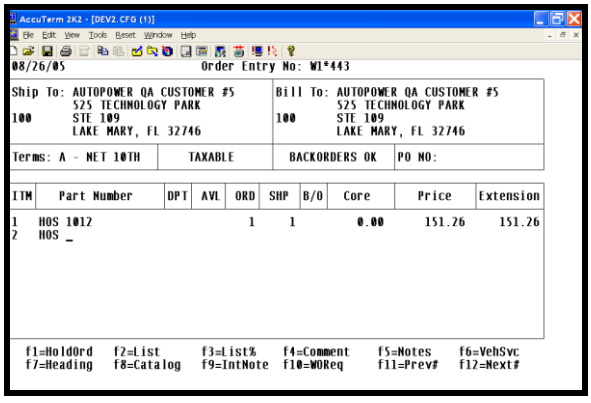
The next prompt will be **"Do you wish to update this assembly?" (Y,N,E).** Type in **N** to make changes to the components of this hose or type in **E** to exit out completely.

Type in **Y** and press **ENTER** to update this hose.

The message **"Hose Assembly updated to the work order"** will flash on your screen and disappear. You will be back at the beginning of the hose assembly screen. If you would like to build another hose, start the process over. If you have completed building the hoses for this work order, press **ENTER** to go back the work order.

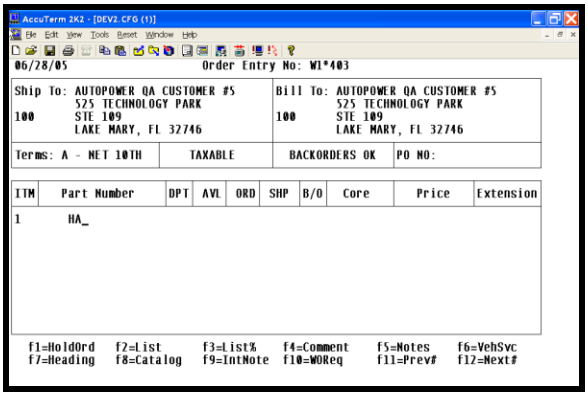


Now that you are back at the work order, you can press the F2 function key to refresh your screen so that you can see line #1 where you added your hose.



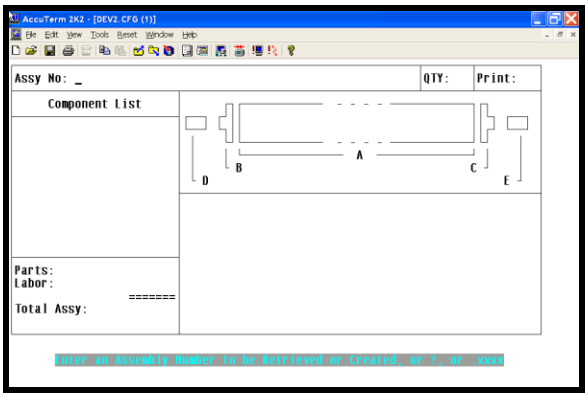
All hose assemblies built and added to a work order will consist of the vendor code HOS.

If one of the components in the assembly has a core price in the inventory file maintenance it will also display on the line item.



How Do I add an existing Hose Assembly?

Type in HA in the part number field and press **ENTER**. The Hose Assembly screen will display as shown below.



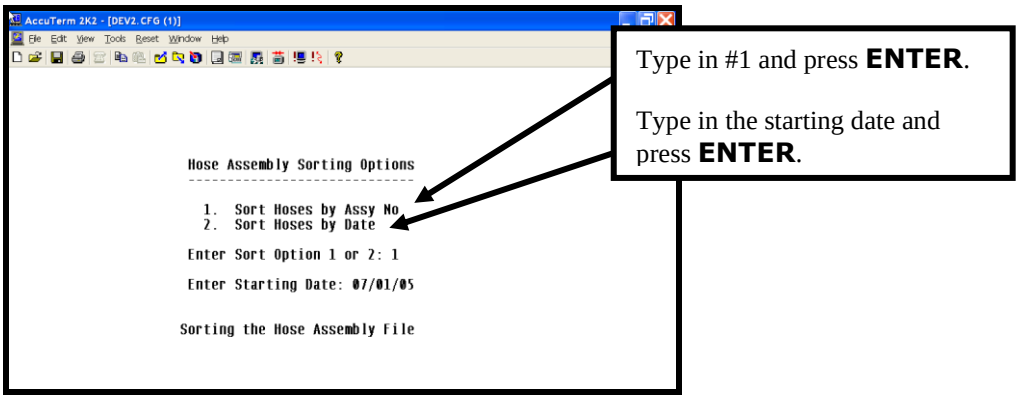
The next prompt to display is "**Enter an Assembly Number to be Retrieved or Created, or ?, or .xxxx**."

You can type in an existing Assembly Number if you know it or type in the word "NEW" to create a new Hose Assembly. You can also type in a "?" to list all the existing Hose Assemblies. Also, there is a search feature if you do not know the Hose Assembly number. Type in a "." followed by part of the Hose Assembly name.

Type in a "**?**" and press **ENTER**.

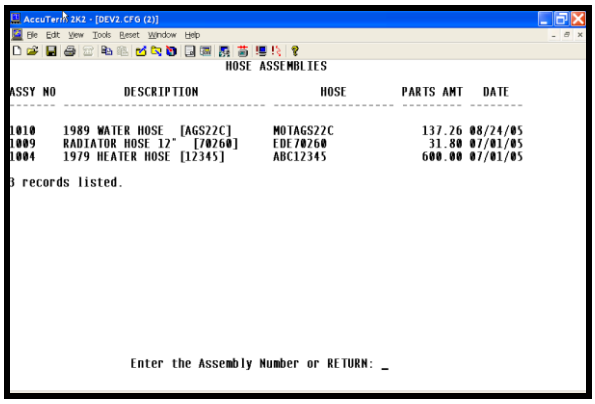
The screen below will display. The options are:

1. Sort Hoses by Assy No.
2. Sort Hoses by Date



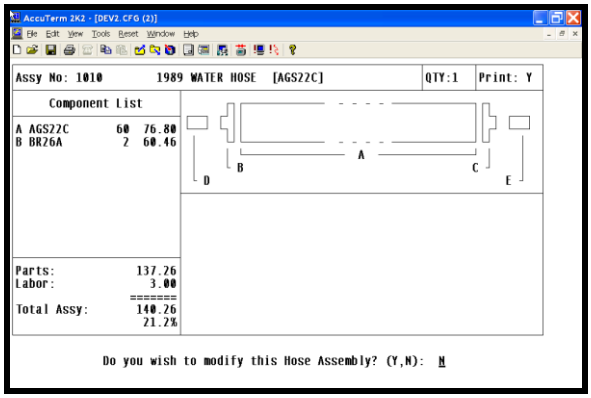
The following screen will display with the Hose Assemblies that have been built in the past and are in history. In our example, I asked to sort the hoses by assembly number and I wanted to see

all hoses that were built since 07/01/05. The results printed to the screen listing the hoses by assembly number as shown below.



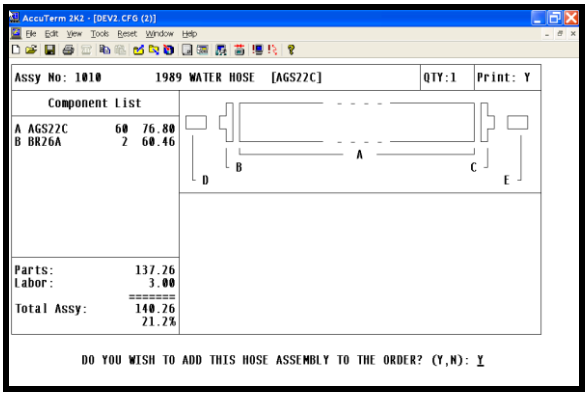
Type in the Assembly Number or Press **ENTER** to return to the Order Entry screen.

In our example, I will type in the #1010 and press **ENTER**.



The Hose Assembly will display to the screen.

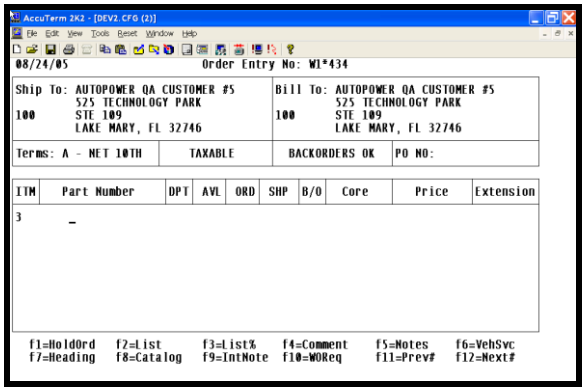
The next prompt will be **"Do you wish to modify the Hose Assembly?" (Y/N)**. The default is N. Press **ENTER**. If you need to make changes to the Hose Assembly that you are creating type in Y and press **ENTER**. Then make your changes.



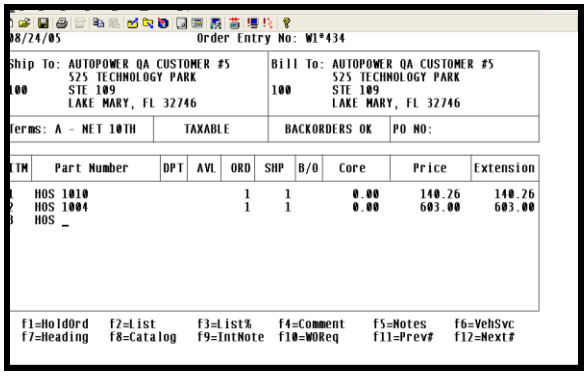
The next prompt to display will be **"Do you wish to add this hose assembly to the order? (Y/N)**. The default is "Y", Press **ENTER**.

A quick message will flash, **"Hose Assembly has been updated to the work order".** You will be back to the Assy No: field.

You can do another search and add another hose assembly or press **ENTER** to return to the Order Entry screen.
When you return to the order entry screen the line-item number will have increased by the number of different hose assemblies part numbers that you have added. In our example, I added 2 hoses. We will now be on line item # 3 of the order.



Press the function key **F2** to refresh your screen.

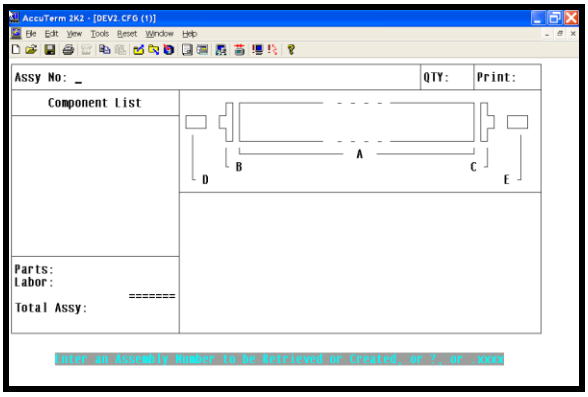


Your screen will reflect the hose assemblies that you just added in the Hose Assembly program.

You will now proceed with adding more line items or printing your picking ticket and invoicing.

How do I modify an existing hose assembly?

Type in HA in the part number field and press **ENTER**. The Hose Assembly screen will display as shown below.



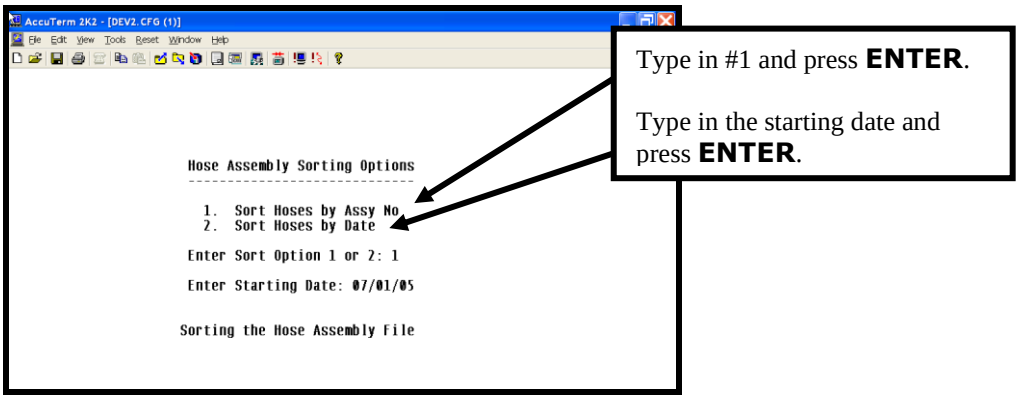
The next prompt to display is "**Enter an Assembly Number to be Retrieved or Created, or ?, or .xxxx**."

You can type in an existing Assembly Number if you know it or type in the word "NEW" to create a new Hose Assembly. You can also type in a "?" to list all the existing Hose Assemblies. Also, there is a search feature if you do not know the Hose Assembly number. Type in a "." followed by part of the Hose Assembly name.

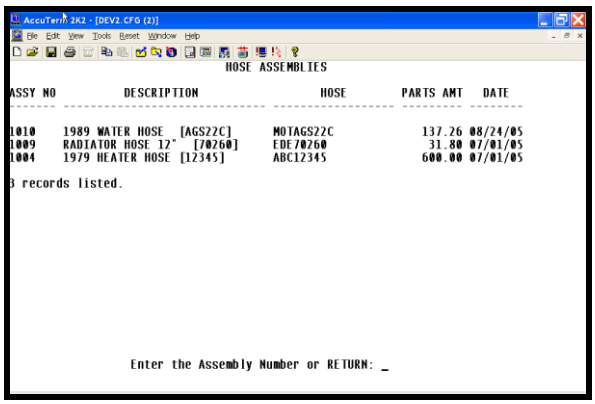
Type in a "**?**" and press **ENTER**.

The screen below will display. The options are:

3. Sort Hoses by Assy No.
4. Sort Hoses by Date

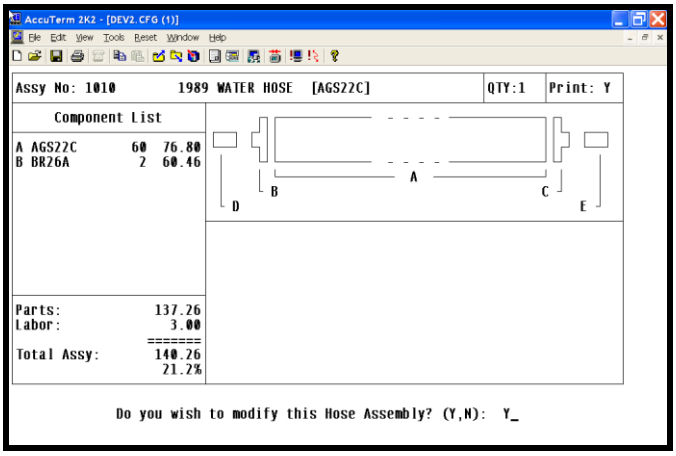


The following screen will display with the Hose Assemblies that have been built in the past and are in history. In our example, I asked to sort the hoses by assembly number and I wanted to see all hoses that were built since 07/01/05. The results printed to the screen listing the hoses by assembly number as shown below.



Type in the Assembly Number or Press **ENTER** to return to the Order Entry screen.

In our example, I will type in the #1010 and press **ENTER**.

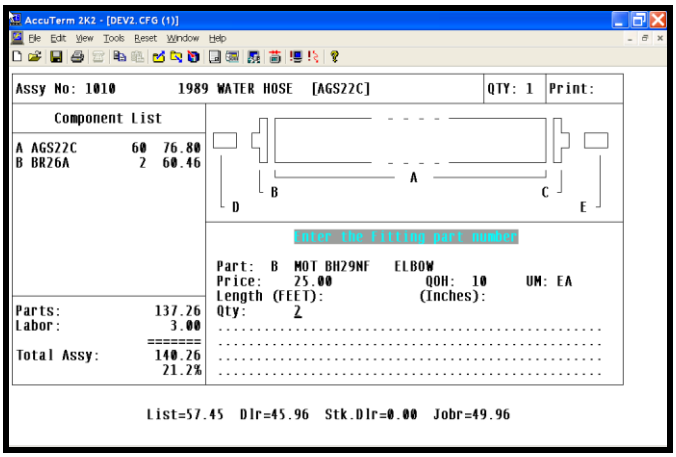


The Hose Assembly will display to the screen.

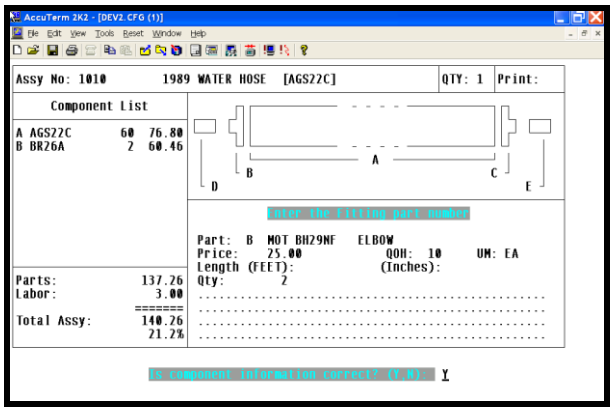
The next prompt will be **"Do you wish to modify the Hose Assembly?" (Y/N)**. The default is N. Press **ENTER**. Since we will be making changes to the Hose Assembly type in Y and press **ENTER**

You will be prompted to make changes to the description and quantity for the hose that is being built and if you would like the components to print on the invoice, Y/N.

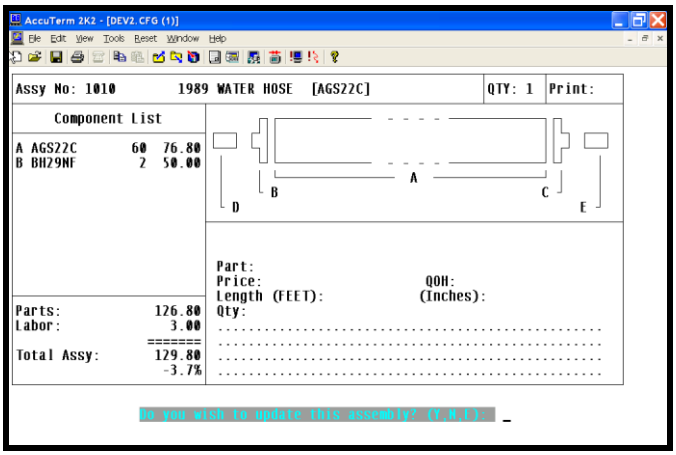
In the existing hose assembly #1010, I would like to change component part #B. I will change this part number to be MOTBH29NF instead of the existing part number MOTBR26A. I recalled part "B" by typing in the component letter B in the Part field. I then typed in the new part number and quantity.



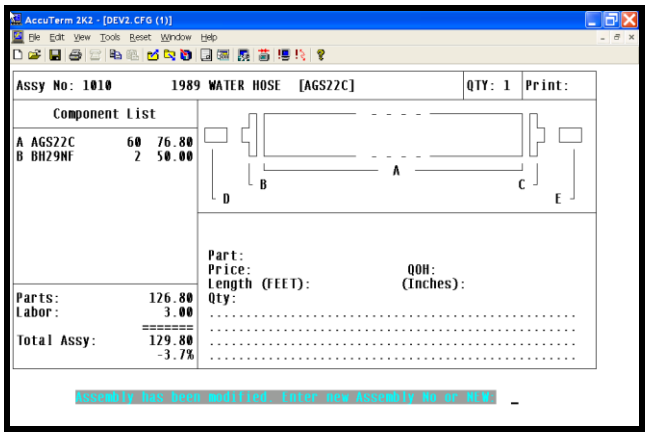
The next prompt will be **"Is this component information correct?"** (Y/N): Type in Y and press **ENTER**.



You will then be prompted to enter your next component. "**press ENTER**"
The next prompt will be to enter the new Labor amount if any and then press **ENTER**.



Now you are at the prompt **"Do you wish to update this Assembly? "Y/N"** Type in "Y" and press **ENTER**.

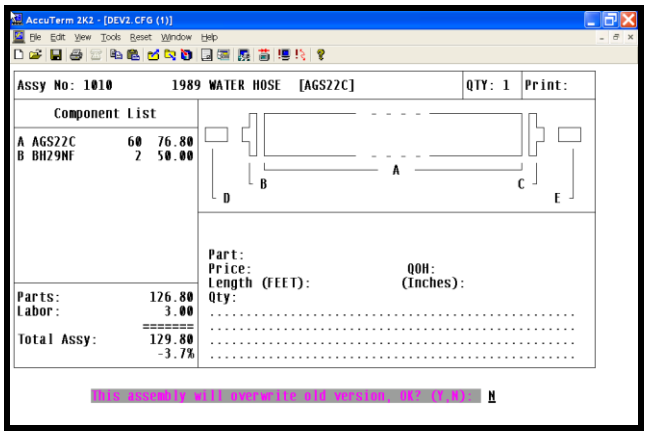


The prompt Assembly has been modified. Enter new Assembly No. or NEW.

This prompt will allow you to assign a different existing assembly number or type in the NEW to assign the next assembly number, which would be #1011.

We would only do this if we did not wish to overwrite the existing assembly number 1010 and keep it intact with its original components.

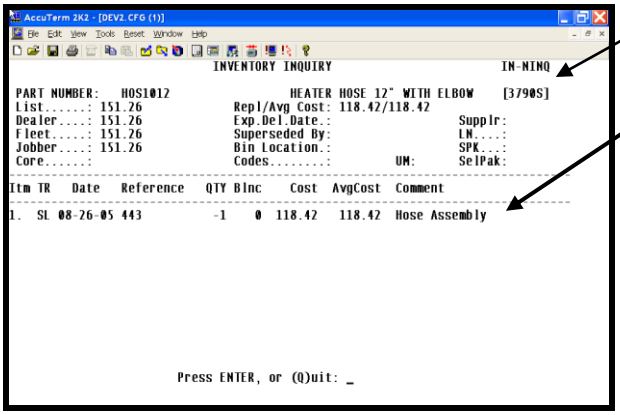
If you wish to keep assembly #1010 because you only wanted to correct a wrong part number in the assembly and not assign a NEW assembly number "press **ENTER**."



The prompt **"This assembly will overwrite old version, OK? (Y,N): Type in "Y"** because we changed a component in assembly #1010 because we had the wrong component part number added.

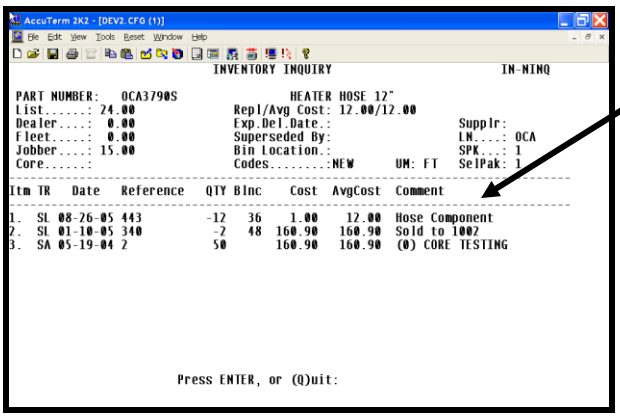
You will now see **"Hose Assembly has been updated to the work order"**.

When the work order has been invoiced, the QOH will be reduced for the hose assembly number and also the components.

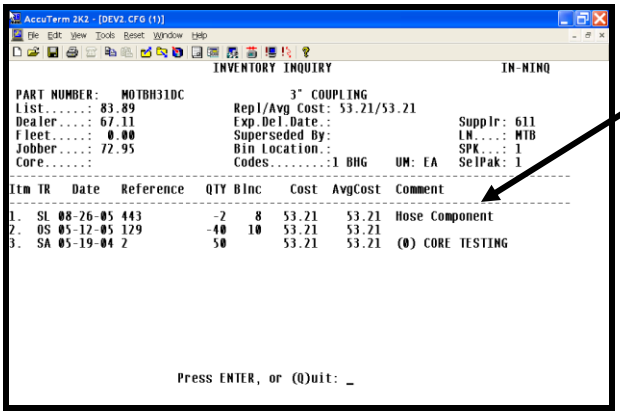


This is the hose part number.

This is the Assembly #HOS1012 that we created.

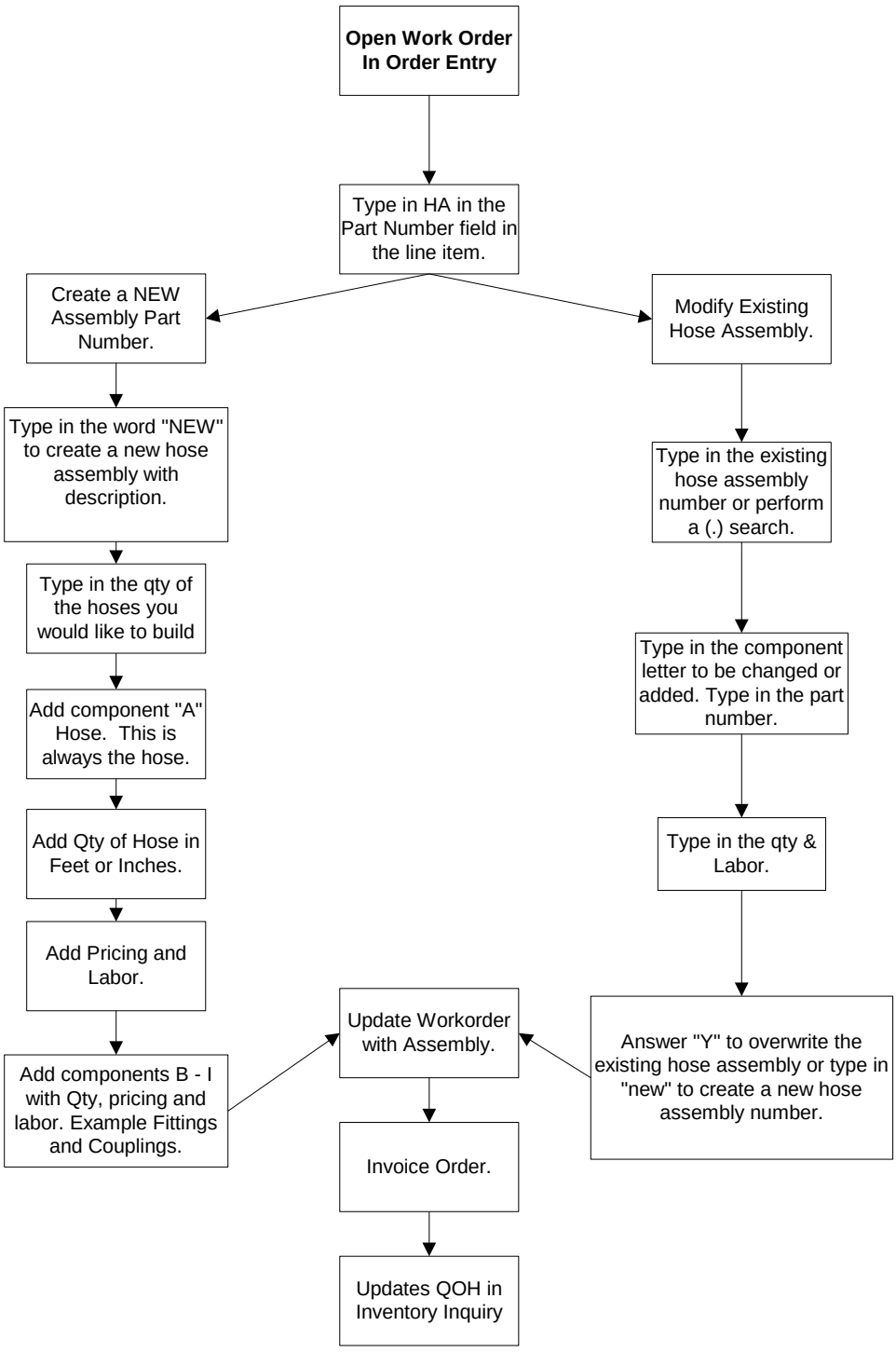


This is one of the components in the hose assembly.



This is the other component in the hose assembly.

The Quantity on hand and Quantity available is not affected until the work order has been invoiced.


Open Work Order In Order Entry
Type in HA in the Part Number field in the line item.
Create a NEW Assembly Part Number.
Modify Existing Hose Assembly.
Type in the word "NEW" to create a new hose assembly with description.
Type in the existing hose assembly number or perform a (.) search.
Type in the qty of the hoses you would like to build
Type in the component letter to be changed or added. Type in the part number.
Add component "A" Hose. This is always the hose.
Type in the qty & Labor.
Add Qty of Hose in Feet or Inches.
Add Pricing and Labor.
Update Workorder with Assembly.
Add components B - I with Qty, pricing and labor. Example Fittings and Couplings.
Answer "Y" to overwrite the existing hose assembly or type in "new" to create a new hose assembly number.
Invoice Order.
Updates QOH in Inventory Inquiry