

Meet your presenters



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- Associated Document Management
- Associated Document Management
 Use Cases and Functions
- Batch Reassociate Feature
- ADM and Batch Reassociate Demonstration

Agenda

Questions / Open Discussion





Associated Document Management

Associated Document Management

Search	t 🔀 View	Unassociated C	Only 🚇 Re-A	ssociate 🎒 Create / Add To Iter	m 🇳 Write Of	f 🖟 Shelve	Return to Vendor	Staging Loc. Movement	TV Disasser	mble	Setup To Tr	ansfer ···
, 200.00	X 1.611								11 0.00000			
Unassociated	Entry Type	Document No. ▼	Item No.↑▼	Description	Quantity	Remaining Qty.	Assignment List	Remaining Cost Amt. Uninvoiced And Actual	Loc. Code ▼	Shel	Assoc. Document Type	Assoc. Document No.
	Purchase	PR001068	NSAS	MCK305CN 84	1	1	Fir EXTERIOR Marks 101	31.95	LI		Contract	JOB000673
	Purchase	PR001103	NSAS	MCK305CN 84	1	1	Fir EXTERIOR Marks 101	14.40	LI		Contract	JOB000700
	Purchase	PR001127	NSAS	MCK305CN 84	1	1	Fir EXTERIOR Marks 101	14.40	LI		Contract	JOB000701
	Purchase	PR001148	NSAS	MCK305CN 84	1	1	Fir EXTERIOR Marks 101	13.09	LI		Contract	JOB000725
	Transfer	TR JOB000	NSAS	MCK305CN 84	1	1	Fir EXTERIOR Marks 101	13.09	LI		Contract	JOB000729
	Purchase	PR001103	NSBO	FB07M US26D	1	1	FIr INTERIOR Marks 106	50.60	LI		Contract	JOB000700
	Purchase	PR001103	NSBO	DPS2 US32D	1	1	FIr INTERIOR Marks 106	50.60	LI		Contract	JOB000700
	Purchase	PR001127	NSBO	FB07M US26D	1	1	FIr INTERIOR Marks 106	50.60	LI		Contract	JOB000701
	Purchase	PR001127	NSBO	DPS2 US32D	1	1	FIr INTERIOR Marks 106	50.60	LI		Contract	JOB000701
	Purchase	PR001092	NSCL	3101 BC PA 689 RH	2	2	Marks 1000	1,177.89	LI		Contract	JOB000672
	Purchase	PR001104	NSCL	351-O EN	3	3	FIr INTERIOR Marks 110, 222	, 223 997.50	LI		Contract	JOB000700
	Purchase	PR001128	NSCL	351-O EN	3	3	FIr INTERIOR Marks 110, 222	, 223 997.50	LI		Contract	JOB000701
	Purchase	PR001145	NSCL	351-O EN	3	3	Fir INTERIOR Marks 110, 222	, 223 349.89	LI		Contract	JOB000723
	Purchase	PR001159	NSCL	4040XP X HCUSH X SRT AL LH	7	7	Marks 101, 108, 112, 119, 12	2, 1 2,560.25	LI		Contract	JOB000728



Associated Document Management

Use Cases

Items Managed within contractERP

Associated/Unassociated

Unassociated / Boneyard

Review and Disposition



View Unassociated Only

- Quickly narrow down Associated Document Management list
- View Unassociated Items Only!

Process Unassociated Items

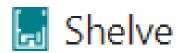


- ADD IT TO STOCK!
- Becomes a standard item available to sell from stock.



- SCRAP IT!
- Damaged? Stolen? Obsolete?
- Cost stays with the job





- PROCRASTINATE!
- Unassociates Item(s) from Job. Then decide how to process.

Process Unassociated Items

Return to Vendor

- SEND IT BACK with ONE CLICK! ... Creates a Purchase Return Order
- Easy open Purchase Return and ready to proceed

P Disassemble

- Break down Kit or Shop Built Item with ONE CLICK!
- Creates negative entry for parent and positive entry for components.
- Components ready to disposition using any of the ADM functions.





Process Unassociated Items

- SELL IN ANOTHER LOCATION!
- · Standard and Non-Standard items can be moved between locations.
- Once set up, the items can automatically pull transfer order lines.

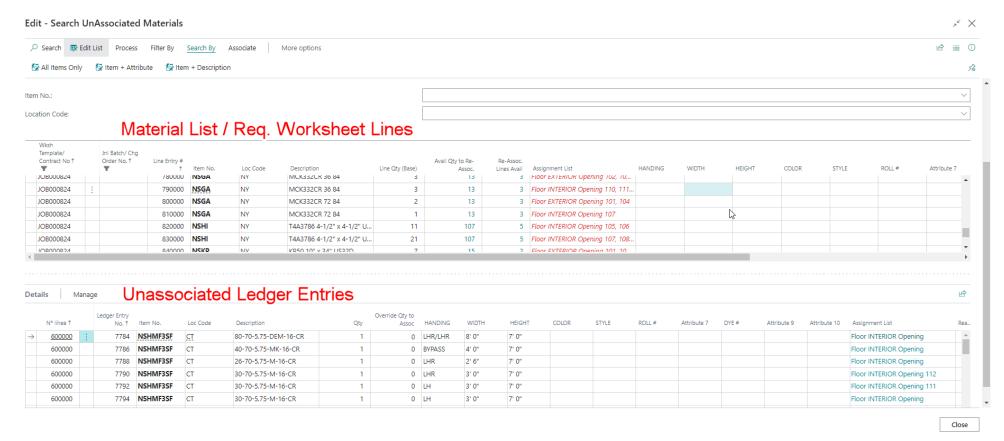
- Re-Associate
 - RE-SELL!
 - Purchased for a specific job and no longer needed.
 Sell it on another job.



Batch Reassociate Reassociate, But Much Better!

Batch Reassociate makes Searching for pertinent Unassociated Material much Easier!





Intuitive Dashboard

- You can select one or more lines from the Material List or Requisition Worksheet to bring into Batch Reassociate.
- Once the lines have been brought in, you select a line one by one and similar ledger entries will be displayed on the bottom.
- You can search by All Items or where the Item No. AND Attributes match the requirement. You can also show results where the Descriptions match one-to-one

- Further Filters can be applied to Show only Ledger Entries where Location Code Matches, or there are enough to fulfill the full line requirement
- When Associating, the Associate Process Only Report opens prefilled with information from the selected Ledger Entry making the Reassociate function even quicker.
- Shortcut Attributes are used to correlate Attributes on the Ledger Entries to the Requirement Attributes.

a COMPUSOFT product

Batch Reassociate Demo

Batch Reassociate Demonstration

- Pull Lines in from Requisition Worksheet
- Discuss Data Interface
- Demonstrate Filters
- Demonstrate Search By
- Using Batch Reassociate



Questions & Open Discussion Time!



Thanks for coming!

