

Contract Material Services

Includes Pre-Install, Paint and Field Install

contract  ERP
a COMPUSOFT product

Meet your presenters



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Agenda

- 1 What are Material Services?
- 2 Material Service Types
- 3 Material Services Workflow
- 4 Material Services Demo
- 5 Q & A



Contract Material Services Defined

- A value-add service that is sold separately from the material within a contract.
- The Service is directly associated to Material Lines (*some or all*) on that contract.
- “Material Services” differ from a “Service” in the following ways:
 1. Specific material within the contract is assigned to the service.
 2. The amount of time to complete the service is directly connected to the material assigned to it.
 3. The material item is most often altered in some way by the service, but not like Shop Labor, as again this service is sold separately.

Contract Material Services - Types

“Inside” Material Service

- Service performed to a material line, **before** it is shipped.
- Performing the Service **IS** a pre-requisite to shipping the material line.
 - Example – Painting (as a service not a shop operation).

“Outside” Material Service

- Service performed to a material line, **after** it is shipped.
- Performing the Service **IS NOT** a pre-requisite to shipping the material line.
 - Example – Field Installation for specified Items

Pre-Install

- Occurs often within Division 8 Industry, Pre-Install is the process of taking material items sold within the contract and assembling them together before the material ships.
 - Example – Hinges, Lock and Closer installed on the door, before the door is sent to the job site.
- Pre-install can exist with any material combination as long as there is a defined “Parent Item” and “Child Items” (installed to the parent).

Contract Material Services - Setup

Material Services Setup

- Open from Item Card.
- In this table, per Item Type, enter the Planned Labor Time, UOM's, Costs and Price.
- **PRE-INSTALL** - define which item type is the Parent Item and what item types are being installed onto the parent item.
 - Install "child" item types can be further defined as installed or shipped loose with the installed parent.

CERP Material Service Setup

Search + New Edit List Delete

Work Code ↑ ▼	Type	Item Category Code	Product Group Code	Item No.	Preinstalled ↑	Preinstall Type	Planned Time	Time Unit of Measure Code	Std. Cost (Per Hour)	Billing Rate	Billing Unit of Measure Code
HM DOOR PREI...	Product Group	HM DOOR	HMDOOR		<input type="checkbox"/>		15	MIN	45.00	67.00	HR
HM DOOR PREI...	Product Group	HARDWARE	CH		<input checked="" type="checkbox"/>	Installed	15	MIN	45.00	67.00	HR
HM DOOR PREI...	Product Group	HARDWARE	CL		<input checked="" type="checkbox"/>	Installed	10	MIN	45.00	67.00	HR
HM DOOR PREI...	Product Group	HARDWARE	ED		<input checked="" type="checkbox"/>	Installed	15	MIN	45.00	67.00	HR
HM DOOR PREI...	Product Group	HARDWARE	ELD		<input checked="" type="checkbox"/>	Installed	20	MIN	45.00	67.00	HR
HM DOOR PREI...	Product Group	HARDWARE	HI		<input checked="" type="checkbox"/>	Installed	9	MIN	45.00	67.00	HR
HM DOOR PREI...	Product Group	HARDWARE	KP		<input checked="" type="checkbox"/>	Installed	15	MIN	45.00	67.00	HR
HM DOOR PREI...	Product Group	HARDWARE	LO		<input checked="" type="checkbox"/>	Installed	10	MIN	45.00	67.00	HR
HM DOOR PREI...	Product Group	HARDWARE	SI		<input checked="" type="checkbox"/>	Loose	1	MIN	45.00	67.00	HR
HM DOOR PREI...	Product Group	HARDWARE	ST		<input checked="" type="checkbox"/>	Loose	1	MIN	45.00	67.00	HR

Contract Material Services - Setup

Product Group Defaults for Material Services

- As a fall back, if a particular item type is not defined in a Work Code's Material Service Setup, and needs to be assigned, defaults can be set up per Product Group Code.


Code ↑	Material Services Billing Rate	Material Services Billing UOM Code	Material Services Planned Time	Material Services Time UOM Code	Mat. Serv. Std. Cost (Per Hour)	Default Escalator
CH	67.00	HR	20	MIN	45.00	
CL	67.00	HR	10	MIN	45.00	
CO	0.00		0		0.00	
CY	0.00		0		0.00	
DB	0.00		0		0.00	
EA	67.00	HR	20	MIN	45.00	
EC	0.00		0		0.00	
ED	67.00	HR	15	MIN	45.00	








Contract Material Services - Setup

Multiple Services Hierarchy

- It may occur, that for a particular material line, multiple Material Services will be performed.
- In this situation users can define the order in which the Services should be performed.
- Example – HM DOOR – Requires Painting, then Pre-installed.
- This is defined per Item Category

CERP Mat. Serv. Lead Time Hierarchy

CERP Mat Serv Lead Time Hrchy 

 Search  New  Edit List  Delete   

Work Code	Order No. ↑
PAINT - HM	1
HM DOOR PREINSTALL	2

Contract Material Services - Setup

Work Code Item Setup

- A Material Service Code is set up as an Item with Item Type = Work Code.
- Setup for the Material Service/Work Code is defined on the Item Card.
 - The setup options determine if the Work Code is first a Material Service, and if so, is it for Pre-Install, or is the Material Service a Pre-requisite for Shipping (Inside Service).

Inside Material Service

Item Card

PAINT - HM

Process Item Sales Purchases Inve

Work/Material Services

Work Code

Material Service

Preinstall Service

Mat Ser. Shipping Prerequisite

Preinstall Material Service

Item Card

HM DOOR PREINSTALL

Process Item Sales Purchases Inve

Work/Material Services

Work Code

Material Service

Preinstall Service

Mat Ser. Shipping Prerequisite

Outside Material Service

Item Card

FIELD INSTALL

Process Item Sales Purchases Inve

Work/Material Services

Work Code

Material Service

Preinstall Service

Mat Ser. Shipping Prerequisite

Inside / Outside Material Service Workflow

Add Contract Service & Assign Material

- Choose PAINTING Work Code within the Contract Services List.
- Assign Material to be Painted. (similar Assigning to Release Schedule)
- Assign the HM DOORS to the Release Schedule, Material Service will be sent to Scheduling.

Schedule and Create Work Order

- Pull Service Requirements into the Work Order Worksheet.
- Create Work Order.

Work Order

- Similar to a Shop Order, complete the Work Order as the Service is Completed.

Pre-Install Material Service Workflow

Add Contract Service & Assign Material

- Choose PRE-INSTALL **DOOR** Work Code within the Contract Services List.
- Assign Material to be Pre-installed. (similar Assigning to Release Schedule)
- Material Services Time presents the Planned Roll Up of hours to complete that Material Service Line. Time is compiled to specific opening.
- Use the Pre-Install Selection Utility to adjust Installed Material per Opening.
- Create Release Schedule for **DOOR**; Hardware will auto assign to the release per Service setups & Pre-Install Line added.
- **Tracked within the system to reduce paper.**

Material Services ✓ Save

Search Edit List Delete Preinstall Selection Material List Mat. List Assignment Service Line Service Line Assignment | More options

Bldg ↑	Openings ↑	Install Relation ↑	Item No.	Description	Item Category Code	Product Group Code	Quantity	Planned Unit Time	Time Unit of Measure Code	Planned Total Time	Planned Total Time (Hours)	Std. Cost (Per Hour)	Unit Cost	
→	:	101	Parent	SLAB867030L	3-0 X 7-0 LH HMD 86 SLAB	HM.DOOR	HMDOOR	1	15	MIN	15	0.25	45.00	11.25
		101	Child	HAG20005	BB1279 4.5 x 4.5 US26D	HARDWARE	HI	3	9	MIN	27	0.45	45.00	20.25
		101	Child	SCH10025	ND50PD x RHO x 13-247 ...	HARDWARE	LO	1	10	MIN	10	0.16667	45.00	7.50
		101	Child	HBI10010	WS406-CCV US26D WALL...	HARDWARE	ST	1	4	MIN	4	0.06667	45.00	3.00

Pre-Install Material Selection Window

Preinstall Selection



JOB000733 · 101

Assignment
 Save Grid Layouts
 Restore Grid Layouts
 | More options

Partial Qty. on Next Drag

Type	Item Category	Product Group	Preinstall Type	Item No	Description	Quantity	Planned Time	Time UOM	Billing Rate	Entry No	Change Order No	Unit Price	HAND
<input type="checkbox"/> Service: HM DOOR PREINSTALL 3-0 X 7-0 LH HMD 86 SLAB													
Parent	HM DOOR	HMDOOR		SLAB867030L	3-0 X 7-0 LH HMD 86 SLAB	1	15	MIN	67	512	0	16.75	
Child	HARDWARE	HI	Installed	HAG20005	BB1279 4.5 x 4.5 US26D	3	27	MIN	67	513	0	30.15	
Child	HARDWARE	LO	Installed	SCH10025	ND50PD x RHO x 13-247 x 10-025 x 613	1	10	MIN	67	514	0	11.1666...	

Item Category	Product Group	Item No	Description	Quantity	Entry No	Change Order No	HAND	WIDTH	HEIGHT	COLOR
HARDWARE	ST	HBI10010	WS406-CCV US26D WALL STOP	1	0-40000	0				

Pre-Install Material Service Workflow

Add Contract Service & Assign Material

- Choose PRE-INSTALL **DOOR** Work Code within the Contract Services List.
- Assign Material to be Pre-installed. (similar Assigning to Release Schedule)
- Material Services Time Presents the Planned Roll Up of hours to complete that Material Service Line. Time is compiled to specific opening.
- Use the Pre-Install Selection Utility to adjust Installed Material per Opening.
- Create Release Schedule for **DOOR**; Hardware will auto assign to the release per Service setups & Pre-Install Line added.
- *Tracked within the system to reduce paper*

Schedule and Create Work Order

- Pull Service Requirements into the Work Order Worksheet.
- Create Work Order.

Mobile Pick and Work Order Completion

- Step 1 - Picking via Mobile Device of pre-install material, both parent (door) and child (hardware) items.
- Step 2 - Scanning of completed Pre-install label and generation of LPN for grouped pre-installed doors.

Material Schedule View

New Material Schedule View

- A new Assignment (opening) consolidated view that presents all Material for that Assignment, what the date requirements are for each item, and where the Material is in the process.
- The View includes both Services and Material for the Assignment and presents the Item/Service in a tree structure, showing what material/service impacts another.

Item /Service	Description	Shipment Date	Required Date	Start By/Order Date	Planned Date	Doc Type	Doc No	Preinstall Type	Release No	Sales Order No
▼ WD PRE-INSTALL	WOOD DOOR PRE-INSTALL	8/20/2017	8/20/2017	8/18/2017				PREINSTALL	1	SO-001523
NSAS	A538BM 83.125" EG-86 Mortise Lock US32D Edge Guard	8/20/2017	8/18/2017	7/21/2017		Purch. Receipt	PPRETR-000933	Installed	1	SO-001523
NSAS	A538SM 83.125" EG-Butt Hinge 5" US32D Edge Guard	8/20/2017	8/18/2017	7/21/2017		Purch. Receipt	PPRETR-000933	Installed	1	SO-001523
NSHI	BB1362 5" US32D Hinge	8/20/2017	8/18/2017	8/11/2017		Purch. Receipt	PPRETR-000935	Installed	1	SO-001523
NSKP	K1050 12" x 33 1/2" 4BE US32D Kick Plate	8/20/2017	8/18/2017	7/21/2017		Purch. Receipt	PPRETR-000936	Installed	1	SO-001523
NSLO	SG 8265 LNP US26D Privacy Lock	8/20/2017	8/18/2017	8/11/2017		Purch. Receipt	PPRETR-000937	Installed	1	SO-001523
NSOH	4424 US32D Surface Overhead Stop	8/20/2017	8/18/2017	7/21/2017		Purch. Receipt	PPRETR-000937	Installed	1	SO-001523
NSF3S	30-70-5.75-3PC-SU-16-CRS									
NSWD	30-70-1.75-EGG-PCE-MBA	8/20/2017	8/18/2017	7/21/2017		Purch. Receipt	PPRETR-000934		1	SO-001523

Material Services Demonstration

