

Meet your presenters



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What are Material Services?

Material Service Types

Material Services Workflow

Material Services Demo

Agenda 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 <a>IS a pre-requisite to shipping the material line.
 - <u>Example</u> Painting (as a service not a shop operation).

"Outside" Material Service

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

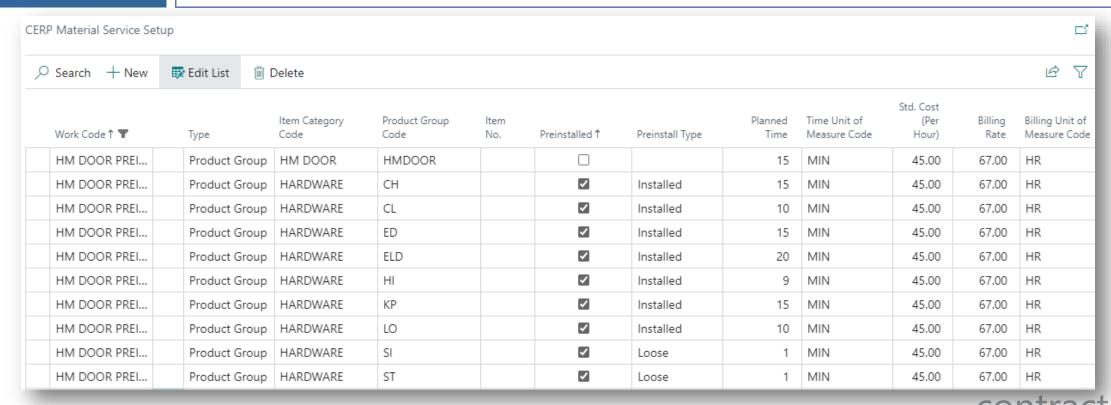
Pre-Install

- 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.
 - <u>Example</u> 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).



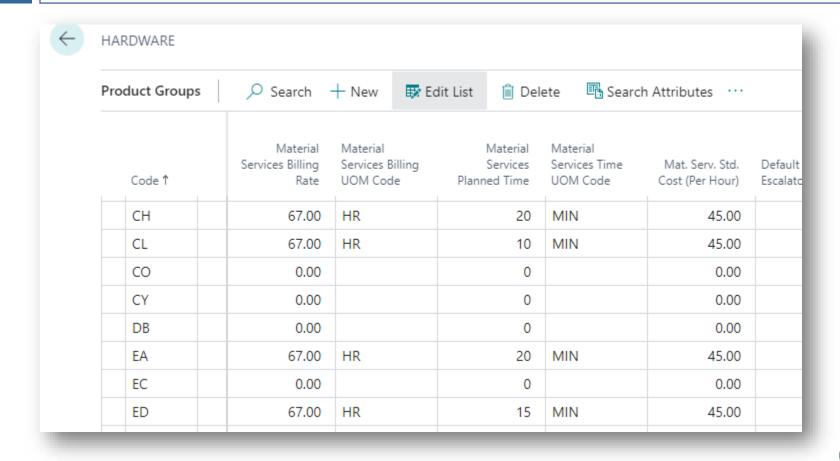
Material Services Setup

- 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.



Product Group
Defaults for
Material Services

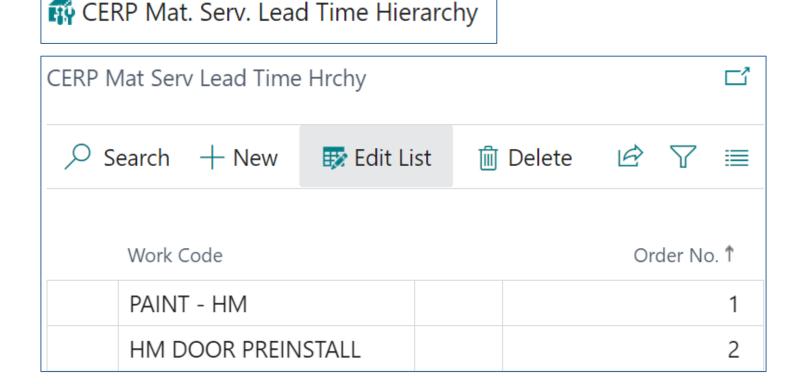
 As a fall back, if a particular item type is not defined in a Work Code's Material Service Setup, and needs to be assigned, defaults can be set up per Product Group Code.





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

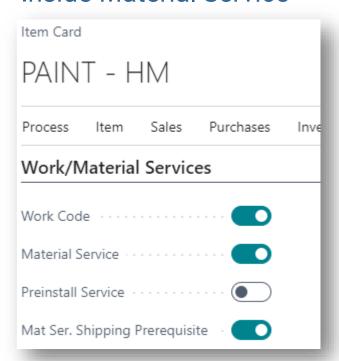




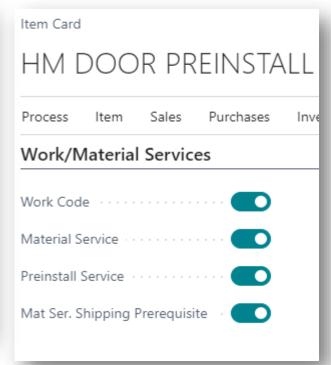
Work Code Item Setup

- 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



Preinstall Material Service



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.

| | | List 🗓 Del | st 🛍 Delete 🥻 Preinstall Selec | | Material List Mat. I | List Assignment | Service Line | Service Line Assignment | | More opti | | | | |
|--------|---|------------|--------------------------------|-------------|--------------------------|-----------------------|-----------------------|-------------------------|----------------------|------------------------------|-----------------------|-------------------------------|-------------------------|-----------|
| 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 | Н | 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 Select | ion | | | | | | B | + | - 🗓 | | | | | |
|-----------------------------------|---------------------|-------------------|----------------------|-------------|--------------------------------------|---------|----------|----------|--------------------|-----------------|----------|--------------------|------------|-------|
| JOB000 | 733 · 101 | | | | | | | | | | | | | |
| Assignment | ☐ Save Grid | Layouts 5 F | Restore Grid Layouts | More o | ptions | | | | | | | | | |
| | | | | | | | | | | | | | | |
| Partial Qty. on N | Next Drag · · · · · | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| Туре | Item Catego | Product Gro | up Preinstall Type | Item No | Description | Quantit | y Plan | | ime OM | Billing Rate | Entry No | Change Order No | Unit Price | HAND |
| □ Service: H | M DOOR PREINSTA | LL 3-0 X 7-0 LH H | MD 86 SLAB | | | ' | <u>'</u> | <u>'</u> | , | | ' | · | | |
| Parent | HM DOOR | HMDOOR | | SLAB867030L | 3-0 X 7-0 LH HMD 86 SLAB | | 1 15 | N | IIN | 67 | 512 | 0 | 16.75 | |
| Child | HARDWARE | HI | Installed | HAG20005 | BB1279 4.5 x 4.5 US26D | : | 3 27 | N | IIN | 67 | 513 | 0 | 30.15 | |
| Child | HARDWARE | LO | Installed | SCH10025 | ND50PD x RHO x 13-247 x 10-025 x 613 | | 1 10 | N | IIN | 67 | 514 | 0 | 11.1666 | |
| | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| | · | · | · | | | | · | | | | | | | |
| | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| Item Category | Product Group | Item No | Description | | | Quar | ntity | Entry No | Change Order No | HAND | | WIDTH | HEIGHT | COLOR |
| HARDWARE ST HBI10010 WS406-CCV US | | WS406-CCV US26D W | NALL STOP | | | | 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.



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| 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

