

Stock Request Help

Job Costing Assign Job Line manage Rule

Below are some examples of how the stock should be handle when trying to manage (WIP Allocation) them onto the job

There are two conditions before promoting a quote to a job

1	Allow to Exceed Value
2	Allow to Exceed Quantity

Allow to Exceed Value

There is no current rule to handle this when adding stock to a job to be managed

Allow to Exceed Quantity

This rule applies when managing more stock onto a line that exceeds more on its budget quantity.

We will leave this rule in place to handle manual job manage to allow to exceed or not exceed budgeted quantity.

Stock Lines

There are three basic rules for assigning stock lines to a job

1	Quote
2	SC – Scope Creep
3	CTC – Cost to Company

Documents that allow lines to be added to a job are as follows:

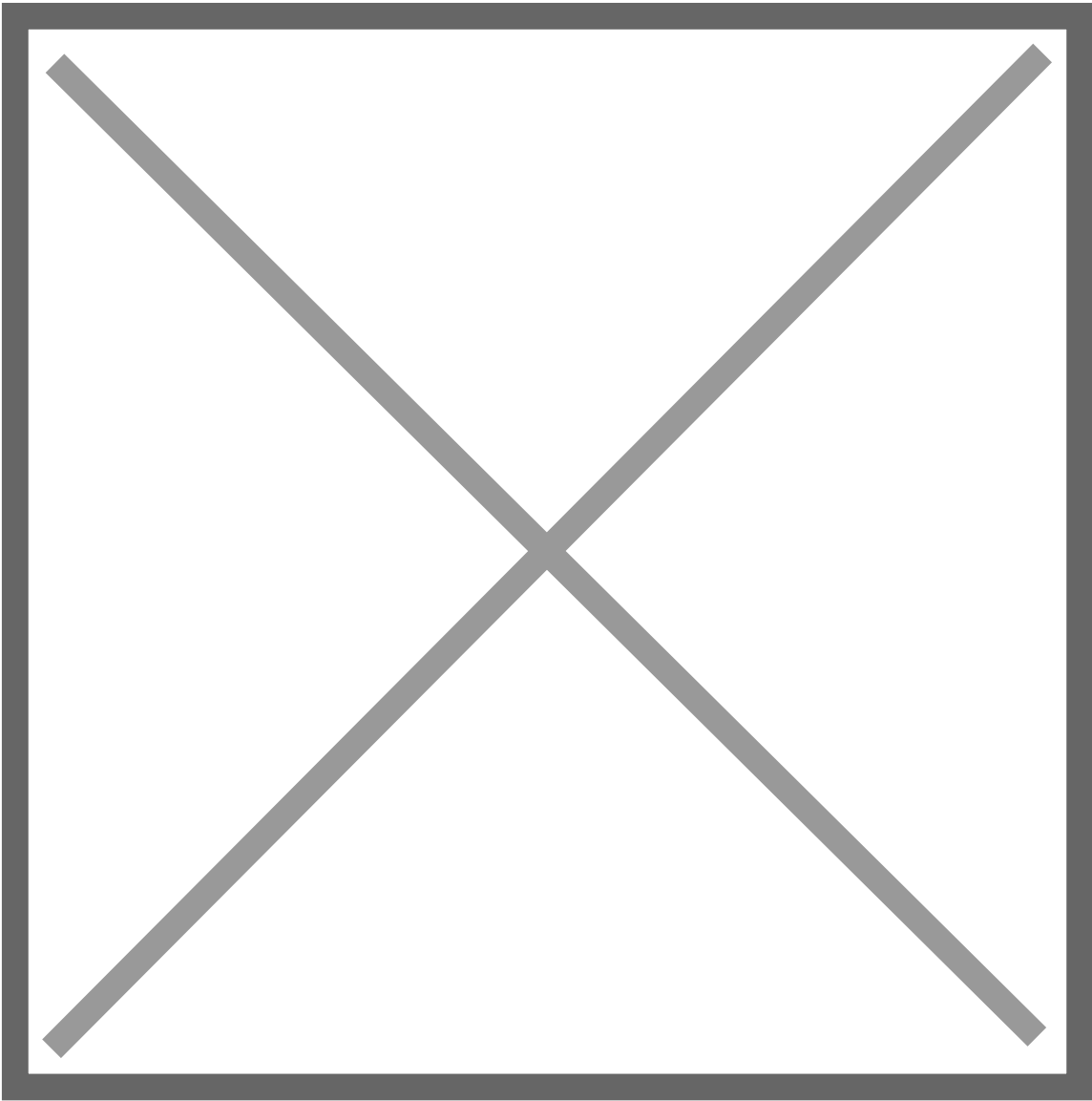
1	Manual Job Manage
2	Stock Request
3	Purchase Orders
4	Time Logs
5	Cashbooks

In each of these cases the users should select what he wants to happen to the stock line to be added to a job.

1	Add and manage quantities to an existing line
2	Create a new stock line
3	Fill up current lines and create new ones
4	Force a new stock line to be created based on either
a.	CTC
b.	SC

Stock Request Selection Actions

The rule for Allow to exceed quantity or NOT does not apply in this section



There will be two sections in the selection

Actual (Quote lines)

CTC or SC lines

By default, the Actual to be Selected with a tick box and the CTC selection selected

Rules as follows:

1	Actual tick on with CTC
2	Actual tick on with SC
3	Actual tick off with CTC
4	Actual tick off with SC

We start off with the simple ones first

Actual tick off with CTC

Force a new line on the job as CTC

Put the system cost and make the selling price ZERO

Actual tick off with SC

Force a new line on the job as SC

Put the system cost and default selling price on the job

Actual Tick on with CTC

Find the stock line on the job

Check the budgeted quantity versus the managed quantity and check the difference.

Manage as much of the stock on the job line marked as quote (do not exceed the budgeted quantity less the managed), Fulfil the line.

If there is more quantity move onto the next stock line of the same item marked as quote and add more quantity.

If there is still more to add, BUT there are no more quote lines, check on Scope creep lines that have not been managed fully.

Managed as much as possible, but do not exceed.

Once all the above is exhausted but there is still quantity, add a new line as a CTC line and put this in the job

Actual Tick on with SC

Find the stock line on the job

Check the budgeted quantity versus the managed quantity and check the difference.

Manage as much of the stock on the job line marked as quote (do not exceed the budgeted quantity less the managed), Fulfil the line.

If there is more quantity move onto the next stock line of the same item marked as quote and add more quantity.

If there is still more to add, BUT there are no more quote lines, check on Scope creep lines that have not been managed fully.

Managed as much as possible, but do not exceed.

Once all the above is exhausted but there is still quantity, add a new line as a SC line and put this in the job

Actual Tick is on, BUT NO stock lines exist

If the Actual tick is on but there are no lines on the job for that stock line, apply the first rules where you force

CTC or SC

Stock request creation from Template Task of Job

Stock request lines created from a template task will remember which lines they were created from. When

lines from a stock request are managed onto the job, the corresponding lines created from the template task will be updated first.

If the corresponding lines are fully managed by other means, then the general rule above will take place

Job Costing MANUAL manage

Rules for Allow to Exceed QUANTITY or NOT will apply here

As it currently stands

Admin Process

Stock Request Stores Management

Search Manage **Admin Process** Print Print Report

Stock Request No.:		Status:	All Excluding Closed & Completed
Reference:		Description:	
Date From:		Date To:	2024-10-23
Job Number:		Storeman:	All
Captured By:	All	Requested By:	All
Document Type:	All	Job Type:	All

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Admin Process

Confirm All Quantities
Line Items To Be Confirmed : 2

Continue Cancel

Revision #3

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