



Manufacturing Management Software

Module Overview

Making IT Work

Save Time

Save Money

Improve Performance

Comprehenisve - Proven - Affordable

www.match-it.com



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Scope

This document provides an introduction to the **Match-IT** system and briefly describes the features of the major modules. It is intended as a 'second-look' in support of the introductory brochure.

Important: Every Match-IT system comprises of every module. Non are optional. You get them all. It is your choice whether you use them or not.

Introduction

The following pages briefly introduce the concept and coverage of the **Match-IT** system.

1 Why Match-IT?

In today's ultra competitive world you need an edge to just survive, let alone succeed. You must always be looking for ways to cut costs while still improving quality.

Are these goals mutually exclusive? Not with **Match-IT**!

Match-IT will allow you to do things faster and more accurately. It will give you complete visibility of what is happening now, as well as what should happen next. **Match-IT** will give you the information you need for ISO 9000, and beyond, automatically.

Match-IT's unique event diary, in combination with its SMART scheduler, provides you with prioritised to-do lists and timely reminders. With **Match-IT** there's no need to remember things yourself, or chase around to find out what's going on. **Match-IT** does it for you! How much of your time will that free up?

But the **Match-IT** advantage doesn't stop there. In fact, it is quite literally just the beginning. With **Match-IT** you can join an elite club; together we will continue to help you improve your business. Giving you that all important edge, now and forever.

As a club member, your **Match-IT** system will be continually updated and improved.

Match-IT was designed by manufacturers for manufacturers.
Its design has been totally focused on meeting your particular needs.
Join the club now and have your say in where it goes next.

Practical Software for Practical People

2 What can Match-IT do for you?

Ask yourself:

- **How often do you find you cannot meet a promised delivery date?**

With **Match-IT** it could be **NEVER!**

- **How often do you find you haven't got the stock you need for a job?**

With **Match-IT** it could be **NEVER!**

- **How often do you find you haven't got the capacity to fulfill an order?**

With **Match-IT** it could be **NEVER!**

- **How long does it take you to find the current state of an order?**

With **Match-IT** it could be **SECONDS!**

- **How long does it take you to generate a quotation?**

With **Match-IT** it could be **SECONDS!**

These are just a few of the things **Match-IT** could do for you.

How can **Match-IT** do this?

- By providing a totally **integrated** system. **Match-IT** tracks the complete lifecycle of an order. It knows what's happening now and it knows what should happen next. All you have to do to progress an order through its various stages is point at it and push a button. What could be simpler?
- **Match-IT** extends the concept of **Work-To Lists** from the shop floor to the office. You can see at a glance all your outstanding quotations, purchases, supplier deliveries, works orders, dispatches, invoices, etc. They are shown to you in priority order and are updated automatically as things happen. You always know what should be done next.

The data sheets explain part of the story on how **Match-IT** brings you these benefits. To find out the full story, arrange a demonstration now.

3 Who is Match-IT aimed at?

If you:

- make, assemble or finish things
- supply to other manufacturers or distributors
- usually make to order, design to order or configure to order
- manufacture many lines all at once
- design many variations on a common theme
- are a profitable and growing company
- are not predominantly involved in low value '1 off', work

And you are looking for ways to:

- reduce your operating costs
- improve your customer service
- gain more visibility and control

Then **Match-IT** is an option you need to investigate.

4 What benefits can Match-IT give you?

Among the major benefits are:

- Significantly reduced administrative workload
- Rapid production of accurate cost estimates
- Accurate delivery estimates
- Reduced stocking levels
- Reduced risk of running out of stock
- Reduced risk of overloading and bottlenecks
- Reduced bad debt risk
- Accurate works loadings
- Reduced delivery times
- Improved customer service
- Full traceability
- **Peace of mind**

5 Architecture Features and Benefits

- Fully integrated: • You only tell **Match-IT** something once.
- Highly customisable: • You can 'tune' and extend the system to work the way you work.
- Windows XP and above, Windows Server 2003 and above: • Your system is future-proof.
- Network ready: • You can use the system from any or all PCs on your network.
- Links to accounting systems: • You can easily transfer data to and from the most popular accounting systems. You will not need to re-key any information.
- Covers whole manufacturing cycle: • You have everything you need in one integrated system.
- Advanced database technology: • **ALL** your information is always quickly available no matter how new or how old it is.
- Sophisticated printing system: • You have total control over when and where your documents are printed and what they look like.
- Comprehensive security system: • You have total control over who can do what and who can see what.
- Legacy data loading • In many cases, data from your existing system can be transferred to **Match-IT** automatically. Your system is immediately useful.
- Easy to use: • The system works the way you do, so its use is natural. Even so, you will be fully trained in the use of your system.
- Training:

6 Activities Covered

Match-IT covers all the major activities required to run any successful manufacturing business. This includes:

- **Enquiries from customers**
- **Tenders to suppliers**
- **Bill of materials planning**
- **Process route planning**
- **Cost and delivery estimating**
- **Quoting to customers**
- **Sales order processing**
- **Purchase planning and scheduling**
- **Purchase order processing**
- **Goods-In processing**
- **Purchase invoice processing**
- **Stock control, including full batch traceability**
- **Production planning and scheduling**
- **Production control**
- **Progress monitoring**
- **Sub-contract scheduling**
- **Inspection and testing**
- **Reject control**
- **Dispatching**
- **Sales invoicing**
- **Calibration and ISO9000 auditing**

All these activities are tightly integrated to give you everything you need in one comprehensive package.

7 Information Stored

Match-IT maintains a comprehensive set of databases that allow you to store every piece of information your business needs. Now and forever!

- **Customer and contact records**
- **Supplier and contact records**
- **Stock records**
- **Assembly structure descriptions (BoMs)**
- **Assembly process descriptions (routes)**
- **Assembly modification notes**
- **Resource characteristics**
- **Enquiry records**
- **Tender records**
- **Quotation records**
- **Purchase order records**
- **Supplier delivery note records**
- **Supplier invoice records**
- **Sales order records**
- **Works order records**
- **Inspection and test results**
- **Non-conformance action records**
- **Calibration and maintenance records**
- **Dispatch notes**
- **Sales invoices and credit notes**

Remember: **computer storage is ten times cheaper than paper** and far more convenient!

8 Documents Produced

All your major business documents can be produced from the databases maintained by **Match-IT**, for example:

- **Requests for tender**
- **Enquiry acknowledgement letters**
- **Quotation letters**
- **Order acknowledgement letters**
- **Credit terms exceeded warning letters**
- **Order on hold advice notes**
- **Purchase orders**
- **Goods-in labels**
- **Works instructions, Route Cards**
- **Stores pick lists**
- **Inspection and test specifications**
- **Product and inspection labels**
- **Non-conformance reports, Reject Notes**
- **Delivery notes**
- **Dispatch on hold advice notes**
- **Package labels**
- **Certificates of Conformance**
- **Consignment notes**
- **Courier labels**
- **Invoices**
- **Credit Notes**

These can be produced on pre-printed stationary or on plain paper or straight to a Fax machine or email, complete with all formatting and logos.

9 Usability Features

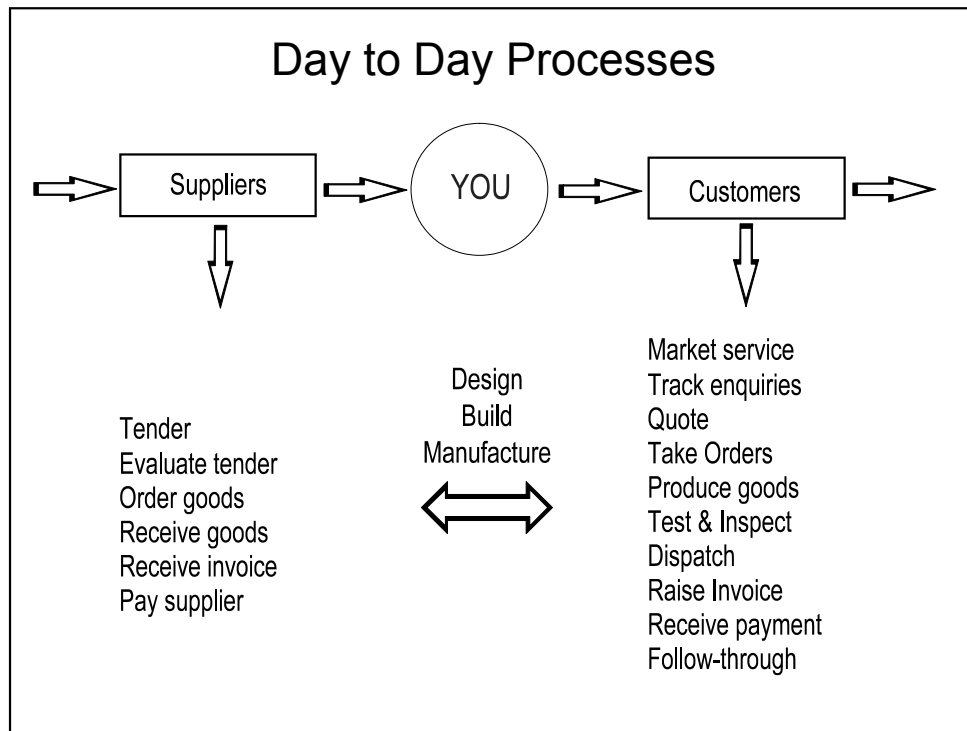
Match-IT has been designed from the outset to be easy, natural and safe to use. Some of the features that contribute to this are:

- **Sophisticated reminder and event diary system**
- **Context sensitive help and user extendible**
- **Context sensitive defaults and user definable**
- **General units of measure and user definable**
- **Define things as you go (e.g. new customer during order entry)**
- **Integration with most popular accounting systems**
- **Multi-currency**
- **Sophisticated printing system to multiple printers**
- **Crash proof file system (your data is always accurate and safe)**
- **Multi-user operation**
- **Modern true Windows™ program**
- **Comprehensive security system**
- **User configurable menus**
- **User configurable database extensions**
- **User definable document layouts**

10 Business Model

Match-IT is a **process** orientated product because it provides facilities that help you **do** things. At its most fundamental level the manufacturing business model used by **Match-IT** is:

- you buy things from your suppliers,
- you transform them in some way and then
- you sell them to your customers.



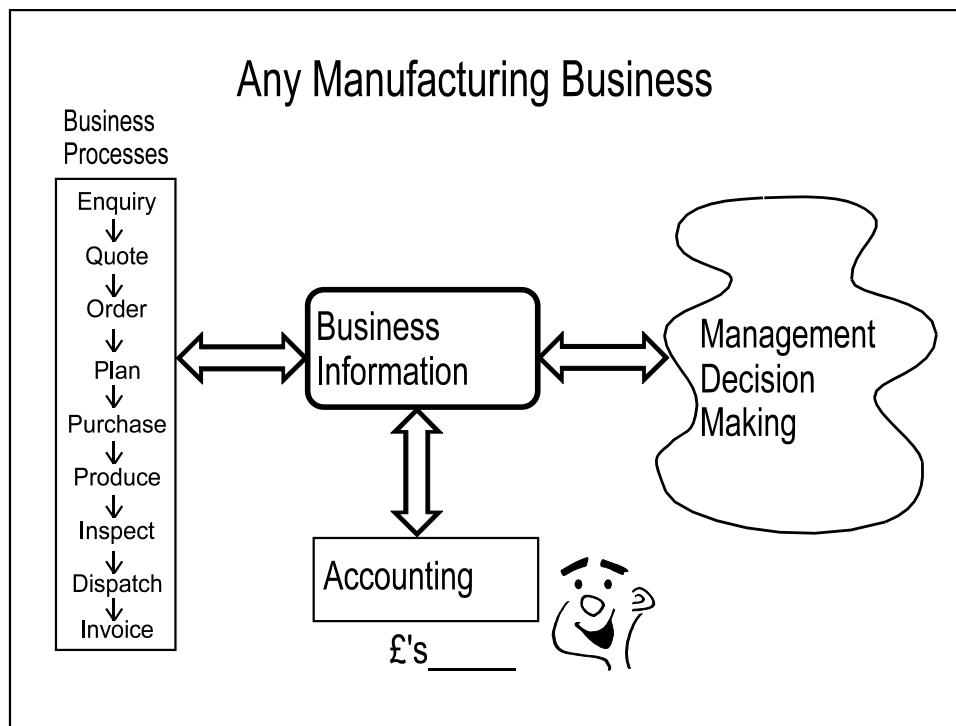
Match-IT fully understands this process. For example: given a desired delivery date for a customer, **Match-IT** will work back through the chain of cause and effect telling you when you need to do things to meet that date.

11 Information Model

The **Match-IT** system is designed around the recognition that there are three very distinct uses for information within a business. For our purposes here we will refer to these three uses as: *Accounting*, *Decision Making* and *Processing*.

Accounting is very well defined and essentially the same for all types of business. There are many excellent low-cost packages available to handle your accounting needs (Sage, Pegasus, etc.). **Match-IT** can be easily integrated with the most popular accounting packages..

Decision making is less well defined. It will probably involve detailed analysis of your information in ways that are particular to you and is often unpredictable. You need powerful tools to allow you to analyse your information in any way you choose. There are many excellent low-cost tools available to sift your information to assist in your decision making (Excel, Access, etc.). **Match-IT** can easily supply information to these tools.



Processing refers to using your information for your day to day needs in performing your business. These processes will be very different for a manufacturing business than, for example, a distribution business. However, within a wide range of manufacturing business there will be many similarities. The **Match-IT** system is specifically designed to fulfil this **processing** role for **manufacturers**.

12 Match-IT Coverage

Enquiry	—	Enquiry records Tender records Customer history
Quote	—	Product configuration Cost estimating Price negotiation Quotation documents
Order	—	Customer history Customer credit position Contract review Order acknowledgements
Planning	—	Purchase scheduling Resource scheduling Sub-contract scheduling Bill of Materials
Purchasing	—	Purchase orders Supplier delivery notes Goods-in processing Supplier invoices
Stock Control	—	Dimension/yield control Batch traceability Movement history ISO 9000 audits
Production	—	Job-card & label printing Progress tracking Partial batches Actual costs
Inspection	—	Inspection specifications In-process inspection Test records Quality procedures
Dispatching	—	Customer credit position Package/Address labels Partial deliveries Dispatch notes/C of C's
Invoicing	—	Invoicing documents Accounts batch posting

Modules

The following pages briefly describe each of the major **Match-IT** modules.

1 Enquiry Management

The problem:

You take enquiries from existing customers. You take enquiries from new customers. You take enquiries for existing products and processes. You take enquiries for new products and processes. You want to track the progress of your enquiries to ensure as many as possible are converted into firm orders.

The **Match-IT** solution:

At the enquiry level **Match-IT** does not differentiate between existing and potential customers. It also does not differentiate between existing and potential products or processes. The details of any enquiry can be captured over the phone with no prior setting up of customer or product records. **Match-IT** will automatically track the progress of the enquiry until you either decide it's dead or it's been converted into an order. **Match-IT**, through its event diary system, will remind you to send a quote and to follow-up the quote. Through the use of *wizards*, **Match-IT** can automatically estimate your costs for new product configurations from the answers to a few simple questions.

The benefits:

You can log enquiry details directly into the system during a phone conversation. Once logged they cannot be forgotten. Cost estimates can be automatically calculated. You do not have to re-key information to convert an enquiry to an order. This saves time and eliminates re-keying errors.

Selected **Match-IT** features:

- Enquiry records • There is no limit to the number of enquiries you can store.
- Enquiry lines • Each enquiry can be for any number of items and in any quantities.
- Full history • All enquiries always available and automatically referenced to any tenders, quotes or sales resulting from them.
- Auto create tender, quote, sales order • Any enquiry can be instantly converted to a tender to a supplier or a quote or a sales order.

Related topics:

Tender management
Quote management

2 Tender Management

The problem:

You want to get competitive tenders from suppliers for some or all the items, or their components, of an enquiry. You want to track their responses and ensure that you only use the 'best' in generating a quote.

The **Match-IT** solution:

Match-IT allows you to convert any enquiry into a tender. You can then edit this in any way you like. You can then *offer* this tender to any number of suppliers and indicate to them when you require a response. **Match-IT** allows you to enter the details of their responses. Responses are automatically associated with the corresponding offer. **Match-IT**, through its event diary system, will remind you if an expected response is late. Appropriate responses are automatically available when you generate a quote.

The benefits:

You can offer identical tenders to many suppliers without having to re-key information. This saves time. You cannot forget a tender response is expected and you cannot forget to consider it when generating a quote. This ensures your quotes reflect the best terms and enhances your chances of converting it to an order.

Selected **Match-IT** features:

- Tender records • You can convert any enquiry to an equivalent tender.
- Tender lines • A tender can have any number of items. They need not be the same as the original enquiry.
- Tender offers • You can offer a tender to any number of suppliers.
- Tender responses • The response lines given by the supplier need not be the same as the offer.
- Event diary • You are reminded about late responses.

Related topics:

Enquiry management
Quote management

3 Quote Management

The problem:

You want to quote against an enquiry with the best possible price and delivery while ensuring a reasonable profit is being made. You also want to ensure that the quote is followed up at the appropriate time.

The **Match-IT** solution:

You can convert any enquiry into an equivalent quote. You can then edit the details of the quote lines as necessary. **Match-IT** can automatically generate selling prices based on a price list plus a discount, or cost plus a margin, or a combination. The cost can either be calculated by analysing the product structure or by performing a tentative schedule. The latter also allows you to check the delivery date required can be met. **Match-IT** will remind you to send a quote on a promised date and remind you again, after it's been sent, to follow it up. You can instantly convert any quote to an equivalent sales order.

The benefits:

You can never unknowingly quote below cost price. You can never forget to send a quote or forget to follow it up. You can be confident that you can meet the delivery dates you are quoting and that your prices are as keen as possible.

Selected **Match-IT** features:

- Quote records • Any enquiry can be converted into a quote.
- Quote lines • A quote can have any number of items. The same item can be quoted several times at different quantities.
- Auto pricing • Prices can be automatically calculated from costs and margins
- History • Previous order and quote history is automatically presented.
- Tentative schedules • You can verify the delivery date can be met given your current work load.

Related topics:

- Enquiry management
- Sales order management
- Production schedule management

4 Sales Order Management

The problem:

You want to ensure your quality control procedures are followed when taking a sales order, your prices are consistent with your quote and the requested delivery date can be met. You also want to ensure you do not accept orders from customers that have exceeded their credit terms.

The **Match-IT** solution:

There are two stages to accepting a sales order. The first is the order detail *entry*. **Match-IT** suggests recommended selling prices for each item based on either an associated quote or your catalogue. The second stage is order *approval*. During approval **Match-IT** checks the current credit standing of the customer against their credit terms and makes a recommendation to either accept the order or to put it on *hold*. If the order is acceptable then it can be *scheduled*. The schedule operation checks the requested delivery can be met and all your quality procedures have been performed. The delivery date check is comprehensive and includes verifying the necessary stock is available, or can be procured, and the required capacity is available in the works. All necessary stock and machine capacity is reserved for the order.

The benefits:

You cannot unknowingly accept an order at below cost or whose delivery date is not achievable. Nor accept an order from a customer who has exceeded their credit terms. You can be confident all your quality control procedures have been followed.

Selected **Match-IT** features:

- Sales order records • There is no limit to the number of live and historical sales orders.
- Sales order lines • Each order can be for any number of items each with their own delivery requirements. The same item can appear several times in an order, each with a different delivery requirement.
- Auto pricing • Prices can be automatically calculated from costs and margins, or pulled through from your quote.
- History • Previous order and quote history is automatically presented.
- Credit checks • The customer's credit standing is automatically checked.
- Delivery checks • The feasibility of the delivery date is automatically verified.
- Quality control • You are prompted to perform your quality control procedures.

Related topics:

Quote management.
Production schedule management.

5 Purchase Schedule Management

The problem:

You need to buy things from your suppliers to meet your sales commitments. You want to buy only what you need and as late as possible. You only want to buy from your approved suppliers.

The **Match-IT** solution:

Match-IT automatically generates a suggested purchasing schedule that will ensure your commitments are met. It can do this because it knows what your outstanding sales orders are, and it knows what components are required. **Match-IT** predicts your stock situation as far into the future as necessary to determine what must be bought and when. It will choose suppliers that are appropriate for what is being bought. **Match-IT** will only use a supplier if they are capable of delivering in time to meet your commitment. **Match-IT** works backwards from the delivery date in order to determine what must happen and when. **Match-IT** will tell you if it thinks it is not possible to meet your commitments.

The benefits:

You cannot unknowingly under order components. You cannot unknowingly over order. You cannot forget to order your components. You can have exactly what you need when you need it and not before. You know as soon as possible when there is a conflict.

Selected **Match-IT** features:

- Just-in-time • You do not buy stock earlier than necessary.
- Preferred suppliers • Each component you buy can have a list of preferred suppliers.
- Manual adjustments • You are free to alter the suggested schedule in any way you choose.
- Purchase orders • Automatic conversion of your schedule to purchase orders.

Related topics:

Purchase order management
Production schedule management

6 Purchase Order Management

The problem:

You want to buy things not specifically related to your sales orders. You want to track the progress of your purchase orders. You want to ensure only authorised purchases are made.

The **Match-IT** solution:

You can generate a purchase order at any time for any reason. Whatever you purchase is automatically entered into your stock catalogue and becomes available for use to meet your current or future sales commitments. Your purchasing schedule is automatically adjusted to reflect your manual purchases. You can see your total purchasing commitment at all times irrespective of whether they were generated automatically or manually. You can see what has been ordered, from who, how much has been delivered, how much invoiced, how much has passed inspection, etc. **Match-IT** will remind you if an expected delivery is late. There are two stages to raising a purchase order. The first is the order detail *entry*. The second is the *approval* of the order. The purchase order documents cannot be produced until the order has been approved.

The benefits:

You are free to allow **Match-IT** to suggest purchase orders or to do it yourself. You always know what the state of all your purchases is. You cannot forget when a delivery is due. You cannot order goods without following an approval procedure.

Selected **Match-IT** features:

- Purchase orders • There is no limit on the number of live and historical purchase orders you can have.
- Purchase order lines • A purchase order can have any number of line items on it, including the same item with a delivery schedule.
- Drill-up • You can always find out why the items being purchased are required.
- Two step approval • A purchase order cannot be sent to the supplier until it has been *approved*. You can nominate who is allowed to approve a purchase order and who is not, and what their buying limit is.

Related topics:

Purchase Schedule Management

7 Goods-In Management

The problem:

You want to ensure the goods you receive from your suppliers are those you ordered and they conform to the required specification and standards. You want to ensure the goods are allocated to the jobs they were ordered for, and you can uniquely identify them.

The **Match-IT** solution:

You can only receive goods for which there is an active purchase order or free issue order. **Match-IT** knows from your stock catalogue what inspections, if any, you perform on the goods. You can inspect a sample of the goods, or all of them, or none of them. **Match-IT** will automatically assign unique identification numbers for all your goods (GRNs) and, at your option, print appropriate labels. All goods that fail inspection are marked as not usable in your stock catalogue. This prevents them from being allocated to jobs. The goods that pass inspection are marked as usable in your stock catalogue and automatically allocated to the jobs they were purchased for (if any).

The benefits:

You cannot accept goods you are not expecting. You are free to inspect as many or as few items as you wish. Goods are automatically allocated to jobs so you do not need to remember these details. All goods can be uniquely labelled so that you can easily identify them.

Selected **Match-IT** features:

- Part deliveries • A supplier may fulfill an order in any number of deliveries.
- Auto order matching • Deliveries are automatically matched to the appropriate purchase order.
- Inspections • Any number of inspections can be performed and their results logged against the goods being inspected.
- Auto job allocation • Deliveries are automatically allocated to the jobs waiting for them (if any).

Related topics:

Purchase order management

8 Purchase Invoice Management

The problem:

You want to ensure you only accept invoices for goods you have received and are usable. You also want to ensure the invoice price matches the purchase order.

The **Match-IT** solution:

You can only accept invoices for goods you have actually received and have not already been invoiced. **Match-IT** will automatically generate a supplier invoice record by just 'pointing-at' the goods-in record. All the price and detail information will be propagated through from the purchase order. You can then approve the invoice as it stands or modify it first. Once you approve the invoice its details can be passed through to your accounting system.

The benefits:

You cannot accept invoices for goods you have not received. You cannot unknowingly accept invoices with prices that are not consistent with the purchase order. An invoice cannot enter your accounting system without approval.

Selected **Match-IT** features:

- Part invoicing • A supplier is allowed to invoice all of a dispatch, part of it or more than one.
- Auto order and dispatch matching • Invoices are automatically matched with their corresponding deliveries and purchase orders.
- Nominal accounts • Purchases can be automatically assigned a nominal account code.

Related topics:

Purchase order management
Goods-in management

9 Production Schedule Management

The problem:

You want to know what you must make, and when, in order to meet your sales order commitment. You want to be able to join small batches into economic bigger batches and split very large batches into more manageable smaller batches. You want to ensure that the most important jobs are done first.

The **Match-IT** solution:

Match-IT incorporates a sophisticated scheduling algorithm that employs *expert system* technology. This allows it to automatically generate a near optimum production schedule based on your sales order demand. It can do this because it knows from your product structures what machines are required to make your products and how long all the operations required take. **Match-IT**'s scheduler considers a large number of factors: machines required, machines available, components required, sub-assemblies and their components required, your stock position now and in the future, etc. **Match-IT** can either work backwards from the delivery date or forwards from today when determining when things must be done. This is a large and complex subject that we can only hint at here. If you want to know more please ask for a demonstration.

The benefits:

You always have an achievable production schedule available. **Match-IT** will tell you if a commitment cannot be met. You do not have to worry about '*can it be done*' but only '*can it be done better*'. You will be reminded if you miss a delivery date.

Selected **Match-IT** features:

- Achievable schedule • You will always be given an achievable schedule.
- Just-in-time and ASAP • You can schedule on a *just-in-time* basis or *as soon as possible* or a mixture.
- Pre-emptive schedule • You can schedule things now, when there is no demand, in the expectation that you will need them later.

Related topics:

Purchase schedule management

10 Works Order Management

The problem:

You want to be able to start a job as soon as its components are available. You want to be able to monitor the progress of the job. You want to inspect the completed products to ensure they meet your quality standards.

The **Match-IT** solution:

Match-IT knows what jobs are waiting and ready to start. You cannot start a job unless the components needed are available. Once started you can track its progress to any level you like. This includes logging the completion and availability of products as you go. This means you can start dispatching from a large batch before its all completed. **Match-IT** knows what inspections you normally apply to the product. You can either inspect all the batch, or just a sample, or none of it. **Match-IT** will log the results of your inspection tests against the products tested. **Match-IT** will automatically assign a unique identification number for everything you make. At your option, appropriate labels can be printed. You can issue more components to the job to make up for any short fall caused by inspection failures. You will be warned if doing this 'robs' some other job that has not started yet. **Match-IT** will remind you if you miss the scheduled completion date. **Match-IT** will tell you if your current schedule is overloading any of your machines.

The benefits:

You can start a job early provided its components are available or on order. You are not constrained to keep within the schedule. You can operate like a pipeline: products can become available for use, or dispatching, as soon as they are completed. You can compensate for inspection failures as you go. You know at all times whether you are on track or not.

Selected **Match-IT** features:

- Early start • You can start as soon as components are available or ordered.
- Pipeline operation • Products can become available before the whole job is complete.
- Replenishment • You can issue more components to a job while its running.
- Productivity • **Match-IT** will update your expected machine usage and integration completion dates on the basis of your actual progress.

Related topics:

Production schedule management

11 Sub-Contract Order Management

The problem:

You want to be able to perform some manufacturing operations using sub-contractors. You want to be able to trace what free issue stock you have sent to them and to inspect the parts they send back. You want your overall production schedule to take into account the turn around time of the sub-contractors.

The **Match-IT** solution:

Match-IT allows you to mark any step in your product structure as 'sub-contracted'. You associate suppliers with these sub-contracted steps. Whenever you are required to make a product that includes a sub-contracted step, **Match-IT** will automatically create the necessary sub-contract schedule. These can be rapidly turned into purchase orders as they stand or modified in any way you choose. **Match-IT** will not allow you to raise the sub-contract documents unless the part-finished goods required by the sub-contractor are ready for dispatch. In many ways a sub-contract operation in **Match-IT** is like an amalgamation of a purchase order and a sales dispatch. It is like a purchase order in that **Match-IT** will expect a delivery from the supplier, and that delivery can undergo inspection just like any other. It is like a sales dispatch in that goods are sent to the supplier (the 'kit') and these require documentation. **Match-IT** will tell you if you are late sending goods to a sub-contractor and will also tell you if the sub-contractor is late returning them.

The benefits:

Your production schedules automatically reflect sub-contract turn around times. Appropriate documentation is automatically produced. Goods received back from the sub-contractor undergo the same inspection processes as a normal purchase.

Selected **Match-IT** features:

- Purchase orders • Automatic conversion of your schedule to purchase orders.
- Early start • You can start a sub-contract operation early providing the required kit is available or on order.

Related topics:

- Purchase Order Management
- Production Schedule Management
- Works Order Management

12 Inspection Management

The problem:

You want to inspect goods received from your suppliers, or products you have manufactured, to ensure they come up to standard. You want to log the results of any inspections carried out.

The **Match-IT** solution:

Match-IT allows you to define the inspections and tests you apply to any item in your stock catalogue. Whenever you 'create' a stock item (either by buying it or making it) you can perform these inspections and record the results against the item. You can inspect every item, or only a sample, or none, from each batch. You can do the inspections interactively with **Match-IT** prompting you with the inspection specification and the expected measurements, or just tell **Match-IT** the final results. Any item that fails its inspection is marked as not usable in your stock catalogue. You can then either: scrap it, repair it, send it back to the supplier, or decide its still usable.

The benefits:

You are free to inspect, or not, any item. You can define detailed inspection specifications but you are not constrained by them. **Match-IT** does not differentiate between items you buy and those you make, all can be subjected to as many or as few inspections as you wish.

Selected **Match-IT** features:

Interactive mode • You can perform inspections interactively with **Match-IT** checking your measurements against the limits for you.

Batch mode • You can just tell **Match-IT** how many passed or failed in a sample from a batch.

Inspection records • There is no limit to the number of live and historical inspection records you can have.

Related topics:

Goods-in management

Works order management

13 Dispatch Management

The problem:

You want to be able to dispatch goods to your customers ensuring they arrive on the promised delivery date. You want to be able to do partial dispatches. You sometimes want to be able to 'rob Peter to pay Paul'.

The **Match-IT** solution:

Match-IT knows what is due to be dispatched and what is ready to be dispatched. It knows what is due to be dispatched by looking at your production schedule. It knows what is ready to be dispatched by looking at your works progress and your stock catalogue. All you have to do is select the ones you actually want to dispatch. You will not be able to select anything that is not ready. The dispatch address will be automatically propagated from the sales order details, but you can change it. The dispatch date is determined by **Match-IT** when it generates your production schedule. It will have taken the carrier delivery time and your customer opening times into consideration. **Match-IT** will remind you if you miss a dispatch date. **Match-IT** will allow you to dispatch things early if they are ready. You can re-allocate stock from one order to another if priorities change.

The benefits:

Your production schedule is geared to meeting your dispatch schedule, but you are free to dispatch at any time provided the products are ready. You cannot unknowingly miss a dispatch date. You can create a dispatch just by 'pointing-at' the sales order line you wish to dispatch: no detail data entry is required.

Selected **Match-IT** features:

- Part dispatches • You can make multiple dispatches on a sales order item.
- Just-in-time delivery • Your dispatch schedule ensures goods arrive on the promised date.
- Point-and-go • No detail data entry is required. Just select a sales line.
- Documents • All dispatch documents are produced automatically, this can include C of Cs and labels.

Related topics:

- Production schedule management
- Works order management

14 Sales Invoice Management

The problem:

You want to be able to invoice for goods as soon as they have been dispatched. You want to ensure you only invoice for goods dispatched and the price is consistent with the sales order.

The **Match-IT** solution:

Match-IT knows what is due for invoicing by looking at your dispatches. You can only select items to be invoiced from the list of dispatches that have not already been invoiced. Invoice address and price information is automatically propagated from the associated sales order line. Carriage information is automatically propagated from the dispatch. You can also add ad-hoc items to an invoice, for example a priority handling charge. The invoice is automatically generated from the dispatch items you select. Once this is done the next step is to *approve* the invoice. Only after an invoice is approved are the documents generated and the details passed through to your accounting system.

The benefits:

You cannot issue invoices for goods you have not dispatched. You cannot generate an inaccurate invoice. An invoice cannot be issued or enter your accounting system without approval.

Selected **Match-IT** features:

- Multi-invoicing • You can invoice for more than one dispatch at a time.
- Auto dispatch and order matching • The invoice, dispatch and sales order are automatically matched.
- Nominal accounts • Sales can be automatically assigned a nominal account code.

Related topics:

Dispatch management

15 Product Configuration Management

The problem:

- You make lots of very similar widgets.
- You spend a lot of time (re-)designing and (re-)costing your widgets.
- You would rather spend this time more productively on other things.

The **Match-IT** solution:

The *product configuration manager* allows you to define the design rules you use to make your widgets through the use of *wizards*. **Match-IT** applies these rules whenever you want to design a new widget and automatically generates the required product structures. These define what materials and components are used, what processes are performed, and what resources are required to make the new widget. **Match-IT** can automatically calculate the manufacturing costs from these definitions and the information you give it about materials costs, labour costs, machine running costs, overheads, etc.

The benefits:

- You save time designing your widget variations.
- Your widget design variations are always accurate.
- Their manufacturing costs are calculated automatically.
- You can delegate the 'design' process to less experienced staff.

Selected **Match-IT** features:

- Configuration wizards
 - Specify the rules required to define a widget.
 - You can have as many design wizards as you like.
 - They encapsulate your knowledge about designing widgets.
- Lookup tables
 - Allow you to define tables of dependent information.
- Design forms
 - Allow you to 'execute' your rules to define a new widget. The result is a product structure as if you entered all the details by hand.

Related topics: