



# **Manufacturing Management Software**

## **Quick Tour Hands-On Guide**

### **Making IT Work**

**Save Time**

**Save Money**

**Improve Performance**

**Comprehensive - Proven - Affordable**

**[www.match-it.com](http://www.match-it.com)**





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## Quick Tour

The quick tour provides an insight into how Match-IT works by taking you step by step through a simple example procedure. The topic can be read alone, but is best used as a guide to actually performing the example in the Match-IT system itself.

The procedure we will perform here is to take an order from an existing customer, for an existing product, and plan the work required. This will introduce you to the *Order* and *Planning* procedures within the overall coverage of Match-IT.

The tour is divided into four parts:

- Part 1 will show you how to take the order details
- Part 2 will show you how to plan the work required
- Part 3 will show you the information Match-IT used to plan the work
- Part 4 will show you how to monitor its progress

Each part builds on the previous one, so the example should be followed in sequence.

After you have run through this example, you will have learned how Match-IT plans your work and guides you through executing it.

The example also introduces you to most of the navigation and data entry mechanisms used in Match-IT.

**IMPORTANT:** If you intend to follow this example in the Match-IT system itself, you will need to switch to the training data set and when prompted to load sample data, select **Yes**. To switch to the training data, select **File** and check **Use training data**.

## 1 Part 1 Sales Order Entry

In this first part we'll just enter the details for a single order containing a single line.

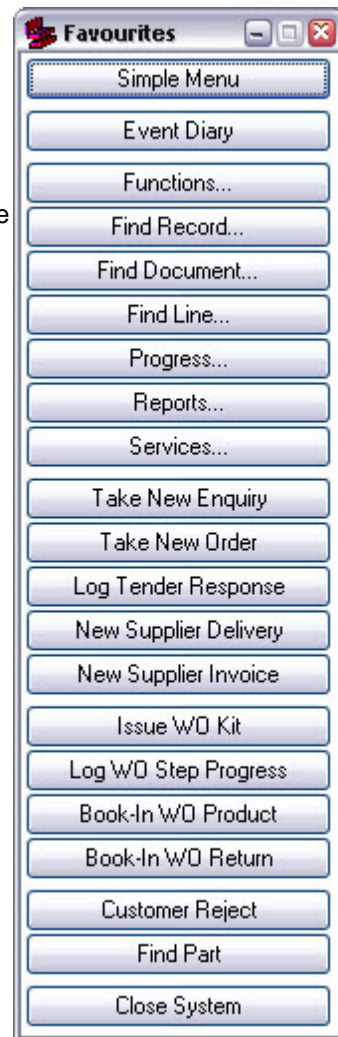
## 1.1 Take New Order

After starting Match-IT and performing the initial configuration, a *ribbon menu* will be shown in the top left of the desktop. It will look something like the one shown on the right here:

Note: These menus are part of the preference settings you can setup. This one is just an example for use here.

Pressing a button in these menus will either open a form, open a browse list or perform some action. Pressing the **Take New Order** button will open the form to allow a new sales order to be entered.

We'll do that now.



A blank sales order form like the one below will be shown.

When we're done, the area at the top will contain header information about the whole order and the area below will contain detail information about each item ordered.

We'll start by selecting the customer. Pressing the  by the **Customer** prompt is the first step.

The next step is to select the customer.

### 1.2 Select Customer

These  buttons are referred to as *ellipsis* buttons, pressing one will usually bring up a list to allow you to select a record. This one brings up a list of customers to pick from; like the one shown below.



In a real system, there could be many 1000's of entries in these pick lists. Match-IT provides several mechanisms to quickly find entries in these lists; they are described in the User Guide so we won't repeat it here.

One thing we will point out, however, is Match-IT's ability to extend these lists 'on-the-fly'. If a required entry is not in a list, for example when you receive an order from a customer you've not dealt with before, it can be added immediately by pressing the **New** button. This will bring up a form to allow you to enter the details for the new record. As soon as you close the form, the new record will be highlighted in the list, ready for selection.

We'll continue now by just selecting an existing entry, the first one, **HoneyComb PLC**. Pressing the **Select** button enters the highlighted name into our sales order form.

The sales order form will now look something like the one shown below.

Notice the **Primary Contact** field has been filled in automatically. This is an example of a customer specific default. Pressing its **...** will bring up a pick list of contacts for the selected customer, allowing you to override the default. Also note the **Our Order Num:** field has been allocated the next sales order number.

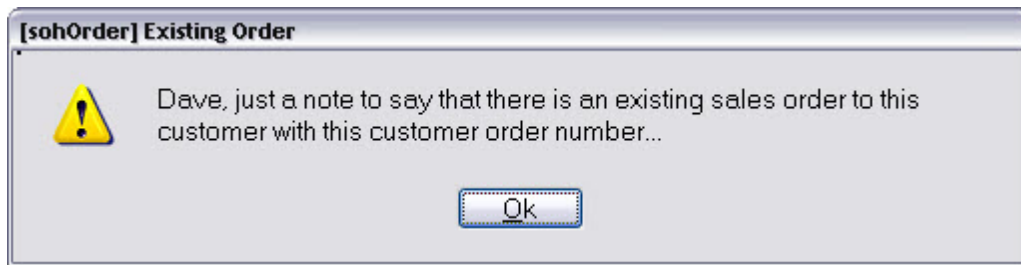
One more thing to point out before we move on; the **Taken On:** and **By:** fields show when the order was taken and who took it. These are examples of the audit information Match-IT maintains.

The next step is to enter the customer's order number.

### 1.3 Enter Their Order Number

You must enter a customer order number for each order. Do this by typing directly into the **Their Order Num:** field. The order number you enter should be unique for the customer, if it is not you will receive a warning message like the one below. This is a safety check to prevent the accidental entry of the same order

twice.



The order number can be anything you like; it doesn't have to be restricted to numbers, e.g. 123-09-99 and BAe/4376 are valid.

That's all the information Match-IT needs to allow you to continue with the order entry. There are many other items of information you can enter if needed, but they are all filled in with their default values automatically. We will leave them at their default value.

Note: All these defaults are sensitive to the customer.

We are now ready to enter the line items for the order. We do this by pressing the **New** button to the right of the line item area.

(Note: do not press the **New** button at the bottom, this adds a new order.)

The next step is to enter the order line detail.

## 1.4 Enter Order Line Detail

The initial order line entry form for our order looks like this:

The screenshot shows the 'Sales Order Line' window with the following fields and options:

- Sales Order:** 0000000001
- Their#:** verbal
- State:** New
- Line Number:** 1
- Cus Line Ref:** Item 1
- Customer:** HoneyComb PLC
- History** button
- Checkboxes:**
  - Line Cancelled
  - Line Fully Dispatched
  - Line Fully Invoiced
  - Customer Approved?
- Tabs:** 1 Detail | 2 Notes/Consign | 3 Qualifiers | 4 Links | 5 Schedule | 6 Profit | 7 Audit | 8 Actions
- Their Part Num:** [ ]  Pick by Their Num
- Our Part Num:** [ ]  Pick by Our Num
- Create New Part Num** button
- Ordered Quantity:** 1 Each  C of C Required
- To Deliver On:** 29/04/09  Use recommended: Not know yet
- Price:** Nil per Each  Use recommended: Nil per Each
- Margin:** [ ] **Est line profit of nil**
- Discount:** [ ]  Apply extra discount of nil
- Customer Notes:** [ ]
- Bottom Bar:** ? | [ ] | [ ] | [ ] | <Back | Next> | »New« | Reset | Del | Save | Close

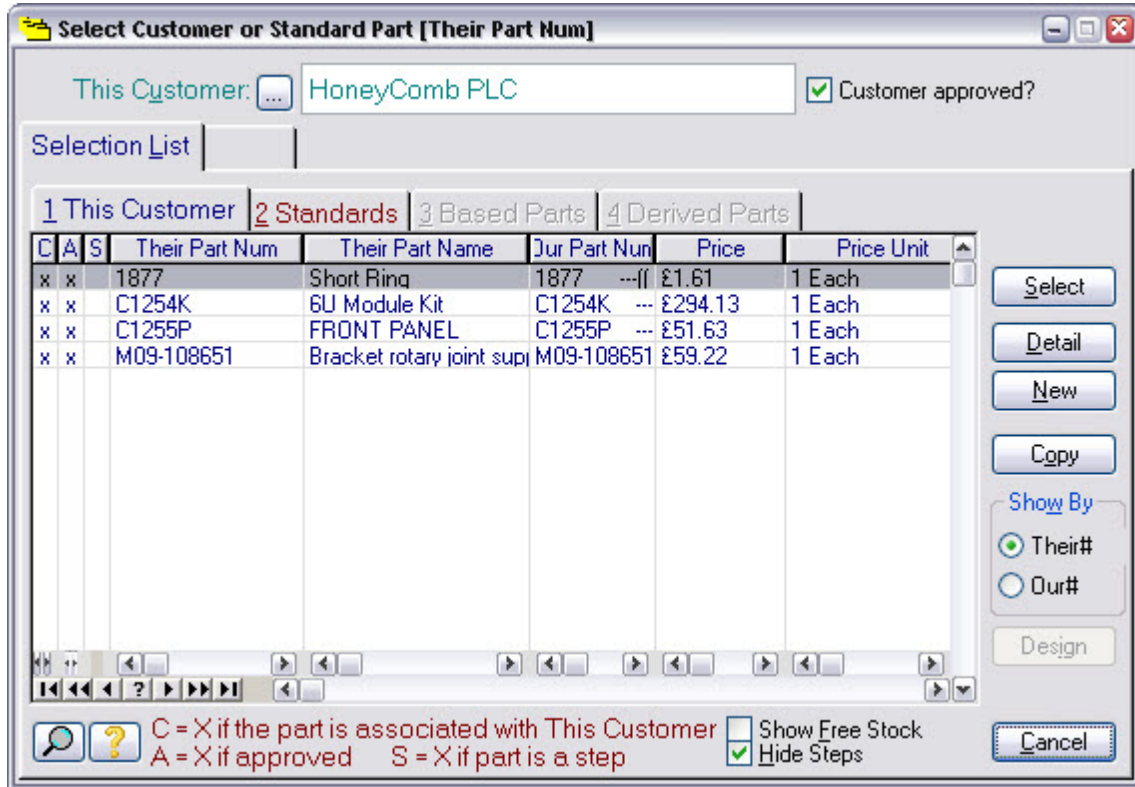
We will only concern ourselves with the minimum information needed to process the order. That is the *item* being ordered, the *quantity* and the required *date*. We'll leave the price until later. The first step is to select the item being ordered.

We do that by pressing the [ ] by the **Their Part Num:** prompt. This brings up a select list of all the jobs you've done in the past for the customer involved.

The next step is to select their part number.

### Select Their Part Num

The customer part pick list will look something like this:



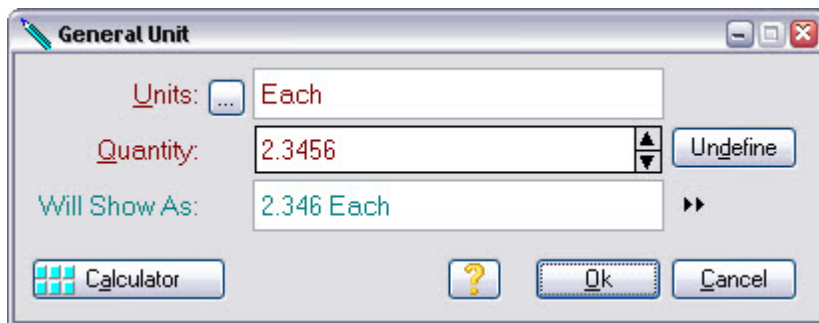
The form shows a list of job names. The **Their Part Num** column shows the name used by your customer; the **Our Part Num** column shows your name for it, which can be different.

If the order were for a new job, you would press **New** here to enter its details. In our simple example we're going to take an order for a job that's been done before. In this case we just need to select it from the list. We'll choose the **C1254K** item. Pressing **select** enters the highlighted part into our order line form.

The next step is to enter the ordered quantity. This can be done by typing directly into the **Quantity:** field or by pressing the **...** to bring up an editing form. We'll do that so you can see how quantities are formatted.

## Enter Quantity

The quantity editing form looks like this:



The **Units:** field defines the units of the quantity. This was set automatically when you selected the part. Match-IT allows any type of unit of measure, and it will convert between them automatically whenever necessary.

You type the required amount in the **Quantity:** field. The **Will Show As:** field shows how the amount you enter will be displayed and printed. The picture associated with the unit of measure controls this. These are modifiable by you. The picture associated with the **Each** unit only displays 3 decimal places, so if you type 2.3456 into the **Quantity:** field, the **Will Show As:** field will show it as 2.346. Note: The quantity is still stored within the Match-IT databases as 2.3456, it is only the displayed and printed form that is 2.346.

Type a quantity of 10 for our order and press **Ok** to enter it into our order line.

The final step in the order line entry, that we'll do here, is to set the delivery date required. Again, you can type the required date directly into the **To Deliver On:** field or use the  to bring up a calendar. We'll use the calendar.

**Note:** Make sure the **Use recommended** check box to the right of the **To Deliver On:** prompt is not checked, otherwise you will not be able to change the date.

## Enter Deliver On

The calendar looks like this:

The screenshot shows a dialog box titled "Select Date To Deliver On". It features a calendar for May 2009. The date 15/05/2009 is selected. Below the calendar, there are radio buttons for "ASAP", "TBD", and "NONE". The "Date:" radio button is selected, and the "Days:" field is set to 30. There are also buttons for "Reset", "Today", "OK", and "Cancel".

The **Date:** field shows the date that is currently set. This initial date was set when you selected the part. The initial date can either be set as a number of days after today (30 in this example) or it can be set to the standard lead-time for the part and quantity selected. In all cases you can override the initial date. We'll see later how Match-IT checks if the date set can be achieved.

The **Wk#** column in the calendar can either show the week number relative to today, so week 1 is this week, week 2 next week, etc., or it can show the week number relative to a reference date you set, your financial year start for example. Initially, Match-IT uses week numbers relative to today.

The **Days:** field shows the number of days away from today the set date is. A positive number shows days into the future and a negative number shows days into the past. The **ASAP** radio button can be used to set a date of "as soon as possible" and **TBD** means "to be defined".

You can set a date by either typing into the **Date:** field or by navigating the calendar. For this example select a date of 7 days time, check the **Date:** radio option and press **OK** to enter it into our order line. This will set the specific date selected into the form. If instead you checked the **Days:** radio option, a relative date is set. A relative date is shown as a number of days. This can be useful when doing quotations as you can quote a delivery date as a number of days after receipt of order.

For this example, we've deliberately chosen a date that cannot be met. You'll see the effect of this later, when we plan the work for this order.

Finally, we must save the order line.

## Save Order Line

We've entered all the information needed for now on this order line. Press **Save** then **Close** to save the information and return to the sales order form. If you try and close the form without first saving, you'll get a message telling you so, and giving you the opportunity of saving or discarding your entries.

## 1.5 Close completed order form

Your sales order form should now look similar to this:

The screenshot shows a 'Sales Order' window with the following fields:

- Our Order Num: 0000000001
- State: New
- Customer: HoneyComb PLC
- Approved?
- Taken On: 15/04/09
- Primary Contact: Roger --(( Roger W
- By: Manager
- Their Order Num: verbal
- Their Order Date:

Navigation tabs: 1 Lines | 2 Terms | 3 Carriage | 4 Addr/Notes | 5 Actions | 6 Profit | 7 Audit | 8 Qualifiers

D	C	E	X	Line	Item Ref	Their Part Num	Our Part Num	Ordered Qty	Rec
				1	Item 1	C1254K	C1254K --(( MODUL 10 Each	22/0	

Legend: D = X if the line is fully dispatched, C = X if line is cancelled, E = X if the line has been edited, X = X if extra discount applies

Buttons: <<, >>, New, Detail, Remove, Cancel, Trace, Events, <Back, Next>, New, Reset, Del, Save, Close

The order can contain as many items as needed, including the same item multiple times with different delivery dates.

We'll just stick with one.

The order entry is now complete; press **Close** to return to the *ribbon menu*.

Note that everything we've done so far has been clerical. The only skill required is knowledge of how to use Match-IT. Most people can learn to take an order after only a few minutes of training.

As you'll see in the next part of this tour, now the order details have been entered, Match-IT will guide you through the rest of the work required. The event diary will provide reminders of what to do next and when.

## 2 Part 2 Sales Order Approval

So far we've just recorded the order details. No work has been planned and no stock or resources allocated. The planning is done automatically when the order is approved. Part 2 of this tour will show you how to do that.

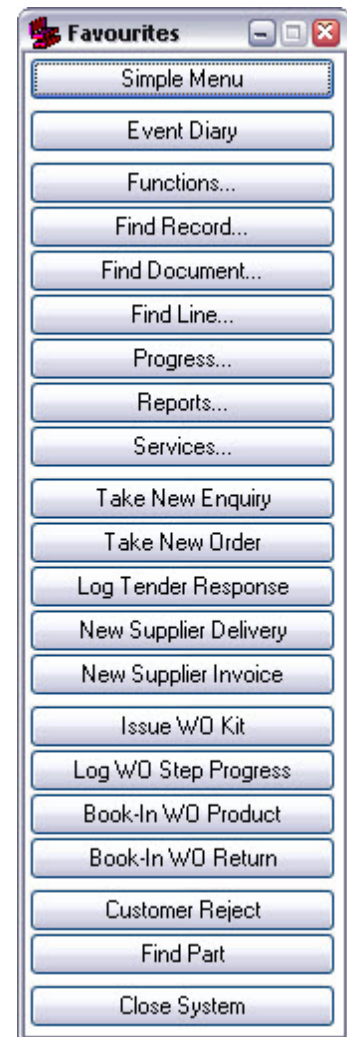
Most activities in Match-IT involving a document, like a sales order, go through this two-stage process: stage 1 creates the document, and stage 2 approves it. Typically, the first stage is clerical and can be done by anybody, while someone else with more authority does the second stage.

We'll start the approval process from the event diary.

## 2.1 Event Diary

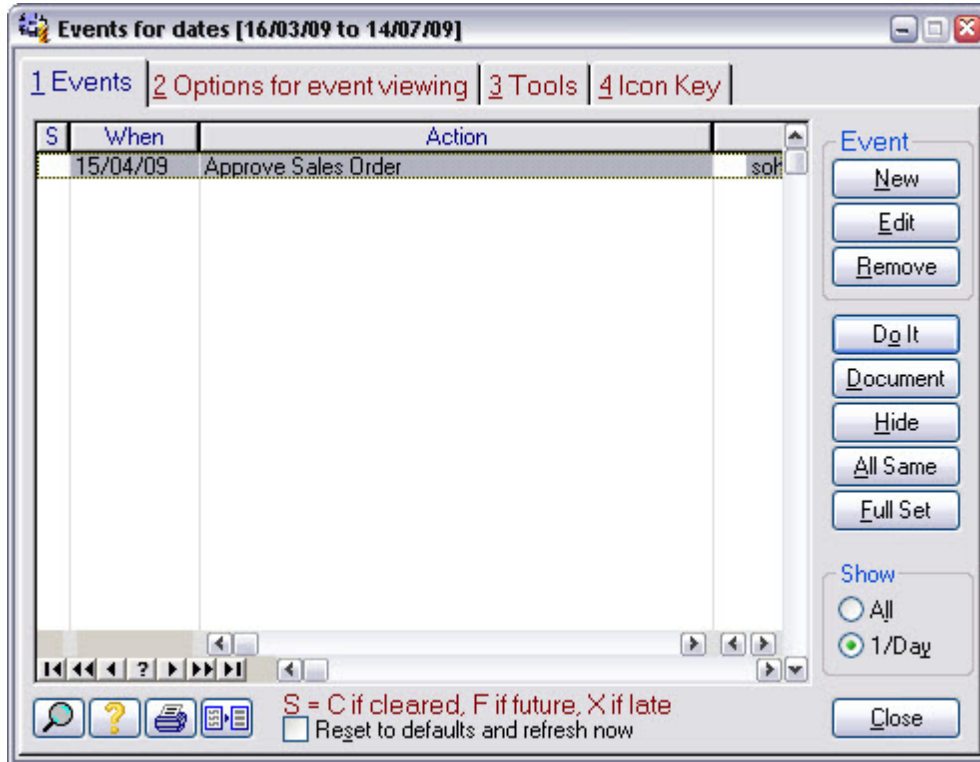
The event diary is so important within Match-IT that we'll spend a bit of time exploring it before we move on to the actual order approval.

Pressing the **Event Diary** button on the *ribbon menu* will open the event diary.



If you've not done anything so far in Match-IT except follow this tour, the event diary will look something like this:





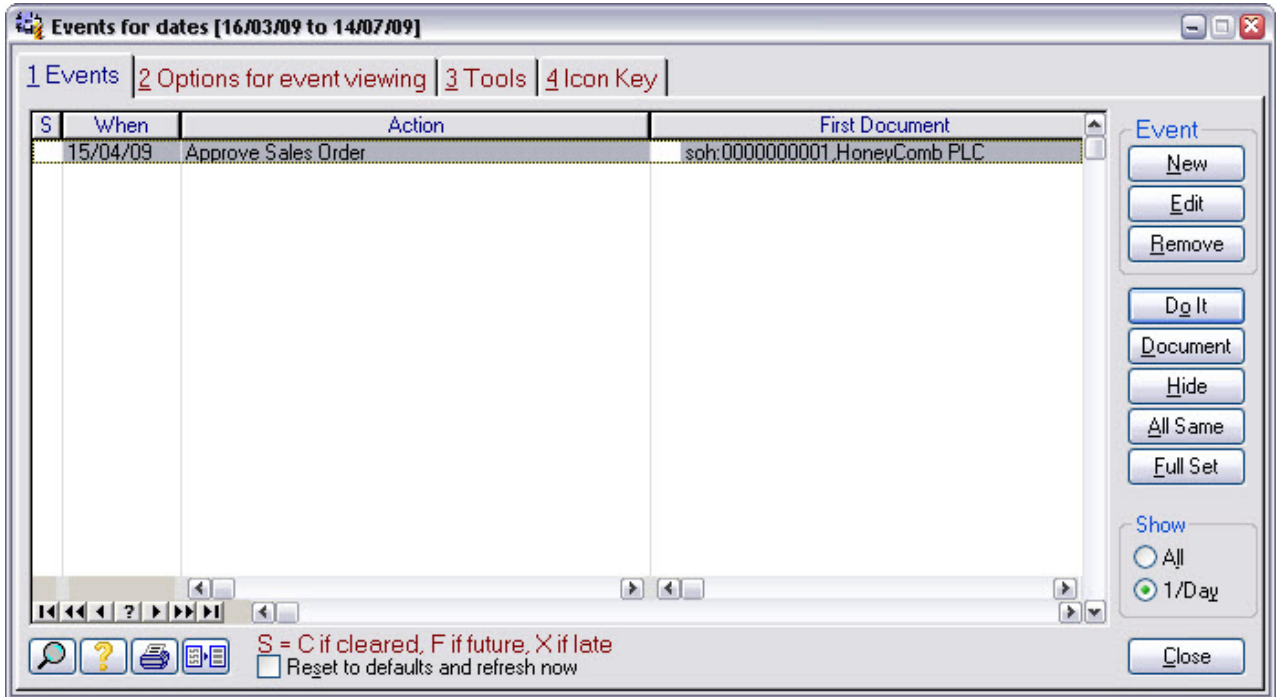
Notice the entry reminding us to approve a sales order. This is for the sales order we entered in part 1 of this tour.

The event diary is the master to-do list. Entries are put in, and taken out, automatically as you do things within Match-IT.

The event diary is used to remind you to do something, like approve a sales order, and also to remind you when something should happen, like receiving a delivery from a supplier. Each entry gives you a short description of the action required and the identity of the document involved. If you can't see the document identity, stretch the width of the window until you can.

Note: Match-IT will open the window next time in the same place and at the same size as you leave it. Match-IT remembers these settings for each user independently, so you and your colleagues can have different preferences.

If your display has sufficient room, it is recommended to set the event diary so it looks something like this in the top right of your Match-IT desktop:

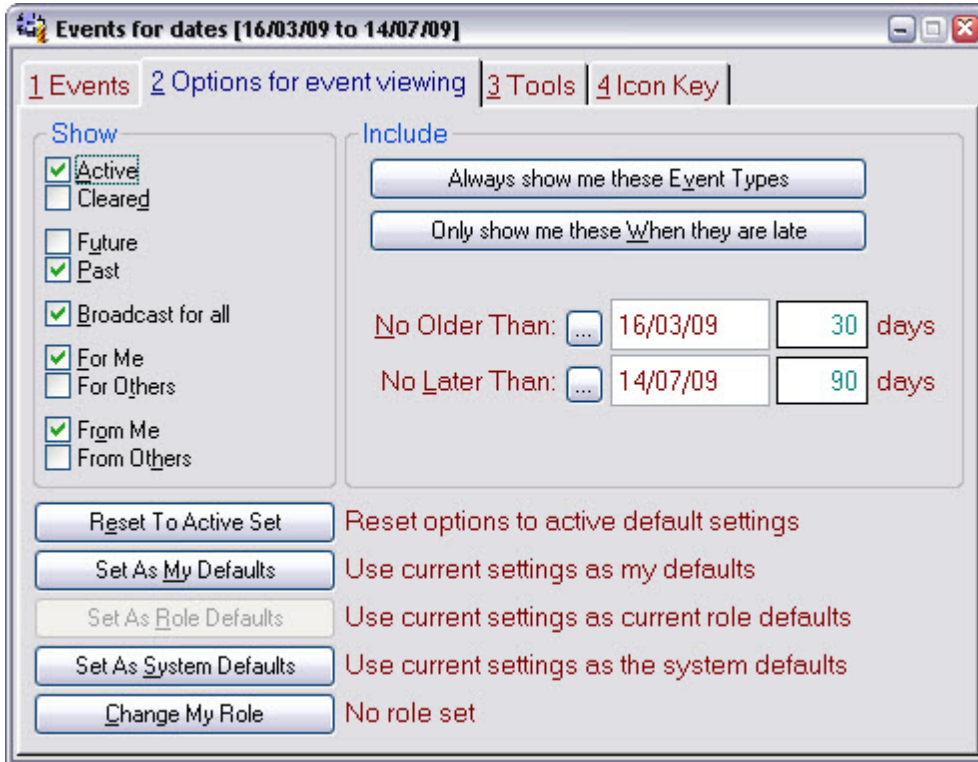


Each event diary entry provides direct access to the document involved and also the appropriate part of the system to perform the required action. Pressing the **Document** button will open the document, and pressing the **Do It** button will allow you to perform the action. Note: The **Do It** button is just a short cut; you can also navigate the menus to get to the same place.

The entries in the diary are referred to as *tickles* and are shown to you in earliest date first order. Ticks associated with actions that haven't been done yet are referred to as *active tickles*. The diary usually only shows you active tickles. In a live system there may be a large number of active tickles, which could be overwhelming if viewed all at once. Most users are only concerned with certain aspects of your overall operation, and as a consequence are only interested in certain types of event diary entries. Match-IT allows each user, or their supervisor, to set the event types of interest to them. This is done from the **Options** tab in the event diary.

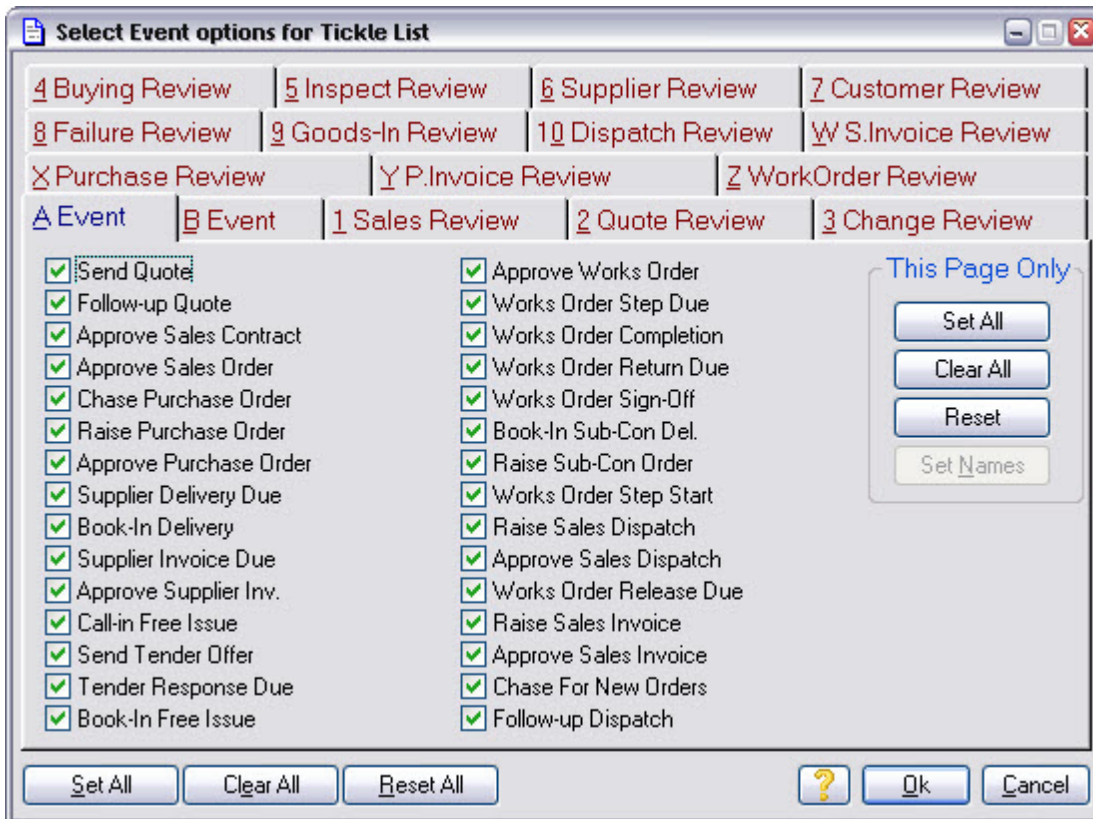
The benefits of using the diary efficiently are significant, so we'll show you how you can set the options. Clicking on the **Options for event viewing** tab will show you a page where you can make your selections.

The **options** tab looks like this:



The check boxes and dates show some of the current settings. The most important settings are the events. Pressing the **Always show me these Event Types** button brings up a form that allows you to choose which events you wish to see in your diary.

The events selection form looks like this:



There are 480 events types available, 16 pages of 30 each. The first 2 pages (A & B) are predefined; the other

14 are definable by you. They can be used to enforce your quality procedures.

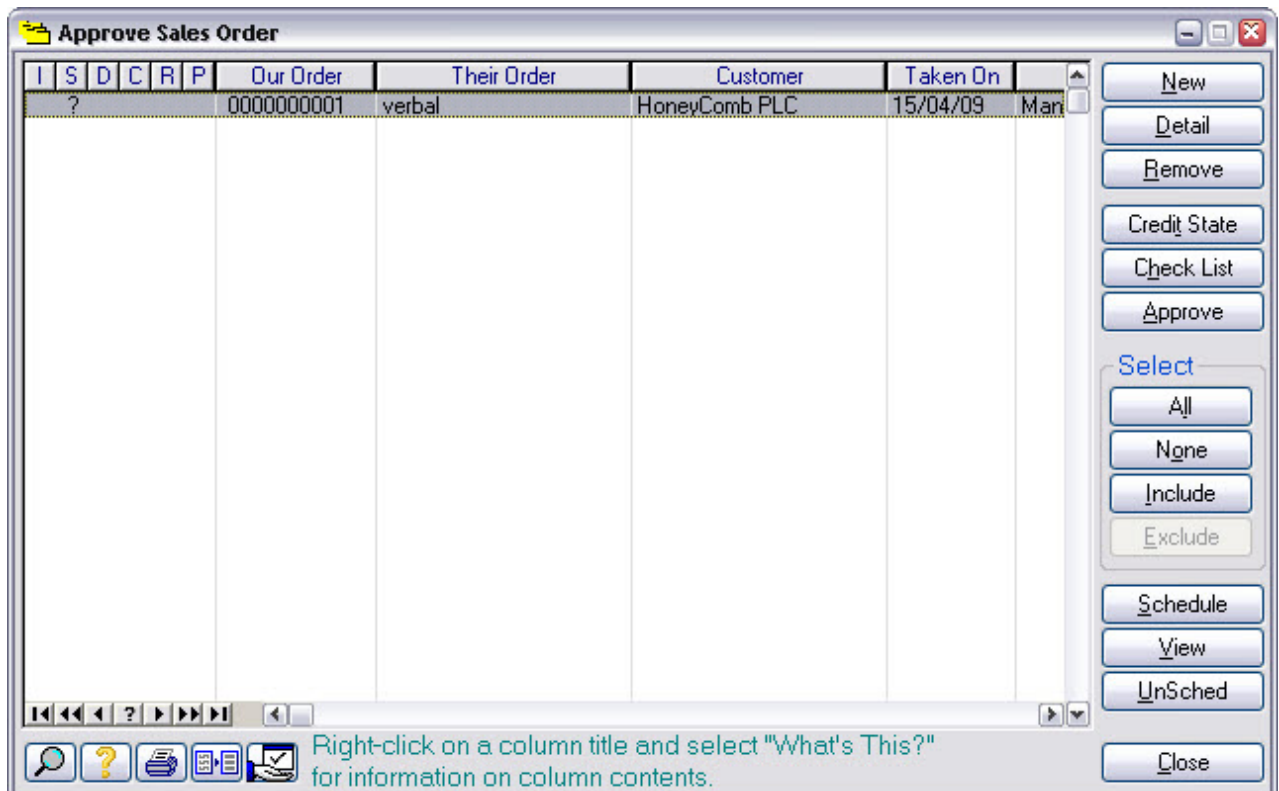
The diary will show all events that have a tick in their check box. For the purposes of this tour, leave the selections as they are.

Press **Cancel** to return to the options form and then click on the **Events** tab to return to the diary.

We're done exploring the diary. We'll now move on to approving our sales order. The first step is to press the **Do It** button while the **Approve Sales Order** item is highlighted.

## 2.2 Sales Orders Awaiting Approval

Pressing **Do It** on our **Approve Sales Order** action takes us to the list of sales orders awaiting approval. It looks like this:



This is an example of a more specialised to-do list. This one shows us all the orders that have been entered and not yet approved. The one we entered earlier is waiting to be done.

There are many specialised to-do lists like this one in Match-IT. As work is done on an order, it is automatically moved from one to-do list to the next. The to-do lists are organised in priority order, so the most urgent action is usually at the top.

There are 4 steps you would normally do before approving an order:

- Check the price
- Check the delivery date
- Perform the contract review
- Schedule it

Note: All these steps can be by-passed when necessary.

We'll check the price now. Pressing the **Detail** button will bring up our sales order and pressing **Detail** for the line within the order will bring up our order for 10 Each of part C1254K.

## 2.3 Check price

The price/delivery fields should look similar to this:

The screenshot shows the 'Sales Order Line' window with the following details:

- Sales Order: 0000000001
- Their#: verbal
- State: New
- Line Number: 1
- Cus Line Ref: Item 1
- Customer: HoneyComb PLC
- Line Status:  Line Cancelled,  Line Fully Dispatched,  Line Fully Invoiced,  Customer Approved?
- Detail 1: Their Part Num: C1254K, Our Part Num: C1254K --((MODULE KIT 6U 21HPXH0S 05 ISS)
- Ordered Quantity: 10 Each
- To Deliver On: 22/04/09
- Price: £138.50 per Each
- Margin: 40.00 %
- Discount: (empty)
- Est line profit of £554.00 (Delivered)
- Customer Notes: (empty)

Notice the **Price:** has already been filled in. Match-IT did this when the order was taken by looking up the usual price for this product to this customer.

Notice too, the **Use recommended** field adjacent to the **To Deliver On:** entry. The date offered here is based on the standard lead-time of the part for the quantity being ordered.

Match-IT calculates the standard lead-time automatically by analysing the production method involved. We'll show you how Match-IT does this in part 3 of the tour.

The recommended price offered is based on the price method set for the part being ordered. This is part of the detail information held in the **Their Part Num:** record. We won't go into that now except to say there are two basic methods of setting recommended prices: cost plus margin or price minus discount.

The *cost plus margin* method applies a margin you set to the estimated cost for the quantity being ordered. The estimated cost is calculated automatically by Match-IT in the same as way as the standard lead-time, by analysing the method. This means the price will vary to maintain your margins when your costs change.

The *price minus discount* method applies a discount you set against the customer to a standard price also set by you. This means the price offered to your customer will not change as your costs change; instead your margin is eroded or enhanced.

Our example uses the *cost plus margin* method.

To set the recommended price, just check the **Use Recommended** option adjacent to the **Price:**. The recommended price will be copied into the **Price:**. You can also just enter the price you want to offer, but first un-check the **Use Recommended** option. If there is an outstanding quotation for the ordered part to the customer, Match-IT will find it and you can copy the price and delivery date from the quote found. The search

is done automatically when you select the part being ordered. When it does this, it fills in the **Quote Line:** field in the **Links** tab. Pressing its **...** will show you the quote involved.

When a price is set, by whatever method, Match-IT will automatically calculate your estimated gross margin and show it to you. This means you can always see if you're going to make a profit!

We'll now move on to checking to see if the delivery date is achievable. Performing a tentative schedule does this. A tentative schedule allows us to schedule the order as if we'd approved it, but without affecting any existing schedules or committing to it. The first step is to press the **What if Schedule?** button you'll find on the **Actions** tab.

## 2.4 Check delivery date

A confirmation form like the one here will be shown to you:

The **Target Date:** shown will be the required delivery date after the carriage delays have been removed. These are defined by the *carriage rule* associated with the order. A default value for this was set automatically when the order was raised.

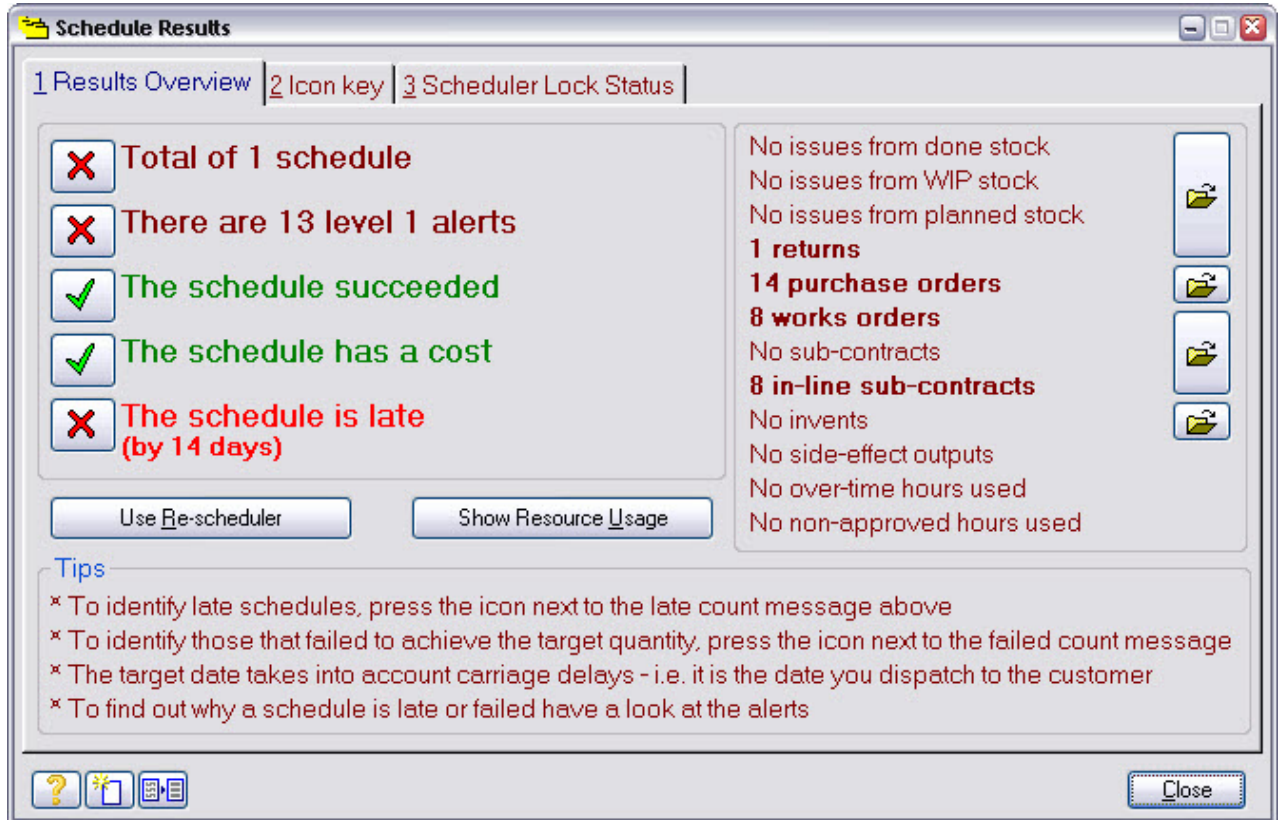
The **Strategy:** field shows the scheduling options that will be used. JIT is *Just In Time*; this means the scheduler will work back from the target date to determine when things must be done to meet that date. If in doing this it works back past today, it means the date cannot be met. When this happens the scheduler will abandon the JIT schedule and instead perform an ASAP one. ASAP is *As Soon As Possible*; in this mode the scheduler works forwards from today to determine when things will finish. A JIT schedule tells you when you must start to achieve a date, while an ASAP schedule tells you when you will finish if you start today.

The Match-IT scheduler performs simultaneous materials and resource planning (MRP and MRPII). It takes your capacity and stock position into account as well as work in progress and planned work. Match-IT uses a *finite capacity* scheduling system. It calculates how much time is required to do a job and then looks for that amount of free time on the machines needed. This means Match-IT will not allow you to become overloaded, instead your planned delivery dates will move out.

Leave the strategy as JIT and press **Start** to start the tentative schedule.

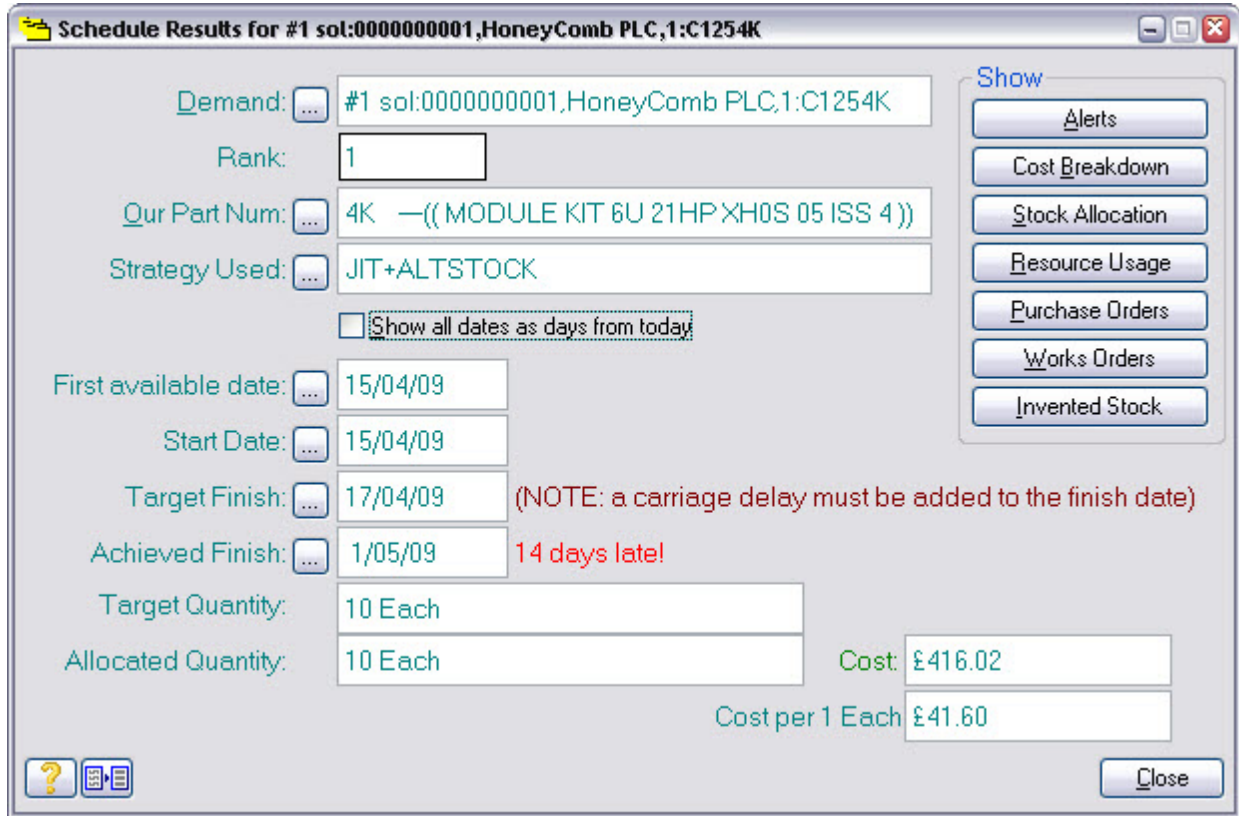
After some activity a form like this will be shown:





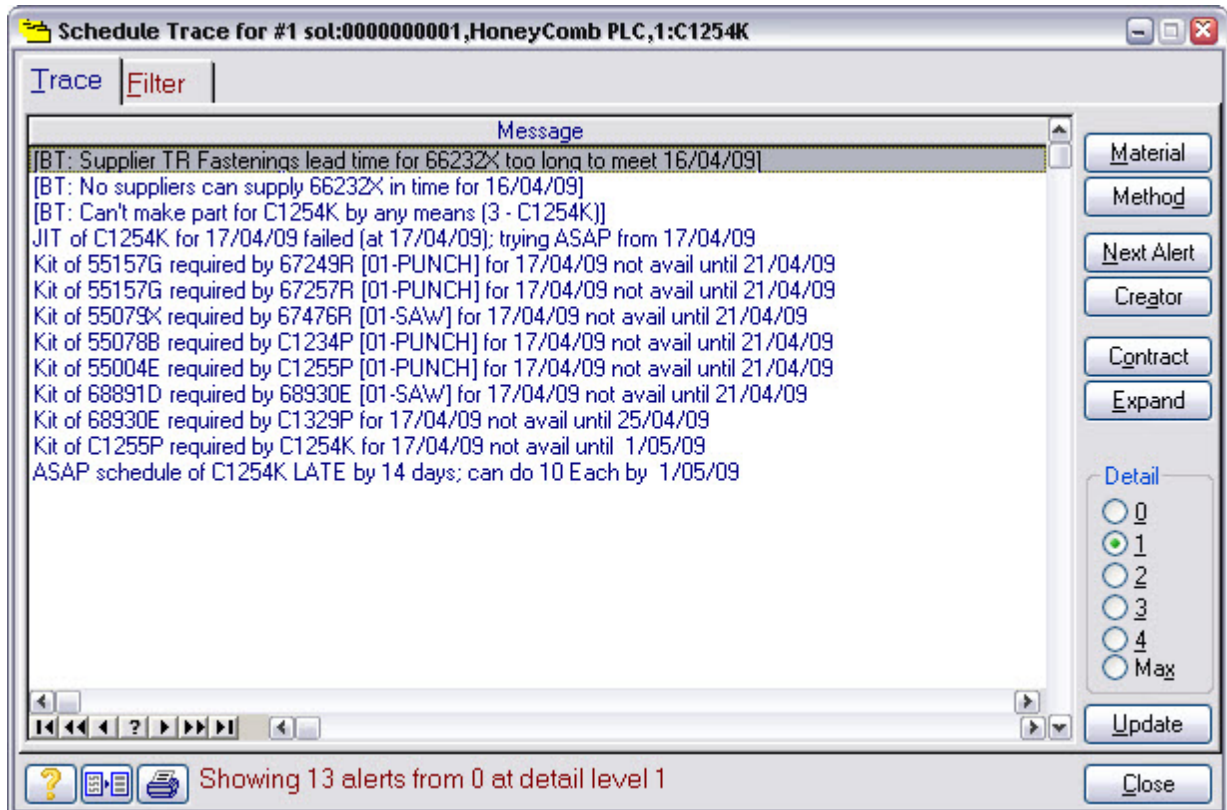
If you followed the suggestion in part 1 of the tour, to set a delivery date of 7 days time, you should see that the date cannot be met, as shown above.

Pressing the against the **Total of 1 schedule** line will show you a summary of the schedule results, like this:



Notice the **Achieved Finished** field is showing the date that can actually be achieved.

We can get more detail on why it is late by pressing the **Alerts** button:



In this case we can see from the **Trace** that a bought part is required and it cannot be supplied in time from TR Fastenings.



This makes the scheduler abandon the JIT option and start again using ASAP.

Note the date that can be achieved and press **Close** twice to get back to our order line.

The tentative schedule has calculated the date the goods will be ready for dispatch, you'll need to make an allowance for the time taken to actually deliver them when setting the delivery date in the order.

Modify the **To Deliver On:** date to that you noted from the *What if schedule?* making due allowance for the carriage delay. Typically, you would need to confirm such a date change with your customer before committing to it.

We're done checking the delivery date. You now know the date you are offering is achievable. The scheduler has taken everything it knows about into consideration when calculating an achievable delivery date. This includes:

- The materials and quantities needed for the job.
- The machines, tools, gauges and people needed.
- The amount of time needed.
- Your free stock position.
- Your expected supplier deliveries.
- Your suppliers' lead-times.
- Your capacity on a day-by-day basis.
- Your current shop-floor loading.
- Your projected finish dates for work in progress

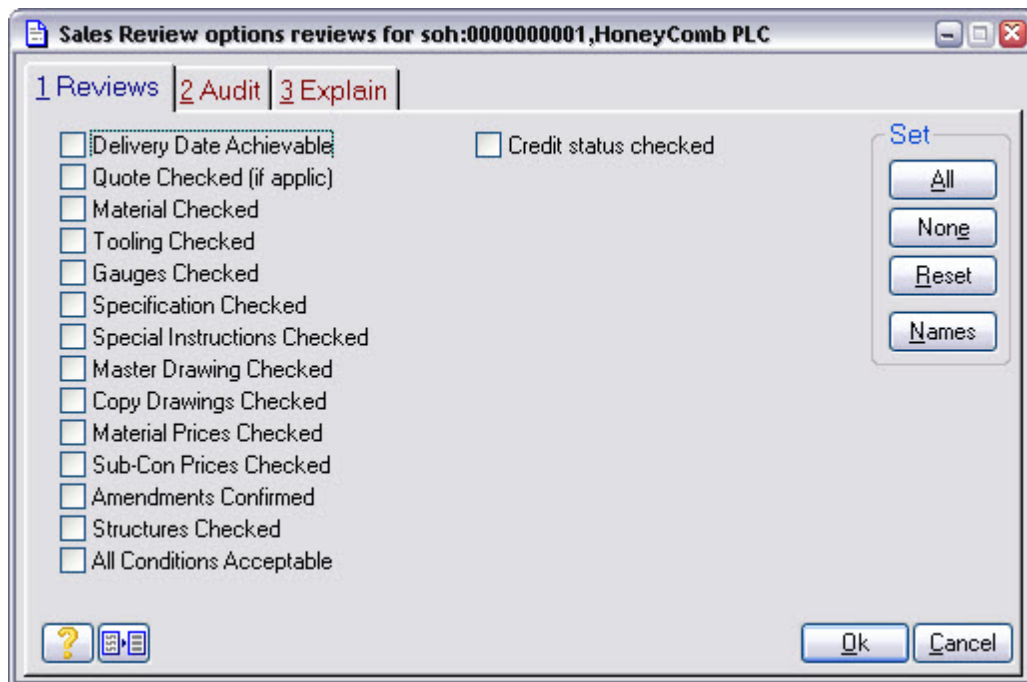
So if you keep Match-IT up to date on what's happening, it can give you realistic delivery date predictions right at the very beginning of the job. This means you know very early if you are likely to encounter delivery problems and have enough time to do something about it!

We'll now move on to the next stage in the approval process - the *contract review*. If you don't run an ISO 9000 (or equivalent) quality system, you'll probably set-up Match-IT so that you don't need to do this. We'll proceed on the basis that you do a *contract review*.

Press **Close** twice to get back to the orders awaiting approval list.

A typical quality system will stipulate that you perform a number of checks when you receive a new order. You can set-up Match-IT to remind you to do these checks and record the fact that you've done them, and who did them and when. Pressing the **Check List** button on the **Sales Orders Awaiting Approval** list will present a simple example.

## 2.5 Contract review



This form would be tailored to reflect your quality system requirements. Tailoring it is simple, just press the **Names** button.

If you decide to use this facility, Match-IT will not let you approve the sales order until you have ticked all the checks to indicate they have been done.

You can set-up this facility to be loose or strict or something in between. When loose, all that's expected is that you tick the boxes. When strict, only specified individuals would be able to tick each box and when they did it would be logged as part of the audit information for the order.

Our example is set-up to be loose, so all we have to do is check all the boxes. Pressing the **All** button is a short cut for this. Press it, then press **Ok** to return to the approval list. Notice an **X** appears in the **R** column to indicate all the review checks are done.

There's one more topic we'll discuss before we move on to scheduling our order. That is the credit check.

## 2.6 Credit Check

Whenever you open the **Sales Orders Awaiting Approval** list, Match-IT automatically checks the credit balances on each of the customer accounts in the list. The results of the check are shown in the **C** column. If the column is blank it means the customer is not exceeding their agreed credit terms. If the column contains a **W**, it means the customer is slightly over their agreed terms and you should consider sending them an advisory letter. If the column contains an **H**, it means the customer has exceeded your tolerance limits and the account should be put on hold.

When an account is on hold, and you try to approve the order, you will either not be allowed to, or receive a warning and be asked to confirm it, depending on how you've set-up your preferences. You would typically set-up the normal case to not allow the order approval unless the person doing it has the necessary authority to override the hold.

Where possible, Match-IT can import the current credit position of each of your accounts from your accounting system, or you can enter the information manually.

The thresholds Match-IT uses to check the credit position are defined by the payment terms associated with the order. These are initially set when you create the order according to the preferences set for the customer. Pressing the **Credit State** button will bring up a form that shows the terms set, as shown below:

**Credit Status (soh:0000000001,HoneyComb PLC)**

Head Office:   Consolidated

Customer:  HoneyComb PLC

Terms:  Standard

Credit Limit:  £50,000.00

Document:  0000000001

**Balance**

This document:  £1,385.00

Not yet posted:

From accounts:

As At:

**Credit Checks**

Hold Limit Ok?

Warn Limit Ok?

Credit Limit OK?

Customer Approved?

Customer on Stop?

**Actions**

**Credit status OK**

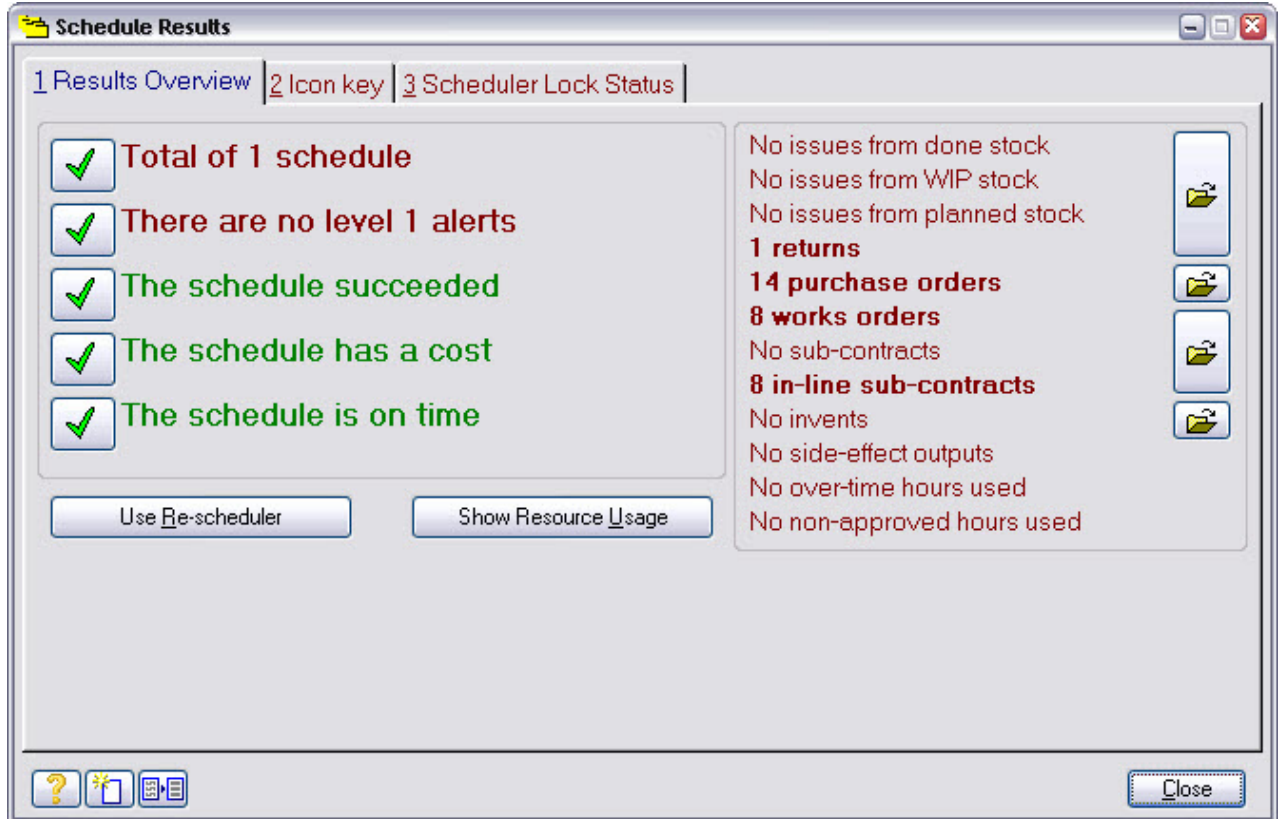
Match-IT can produce letters for you to send to your customers when they exceed their payments terms. Pressing the **Warn** button produces a warning letter, and pressing the **Hold** button produces an 'order on hold' letter.

Press **Continue** to return to the approval list.

We're now ready to schedule the order. Press **Schedule** to do this.

## 2.7 Schedule the order

After some activity you will be shown the result of the schedule:



This is the same form we saw earlier when checking the delivery date, but this time it should say the date can be met.

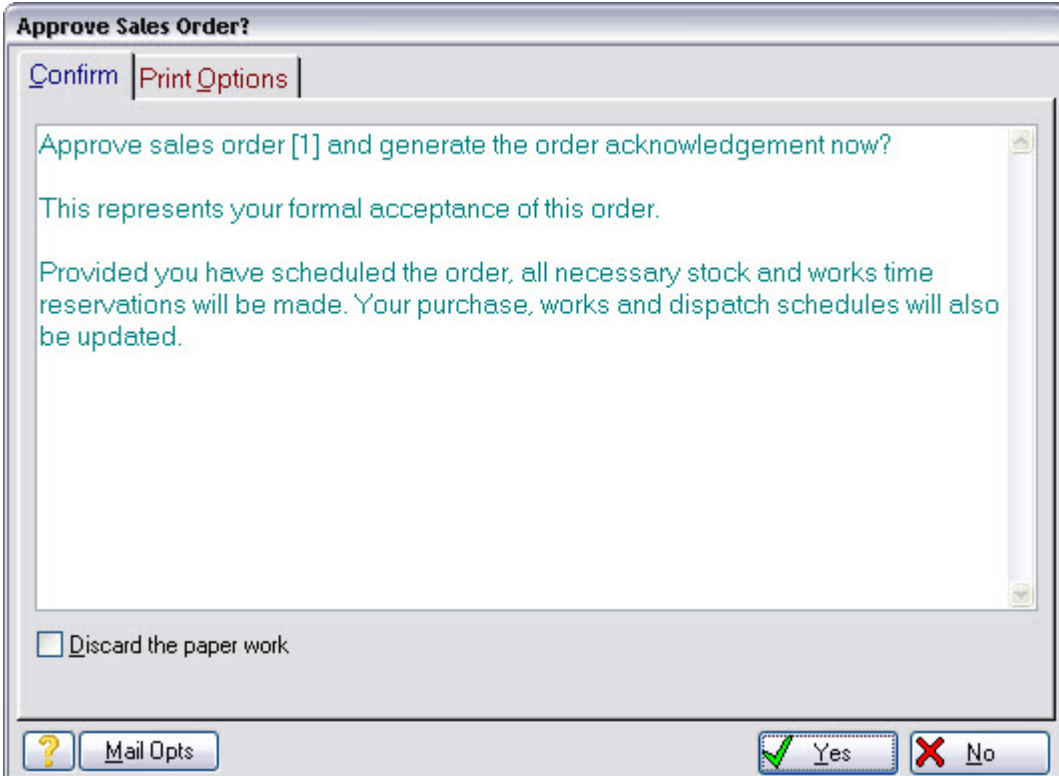
This confirms the date we set is achievable.

Press **Close** to return to the approval list. Notice the '?' originally showing in the 'S' column has been removed to indicate the delivery date can be achieved.

That's all the preparation completed, we can now approve the order by pressing the **Approve** button.

## 2.8 Approve the order

You will be asked to confirm the action with a form like this:



**Approve Sales Order?**

Confirm | Print Options

Approve sales order [1] and generate the order acknowledgement now?

This represents your formal acceptance of this order.

Provided you have scheduled the order, all necessary stock and works time reservations will be made. Your purchase, works and dispatch schedules will also be updated.

Discard the paper work

? Mail Opts Yes No

Before you do so, first check the **Print from this station now** print option is set and make sure the **Preview then ...** option is selected. This tells Match-IT to show the acknowledgement letter on the screen before printing.

When ready, press **Yes** to confirm the action.

Note: If you haven't followed the procedure to set-up your documents as set out in the Installation Guide, the print action may fail.

When you approve the order, Match-IT produces an order acknowledgement letter for you to send to your customer, then updates your purchase, works and dispatch schedules for the work required to fulfil the order.

After some activity you will be shown a preview of the acknowledgement letter. It will look similar to this:



## Your Company Name

Your Company Address (8 lines)

Tel: Your Company Telephone    Fax: Your Company FAX



---

Order from: Roger Woodward  
HoneyComb International Products PLC  
Unit 1  
Heathrow Business Park  
Near M4

Phone No: 01 23 456 789  
FAX No: 01 23 456 012

Terms: Standard

**Order No: 1**

Page: 1 of 1

Date: 15/04/09

Your Ref: verbal

---

Order Confirmed Acknowledgement

Product Code	Product Description	Quantity Required	Unit	Unit Price	Delivery
C1254K	BU Module Kit	10 Each	1 Each	£138.50	7/05/09

We acknowledge, with thanks, receipt of your order. Please check the details given below are correct. If not, contact us immediately.

**IMPORTANT:** The delivery dates quoted have been calculated by our scheduling system. If they are later than the date specified on your order and this is unacceptable please contact us immediately. If the date is acceptable, please amend your records accordingly and we will deliver on that date.

---

Reg. office: Your Company Registered Office Company Reg. No. Your Company Registration# VAT Reg No. Your Company VAT#

This acknowledgement letter is just a sample document layout. These can be tailored and customised to any degree you like to suit your requirements.

When you close the preview, you'll be asked if you want to print the letter, press **Start** to print it, or **Cancel** not to. **Note:** If you cancel here, you are just cancelling the print, not the order approval. The order becomes approved either way.

After some more activity you will be returned to the approval list, which will now be empty. Press **Close** on the approval list and then click anywhere on the event diary window to make it update itself.

The diary will now contain reminders of all the actions necessary to fulfil the order. You'll probably have to stretch the window height to see it all! It'll be something like this:

The screenshot shows a software window titled "Events for dates [16/03/09 to 14/07/09]". It features a tabbed interface with "1 Events" selected. Below the tabs is a table with the following columns: "S", "When", "Action", and "First Document". The table contains 17 rows of event data. To the right of the table is a control panel with buttons for "Event" (New, Edit, Remove), "Do It" (Document, Hide), "All Same", "Full Set", "Show" (All, 1/Day), and "Close". At the bottom of the window, there are navigation icons and a legend: "S = C if cleared, F if future, X if late" and a checkbox for "Reset to defaults and refresh now".

S	When	Action	First Document
F	16/04/09	Raise Purchase Order	pol.:20:55004E
F	21/04/09	Raise Purchase Order	pol.:22:55079X
F	22/04/09	Raise Purchase Order	pol.:18:55157G
F	22/04/09	Approve works order	woh:(0000000020):C1255P
F	22/04/09	Raise In-Line Sub-Con Purchase Order	pol.:6:C1255P [05-SAT ANOD]
F	22/04/09	Works Order Step Start Due	woa:(0000000020):05-SAT ANOD
F	27/04/09	Approve works order	woh:(0000000018):67476R
F	27/04/09	Raise In-Line Sub-Con Purchase Order	pol.:8:67476R [07-SAT ANOD]
F	27/04/09	Works Order Step Start Due	woa:(0000000018):07-SAT ANOD
F	28/04/09	Raise Purchase Order	pol.:9:66232X
F	28/04/09	Approve works order	woh:(0000000016):67249R
F	28/04/09	Raise In-Line Sub-Con Purchase Order	pol.:1:67249R
F	28/04/09	Works Order Step Start Due	woa:(0000000020):06-SILK SCREEN
F	1/05/09	Works Order Step Start Due	woa:(0000000018):10-DEGREASE
F	4/05/09	Approve works order	woh:(0000000015):C1254K
F	4/05/09	Sales line dispatch due	sol:0000000001,HoneyComb PLC,1:C1254K

That's completed the order approval. It's now just a matter of "point and shoot" from here to do all that's necessary to complete the order!

### 3 Part 3 Production Methods

In this part of the tour, we'll very briefly explore the production method of the **C1254K** item used in our example order.

A method is the description of how you transform your parts and materials into products. The term product is used loosely here; it just means the result of applying the method. It may be just a simple turned part or a complex assembly involving 100s or 1000s of components.

All we'll be doing here is showing you the method for the **C1254K** and briefly explaining what it means. It is beyond the scope of this quick tour to describe how to create methods.

From the initial ribbon menu, press **Find Record** then **Our Part**. This opens a list of all the material and product records in your Match-IT system.



### 3.1 Materials Catalog

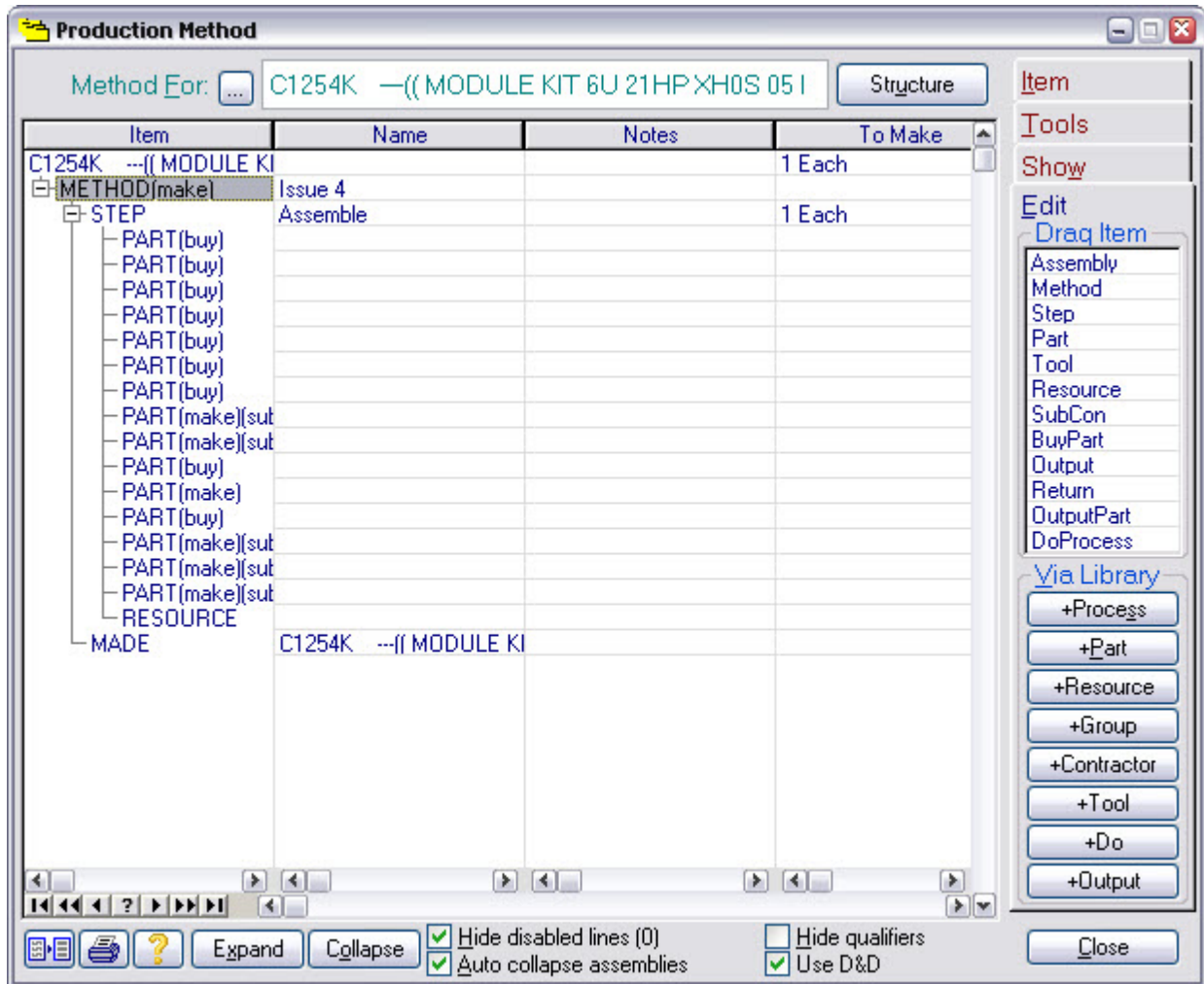
Our Part Num	S	B	M	C	T	D	Name	A	Issue ID	Cl
1877	S		M				Short Ring			Saleabl
55004E		B					SHEET ALLOY 1M X 1M X 2.5MM			RawMa
55078B		B					SHEET ALLOY 1.6MM			RawMa
55079X		B					EXTR ITT57 VERSI RAIL 2.0M SC10			RawMa
55157G		B					SHEET ALLOY 1.2MM			RawMa
66232X		B					SCREW M3 12 POZI PAN			RawMa
66239G		B					SCREW M3 12 CSK POZI			RawMa
66253X		B					SCREW M2.5 X 10 POZI PAN			RawMa
66267X		B					NUT M2.5 FULL HEX			RawMa
66475E		B					WASHER M2.5 PLAIN			RawMa
66840F		B					SCREW M2.5 X 6 POZI PAN			RawMa
67201H		B					BUSH RETENTION PLASTIC			RawMa
67249R			M				MOD TOP/BOT COVER			Assemb
67257R			M				MOD SIDE COVER			Assemb
67473D		B					BLOCK SPACER PCB			RawMa
67476R			M				MODULE RAIL			Assemb
68891D		B					*EXT EURO PANEL HANDLE 2.2M			RawMa
68930E			M				HANDLE			Assemb
68942A		B					SCREW PANEL RET M2.5			RawMa
ALS02730	S	B					Aluminium 3mm Thk 5251 H24			RawMa
Brake Set		B					Front/Rear Brake Set Complete			RawMa
C1234P			M				REAR PANEL			Assemb
C1254K	S		M				MODULE KIT 6U 21HP XH05 05 ISS			Saleabl
C1255P	S		M				FRONT PANEL MODULE			Assemb
C1329P			M				HANDLE			Assemb
Chain Set 18		B					18 Gear (6x3) Chain Set			RawMa
Front Hub		B					Universal Front Hub			RawMa

Scroll down the list until **C1254K** is highlighted in the **Our Part Num** column, as shown here:

Now press the **Method** button to bring up the method for the **C1254K**. This is the part in our sample order.

## 3.2 Top Level Method

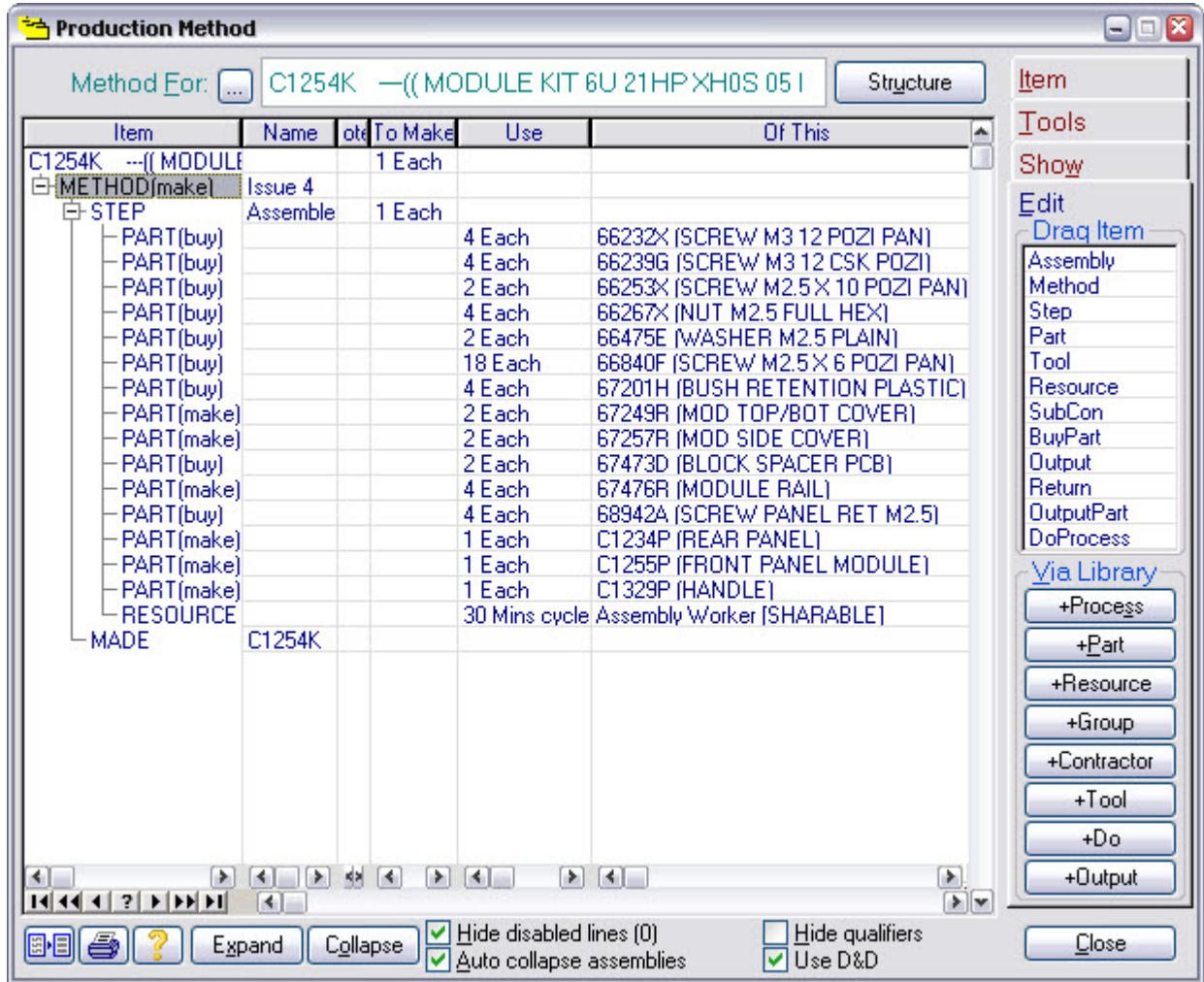
The first time you open a window, Match-IT opens it at its smallest size in the middle of the desktop. This is often not the best size or place, as in this case:



You can adjust the size of the window and the width of the columns by dragging in the usual *Windows*™ way.

Match-IT will remember your settings, including the column widths.

Re-size the window and the columns until it looks more like this:



Our C1254K example is an assembled product, made up from a mixture of bought-in parts and manufactured parts. The method we're looking at here is for the final assembly. It consists of a list of 15 parts and sub-assemblies, and one resource (assembly worker) to put it all together.

Each PART record specifies what the part is, and how many are required to make one C1254K. For example, the method above specifies that four 66232X screws are required. The scheduler uses this information to calculate costs and to allocate stock.

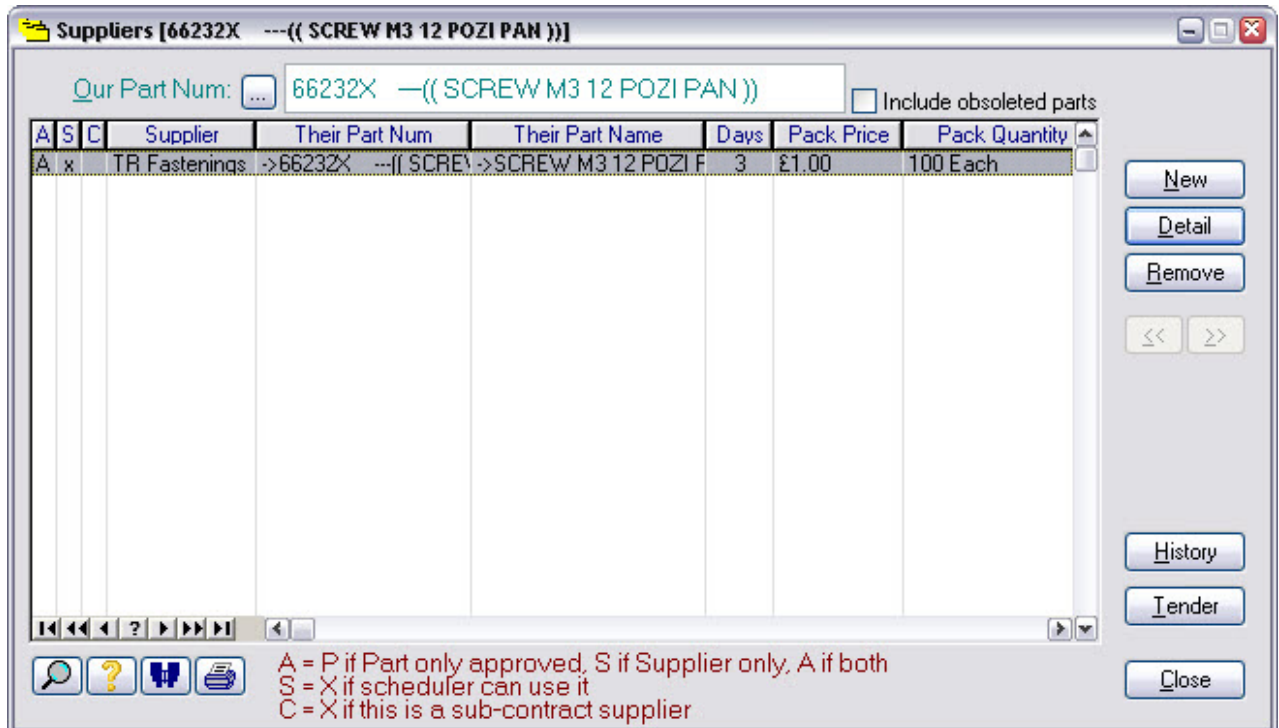
The RESOURCE record specifies the resource to be used and how much time is required to assemble one C1254K (the cycle time) and how much time is required to prepare to make any number (the setup time). In the method above, the assembly worker requires 5 minutes to get ready, and 30 minutes to assemble each C1254K. This information is used to estimate costs and to allocate time.

These methods can be edited very easily, for example, by double clicking on a column entry to change it, or by dragging to move a record up or down the method. There are also a number of tools available that allow you to construct these methods from boilerplate templates. We won't go into that here.

Match-IT does not differentiate between a PART that is bought-in from one that is made. This means you can have assemblies within sub-assemblies to any depth you like, with bought-in parts mixed in at any level. We'll briefly look at one bought-in part and one sub-assembly.

Highlight the 66232X part. This is a bought-in part, so pressing **Suppliers** on the Show tab will bring up the list of suppliers and prices for it, as shown below.

### 3.3 Bought-In Part



Here, there is only one supplier specified for the part. You can have as many as you like. When there is more than one, the scheduler will choose the one with the lowest price, unless you have marked the job as urgent. In this case, it will choose the supplier with the shortest lead-time.

In this example, the supplier for 66232X parts is TR Fastenings, they charge £1 for a pack of 100 and their standard delivery is 3 days. Press **Detail** if you want to explore this further yourself.

Press **Close** to return to the method.

We'll now explore a manufactured part. Highlight the C1255P part and press **Method** on the **Show** tab to see its method. This will open a new method window. If you move the new one, you'll see the other one underneath.

### 3.4 Manufactured Part

Item	Name	Qty	To Make	Use	Of Th
C1255P	...		1 Each		
METHOD(make)					
STEP(logged)	01-PUNC		[1 cycle]		
PART(buy)				1 Sheets of 125 mm x 475 mm 55004E (SHEET ALLO	
RESOURCE				80*0.5 Secs cycle & 30 Mins se AMADA	
STEP(logged)	02-RECU		[1 cycle]		
RESOURCE				4*15 Secs cycle & 2 Mins setup PWRPRESS	
STEP(logged)	03-LINISH		[1 cycle]		
RESOURCE				80*0.2 Secs cycle & 5 Mins set SPEDFAM	
STEP(logged)	04-CSINK		[1 cycle]		
RESOURCE				4*9 Secs cycle & 5 Mins setup WORKER (SHARABLE	
STEP(subcon lo	05-SAT A		1 Each		
CONTRACT				3 days	Stotfold Plating
STEP(subcon lo	06-SILK S		1 Each		
CONTRACT				3 days	PREMIER SCREENPR
MADE	C1255P				

This is an example of a simple piece of sheet metal work.

It uses a panel of 0.125 metres by 0.475 metres of the sheet material [55004E](#).

This is processed through 4 steps in-house, and 2 by sub-contractors.

It is punched on an [AMADA](#), then re-cut, finished and countersunk, before being passed to sub-contractors to satin-anodise and silk-screen print it.

Sub-contractors are handled in a similar way to suppliers for bought-in parts. Pressing the **Suppliers** button on a [SUBCON](#) line will bring up a list like the one we've already seen for the [66232X](#) part. Typically, a sub-contractor will levy a per batch charge as well as a per item charge; you will see this in the [Batch Charge](#) column in the contractor list.

The cost of using a resource for a job is the time required multiplied by its cost rate. Select the [AMADA](#) line and press the **Detail** button in the [Show Use](#) group and you'll be presented with the cost information for the [AMADA](#). (Make sure you press the detail button in the [Show Use](#) group on the [Show](#) tab and not the one above it; that'll just show you the detail of the method record.)



### 3.5 Resource Costs

**Resource Type**

Full Name: AMADA

Resource ID: AMADA

Conversations Events

1 Running Costs | 2 Calibration | 3 Identification | 4 Qualifiers | 5 Actions

Cycle Time Cost: £24.00 per Hour

Setup cost is same as cycle cost

Setup Time Cost: £24.00 per Hour

Cost Time Unit: 1 Hrs

This is the time period the costs set above apply to

Next Cost Review On: 15/04/10  Set costs as reviewed today

Last Reviewed: 15/04/09

Nominal Code: 6000

Setup Time Units: Hour

Cycle Time Units: Minute

The units you set here are used as the default when you use this resource in a method.

Help Print ? <Back Next> New Reset Del Save Close

In this example the resource called **AMADA** is costed at £24 per hour.

Changing the cost rate here will automatically reflect through into the estimated costs of all the products that use it.

That completes our brief exploration of production methods. Press **Close** on each form you have open until you are returned to the initial menu.

You have now seen most of the sources of information Match-IT will use to plan your work. What you haven't seen are the stock records. Match-IT will only plan to buy or make something if there is no free stock available. Match-IT's stock handling is beyond the scope of this quick tour, so we won't go into that here.

## 4 Part 4 Progress Tracking

So far in this tour, you've seen how to take an order and plan the work for it. You've also seen where Match-IT gets the information it needs to plan the work.

In this part of the tour we'll introduce you to one of the ways you can use to view the status of your jobs.

Match-IT is a real time system. This means if you keep it informed, it can give you instant feedback on progress, no matter how complex the job, and it can tell you if, at your current rate of progress, you're likely to miss a delivery date.

Match-IT provides facilities to allow you to log progress to any level of detail you wish, including not at all, if that's appropriate. It is beyond the scope of this tour to go into the logging procedures, but we will show you how to trace a job. A trace gives you a quick overview of the status.

From the initial *ribbon menu*, press **Progress** then **Sales Dispatches Due**. This opens a list of all the sales lines that are due, or overdue, for dispatch. The list does not show orders that are complete, so this is a view of your live orders.

## 4.1 Dispatches Due

After some column width adjustment you should see something like this:

Order#	Customer	Cus Order	Jur Part Num	Name	Ordered	Shipped Qty	To Ship	Shipped	Planned	Dispatch	Deliver
0000000001	HoneyComb verbal	C1254K	MODULE KIT	10 Each	10 Each	4/05/09	4/05/09	7/05/09			

Notice our example sales order line is showing. This list provides a top-level view of progress.

The **Planned** column shows the date the sales order line is *planned* to be complete. Note: This may not be the same as the delivery date requested by your customer. The planned date reflects the date you expect to actually achieve. This will be shown in **red** if the planned date is late. The planned date is automatically adjusted as you log progress against the job.

The **Deliver** column shows the required delivery date as set in the sales order line. If you've missed this, because the due date is yesterday or before, it will be shown in **red**.

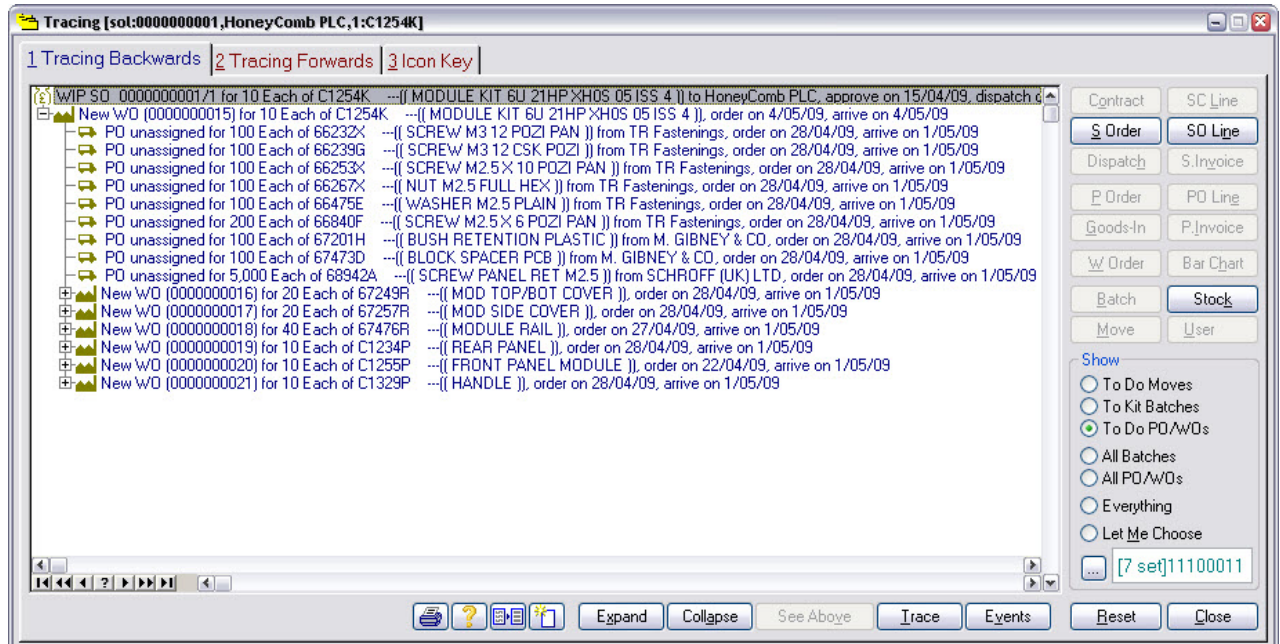
In a real system there may be many hundreds of live orders in this list. Typically, you'll be more interested in the jobs that are late than those that are on track. Checking the **Show Overdues Only** option reduces the list to just those order lines that are overdue or planned late. Your objective is to keep this list empty!

Pressing the **Trace** button will bring up a more detailed picture of the status of the order.



## 4.2 Tracing Backwards

Whenever you see a **Trace** button, pressing it will bring up a view like the one below:



Initially, the form will show a backward trace. This means Match-IT is showing you the connections going back in time, i.e. it is answering the question: *"Where will, or did, this come from?"* So, tracing backward on a sales order line, as in this example, will show the works orders and purchases orders that are required to fulfil it.

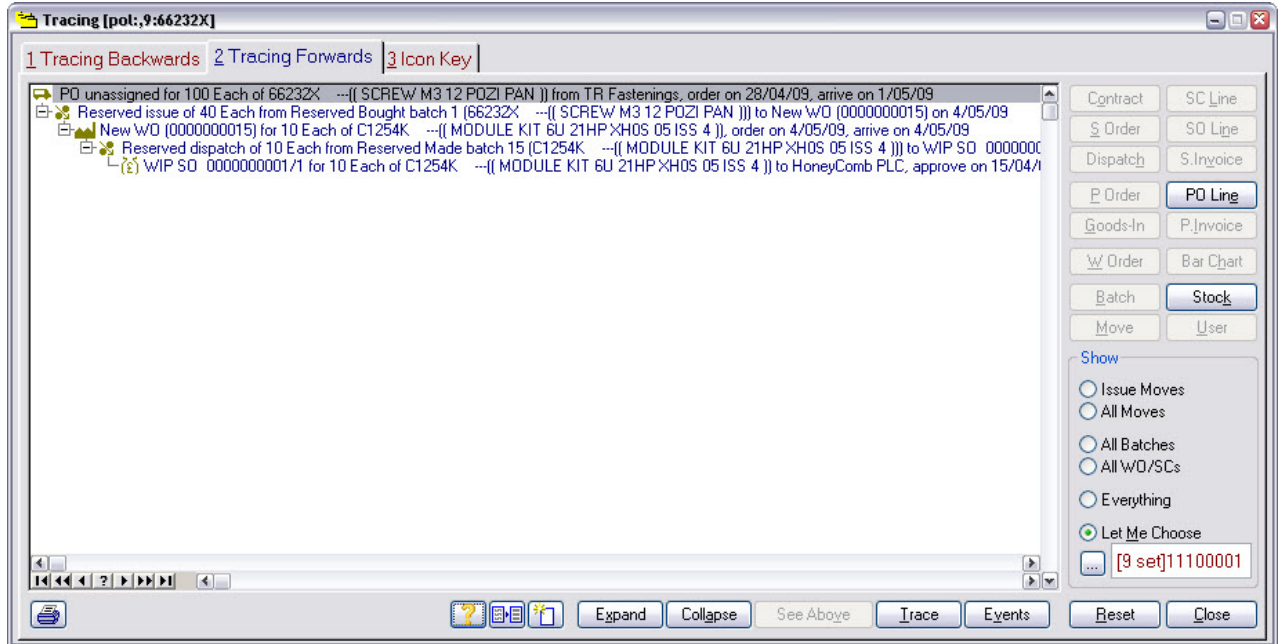
You can also see the status of each of these works orders and purchases orders, both in the words and the colours. Late items are shown with a red icon. Various symbols and colours are used to show other conditions, like planned, in progress and complete. The Icon Key tab shows all the colours and symbols used.

When you have complex structures involving large numbers of inter-related works orders, you can click on the **+** symbols to expand the display to show detail at lower levels.

Highlight one of the **PO** lines and press the **Trace** button at the bottom of the list. This opens another trace window on top of the original one, this time tracing the purchase order line you selected. If you move the new window, you'll see the original underneath it. The new trace window has opened showing the tracing forward view.

### 4.3 Tracing Forwards

A typical forward view on a purchase order line will look like this:

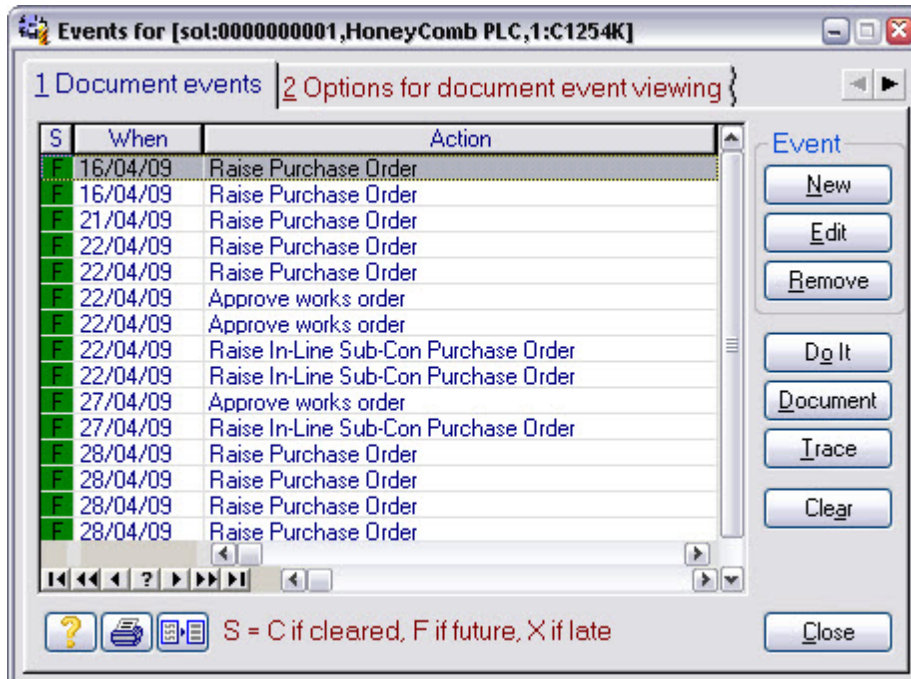


When looking forward Match-IT is answering the question: "Where will, or does, this item go?" So, tracing a purchase order line forwards, as in this example, will show all the works orders and sales order lines where the purchased item is being used. Again, colours are used to show status. If you keep expanding the view by clicking on the + symbols, you'll eventually expand out to the sales order line(s) involved. Doing this on a stock batch is useful to find out where it went, if you need to re-call products for example.

Press **Close** twice to get back to the dispatches due list, and then press the **Events** button.

### 4.4 Outstanding Events

Whenever you see an **Events** button, pressing it will bring up a view like the one below:



This is similar to the event diary except it only shows the to-do actions for a specific document, in this case one line from our sales order.

This is a quick way to find out what is left to be done. Also, by checking the **Cleared** option on tab 2, you can quickly see what has already been done. Done actions are indicated by a **C** in the **'S'** column.

Well, that's it for this tour. We hope you enjoyed it and found it useful.