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# SAGE 100

## AUTO GENERATE WORK ORDERS OPERATING MANUAL

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<http://fayebsg.com/sage-100-auto-generate-work-orders/>

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## **Overview**

The **Auto Generate Work Orders (AGWO)** enhancement streamlines and automates the process of creating work orders associated with purchase orders that have already been entered. This is especially valuable for organizations that inventory all components for finish goods but outsource the labor for the production or manufacturing of the actual finished goods themselves. The AGWO enhancement allows users to automatically generate a work order for the finished good after a purchase order for the related outsourced labor is entered. In addition, when the purchase order is closed, the enhancement can automatically close the work order and generate the entry that adds the finished good into inventory and issues the component items out of inventory. This enhancement eliminates significant manually processes as well as reduces numerous opportunities for data entry errors or omissions, increasing the accuracy of inventory and production statuses.

## **Key Features & Functions**

- Automatically creates work orders based on purchase orders
- Automatically closes work orders based on receipt of goods
- Improves accuracy of work order processing
- Increases speed of entries
- Improves timeliness of inventory information
- Improves visibility of inventory work in process

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Enhancement for Sage 100  
Auto Generate Work Orders from Purchase Orders

Automatically Generating Work Orders from Purchase Orders

1. Launch Sage 100
2. Select **Purchase Orders** from the *Sage 100 Modules Menu*.
3. Select **Purchase Order Entry** from the *Purchase Order Menu*.

The screenshot shows the 'Purchase Order Entry' window in Sage 100. The window is divided into several sections. At the top, there's a toolbar with buttons for 'Quick Print...', 'Defaults...', and 'Vendor...'. Below that, there are tabs for '1. Header', '2. Address', '3. Lines', and '4. Totals'. The 'Header' tab is selected. The main area contains various input fields and checkboxes. Fields include 'Order Number', 'Order Date' (04/30/2010), 'Type' (Standard Order), 'Master/Repeat PO', 'Vendor No.', 'Purchase Address', 'Order Status' (New), 'Date Required' (04/30/2010), 'Ship To Address' (0000 Cosmetic Design Group), 'Terms Code', 'Ship Via' (empty FOB), 'Warehouse' (CDG Cosmetic Design Group), 'Confirm To', 'Comment', 'Telephone', 'Ext', 'Fax', and 'Batch Fax'. There are also checkboxes for 'On Hold' and 'Print Purchase Order', and dropdown menus for '1099 Form' (None) and '1099 Box'. At the bottom, there are navigation buttons (back, forward, refresh) and 'Accept', 'Cancel', 'Delete' buttons. A status bar at the very bottom shows 'Enter the Purchase Order Number', 'DF', 'CDG', and '4/30/2010'.

4. Proceed to create a Purchase Order, while entering one (1) or more items that meet all of the following criteria:
  - Item has Alias Items.
  - One of the Alias Items is BM.
  - The BM alias item is type General.
  - The description of the Alias BM General item is a bill number. This will be the finished good entered on the work order to be created.
5. Press the **Accept** button.

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Using Auto Generate Work Orders from Purchase Orders to create Work Orders (continued)

13. Exit *Purchase Order Entry*.
14. Select **Work Order** from the *Sage 100 Modules Menu*.
15. Select **Work Order Entry** from the *Work Order Menu*.
16. Enter the *Work Order* noted in step 12.
17. Note the Work Order assigned to the Bill of the item, with the same quantity, with a Released status.

**Work Order Entry**

Work Order Number: 0000115

Order Date: 04/30/2010    Status: Released    Copy From: [ ]

Make For: Inventory

Item/Bill No.: 10001    Description: RX1- Instant Nail Hardener

Qty Ordered: 9.00    U/M: EACH    Parent Whse: RCV

Yield %: 100.000    Component Whse: CD    Cosmetic Design Grou

Qty Planned: 9.00    Issue Method: Backflush

Routing No.: [ ]    Print Pick Sheet:     Print Labels:

DF    CDG    4/30/2010

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Using Auto Generate Work Orders from Purchase Orders to create Work Orders (continued)

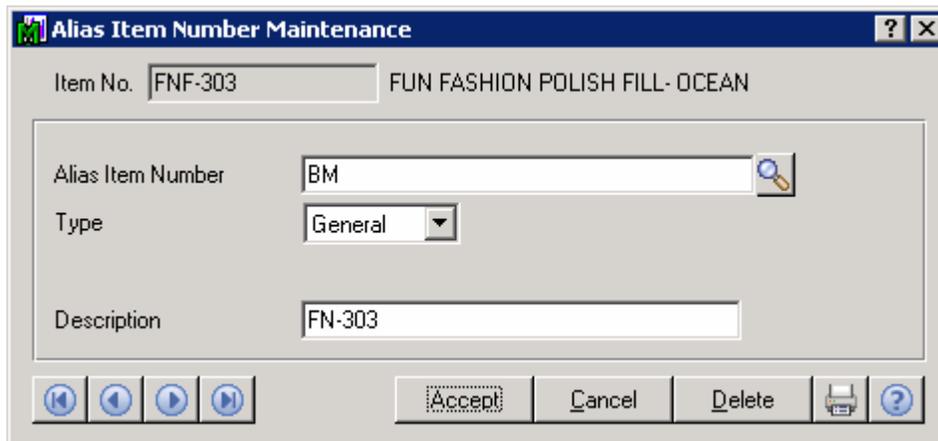
18. Click on the **Additional** tab
19. Note the status comment shows the Purchase Order origin of the Work Order.

The screenshot shows the 'Work Order Entry' window with the 'Additional' tab selected. The 'Work Order Number' is 0000115. The 'Item/Bill No.' is 10001, with the description 'RX1- Instant Nail Hardener'. The 'Status Comment' field contains 'PO#: 0010150'. The 'Due Date' is 04/30/2010, 'Lead Time' is 1 Days, and 'Sched Release' is 04/30/2010. The 'Planner' field is empty. The 'Order on Hold' checkbox is unchecked, and the 'Explode Sub-Assem' checkbox is checked. The 'Cost Completion Method' is set to 'Actual', 'Auto Issue Material' is 'Yes', 'Auto Generate Labor' is unchecked, and 'Auto Generate Out-Process' is unchecked. The bottom status bar displays 'DF CDG 4/30/2010'.

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Technical Information

1. Criteria for selecting the finished good on the related Work Order:
  - a. For each valid item on the Purchase Order Lines, the program will check that item's related ALIAS file.
  - b. If an Alias Item Number for *BM* exists for the item received, then the function will automatically create a Production Entry for the item number contained in the BM Alias Item's related Description field.



The screenshot shows a window titled "Alias Item Number Maintenance". At the top, it displays "Item No. FNF-303" and "FUN FASHION POLISH FILL- OCEAN". Below this, there are three main fields: "Alias Item Number" with the value "BM", "Type" with a dropdown menu set to "General", and "Description" with the value "FN-303". At the bottom of the window, there are several buttons: four navigation buttons (back, forward, etc.), an "Accept" button, a "Cancel" button, a "Delete" button, a printer icon, and a help icon.

In the above example, item number FNF-303 (the "fill" item for the finished good FN-303) has been received and updated from Receipt of Goods Entry. The function would then automatically create a Production Entry for item FN-303.

- c. If an Alias Item Number for *BM* does not exist, the function will bypass this item.
2. Closing the Work Order

When a receipt of goods entry is updated for the related purchase order, the user will be prompted to "Close Work Order". If "YES" is selected, the related work order will also be closed at that time. Closing the work order will result in the finished good being added to inventory and the component items being removed from inventory.