

Enable Split, Drill Down, Flatten Features on a Work Order

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Overview:

This article explains the Split, Drill Down and Flatten features and how to enable them.

Split Feature

The main reason to use this is if the quantity needed for an order is greater than the amount available. If you've produced 8 units of a product but there were 10 on order — you can split the order, ship the produced quantity, and produce the rest later on the split off Work Order.

Drill Down Feature

When you have a multi-level or nested Bill of Materials, you're going to want to create a chained set of Work Orders. These are to produce the main item by creating Work Orders for all the sub-assemblies in a chain. All the Work Orders that are part of the chain have the same reference number so that you can keep track. You can also go on the Work Order List and pull up just that reference number to see all the ones in that chain. It's easier to follow along that way.

Flatten Feature

Personally this is my favorite. If you have multi-level Bill of Materials, sometimes you want all the sub-assemblies and production steps all on ONE Work Order. This would list all the components of the entire top-level item as though it were a single Bill of Materials. For this to work, sub-assemblies must be checked as 'Phantom BOM' in the system.

To Enable

To Enable these feature you will need to go into your company admin > Company Preferences > Production > check the boxes of the features you choose.

Create New

Open Full List

Recent Records



Company Preferences

Save Reset

- Section
- General
- Activities
- Doc #s
- Items
- Inventory
- Sales
- Shipping
- Payments
- Purchasing
- Receiving
- Production
- Lot / Serial #s
- All Orders Mobile

Work Order - General

- Disable Production
- Copy bill of materials instructions to work order instructions.
- Allocate components when a work order is created.
- Change status to Ready when a Step's components are fully allocated.
- Use only available locations or bins when allocating components on a work order.
- Warn when work order is finished and components are not fully allocated.
- Automatically add quantity when finishing a work order.
- Allow BOM components to be percentages
- Enable Splitting
- Enable Drill Down
- Enable Flatten

Depending on your companies work flow, you can enable the following three features.

Split

If you have already completed at least one assembly (and have the inventory available to produce the remaining total ordered), you can split off the remaining unfinished assemblies into a new Work Order so that you can bill for the ones you've already produced.

Drill Down

In the case of a multi-level Bill of Materials, Drill Down will automatically create the chain of work orders for the top level item's sub-assemblies. All work orders that are part of the chain will have the same Drill Down Ref being the work order # of the top level item. You can filter the work order list to by Drill Down Ref to view only the work orders in the drill down chain.

Flatten

In the case of a multi-level Bill of Materials, you might want to do a single Work Order, listing all the components of the entire hierarchy as though it were a single Bill of Materials. This button allows you to do that. In order for the Flatten function to drill down to the components of the sub-assembly, the sub-assembly must be parked as a 'Phantom BOM'.