*Statement of Work*

*prepared for:*



**Automate PO from Work Order**

**Original Creation Date: August 31, 2020**

**Created By: Mike Williams**

**For Review By: Patty Baird**

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| **Revision date** | **Revised By** | **Version** |
| **8.31.20** | **M. Williams** | **1.0** |
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| **Customer:** | Luca + Danni |
| **Project Name:** | Automate PO from Work Order |

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| **Project Description:** |
| *Project Overview*  Luca + Danni recently went live with the NetSuite applications. Part of their process is to create work orders that have an outside process done on them. This requires a manual effort of clicking on the Spec Ord link on the work order detail line and making updates to the PO prior to saving.  Luca + Danni would like to streamline this process to save effort and reduce the chance for human error.  *Scope*  **Autocreate PO from Work Order**  There are certain outside service line items that are included in the bill of materials for assemblies. These are setup as Other Charge for Purchase. There are, however, also some internal service items that are also setup as Other Charge for Purchase that do NOT require a purchase order to be created.  To distinguish between them there is a check box on the Service Item setup titled Outside Processing. Any Other Charge for Purchase items in the Bill of Material on the work order should automatically have a purchase order created.    Below is a screen shot of a work order that has an Other Charge for Purchase item and how the manual process works.  Go to Transactions > Manufacturing > Enter Work Orders.  You enter the Assembly and Qty in the header of the work order.    Also enter the WO Vendor. This identifies the Vendor that will be doing the outside processing work.    When you save the work order you will see a Spec Ord link at the line level.    Note the Qty for the service line does not match the Qty for the work order (work order is for 100 and Plating: SO is for 52. This is because the Plating: SO is setup as $1.00 purchase price, but the cost per item is only $0.52. This is not the case for all service items, but only some.  The manual process is to click on this link, which opens the purchase order form.  The fields that need to be entered at the header of the purchase order are:  - Vendor: This should populate with the same value from the WO Vendor field on the Work Order.  - Department: This should always populate with Production from the list of values.    In the manual process the system is bringing over all detail lines from the work order, but we only want the Other Charge for Purchase item to be on the PO.  Here is what the manual process does:    Here is how it should look:    For the Other Charge for Purchase items where the qty does not match the qty on the work order, we need to manually update the line.  In the example above, the qty for the assembly on the work order was 100, but qty 52 was put on the PO because that was the calculated qty based on the bill of material having qty of .52.  We need the Qty on the PO line to equal the Qty on the work order and the Rate should equal the qty to get the correct cost.  To calculate this you can divide the Qty of the Other Charge for Purchase item by the Qty of the work order.  52 divided by 100 = .52. This is the rate.  This is how the line should look on the PO once all corrections have been done.    This calculation ONLY needs to be done if the qty for the Other charge for Purchase item does NOT match the Qty at the header level of the work order.  As an example there are Other Charge for Purchase items where the qty will match the Work Order qty. No calculation is required for these. See below.    EXC-789RUS is setup as Other Charge for Purchase, but because the Qty of 100 matches the Work Order qty of 100, no calculation is needed. |

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| **Assumptions:** |
| Luca + Danni (Customer) acknowledges the Project Scope defined above is contingent on the following key assumptions.   * Customer will provide required credentials and access to sandbox and production environments necessary to complete the work * Customer acknowledges and agrees to provide MSuite Consulting with prompt and adequate responses to its requests for information and other requests related to the performance of this SOW. This includes providing access to key stakeholders, functional representatives and end users to ensure timely completion of tasks. * Customer will provide access to existing documents and analysis related to the business requirements, system setup and configuration, application options, etc. * Unless otherwise stated in this SOW, Customer is responsible for any third parties or consultants not being provided by MSuite Consulting, associated with this project. * Customer is responsible for separately procuring at its own expense any necessary rights, license or subscription for any technology that is to be used in the performance of this SOW. * This is a Time and Materials engagement. Customer will be billed for hours worked. * All work will initially be done in the Sandbox environment and only deployed to Production after approval is received by Luca + Danni. Any refresh of the sandbox environment will be coordinated across the entire project team to prevent any loss of work. |

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| **Resource** | **Hours** | **Hourly Rate** | **Total** |
| Functional Consultant |  |  |  |
| NetSuite Developer |  |  |  |
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\*Should travel be required for MSuite Consulting personnel, Customer will reimburse MSuite Consulting for the reasonable travel, auto rental or mileage, lodging, per diem and other out-of-pocket expenses incurred by MSuite Consulting’s employees or contract personnel in performing the services described herein.

**Luca + Danni**  **MSuite Consulting Corporation**

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