

Using Call Off Order Schedules

Call Off Order Schedules allow you to plan the dates to have products ready for delivery or pick up, before your customer's large construction project begins. In this training course, you will learn how to add schedules using two different methods including Add Schedules and Add All Sections. Then we'll take a look at changing schedule dates and how this affects the overall process.

A schedule can be added for each section of a call off order. We'll start with a call off order for a new-house build. Products have been organized into Sections that represent the key phases of the project starting at the Foundation and ending at the Roof. The Date required is important as it can be used as the basis for setting a schedule's Planned date.

Set this to the date the project will begin. Open the Schedule tab. The main body displays the schedules added and the buttons are used to create, maintain and remove schedules. Select Add Schedule.

The first two fields on the New Call Off Schedule form are optional and are user-defined in System Options. You can set these according to the most common type of projects where call off schedules are used. Here they have been named Plot and Phase. When a number is entered in either field, it is automatically incremented by 1 for the next schedule.

If a reference such as a customer purchase order number is to be noted, include it here. This field can be left blank. The Section drop down lists all those that are in the Call Off order. Select one to schedule. The Planned field is the date the products in this section need to be ready for delivery or pickup.

When this section is called off onto a sales order, the Planned date becomes the order's Date required. There are three ways to set the date. You can enter a specific one or select it from the Date Picker. It can also be calculated using the value entered in Days+.

In this example, a one is entered and Planned is automatically set to one day after the Date required. Finally, it can be based on a previously entered schedule. As this is our first schedule, we'll demonstrate using this option next.

Enter any Special instructions as needed and then click Save. The schedule is added to the window and the form is ready for entry of the next schedule. The Plot and Phase fields have automatically incremented by 1. The next Section is selected. A number is entered in Days+ and the Planned date is automatically calculated using the Date required. Instead of using that method we will base it on an existing schedule's date.

From the drop down the schedule previously added is picked. The date is calculated using Days+ and the date from the schedule chosen. Save the entry. Continue to set the Schedules for remaining sections then save and close the order.

You can quickly generate blank schedules for all Sections on a Call Off order. Using the same Call Off order, the Schedule tab is opened and the Add All Sections button is selected. An empty schedule is created for each section. Now you can set the properties for each one individually. Select a section and then click the Properties button.

Set the Planned field by entering a date or Days+. In this case, one is entered so the Planned is set to one day after the Date required on the call off. Click OK to save and close the properties window. The details are added to the schedule. Continue to set the properties for the remaining sections.

Inevitably project timelines will fluctuate and dates will need to be changed. You can access a Schedule separate from the Call Off order. Using the Find Documents view, set the filter to Call Off Orders. Select an order from the list and then from the right-click menu pick the Schedule option.

Only the Schedule details are displayed. The same buttons are available to Add a schedule, open the Properties or Add All Sections. Each Section has a Planned date set using a combination of methods. The first Section's date is set to one day from the Date required.

The next four are based on other schedules and the last is a specific date. When the Planned date for a Section has been set to a specific date or Days+, you can select a new date from the Date Picker. From the first Section, a date one month from now is selected.

The next four schedules were automatically updated because their Planned dates were based on the other Schedules. The last section however, was not automatically updated because a specific date was set when the schedule was entered. To adjust, click on the date and select a new one. You can also make changes to the Days + or Based on Schedule fields using the grid.

For the Garage Section, the Days+ is changed to 6. When you press Enter, the cursor moves to the next line and the Planned date for the Section is automatically updated. Any schedules that are based on the one modified are updated as well.

When a Section's Planned date is changed AND it has already been called off to a sales order, the Date required on the order is automatically updated as well. This is a key advantage of using Schedules on Call Off orders. When finished, press OK to save the changes and close the window.

Call Off Order Schedules are an effective way to plan the delivery of products for large projects that occur over a period of time. You should now be familiar with steps to create schedules using three different methods for setting Planned dates and using the Add All Sections option. You should also recognize the effects that making date changes will have on the Schedule.

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