



Version

8.5

PENTAGON 2000 SOFTWARE

Outside Service: Teardown

Pentagon 2000 Software
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TITLE:	Outside Service: Teardown		
PART:	Material Management		
MODULE:	Outside Teardown	BUILD	8.5.54.113.9
RESPONSIBILITY:	Procedures Specialist, Pentagon 2000	REVISION:	00
APPROVED BY:	Vice President, Operations, Pentagon 2000	EFFECTIVE DATE:	07/26/2013

Purpose

The Outside Teardown feature allows your organization to send an item out to a vendor for teardown and return of the separate components. The purchase order will identify both the assembly to be shipped and the components to be received. The receiver will identify the location into which each returned component will be stocked. The invoice will allow you to allocate the assembly cost to its components as required.

Overview

This procedure outlines the steps for handling an outside teardown.

Required Modules/Features

- Pentagon 2000 Core
- Outside Teardown

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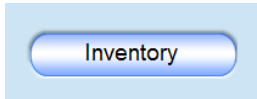
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Procedure

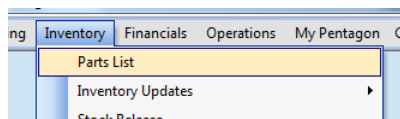
1. Parts Master File Setup

Any assembly shipped to a vendor for teardown must have a bill of materials (BOM) identified in the parts master file.

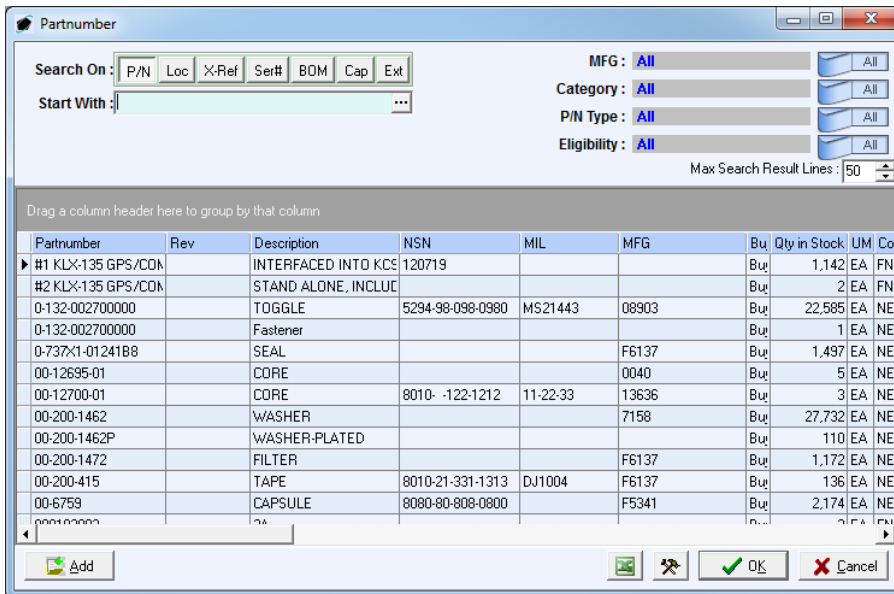
- a. From the **Main Menu** screen, left-click the **Inventory** button.



NOTE: The user may also left-click **Inventory** from the **Main Menu** toolbar, then left-click **Parts List**.

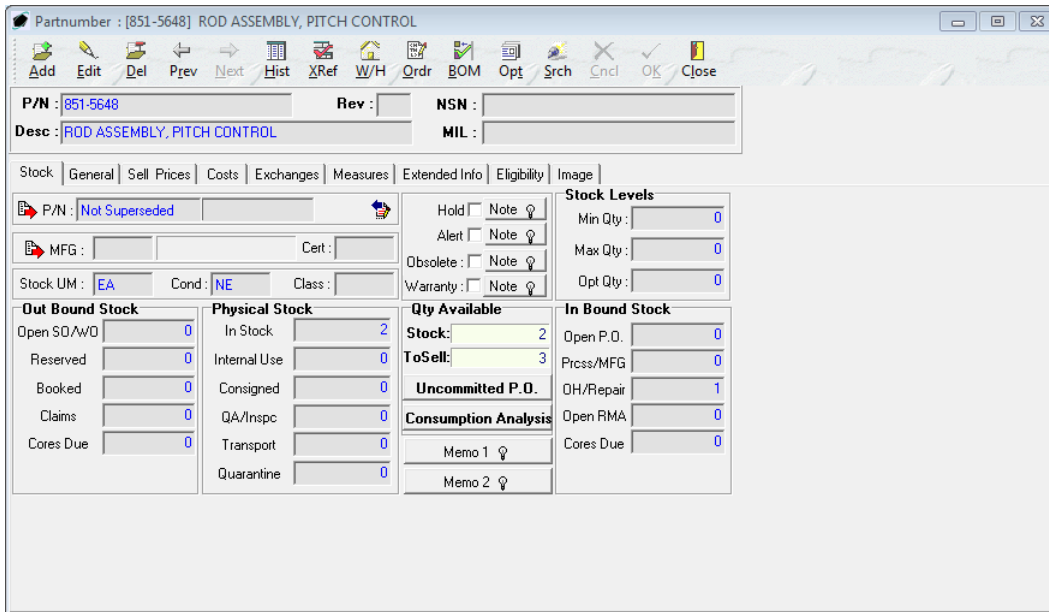


- b. The **Partnumber** search window will appear.



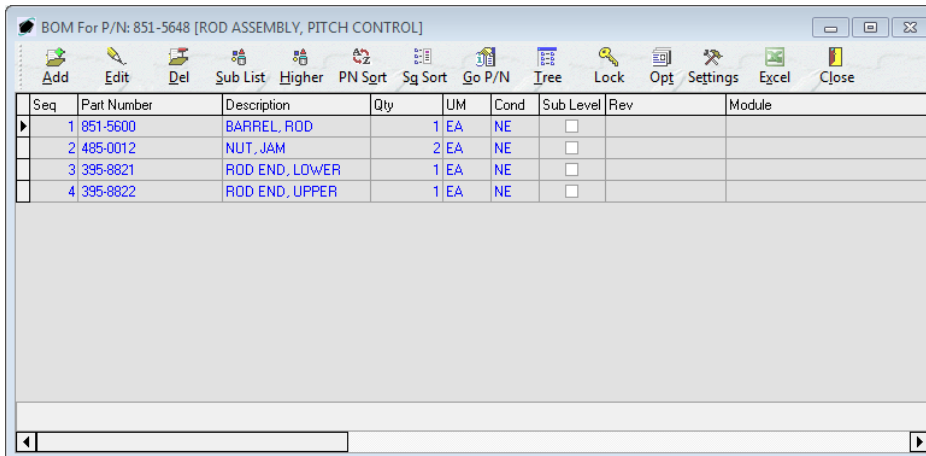
- c. Select the appropriate part number (left-click the line within the search window and left-click OK; or double-click the line within the search window).

d. The **Partnumber** window will appear.



e. Left-click the **BOM** button in the **Partnumber** window toolbar.

f. The **BOM for P/N** window will appear.

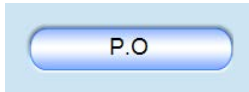


g. Ensure that (at minimum) all components you expect your vendor to return to you after teardown, along with their applicable quantities, are listed on the BOM for the assembly.

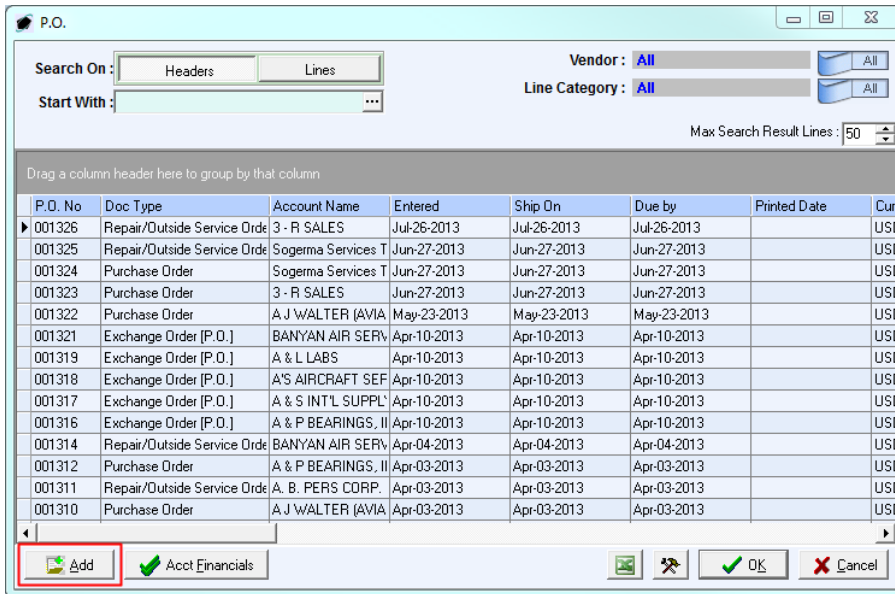
END OF SECTION

2. Create a Teardown Purchase Order

- a. From the **Main Menu** Screen, left-click the **PO** button.

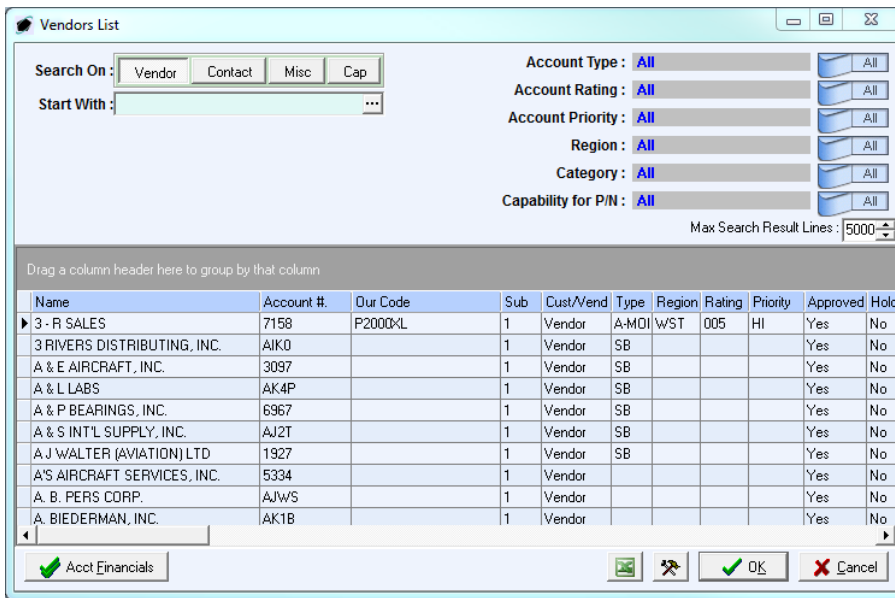


- b. The **P.O.** search window will appear. Left-click the **Add** button.



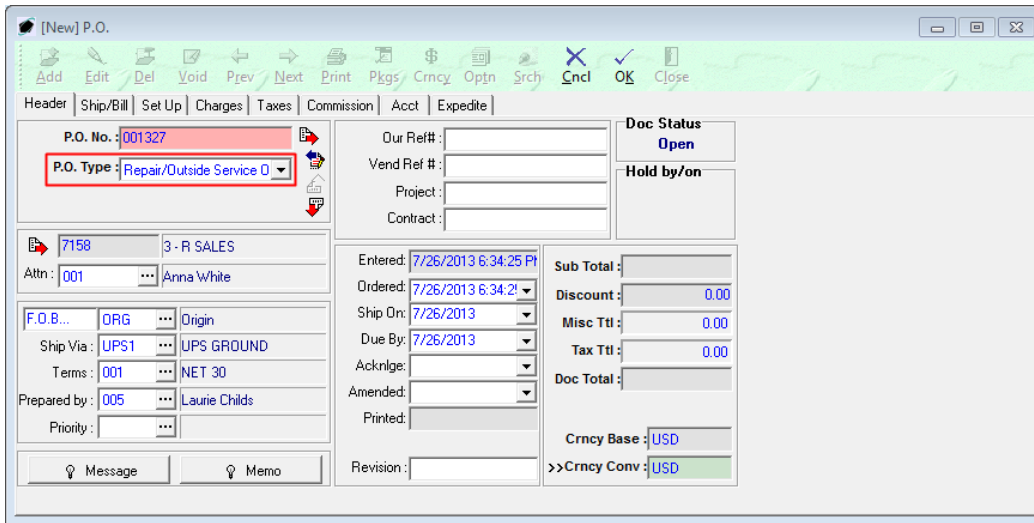
P.O. No	Doc Type	Account Name	Entered	Ship On	Due by	Printed Date	Cur
001326	Repair/Outside Service Orde	3 - R SALES	Jul-26-2013	Jul-26-2013	Jul-26-2013		US\$
001325	Repair/Outside Service Orde	Sogerma Services T	Jun-27-2013	Jun-27-2013	Jun-27-2013		US\$
001324	Purchase Order	Sogerma Services T	Jun-27-2013	Jun-27-2013	Jun-27-2013		US\$
001323	Purchase Order	3 - R SALES	Jun-27-2013	Jun-27-2013	Jun-27-2013		US\$
001322	Purchase Order	A.J WALTER (AVIA	May-23-2013	May-23-2013	May-23-2013		US\$
001321	Exchange Order [P.O.]	BANYAN AIR SERV	Apr-10-2013	Apr-10-2013	Apr-10-2013		US\$
001319	Exchange Order [P.O.]	A & L LABS	Apr-10-2013	Apr-10-2013	Apr-10-2013		US\$
001318	Exchange Order [P.O.]	A'S AIRCRAFT SEF	Apr-10-2013	Apr-10-2013	Apr-10-2013		US\$
001317	Exchange Order [P.O.]	A & S INT'L SUPPL	Apr-10-2013	Apr-10-2013	Apr-10-2013		US\$
001316	Exchange Order [P.O.]	A & P BEARINGS, II	Apr-10-2013	Apr-10-2013	Apr-10-2013		US\$
001314	Repair/Outside Service Orde	BANYAN AIR SERV	Apr-04-2013	Apr-04-2013	Apr-04-2013		US\$
001312	Purchase Order	A & P BEARINGS, II	Apr-03-2013	Apr-03-2013	Apr-03-2013		US\$
001311	Repair/Outside Service Orde	A. B. PERS CORP.	Apr-03-2013	Apr-03-2013	Apr-03-2013		US\$
001310	Purchase Order	A.J WALTER (AVIA	Apr-03-2013	Apr-03-2013	Apr-03-2013		US\$

- c. The **Vendor's List** search window will appear.

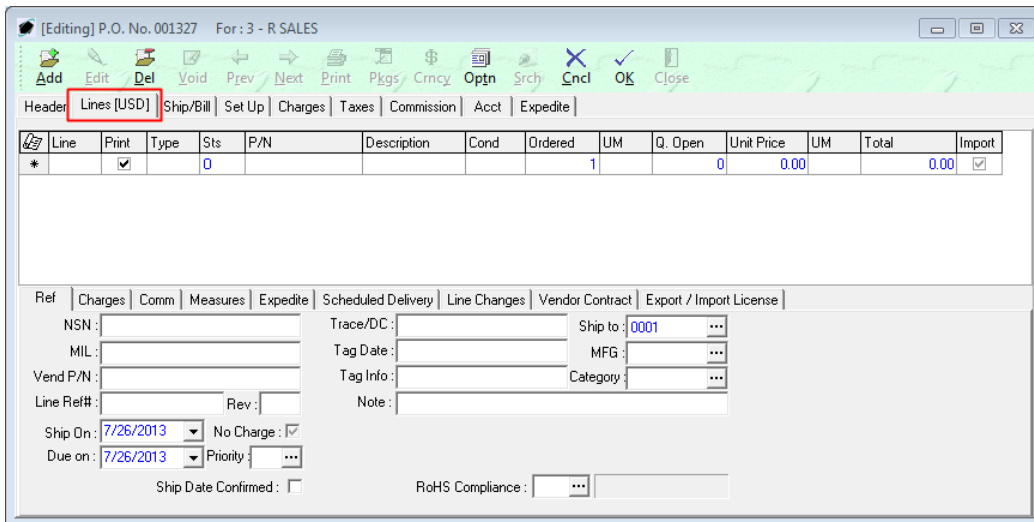


Name	Account #	Our Code	Sub	Cust/Vend	Type	Region	Rating	Priority	Approved	Holc
3 - R SALES	7158	P2000XL	1	Vendor	A-MOI	WST	005	HI	Yes	No
3 RIVERS DISTRIBUTING, INC.	AIK0		1	Vendor	SB				Yes	No
A & E AIRCRAFT, INC.	3097		1	Vendor	SB				Yes	No
A & L LABS	AK4P		1	Vendor	SB				Yes	No
A & P BEARINGS, INC.	6967		1	Vendor	SB				Yes	No
A & S INT'L SUPPLY, INC.	AJ2T		1	Vendor	SB				Yes	No
A.J WALTER (AVIATION) LTD	1927		1	Vendor	SB				Yes	No
A'S AIRCRAFT SERVICES, INC.	5334		1	Vendor					Yes	No
A. B. PERS CORP.	AJWS		1	Vendor					Yes	No
A. BIEDERMAN, INC.	AK1B		1	Vendor					Yes	No

- d. Select the appropriate vendor (left-click the line within the search window and left-click OK; or double-click the line within the search window).
- e. The **P.O.** window will appear. Select “Repair/Outside Service Order” from the drop down menu in the **P.O. Type** field.



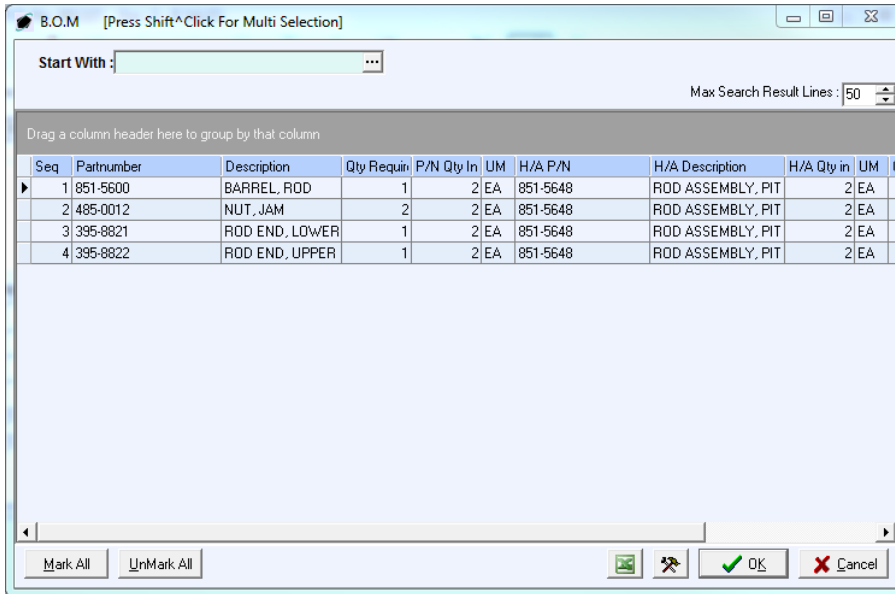
- f. Left-click the **OK** button on the **P.O.** window toolbar.
- g. The **Lines** tab will appear.



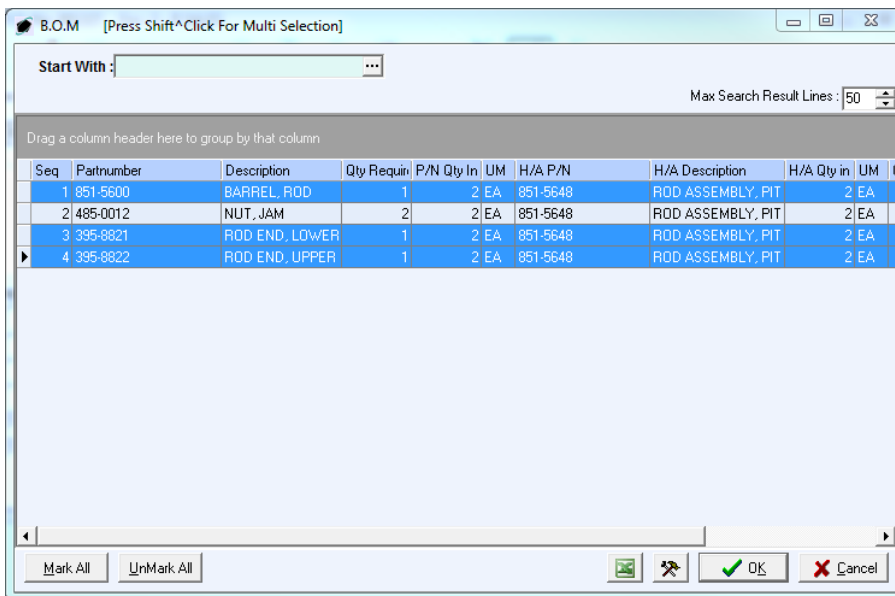
Line	Print	Type	Sts	P/N	Description	Cond	Ordered	UM	Q. Open	Unit Price	UM	Total	Import
*	<input checked="" type="checkbox"/>		0				1		0	0.00		0.00	<input checked="" type="checkbox"/>

- i. **Type** column – Select line type 28 (Teardown)
- ii. **P/N** column – Select the part number of the assembly that will be shipped to the vendor.
- iii. **Cond** column – Select the condition code that applies to the assembly that will be shipped to the vendor.

- h. When all applicable information is completed, left-click the **OK** button in the **P.O.** window toolbar.
- i. The **BOM** search window will appear listing the components that are a part of the assembly's (line type 28) BOM.

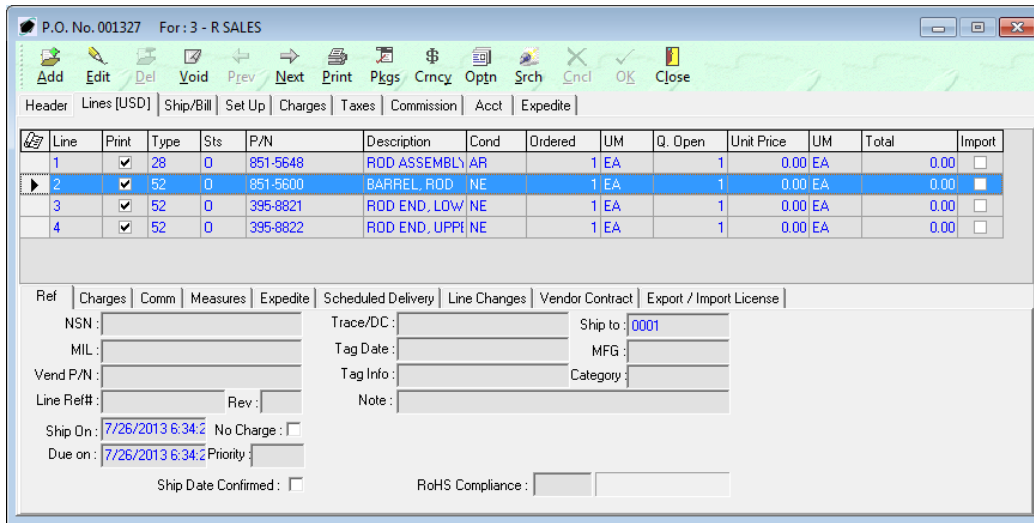


- i. Select the components that you expect to receive back from the vendor after teardown is complete.



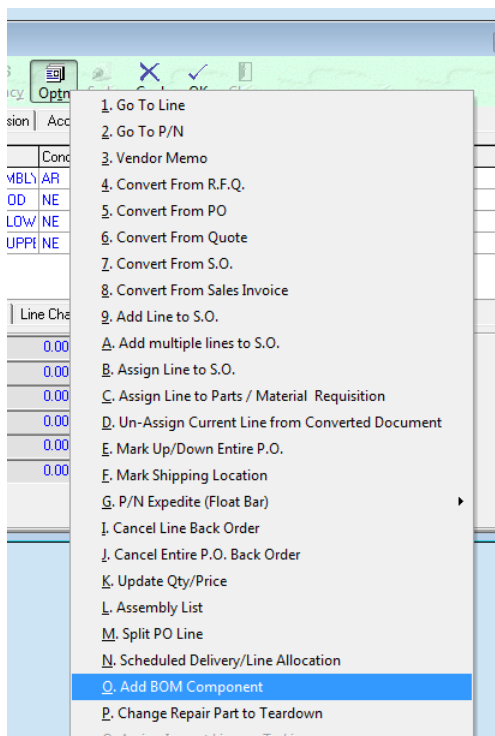
- ii. Left-click the **OK** button.

- j. The selected components will be listed on the purchase order as line type 52 (Teardown Component).



- k. If there is a need to add additional line type 52 components after the initial selection, you may add other components listed on the BOM.

- i. While in “Edit” mode, left-click the **Optn** button from the **P.O.** window toolbar and left-click **O. Add BOM Component**.

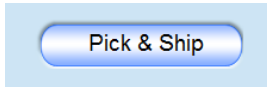


- ii. The **BOM** search window will appear listing the components that are a part of the assembly's (line type 28) BOM.
 - iii. Select the components that you expect to receive back from the vendor after teardown is complete.
 - iv. Left-click the **OK** button.
- I. When all remaining applicable tabs have been completed, left click the Close button on the **P.O.** window toolbar to close the window.

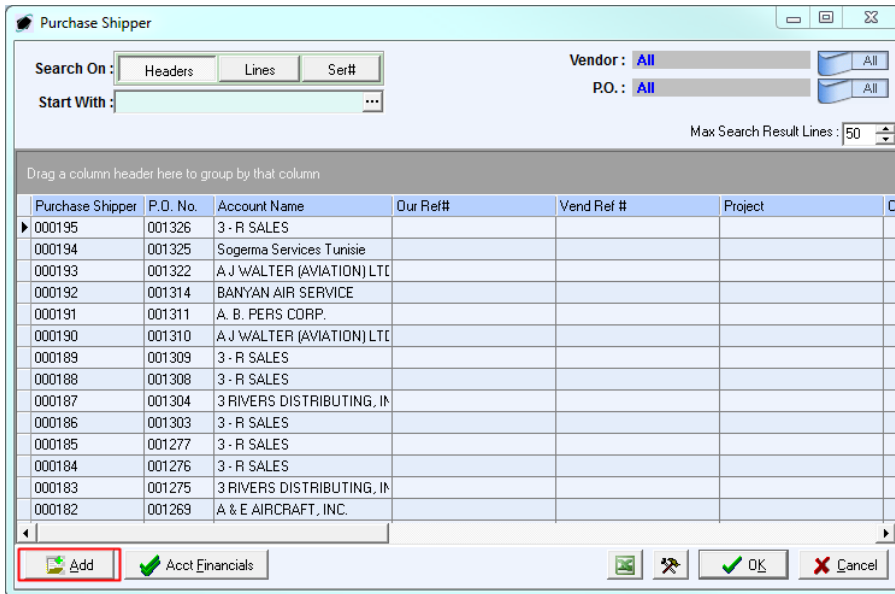
END OF SECTION

3. Ship Assembly to Vendor

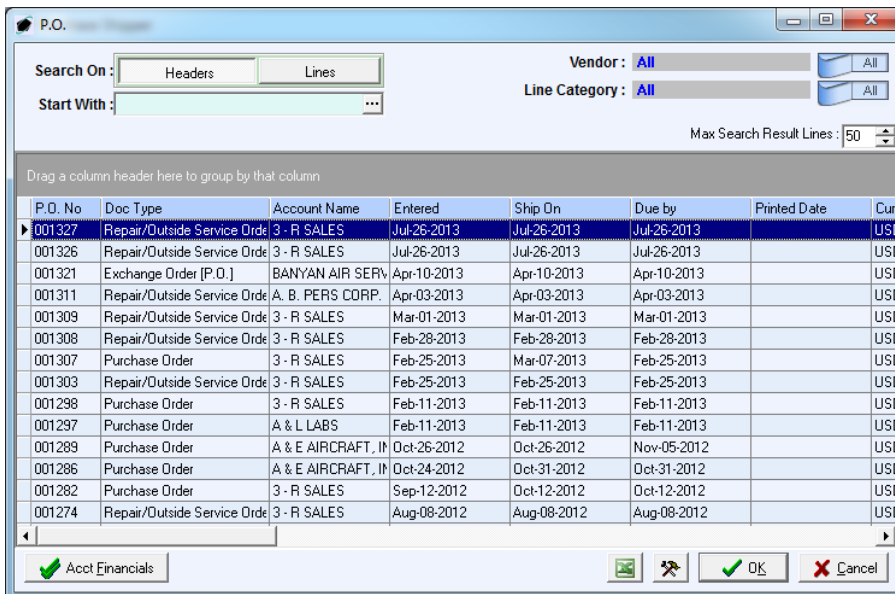
- a. From the **Main Menu** screen, left-click the **Pick & Ship** button.



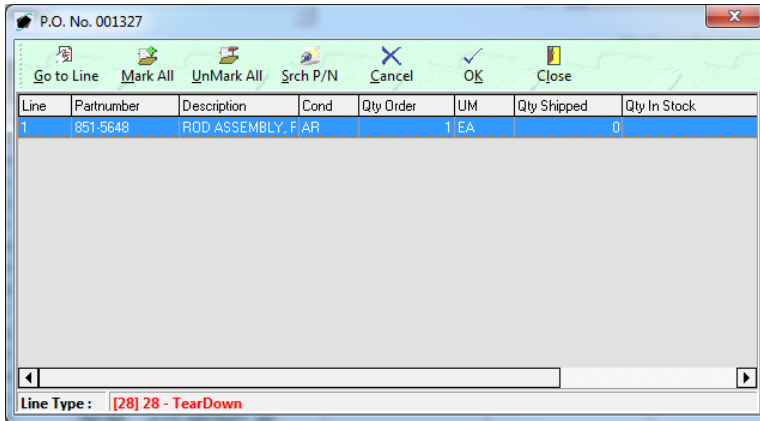
- b. The **Purchase Shipper** search window will appear. Left-click the **Add** button.



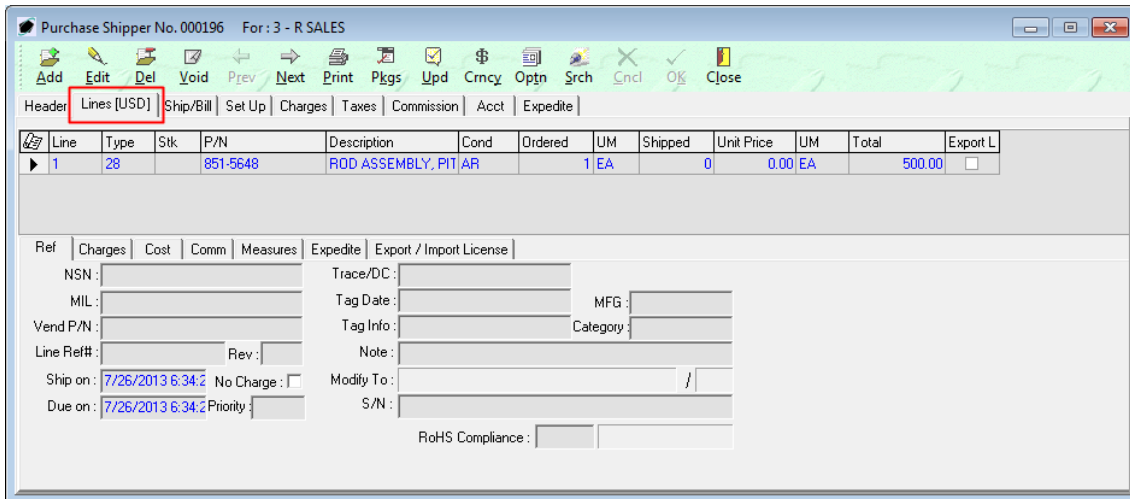
- c. The **P.O.** search window will appear.



- d. Select the appropriate purchase order (left-click the line within the search window and left-click OK; or double-click the line within the search window).
- e. The **P.O.** window will appear.



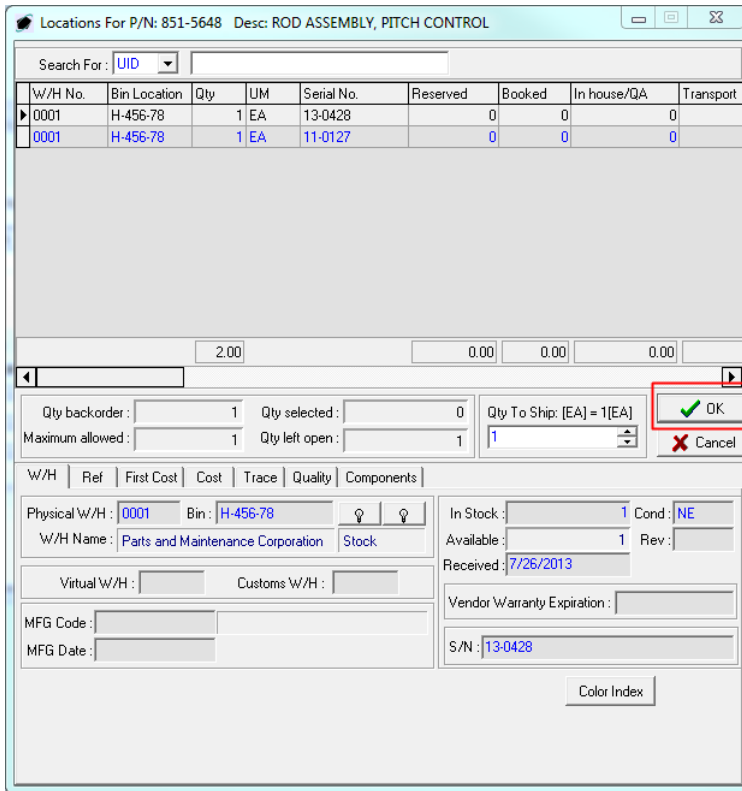
- f. Select the assembly being shipped and left-click the **OK** button from the **P.O.** window toolbar.
- g. The **Purchase Shipper** window will appear. Left-click the **Lines** tab.



- h. Left-click the **Edit** button to place the document in “Edit” mode.
- i. Double-click the line that will be shipped.

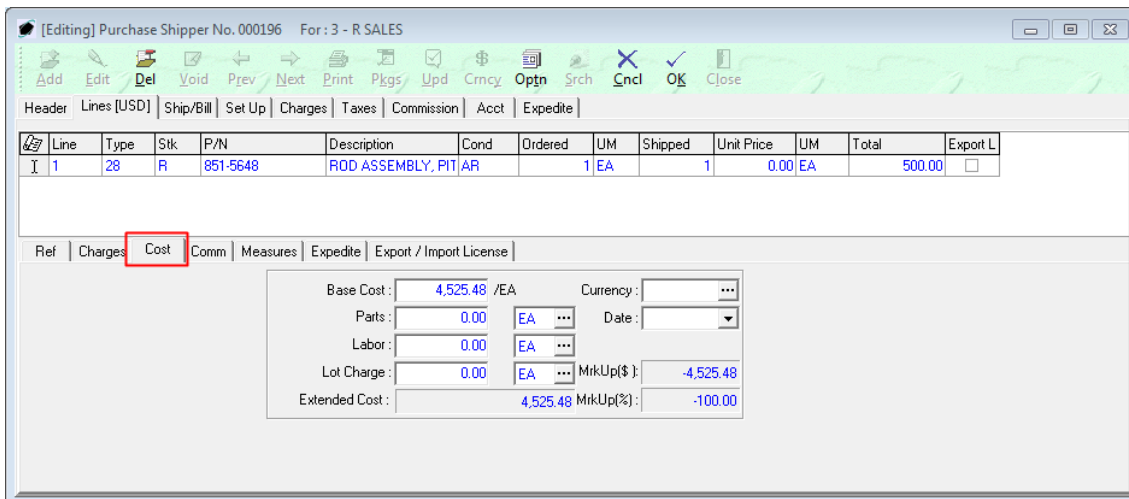
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j. The **Locations** window will appear.



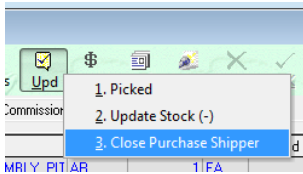
k. Select the particular assembly that you would like to ship to the vendor and left-click the **OK** button.

l. The **Cost** tab will be updated.



m. Update the remaining applicable tabs, then left-click **OK** on the **Purchase Shipper** window toolbar.

- n. Left-click the **Upd** button on the **Purchase Shipper** window toolbar, then left-click **3. Close Purchase Shipper**.

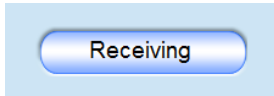


- o. Left-click the **Close** button on the **Purchase Shipper** window toolbar to close the window.

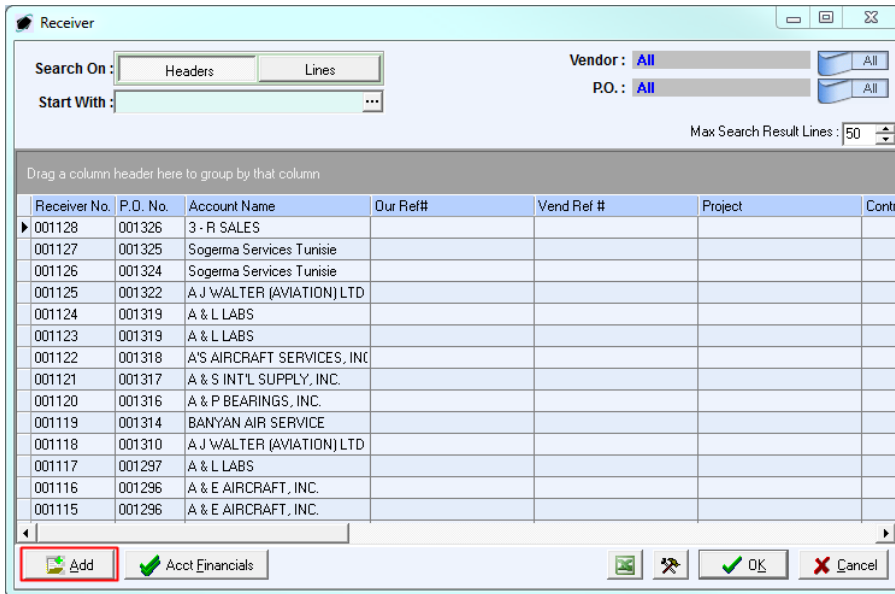
END OF SECTION

4. Receive Components from Vendor

- a. From the **Main Menu** screen, left-click the **Receiving** button.



- b. The **Receiver** search window will appear. Left-click the **Add** button.



Receiver

Search On:

Start With:

Vendor:

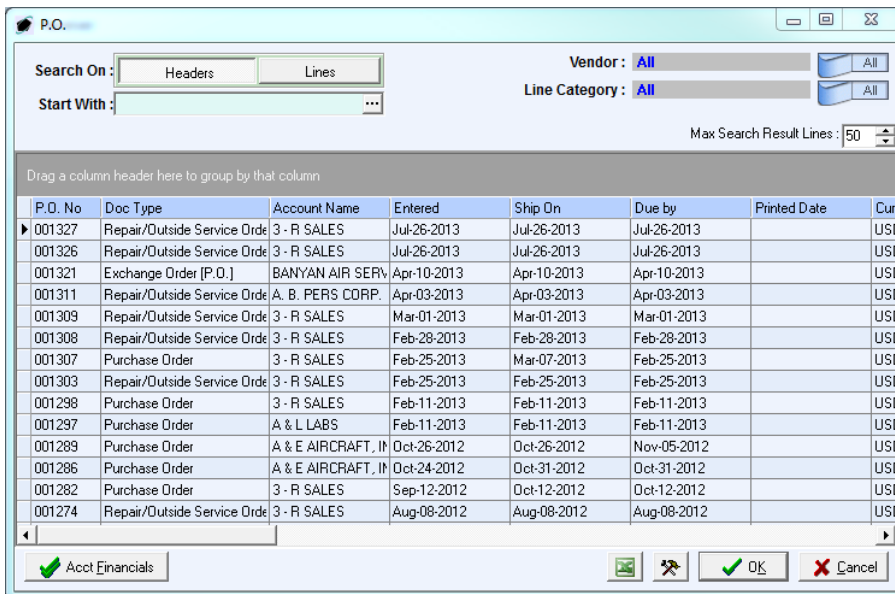
P.O.:

Max Search Result Lines: 50

Drag a column header here to group by that column

Receiver No.	P.O. No.	Account Name	Our Ref#	Vend Ref #	Project	Contr
001128	001326	3 - R SALES				
001127	001325	Sogerma Services Tunisie				
001126	001324	Sogerma Services Tunisie				
001125	001322	A J WALTER (AVIATION) LTD				
001124	001319	A & L LABS				
001123	001319	A & L LABS				
001122	001318	A'S AIRCRAFT SERVICES, INC				
001121	001317	A & S INT'L SUPPLY, INC.				
001120	001316	A & P BEARINGS, INC.				
001119	001314	BANYAN AIR SERVICE				
001118	001310	A J WALTER (AVIATION) LTD				
001117	001297	A & L LABS				
001116	001296	A & E AIRCRAFT, INC.				
001115	001296	A & E AIRCRAFT, INC.				

- c. The **P.O.** search window will appear.



P.O.

Search On:

Start With:

Vendor:

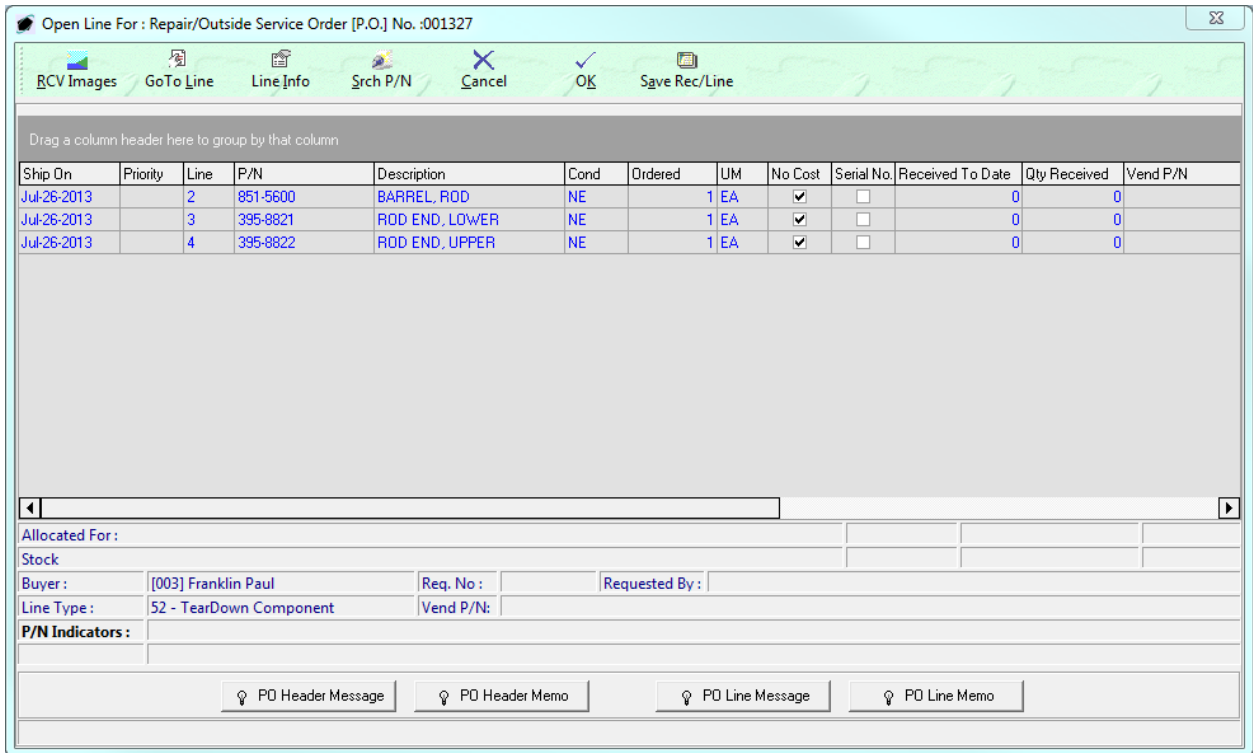
Line Category:

Max Search Result Lines: 50

Drag a column header here to group by that column

P.O. No	Doc Type	Account Name	Entered	Ship On	Due by	Printed Date	Cur
001327	Repair/Outside Service Orde	3 - R SALES	Jul-26-2013	Jul-26-2013	Jul-26-2013		US\$
001326	Repair/Outside Service Orde	3 - R SALES	Jul-26-2013	Jul-26-2013	Jul-26-2013		US\$
001321	Exchange Order [P.O.]	BANYAN AIR SERV	Apr-10-2013	Apr-10-2013	Apr-10-2013		US\$
001311	Repair/Outside Service Orde	A. B. PERS CORP.	Apr-03-2013	Apr-03-2013	Apr-03-2013		US\$
001309	Repair/Outside Service Orde	3 - R SALES	Mar-01-2013	Mar-01-2013	Mar-01-2013		US\$
001308	Repair/Outside Service Orde	3 - R SALES	Feb-28-2013	Feb-28-2013	Feb-28-2013		US\$
001307	Purchase Order	3 - R SALES	Feb-25-2013	Mar-07-2013	Feb-25-2013		US\$
001303	Repair/Outside Service Orde	3 - R SALES	Feb-25-2013	Feb-25-2013	Feb-25-2013		US\$
001298	Purchase Order	3 - R SALES	Feb-11-2013	Feb-11-2013	Feb-11-2013		US\$
001297	Purchase Order	A & L LABS	Feb-11-2013	Feb-11-2013	Feb-11-2013		US\$
001289	Purchase Order	A & E AIRCRAFT, IN	Oct-26-2012	Oct-26-2012	Nov-05-2012		US\$
001286	Purchase Order	A & E AIRCRAFT, IN	Oct-24-2012	Oct-31-2012	Oct-31-2012		US\$
001282	Purchase Order	3 - R SALES	Sep-12-2012	Oct-12-2012	Oct-12-2012		US\$
001274	Repair/Outside Service Orde	3 - R SALES	Aug-08-2012	Aug-08-2012	Aug-08-2012		US\$

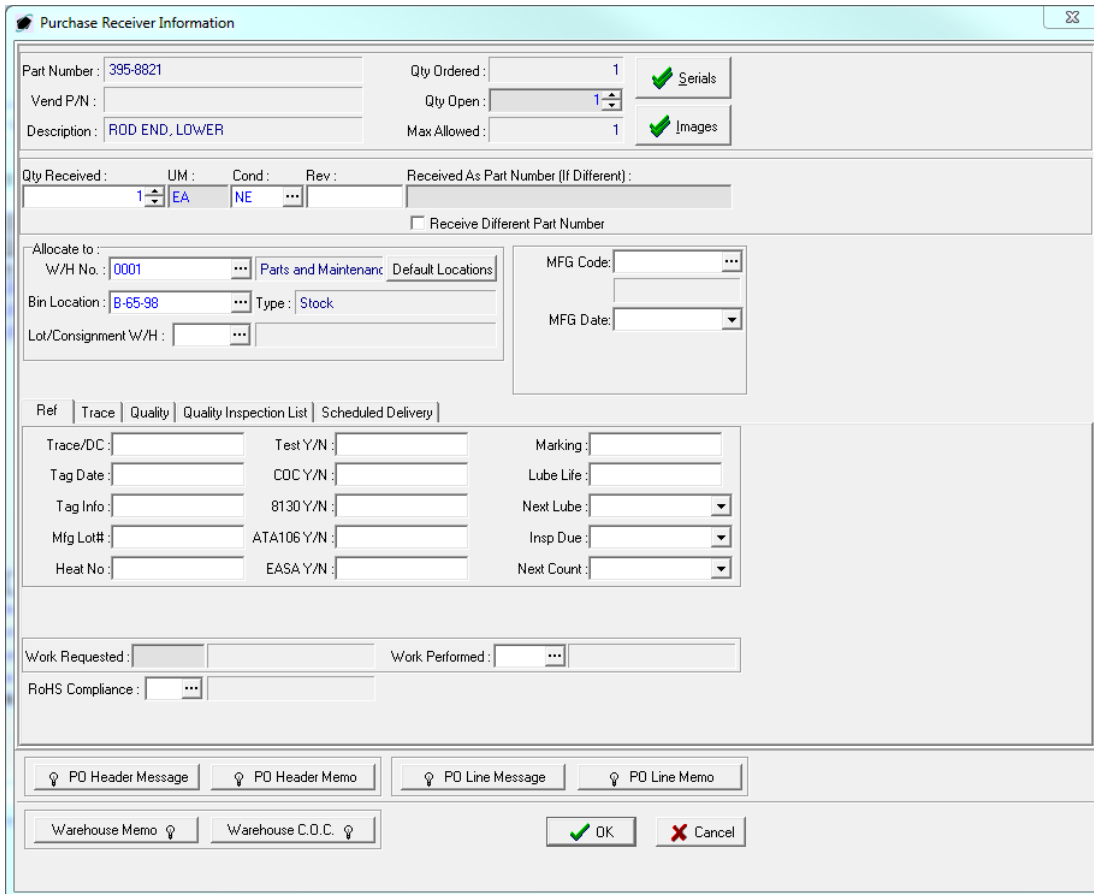
- d. Select the appropriate purchase order (left-click the line within the search window and left-click OK; or double-click the line within the search window).
- e. The **Open Line** window will appear. Each of the components that you expected to receive from the vendor should appear in this window.



- f. For each component received from the vendor:
 - i. Double-click the line that corresponds to the component received.

CONTINUE TO NEXT PAGE

ii. The **Purchase Receiver Information** window will appear.

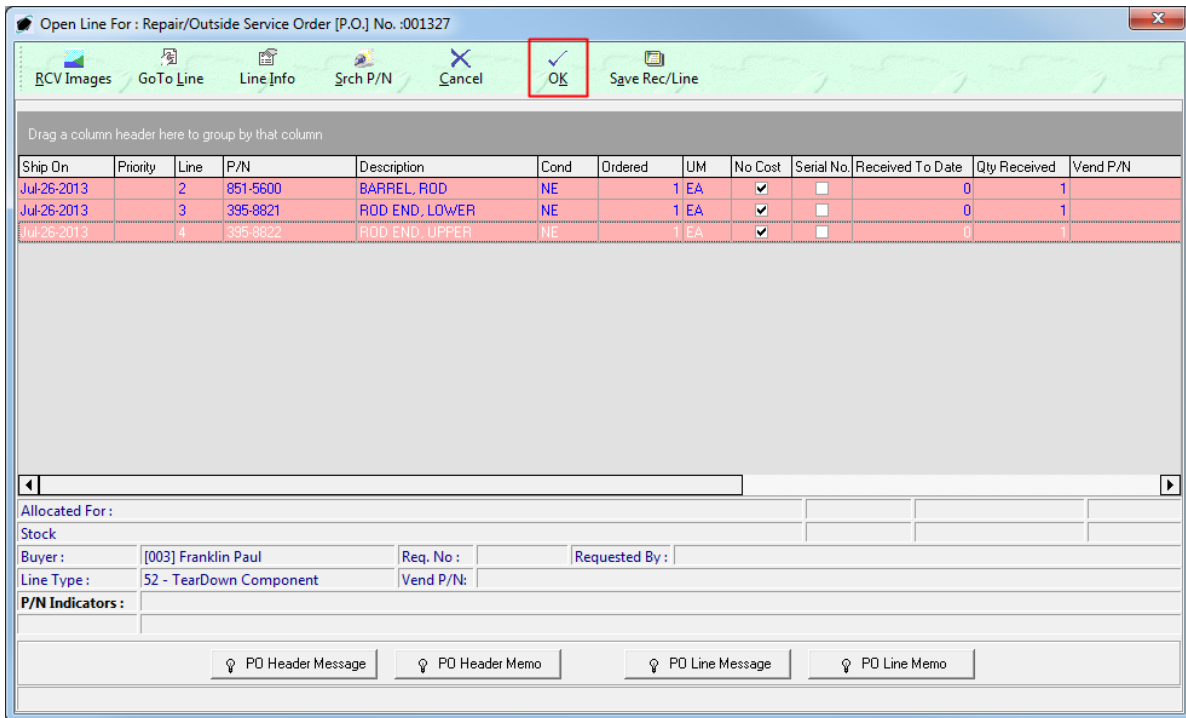


1. **W/H No** field – Identify the warehouse into which the component should be placed.
2. **Bin Location** field – Identify the bin location into which the component should be placed
3. **Serials** button – Identify the serial number received (if applicable)

iii. Left-click the **OK** button.

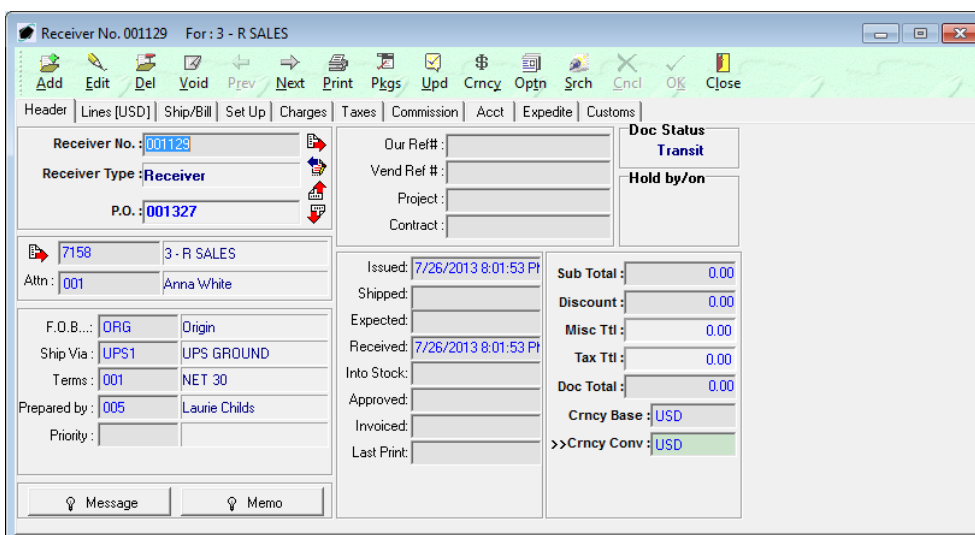
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- g. When all lines corresponding to the received components have been completed, left click-the **OK** button on the **Open Line** window toolbar.

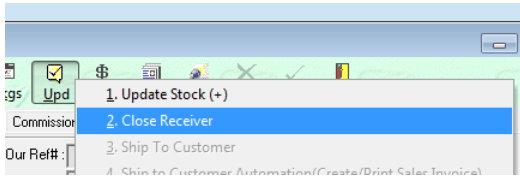


NOTE: All components do not have to be received on the same purchase receiver. The purchase order will remain open until all lines have been received.

- h. The **Receiver** window will appear.



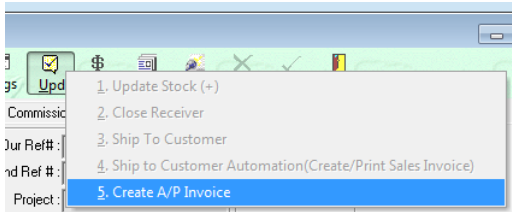
- i. Left-click the **Upd** button on the **Receiver** window toolbar, then left-click **2. Close Receiver**.



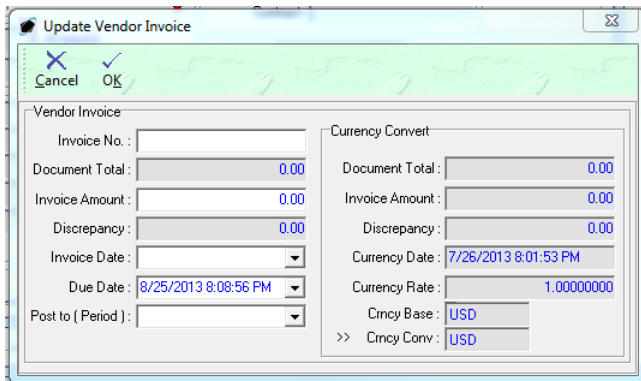
END OF SECTION

5. Create Vendor Invoice

- a. From the **Receiver** window, left-click **Upd** on the **Receiver** window toolbar, then left-click **5. Create A/P Invoice**.



- b. The **Update Vendor Invoice** window will appear.

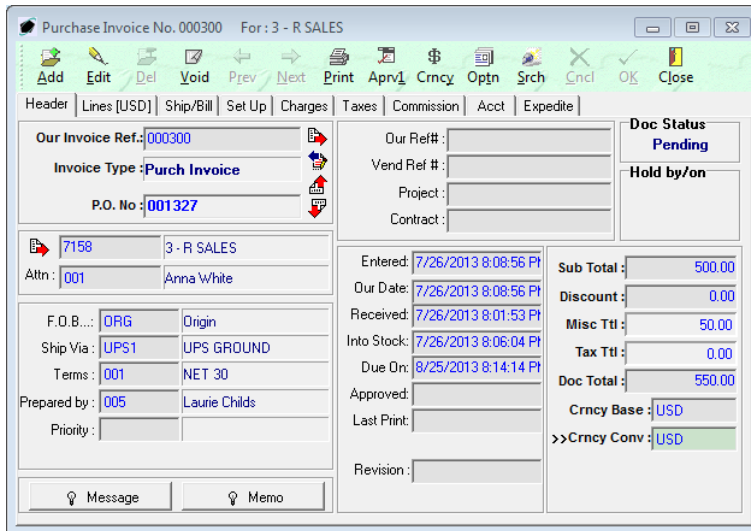


The image shows the 'Update Vendor Invoice' dialog box. It has a title bar with a close button. Below the title bar are 'Cancel' and 'OK' buttons. The dialog is divided into two main sections: 'Vendor Invoice' and 'Currency Convert'.
Vendor Invoice section:
 - Invoice No.: [Empty text field]
 - Document Total: [Text field with value 0.00]
 - Invoice Amount: [Text field with value 0.00]
 - Discrepancy: [Text field with value 0.00]
 - Invoice Date: [Date dropdown menu]
 - Due Date: [Date dropdown menu with value 8/25/2013 8:08:56 PM]
 - Post to (Period): [Period dropdown menu]
Currency Convert section:
 - Document Total: [Text field with value 0.00]
 - Invoice Amount: [Text field with value 0.00]
 - Discrepancy: [Text field with value 0.00]
 - Currency Date: [Date dropdown menu with value 7/26/2013 8:01:53 PM]
 - Currency Rate: [Text field with value 1.00000000]
 - Cncy Base: [Text field with value USD]
 - Cncy Conv: [Text field with value USD]

- i. **Invoice No** field – Enter the vendor’s invoice number.
 - ii. **Invoice Amount** field – Enter the amount on the vendor’s invoice.
 - iii. **Invoice Date** field – Select the date the vendor’s invoice was issued.
 - iv. **Post to (Period)** field – Select the date the vendor’s invoice was received.
- c. Left-click the **OK** button on the **Update Vendor Invoice** window toolbar.

CONTINUE TO NEXT PAGE

d. The **Purchase Invoice** window will appear.



Purchase Invoice No. 000300 For: 3 - R SALES

Our Invoice Ref.: 000300
Invoice Type: Purch Invoice
P.O. No.: 001327

Our Ref#: _____
Vend Ref #: _____
Project: _____
Contract: _____

Doc Status: Pending
Hold by/on: _____

7158 3 - R SALES
Attn: 001 Anna White

Entered: 7/26/2013 8:08:56 Pt
Our Date: 7/26/2013 8:08:56 Pt
Received: 7/26/2013 8:01:53 Pt
Into Stock: 7/26/2013 8:06:04 Pt
Due On: 8/25/2013 8:14:14 Pt

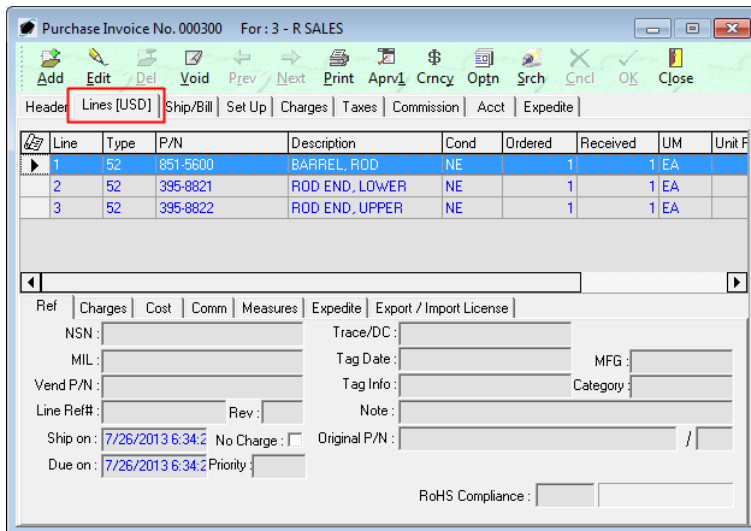
Sub Total: 500.00
Discount: 0.00
Misc Ttl: 50.00
Tax Ttl: 0.00
Doc Total: 550.00

F.O.B.: ORG Origin
Ship Via: UPS1 UPS GROUND
Terms: 001 NET 30
Prepared by: 005 Laurie Childs
Priority: _____

Crncy Base: USD
>>Crncy Conv: USD

e. Left-click the **Edit** button on the **Purchase Invoice** window toolbar.

f. Left-click the **Lines** button.



Purchase Invoice No. 000300 For: 3 - R SALES

Header | **Lines [USD]** | Ship/Bill | Set Up | Charges | Taxes | Commission | Acct | Expedite

Line	Type	P/N	Description	Cond	Ordered	Received	UM	Unit F
1	52	851-5600	BARREL, ROD	NE	1	1	EA	
2	52	395-8821	ROD END, LOWER	NE	1	1	EA	
3	52	395-8822	ROD END, UPPER	NE	1	1	EA	

Ref | Charges | Cost | Comm | Measures | Expedite | Export / Import License

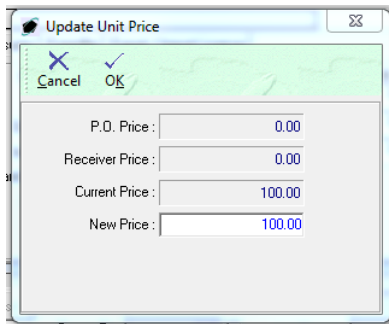
NSN: _____ Trace/DC: _____
MIL: _____ Tag Date: _____ MFG: _____
Vend P/N: _____ Tag Info: _____ Category: _____
Line Ref#: _____ Rev: _____ Note: _____
Ship on: 7/26/2013 6:34:2 No Charge: Original P/N: _____ / _____
Due on: 7/26/2013 6:34:2 Priority: _____
RoHS Compliance: _____

i. To change the price of each line:

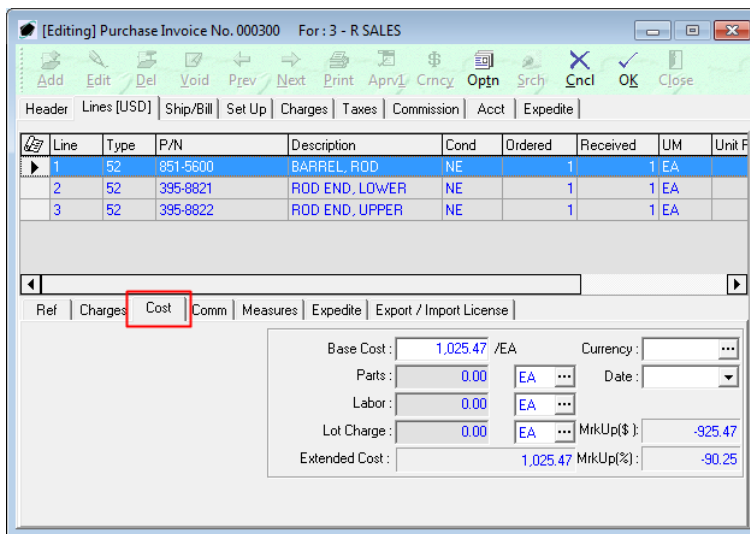
1. Double click the line.

CONTINUE TO NEXT PAGE

2. The Update Unit Price window will appear.



3. Enter the correct unit price of the line.
 4. Left-click the OK button on the Update Unit Price window toolbar.
- ii. To allocate a portion of the cost of the teardown assembly to each of the components:
1. Left-click the **Cost** tab.



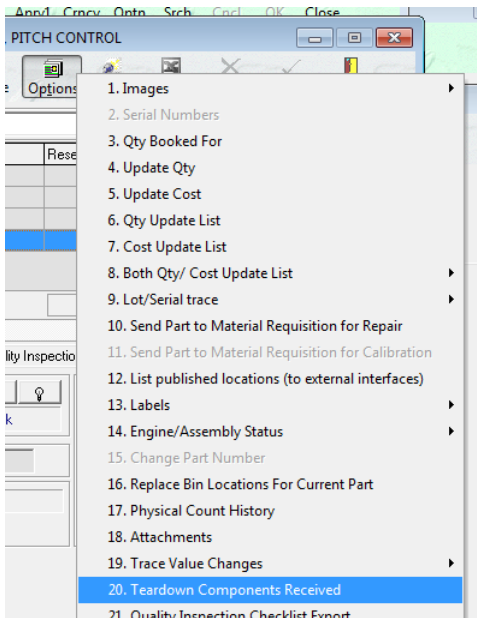
2. Enter the portion of the cost of the teardown assembly that should be allocated to the component in the **Base Cost** field.

NOTE: The total of all received components cannot exceed the cost of the teardown assembly at the time of shipping.

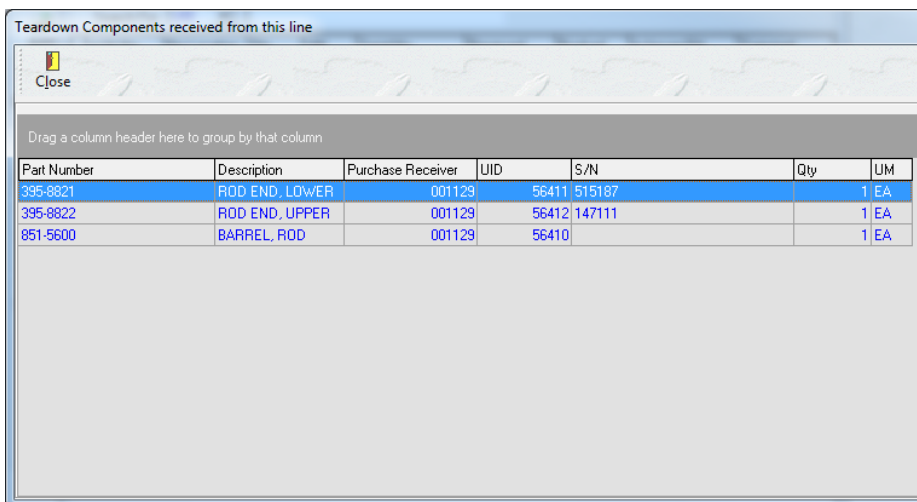
- g. Left-click the **OK** button on the **Purchase Invoice** window toolbar.
- h. Left-click the **Close** button on the **Purchase Invoice** window toolbar to close the window.

6. History Views

- a. For teardown assemblies sent out for repair, you may view what teardown components were received.
 - i. From the **Locations** window toolbar, left-click the **Options** button, then left-click **20. Teardown Components Received**.

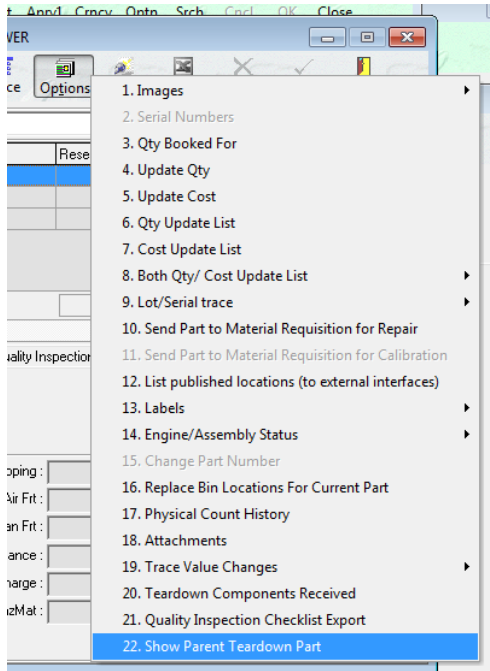


- ii. The **Teardown Components Received from this Line** window will appear.

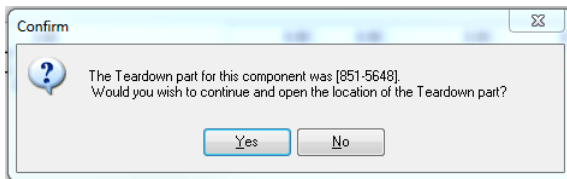


Part Number	Description	Purchase Receiver	UID	S/N	Qty	UM
395-8821	ROD END, LOWER	001129	56411	515187	1	EA
395-8822	ROD END, UPPER	001129	56412	147111	1	EA
851-5600	BARREL, ROD	001129	56410		1	EA

- b. For teardown components received, you may view the teardown assembly.
 - i. From the **Locations** window toolbar, left-click the **Options** button, then left-click **22.Show Parent Teardown Part**.



- ii. A **Confirm** dialog box will appear with the following message:



- iii. If you left-click the **Yes** button on the **Confirm** dialog box, the **Location** window will appear for the teardown assembly.