Version

8.5

Outside Service: Teardown

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
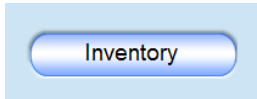- Outside Teardown

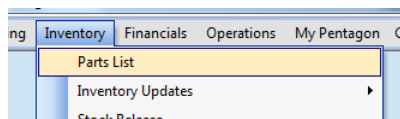**Table of Contents**

Procedure

1. Parts Master File Setup

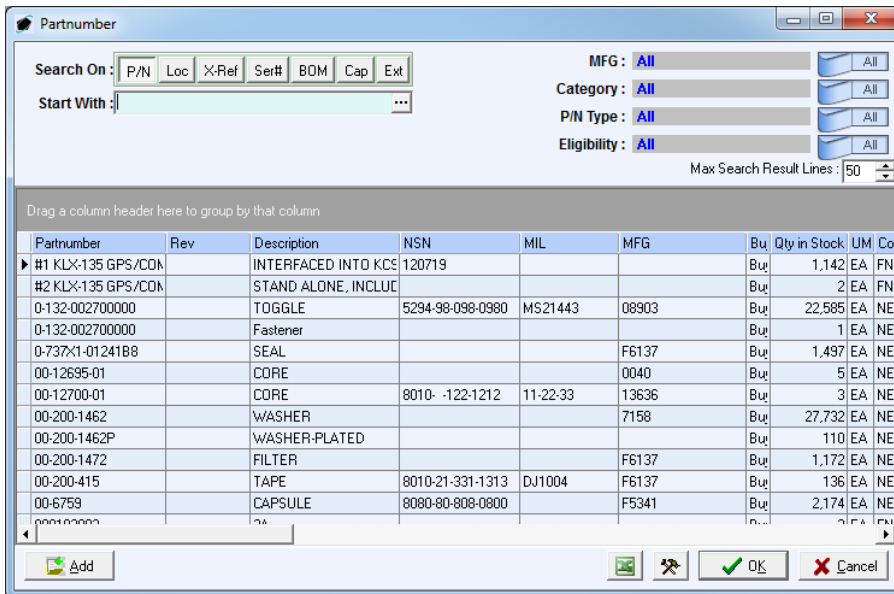Any assembly shipped to a vendor for teardown must have a bill of materials (BOM) identified in the parts master file.

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**.
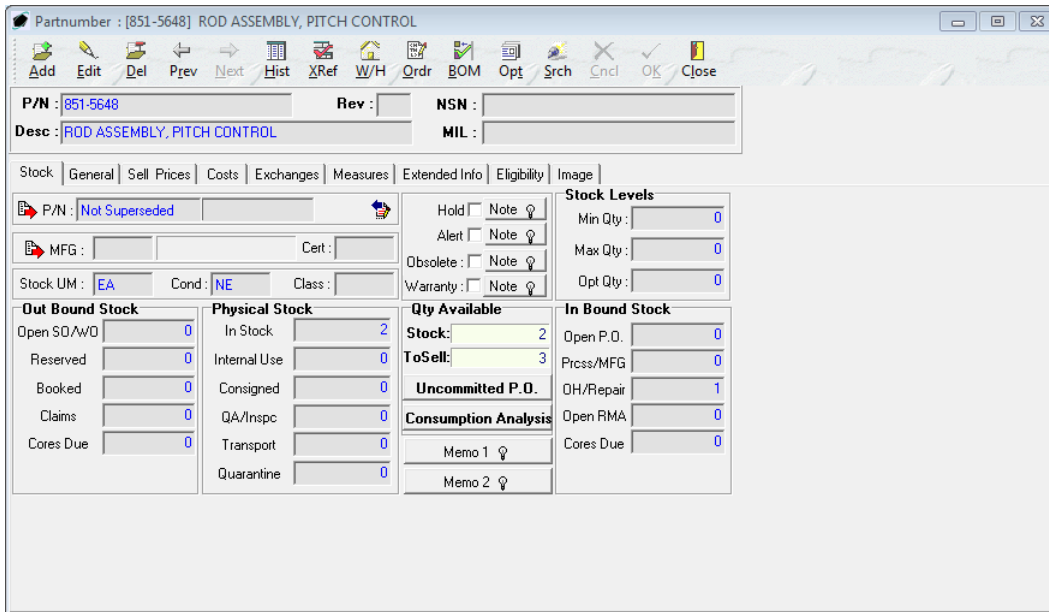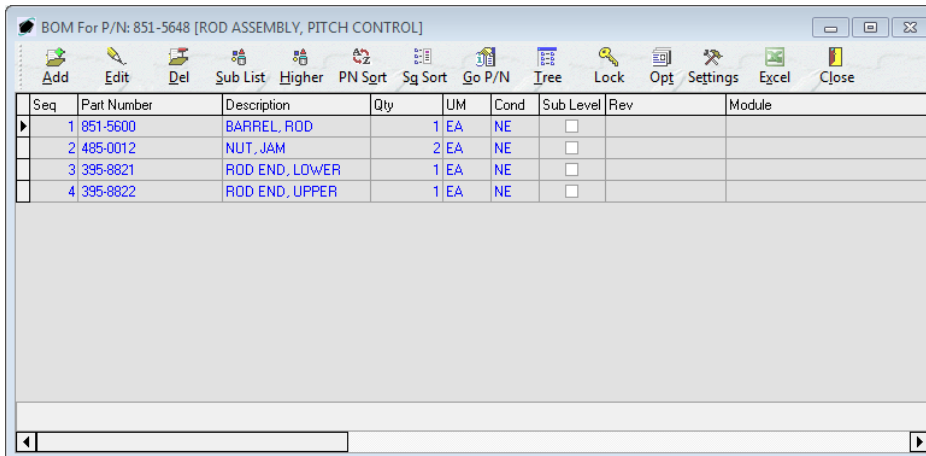

b. The **Partnumber** search window will appear.

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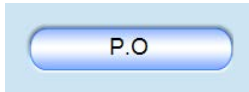
f. The **BOM for P/N** window will appear.

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.
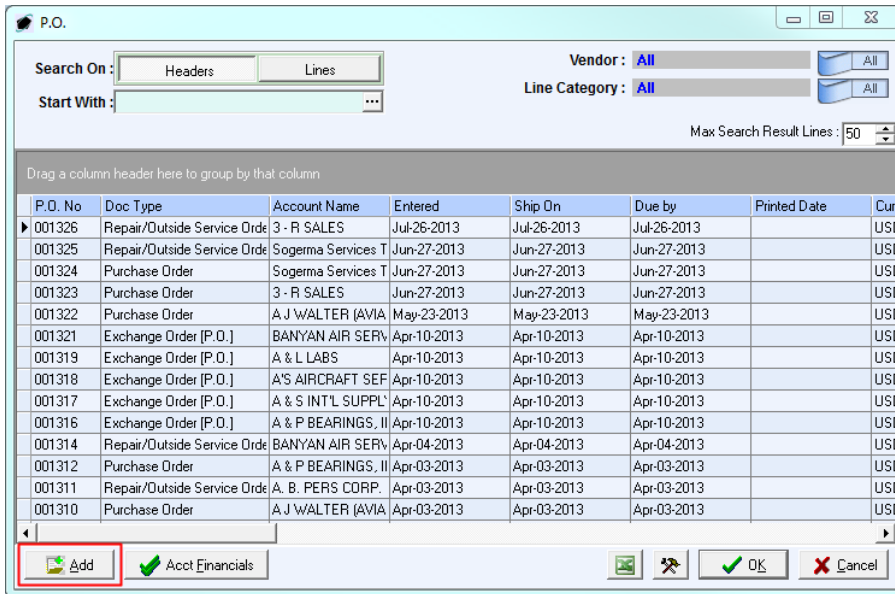
END OF SECTION

2. Create a Teardown Purchase Order

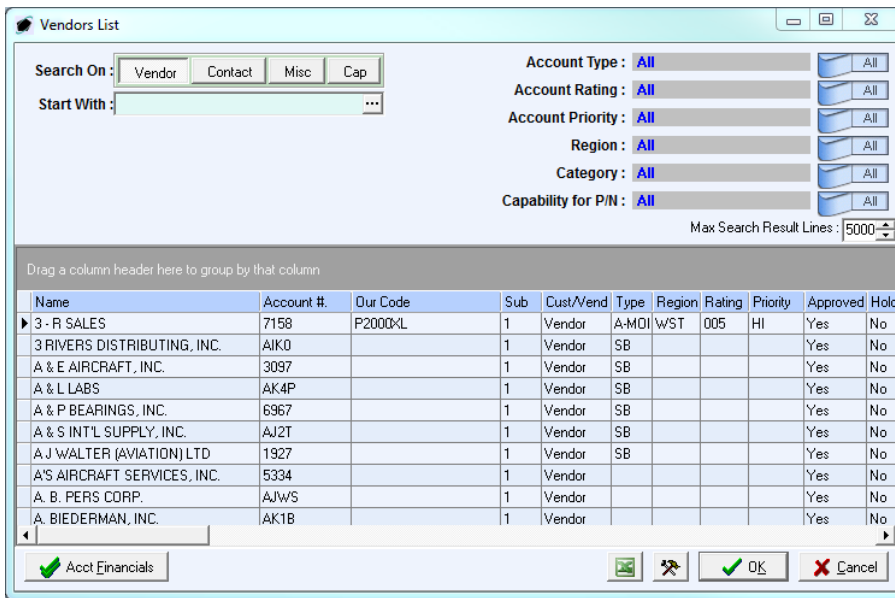a. From the **Main Menu** Screen, left-click the **PO** button.

P.O

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

c. The **Vendor's List** search window will appear.
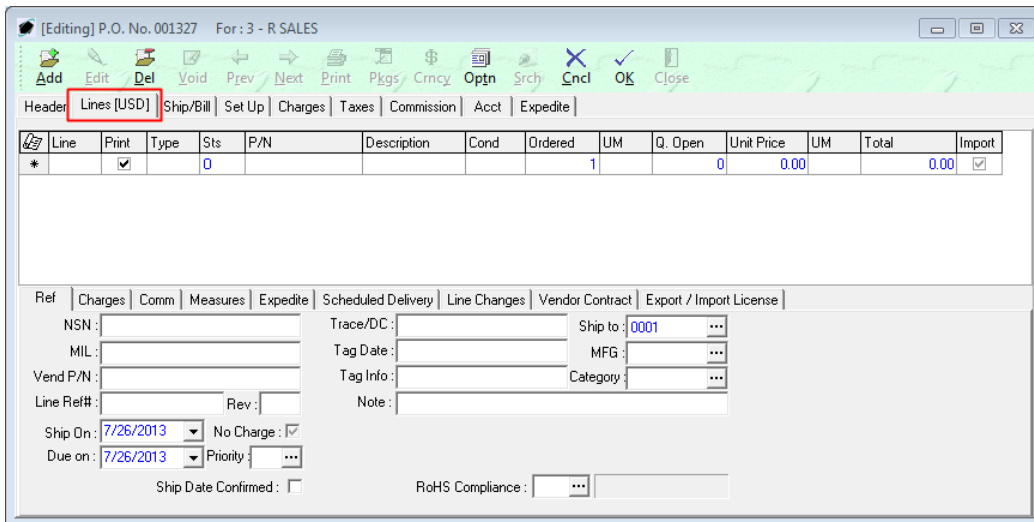
d. Select the appropriate vendor (left-click the line within the search window and left-click OK; or double-click the line within the search window).

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.

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.
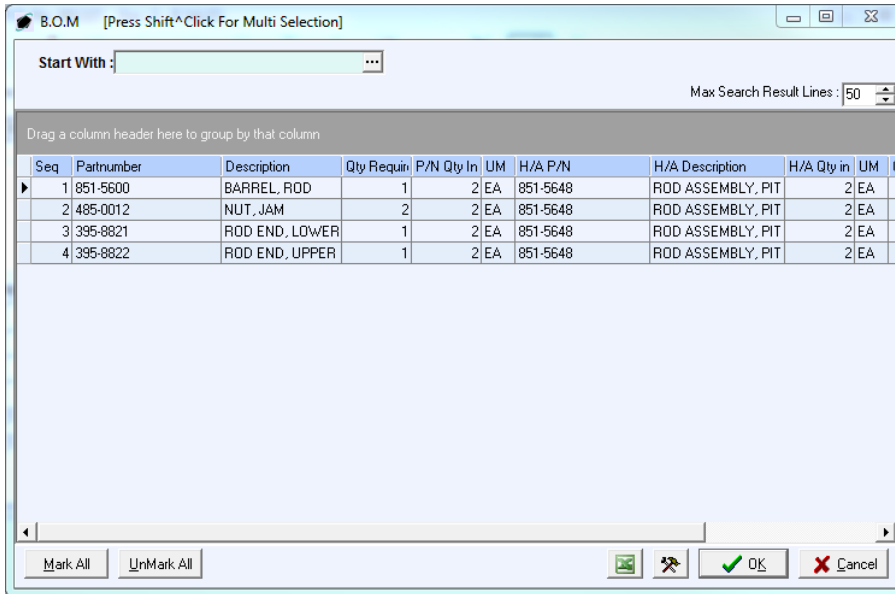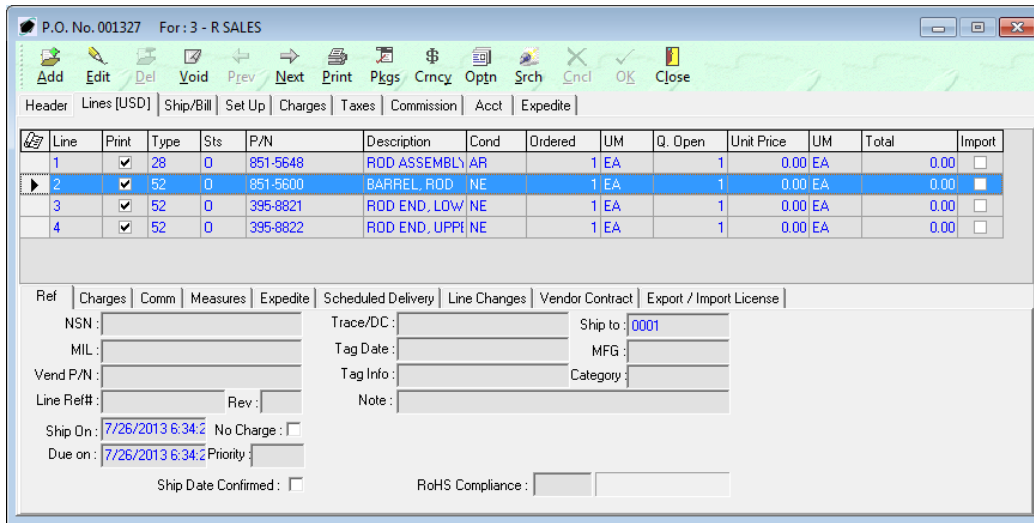

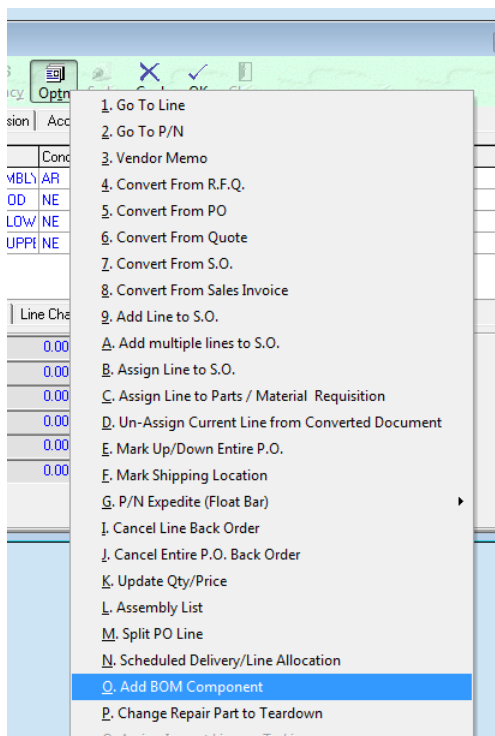i. Select the components that you expect to receive back from the vendor after teardown is complete.
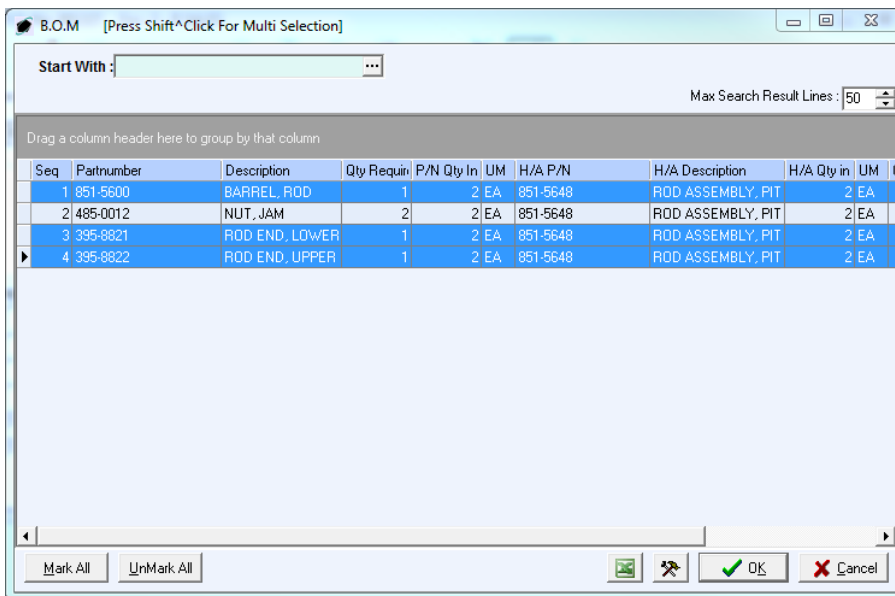
ii. Left-click the **OK** button.

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.

l. When all remaining applicable tabs have been completed, left click the Close button on the **P.O.** window toolbar to close the window.
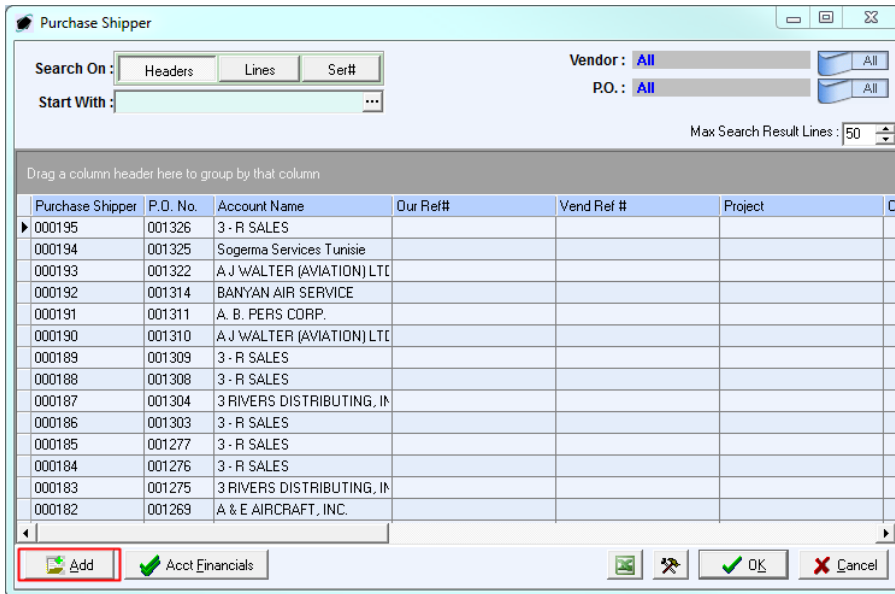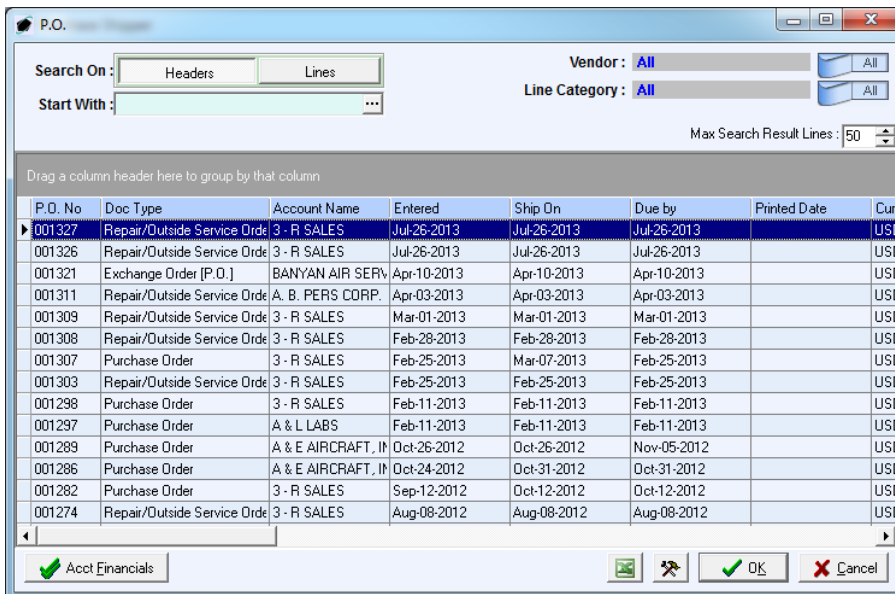
END OF SECTION

3. Ship Assembly to Vendor

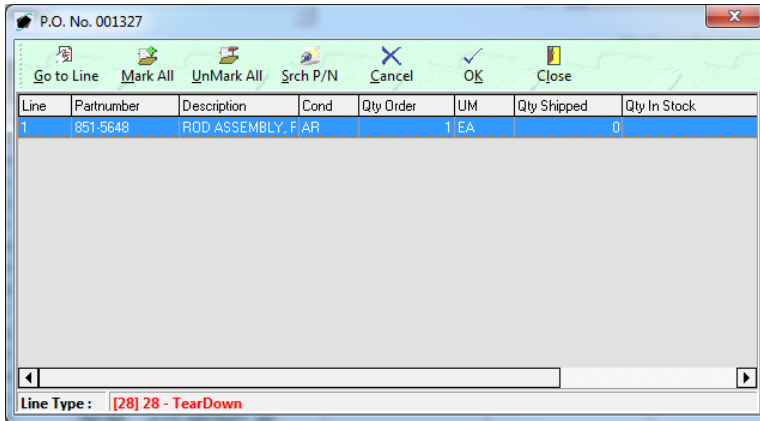a. From the **Main Menu** screen, left-click the **Pick & Ship** button.
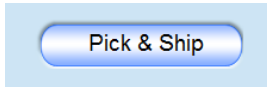
b. The **Purchase Shipper** search window will appear. Left-click the **Add** button.

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).
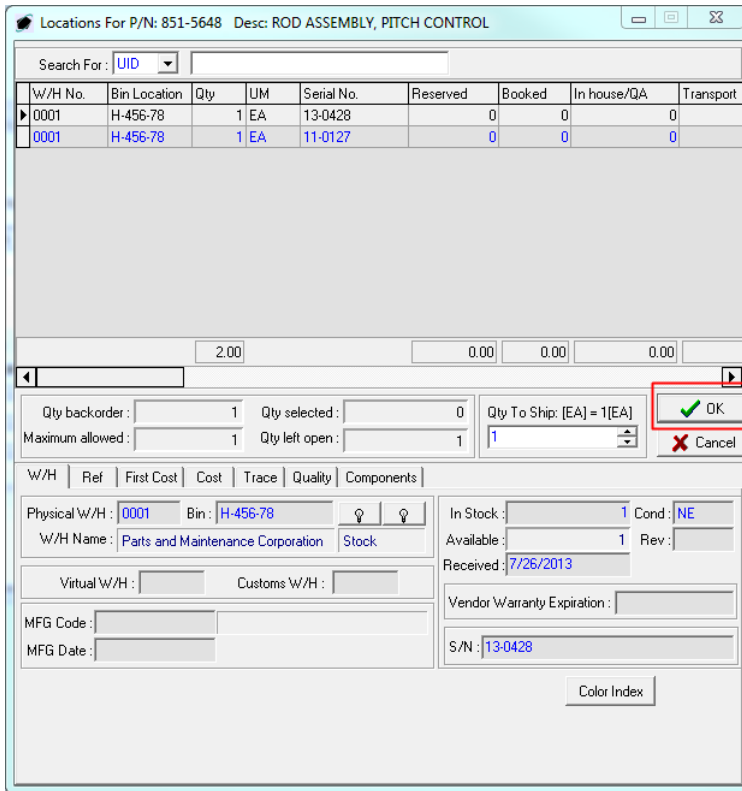
e. The **P.O.** window will appear.

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.
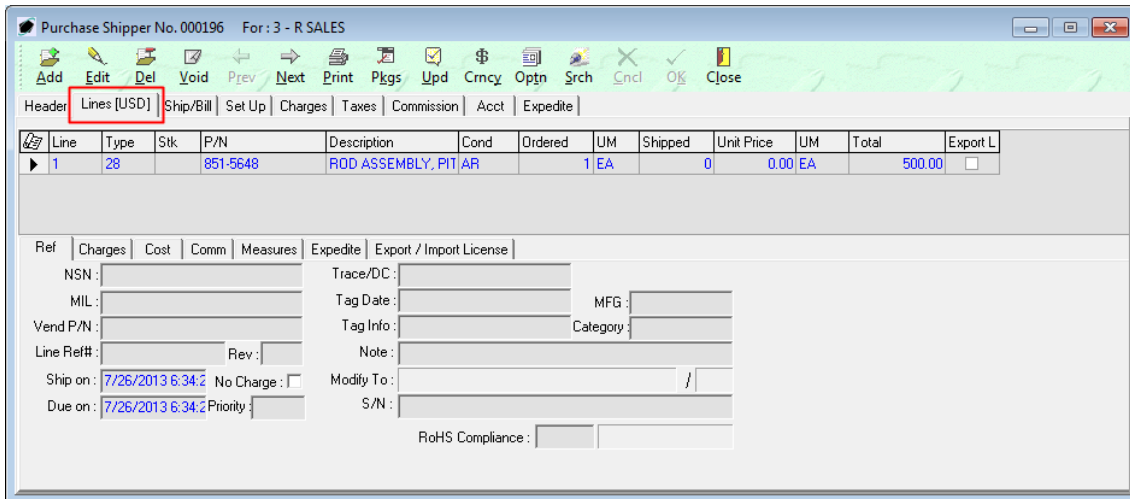
h. Left-click the **Edit** button to place the document in "Edit" mode.

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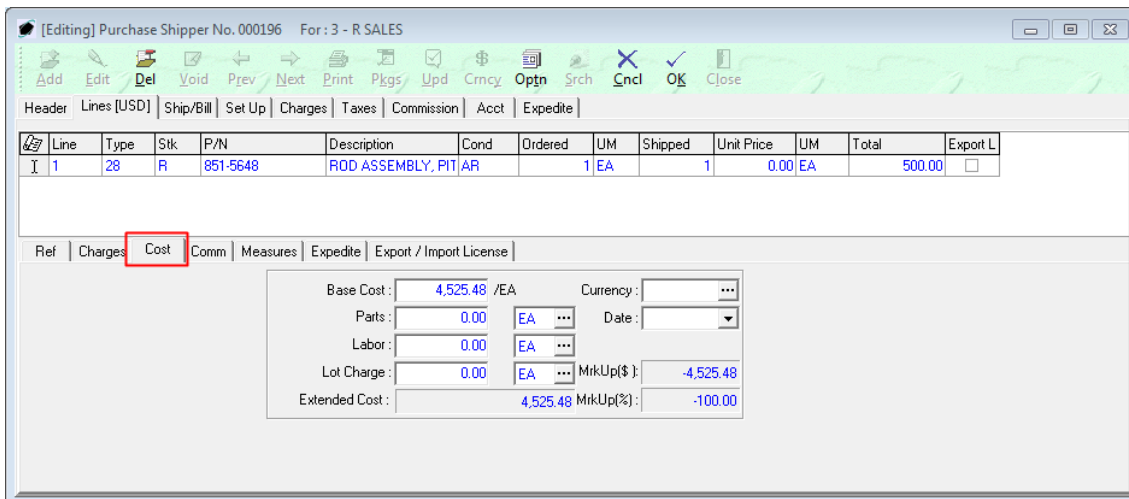
m. Update the remaining applicable tabs, then left-click **OK** on the **Purchase Shipper** window toolbar.

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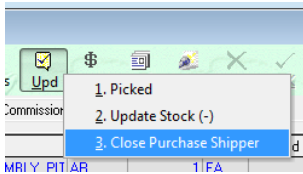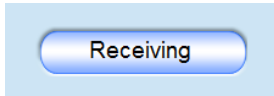

o. Left-click the **Close** button on the **Purchase Shipper** window toolbar to close the window.
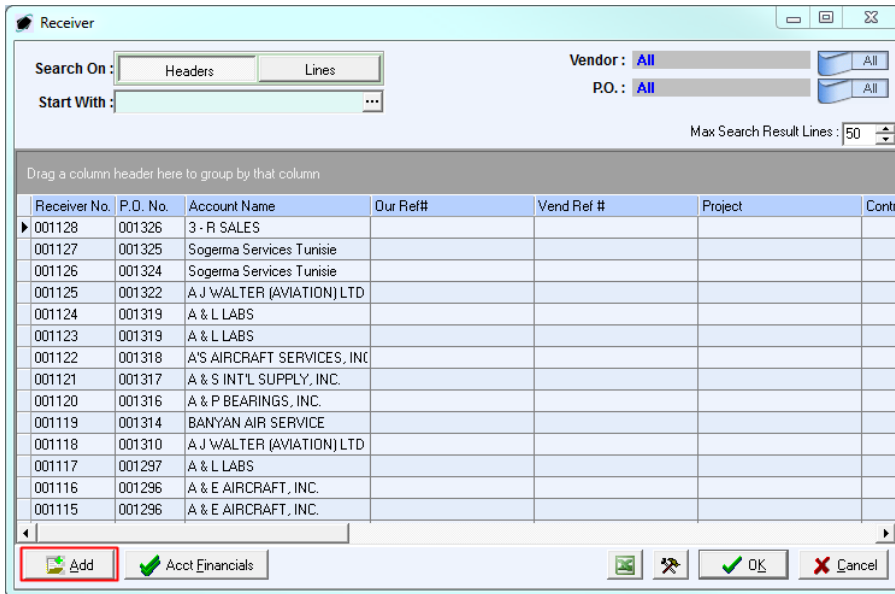
END OF SECTION

4. Receive Components from Vendor

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

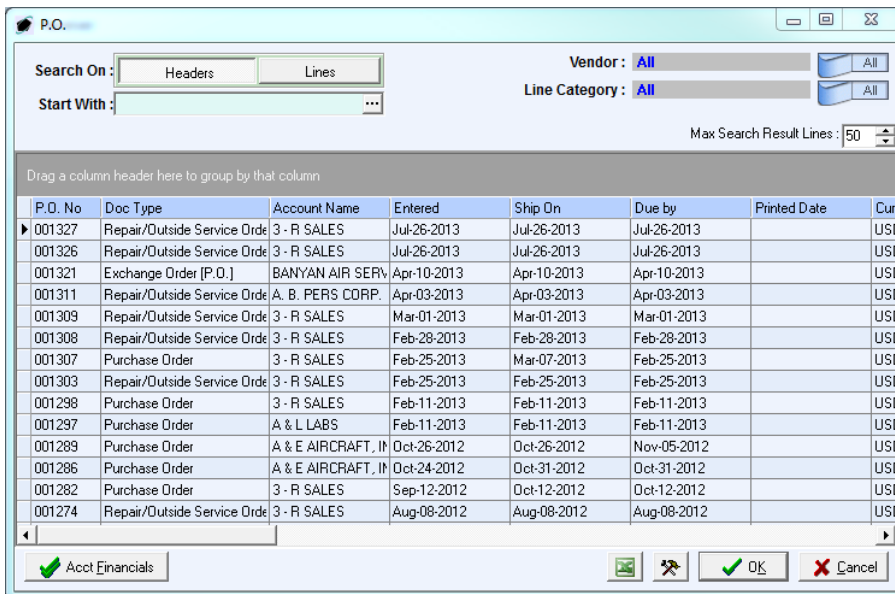b. The **Receiver** search window will appear. Left-click the **Add** button.
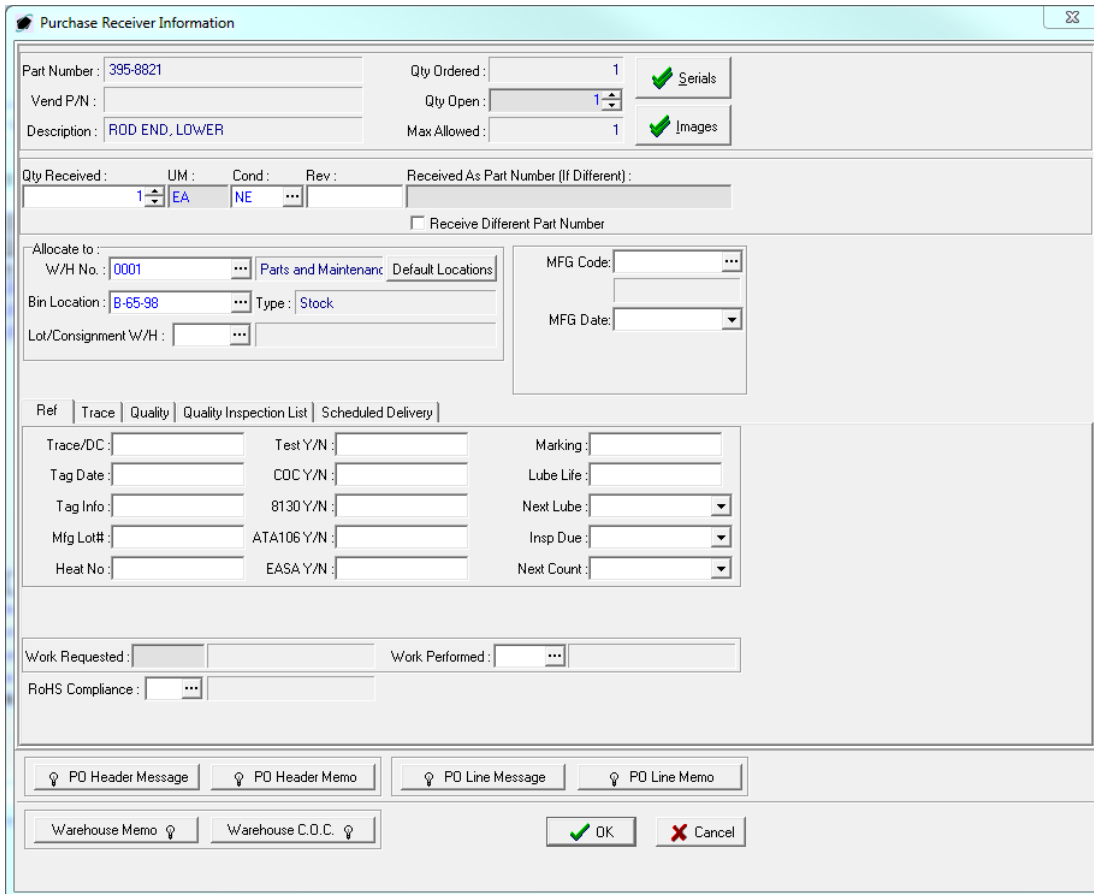

c. The **P.O.** search window will appear.

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 **Open Line** window will appear. Each of the components that you expected to receive from the vendor should appear in this window.
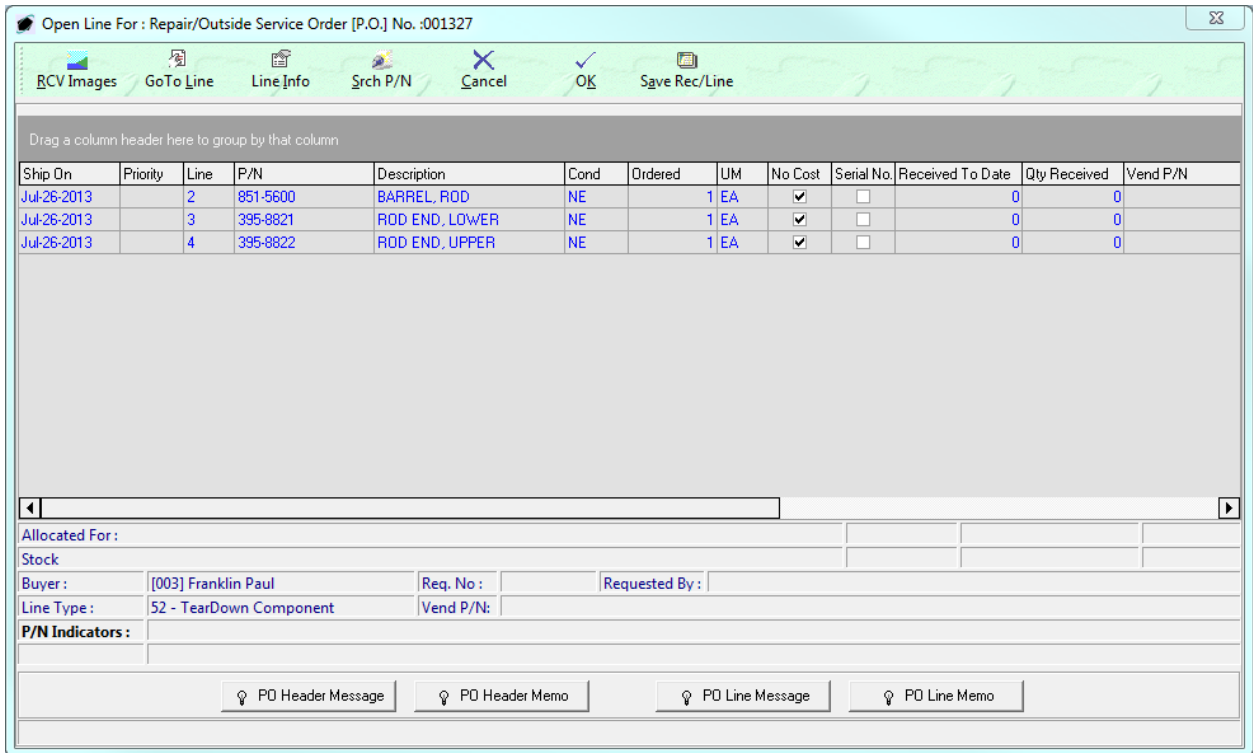
f.   For each component received from the vendor:

i.   Double-click the line that corresponds to the component received.

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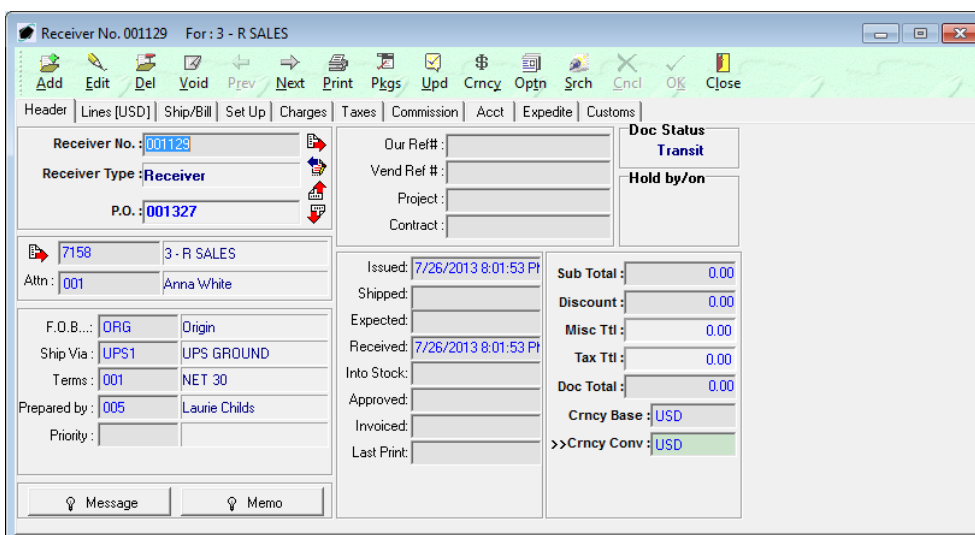
iii. Left-click the **OK** button.

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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.
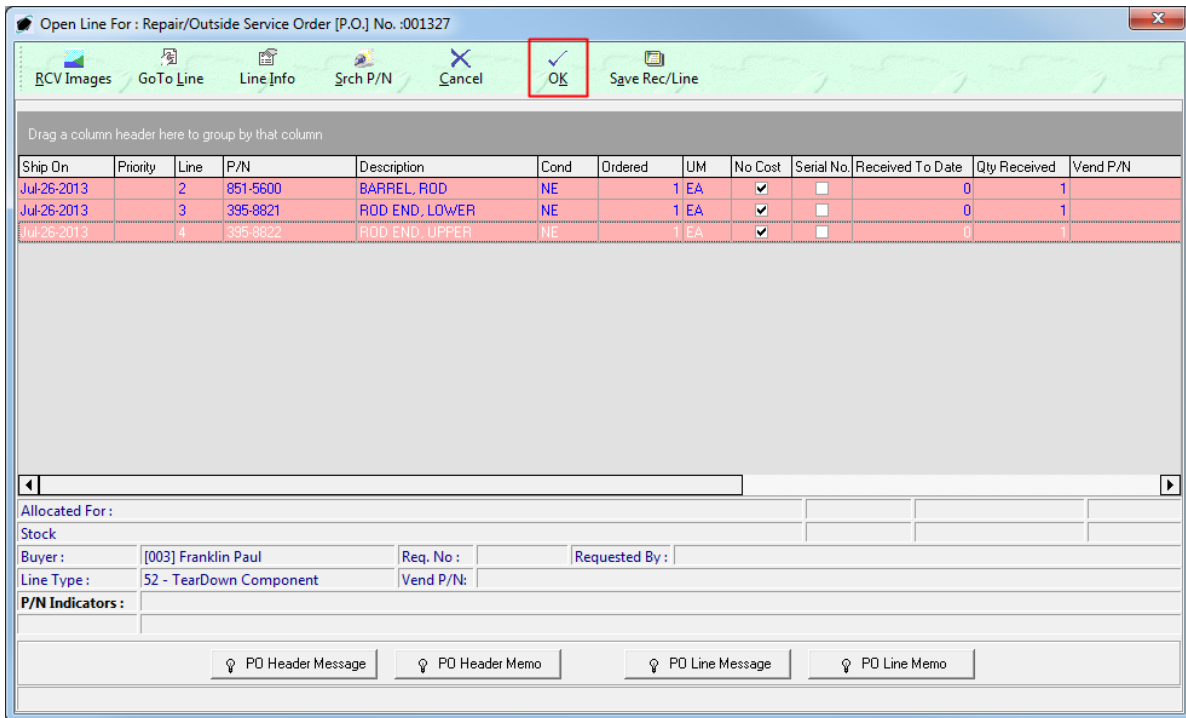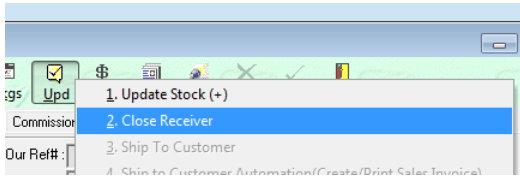

NOTE: *All components do not have to be received on the same purchase receiver. The purchase order will remain open until all lines have been received.*
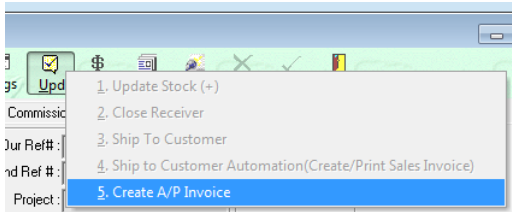
h. The **Receiver** window will appear.

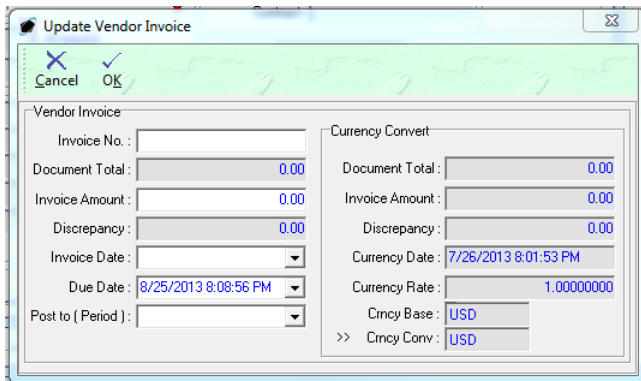i.   Left-click the **Upd** button on the **Receiver** window toolbar, then left-click **2. Close Receiver**.

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**.
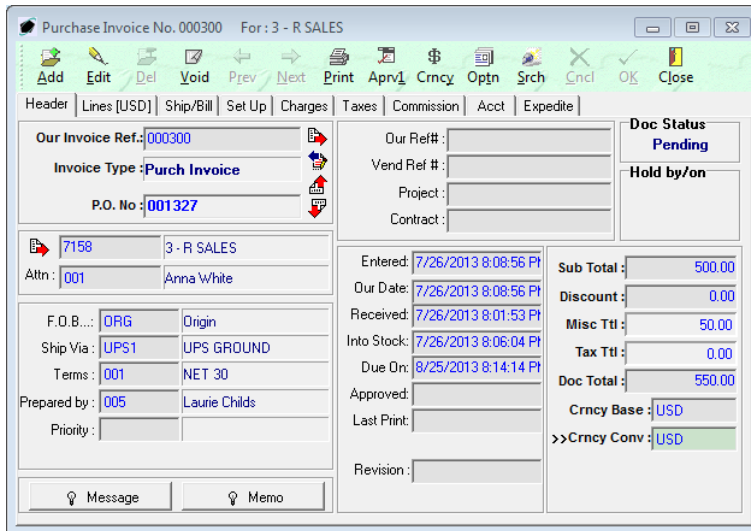

b. The **Update Vendor Invoice** window will appear.

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.

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d. The **Purchase Invoice** window will appear.
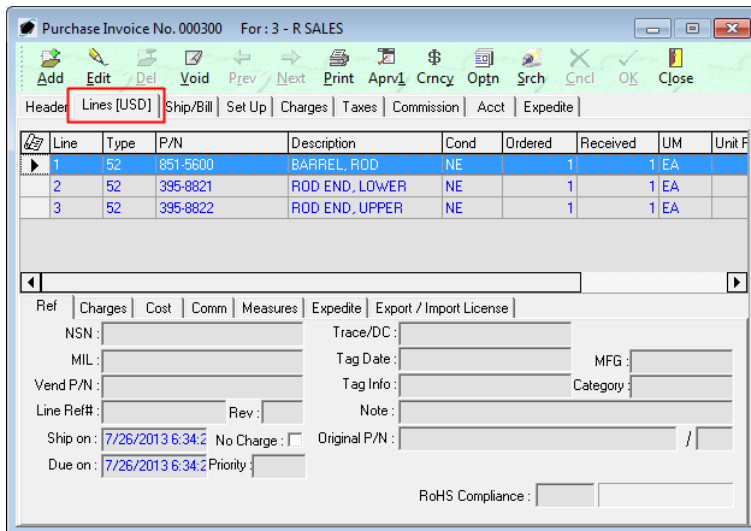
e. Left-click the **Edit** button on the **Purchase Invoice** window toolbar.

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

i. To change the price of each line:

1. Double click the line.

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2. The Update Unit Price window will appear.
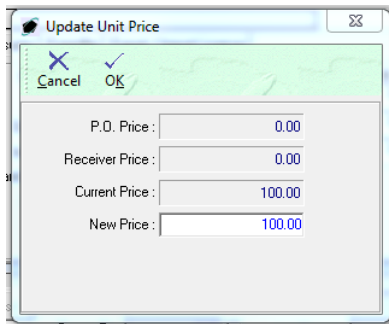
3. Enter the correct unit price of the line.

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:
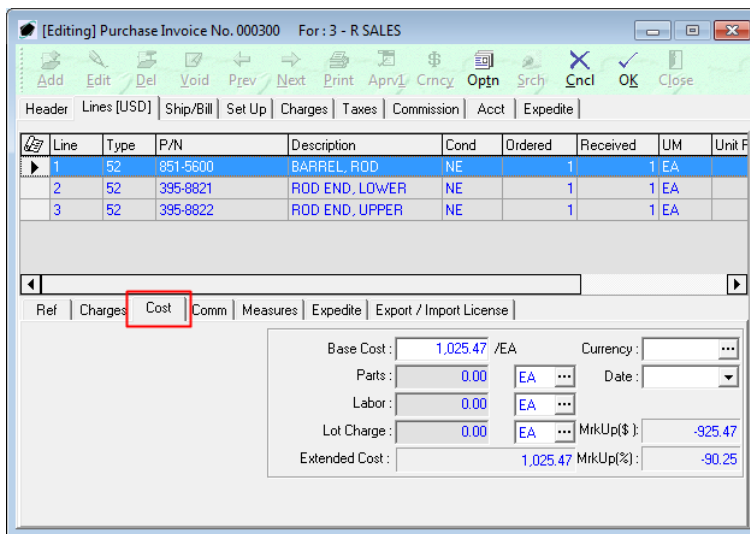
1. Left-click the **Cost** tab.

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.*
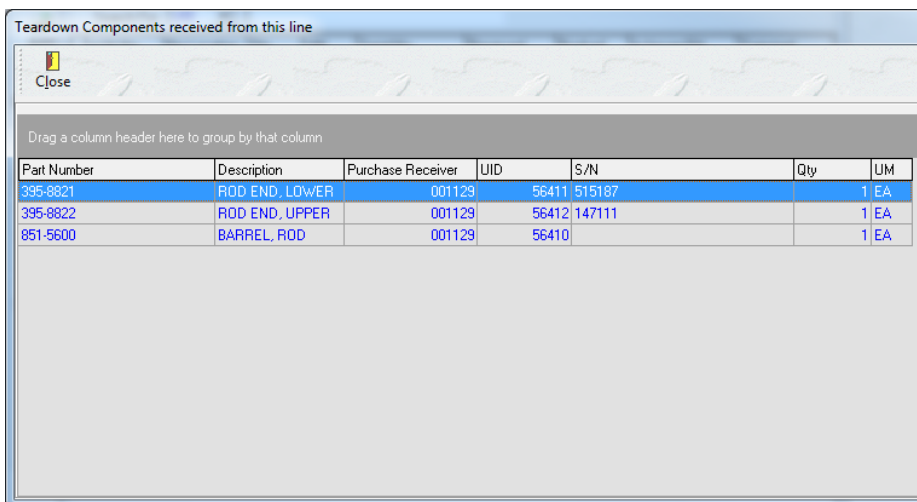
g. Left-click the **OK** button on the **Purchase Invoice** window toolbar.

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**.
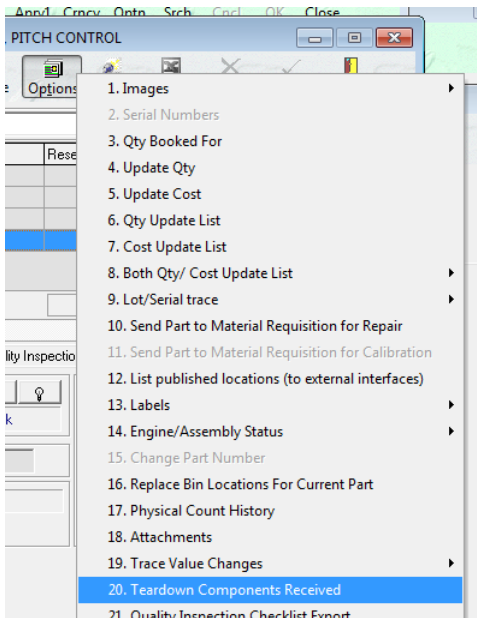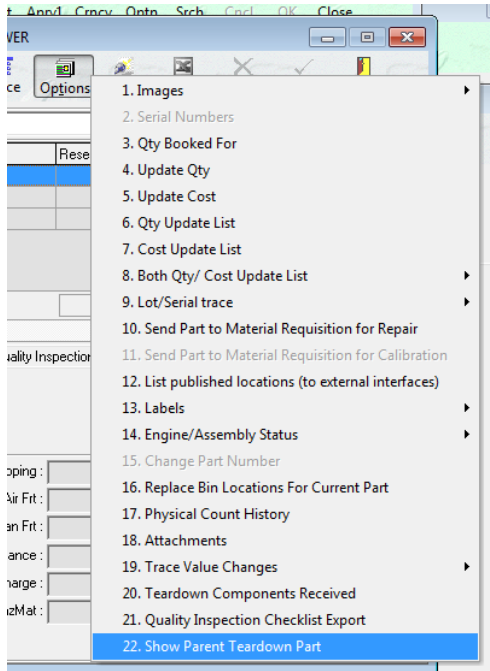

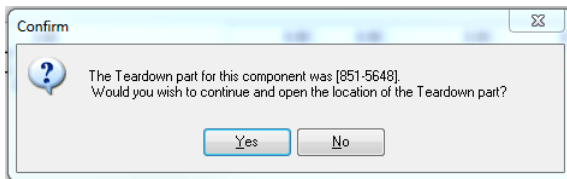   ii. The **Teardown Components Received from this Line** window will appear.

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.