

CUSTOM MANUFACTURING WORKFLOW



A streamlined quote-to-job workflow for one-off custom manufacturing.

1



Generate a one-off BOM within a quote

Create the one-off item in a quote using the One-Off Item Generator. Start from a model BOM or create the item from scratch.

5



Convert the quote to a sales order

After customer approval, convert the quote to a live sales order. The required date is forward scheduled using lead days and job days.

2



Customize the one-off BOM

Modify components and routing as needed for the customer order. For scratch-built items, use the routing generator, speed entry, or CAD import to build the BOM quickly.

6



Use MRP to generate a CTO Job

Run MRP to generate the custom-to-order job from the sales order line, along with any needed subassembly jobs and purchase orders.

3



Establish Job Days allocation

Run Job Days Inquiry after the BOM is finalized to estimate the shop days MRP should allocate for making the item.

7



Customize job details for special job types

For repair, disassembly, or remanufacturing jobs, add components and outputs during the job as actual requirements are discovered. New demand is picked up in the next MRP run.

4



Run a cost rollup and establish the price

Run a cost rollup to calculate estimated cost, apply a margin to set the selling price, and add the price to the quote for customer approval.

8



Use shop control to complete the job

Release the job when material is available, then use shop control and work center priorities to complete the custom job by its required date.



RESULT: One-off items let you quote, cost, schedule, and produce custom jobs with a controlled workflow from quote through shop completion.