Project /Point-Event: Machine Shop Material Sales Improvement

Date: April 26, 2012

Team Leader/Dept: BJ Schenck/Facilities Building Trades-Machine Shop

Process Owner/Dept: Facilities Fiscal Office/Shop Stores

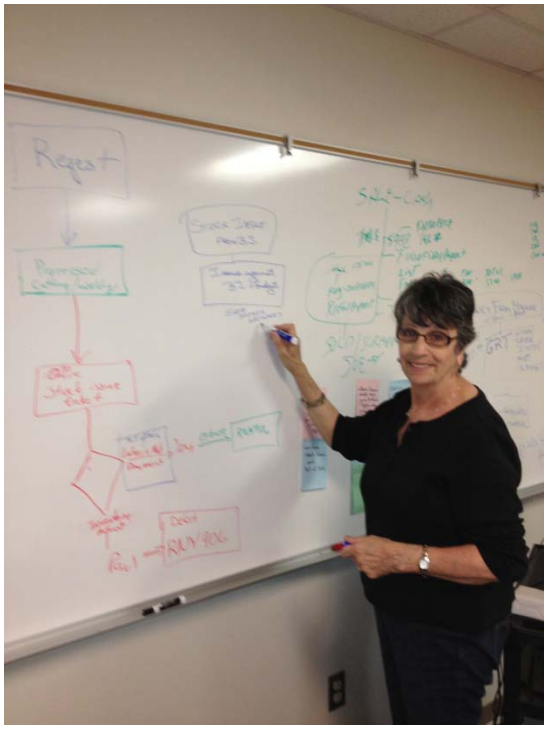
Business Need: Currently cannot process credit/debit cards for material purchases. Also need to improve invoice documents to allow better tracking between Facilities offices.

Pre work: Initiated paperwork to purchase point of sale device and establish merchant ID

Summary of Event: We mapped the existing method to process invoices from customer request to through inventory adjustments, payment processing, receipts, and issue of materials. The group submitted brainstorm ideas for areas that needed improvement. These ideas were sorted into similar groups and we discussed and mapped merits based on impact vs difficulty of implementation. From this discussion we removed unnecessary steps from the existing process and developed a more user friendly sales receipt form with inventory numbers and pricing built into the form. We ran trials with Stores staff that would use them. Finally we adjusted forms based on input from test trails, and established a procedure for use of the new forms. Issue numbers generated from shop stores would then be tied to the sales receipt and GRT processed in the fiscal office.

Results: We developed a better standardized procedure for material sales that creates tracking numbers that can be tied to payment processes of all types, cash, check, and credit/debit. This new process reduces paper forms to a single stock issue ticket that is converted into a more easily tracked electronic document. The new procedure also eliminates handling payment transactions in the trade shop and centralizes them in the Fiscal Office.

Team Members: Jerry Martin, BJ Schenck, Joy Stotz, Paul Turner



University of Idaho

Sales Receipt

Facilities Services

Date: April 26, 2012
Issue #: 123456TEST

Sold to: Joe Vandal
V000998878

Issued by: Shop Employee

Payment Method	Check	Job

Stock #	Description	Quantity	Unit/Measure	Rate	Total
	Labor	3.5	Hours	$ 38.00	$ 133.00
3010	Aluminum, all		lb.	$ 2.96	$ -
3110	Brass all		lb.	$ 3.55	$ -
3310	Expanded Metal, all		lb	$ 1.41	$ -
3410	Iron, flats, angles, channels	34	lb.	$ 0.75	$ 25.50
3420	Stainless steel		lb.	$ 2.80	$ -
3421	Stainless steel, Type 304 brushed finish		lb.	$ 7.07	$ -
3430	Steel, 4140		lb.	$ 1.66	$ -
3450	Seamless Mechanical Tubing		lb.	$ 0.90	$ -
3460	Cold Rolled, rounds & bars		lb.	$ 1.01	$ -
3470	Tubing, square & retangle		lb.	$ 0.93	$ -
34111	11 ga. Hot rolled sheet		ft.	$ 16.78	$ -
34114	14 ga. Hot rolled sheet		ft.	$ 13.72	$ -
34116	16 ga. Hot rolled sheet		ft.	$ 10.23	$ -
34118	18 ga. Cold rolled sheet		ft.	$ 8.73	$ -
34120	20 ga. Cold rolled sheet		ft.	$ 4.01	$ -
34124	24 ga. Cold rolled sheet		ft.	$ 7.29	$ -
34140	Pipe & ERW round tubing		lb.	$ 1.46	$ -
3614	14 ga. Galv. Sheet	2	ft.	$ 10.98	$ 21.96
3616	16. ga. Galv. Sheet		ft.	$ 8.79	$ -
3618	18 ga. Galv. Sheet		ft.	$ 6.69	$ -
3620	20. ga. Galv. Sheet		ft.	$ 5.16	$ -
3622	22 ga. Galv. Sheet		ft.	$ 4.59	$ -
3624	24. ga. Galv. Sheet		ft.	$ 3.74	$ -
				Maaterial Subtotal	$ 47.46
				Sales Tax	$ 2.85
				Subtotal	$ 50.31
				Total	$ 183.31

Thank you for your business!