POST TRAINING AUDIT

1. Vendor File (Hot Keys V-F-1)
2. Add Truck, Freight Payment Terms and Overrun% and Underrun%
3. Add Vendor Types to Each Vendor (V-F-4 allows adding more for better reporting)
4. Customer File (Hot Keys A-F-1)
5. Remove Duplicate Customers and Add as SHIPTO IDs under the A-F-1 Ship To File.
6. A-F-8 Truck/Common Carrier File
7. Add new Carriers such as CC for Common Carrier, UPS, FedX, etc.
8. Add Delivery Zones and Freight Costs per Carrier.
9. A-F-1 Add the Truck/Carrier from A-F-8 and Zone to each Customer Ship To File.  
   This is critical to calculate freight cost on the estimate.  
   Please note, the Minimum charge is as Minimum for 1 Delivery and for deliveries 2-99
10. A-F-1 Update Warehouse Days
11. A-F-1 Update Credit Limits as Needed
12. A-F-1 Customer MARKUP for Cost Estimating to Markup Cost by %
13. A-F-1 Customer Ship To File - ADD NOTES at bottom which will print on every Bill Of Lading Form  
    For example, Dock Times, Dock Location, Pallet Height Limits, etc.
14. N-Q-2 Utility allows Changing Customer Codes and Updates all ASI Files.
15. Raw Material (Hot Keys M-F-1)
16. Standardized all Materials to be the Same Format.
17. Fix Board Item Code, Item Name and Flute and Test to be Same Format. 200 C and 51 ECT (Not ECT 51).

Start all with Number. And Correct the Bad TESTS and Update Weight/MSF.

1. N-Y-5 - After Adding and fix all BOARD Materials -   
   Run N-Y-5 (Click Delete Toggle Box) to Update Flute/Test Matrix.

This file is used when pressing F1 on Flute and Test fields.

1. N-Q-7 Utility allows Changing RM Items Codes and Updates all ASI Files.
2. M-U-1 Add Receipts for Board, Plates, Dies, Inks, Pallets and other Raw Materials.
3. M-U-6 Post Raw Materials to On Hand Inventory
4. Estimating Build Files
5. E-B-5 Add any new Stacking Patterns to be used when estimating. (See N:\PATTERNS)
6. E-B-1 Machine File - Update Crew Sizes and Machine Dollar Rates for Direct Labor, Fixed O/H and Variable O/H
7. E-B-1 Machine File - Update Min and Max Machine Size Parameters.
8. E-B-1 Machine File - Update Standards for Setup Times, Run Speeds and Waste%
9. E-B-3 Box Designs - Update existing .JPG images as needed with Images from your Disk Files.
10. E-B-3 Box Designs - ADD New Box Designs for Die Cuts as Needed for Repeat Items  
    Each Panel must have a number such as [01] [02] [03] etc
11. E-B-2 Style File - Delete all Styles that will not be used.
12. E-B-2 Style File - Add New Styles and Type Box Designs from E-B-3 Table.
13. E-B-2 Style File - Update Scoring Allowances for B, C and DW flutes.  
    Remember, each + Sign in Formula requires a Score Allowance.
14. E-B-2 Style File - Routing Tab - Find RSC and click COPY BUTTON to copy to Similar Styles.
15. E-B-2 Style File - Routing Tab – New Styles different from RSC Routing

Find RSC and click COPY BUTTON to Update Routing for D/C Styles, Partitions, etc.

1. E-B-8 Estimate Control File for DEFAULT cost Markups.
2. Estimating
3. + Sign Add Top of Screen to add new Estimates.  
   New Estimate, Set Estimate or Assembled Partition Buttons

For Existing and Repeat Items:   
TYPE FG ITEM CODE to BUILD THE FINISHED GOOD MASTER ITEM

1. Use ADD button on Bottom of Estimate Tab to add Components to a Kit / Set
2. Type Customer, Part#, Style, Flute, Test, L, W, D and Program calculates all Tab.

SPEC Tab – OVERRID Button to add Die, Plates and Cad Numbers and Images  
SPEC TAB - Click OVERRIDE Button to Check Score Allowances for Blank W and L

DESIGN Tab – Check Box Design and Score Allowances

LAYOUT TAB – Update Die# Up on Die and Number Out on Slitter or Saw

INKS/PACK – Override Buttons for Change Inks and Unitization

MISC TAB - Outside Labor or Materials Costs

PRINT TAB - Calculate Button to calculate the Cost Estimate

PRINT TAB - WHATIF Button to change the Sell Price

PRINT TAB - VIEW or HARDCOPY to see Cost Details for Management to Assign Sell Price.

PRINT TAB - QUOTE Button to Create Quote to Send to Customer.

N-K-1 QuoPrice for setting Price Defaults by EA or M by Customer

N-K-1 QuoPrint is Format for Quote Forms.

1. FINISHED GOODS
2. E-C Corrugated Estimating, Type FG Item code to Create Repeat Finished Goods Items
3. ADD button to add items for Poly Bags, Foam, etc.  
   Please note, Foam, Angle Board, etc can be added as estimates with P for Purchased field checked.
4. I-F-3 To Add more Product Categories
5. I-F-4 to Add more Finished Goods and Raw Materials Warehouse Bin Locations
6. Finished Goods Receipts
7. I-U-1 to ADD / CHANGE FG Receipts
8. LOADTAGS to Create Finished Goods Receipts via O-U-7, O-U-1 Item Tab Icon or Desktop Icon
9. I-U-5 POST Finished Goods Receipts to ON HAND Inventory
10. ORDER PROCESSING
11. O-U-1 Type Estimate Number for Customer Jobs and Farmouts via Estmating.
12. O-U-1 Leave Estimate Number Blank to Stock Boxes and Purchased Items
13. O-U-1 RELEASE Tab to Add, Change or Delete Release Qty and Ship To Location.
14. O-U-1 ITEMS TAB – Release Button to Transfer Release Qty for Shipping (O-T-1 table)
15. O-T-1 To Print Release Ticket
16. O-U-1 Release Tab Ticket ICON to Print Release Ticket
17. O-S-1 Bill of Lading Print and Changes
18. O-S-5 Post Bill of Lading / Create Invocie
19. O-B-1 Invoice Printing and Changes
20. O-B-3 Invoice Printing in Batch
21. O-B-4 Post Invoice to A/R and G/L

This Invoice would be then ReTyped into Accounting System Running in Parralel.

1. Purchasing
2. Add PO for Raw Materials directly from O-U-1 for Jobs with Estimates
3. P-U-1 Add POS for Purchased Finished Goods.
4. P-U-1 Print Icon to Print
5. P-U-3 Print in Batch