Manufacturing Training

Company:_____ **Signed**:_____

Name:_____ **Position**:_____ **Date:** _____

Trainee to complete: Please tick

1. [   ] **Preferences**
   Have you set the company preferences for Manufacturing?

2. [   ] **Weeks to Display**
   Have you defined how many weeks in advance that you wish to display the calender?

3. [   ] **Product Source**
   Do you understand how by default the sales order should always be set to "Take From Stock"?

4. [   ] **Process Steps**
   Do you know where to set these up?

5. [   ] **Resource**
   Have you added the process steps to a resource?

6. [   ] **Defining Capacity**
   Can you defined the capacity for a resource?

7. [   ] **Allocating Processes**
   Have you defined your process steps?

8. [   ] **Total Capacity**
   Where does your total capacity for the floor display?

9. [   ] **Manufactured Product**
   Where do you start the creation of a Bill Of Materials (BOM)?

10. [   ] **Creating A Wagon**
    Have you worked through the process of creating a wagon in your sample database?

11.[   ] **Fixed Sell**
    What effect is there by defining the sell price for the BOM?

12.[   ] **Floating Price**
    What effect is there by not defining the sell price for the BOM?

13.[   ] **Tree Strcuture**
    How do you view the tree structure for this Bill Of Materials?

14.[   ] **Must Have Process**
    Which line must always have a Process assigned to it?

15.[   ] **Duration**

Where do you define the time lines for each product for each process?

16.[   ] **Sequence**
What effect is there by defining sequences?

17.[   ] **Adding Branches**
How do you add a branch to the BOM?

18.[   ] **Assigning Steps**
How do you add a process step to the sub branches?

19.[   ] **Input Types**
What is the default setting for most input types?

20.[   ] **Creating Choices**
What input type allows the user to make choices when selling the BOM?

21.[   ] **Set The Default**
How do you set the default sales choice, if using an "Option" input type?

22.[   ] **Reduced Tree**
Why is the tree reduced when displayed on the Sales Order?

23.[   ] **Sales Options**
Why is this done, focusing on manufacturing needs and sales choices?

24.[   ] **Loading Costs**
Where do the cost values load from in the BOM?

25.[   ] **Building For Stock**
Which option on the sales order creates an internal order for stock only?

26.[   ] **Customer Build**
How do you build a product to order?

27.[   ] **Stock or Manufacture**
How do you create a pop-up to allow a choice of Manufacture or take from stock?

28.[   ] **Pricing Based on Choice**
How do you have choices within the BOM, from a Sales Order determine the price on the Sales Order?

29.[   ] **Hide Pop-up**
Why do we stronely recommend to hide the manufacture Pop-up screen?

30.[   ] **Orders From Stock**
Why do we stronely recommend to use the Orders From Stock screen?

31[   ] **Choose to Build or Not**
Which screen would the factory manager generally work from for managing the stock floor?

32.[   ] **Change SO Status**
How do you make this choice from a Sales Order?

33.[   ] **Simple Completion**
How do you do this from the Orders From Stock Screen?

34.[   ] **Finalise From Production**
How do you do this from the Production Job Status Screen?

35.[   ] **Displaying Capacity**
Where do I display my shop floor capacity?

36.[ ] **Drag and Drop**
Can you move process times for jobs using just the mouse?

37.[ ] **Auto Schedule**
Where can you auto load all the jobs waiting to be scheduled?

38.[ ] **Filtering Capacity**
Can you reduce the capacity planner to display just a single customer or a single resource?

39.[ ] **Stages**
Can you flag as started the schedule, for just one job or resource?

40.[ ] **Production Worksheet**
Can you produce a production worksheet for just one job or resource?

41.[ ] **Production Job Status**
Can you see the same, but in a easy to view version, in the production Job Status screen?

42.[ ] **Ordering Products**
Where do you go to see what products you need to keep production on schedule?

43.[ ] **Producing Purchase Orders**
How do you create purchase orders from the Production Parts Status list?

44.[ ] **Finalising an Order**
How do you complete a job and convert it to an Invoice or complete an internal order for stock?

Notes:
Are there any aspects in this area that more training would be useful?

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