

Course Catalog Schedule

Instructions: Click on Course Title to Register for Classes January - February 2016

Each session is approximately 2 hours in length.

Thursday, January 7— 9:00AM

VF:003 Shipping Basics Learn how to create pro-forma/commercial invoice forms, setup automatic numbering and apply actual freight; View information about customers and orders. Review Pick/Pack reports available in Visual.

Thursday, January 7—2:00PM

VF:008 Document Management Basics Learn how to attach documents using the Document Reference feature, create specifications and notation fields throughout Visual, and how to attach a file to a part or Engineering Masters. Did you know you can drag & drop a file from your Windows folders to attach to just about any Visual transaction? Learn how!

Friday, January 8— 9:00AM

VF:011 Part Information Management Think Part Maintenance is just for creating your parts? Attendees to this class will learn all about the many powerful functions and settings found in Part Maintenance, such as the Order Policies, Product Codes, and how to setup VISUAL to auto-populate your Purchase Orders with vendor pricing.

Friday, January 8— 2:00PM

VF:004 Purchasing Fundamentals How to access and navigate through windows associated with Vendors, Outside Services, Purchasing, Receipts, Inspections, Dispatch and Reports. *Prerequisites for this course include Visual Fundamentals, VF: 011.*

Thursday, January 14—9:00AM

VF:005 Navigation Basics Did you know you can use the VISUAL browse windows for more than just selecting a record? Why not use them to sort and update data? It's all here in this class where we uncover efficiency tips and tricks. This class is for new users and experienced users who want to improve their efficiency with using Visual and finding their data.

Thursday, January 14—2:00PM

VF:006 VISUAL System Administration Basics Learn the basics of your Visual system administration: how to set up security settings, application preferences, set up roles & users inside of Visual, manage passwords and logins in Visual windows, approval groups, Application Permissions, standard and Customizable User defined fields, and customizing Visual Windows. Recommend continue with VF:007.

Friday, January 15—9:00AM

VF:002 Estimating Fundamentals Using the Estimating Window, learn to create and maintain quotes to present and prospective customers. Estimate costs, define basic engineering masters, using Quick quote, develop basic custom jobs. Price quotes, determine best quantities, unit price break up, print quotations, define transmittal formats, print proforma, convert quotes.

Friday, January 15—2:00PM

VF:001 Sales Order Fundamentals Learn how to get from the process of quotes to Sales Orders, specify the product ordered, create and link work orders, link existing orders, and allocate quantities.

Friday, January 22—9:00AM

VF:009 Labor Collection Basics Explore how to use, monitor, control, and adjust the data being supplied by your Labor Barcode Entry. Learn to react to incorrect transactions soon after they occur to help keep accurate costs and schedules.

Friday, January 22—2:00PM

VF:010 Engineering-Manufacturing Basics The Manufacturing Window is one of the central tenets of the VISUAL ERP system. Learn about all the powerful tools at your fingertips, for creating Quote Masters, Engineering Masters, and Work Orders. You'll learn the basics plus a few new tricks, like getting immediate feedback on when your product would be scheduled in your production cycle, all from the Manufacturing Window.

Monday, January 25—9:00AM

VF:013 Material Planning Basics Understand how VISUAL's Infinite Scheduler integrates with Material Planning. Understand the basic concepts on how the tool set operates.

Monday, January 25—2:00PM

VF:012 Inventory Management Basics Demand and Supply: A simple concept, but with far reaching implications for your inventory and your business. Come learn how to get a handle on your ins and outs by employing workflow, macros, tools/extensions, and other tips and tricks.

Tuesday, January 26—9:00AM

VF:015 A/R Cash Application Process & Collections Window Use the Cash Application window to record customer payments, print deposit batch reports, and apply credit memos and payment discounts. Learn how to use the Collections Window to establish and track installment payment plans. *Recommendation: Continue with VF:016.*

Tuesday, January 26—2:00PM

VF:017 A/P Payment Process Use the Payment Entry and Payment Scheduling windows to efficiently select vendors and invoices to be paid, and to process your vendor payment batches. Also see how to pay one-time vendors.

Thursday, January 28—9:00AM

VA:008 Workflow (Advanced) Understand the capabilities of Workflow in VISUAL to streamline processes and enforce controls.

Thursday, January 28—2:00PM

VA:009 SQL System Administration (Advanced) Learn what you need to know regarding your SQL database and Visual server: Setting up, Maintaining, and verifying SQL Maintenance Plans, VE Scripts, Application Preferences versus INI files, Setting up Roles & Users in SQL (restoring DBs to a new instance), managing passwords and logins, Visual Client Installations. What/Where/Why/How: Network Shares, AutoClones, Database Transaction Logs, VISUAL executable patches and EXE updates.

Tuesday, February 2—9:00AM

VF:018 Shop Floor Control Basics Knowing what is going on (and what's not) on the shop floor is vital to your business! Know what you don't know. Learn various strategies and specific techniques for maintaining the accuracy of your work orders and keeping a pulse on your operations.

Tuesday, February 2—2:00PM

VA:003 Part Traceability (Advanced) Improving the accuracy, reliability, and quality of your lot and serial number tracking processes can help you improve customer service and reduce costs throughout your company. This session will explore the features of the Lot & Serial Trace module. C

Thursday, February 4—9:00AM

VA:014 Financial Report Writer Use the Financial Report Writer wizard in VISUAL Standard Financials to create Balance Sheets, Income Statements, and worksheets; including 13-column P&Ls with percentages.

Thursday, February 4—2:00PM

VA:010 A/R Progress Billing Progress billing, customer and vendor prepayments.

Tuesday, February 9—9:00AM

VA:015 Accounting Month-End Processing Are you maintaining GL to Sub-Ledger reconciliations through Journal Entries? Performing month end closing can pose challenges for even the most experienced users. Learn the proper procedures, steps, and transactions that make a successful month end closing a fast and easy process.

Tuesday, February 9—2:00PM

VA:012 Cash Book Processing Use the Cash Book in Standard Financials to maintain up to date cash positions for your Company. Get rid of your Excel spreadsheet for cash account reconciliations.

Thursday, February 11—9:00AM

VA:004 Manufacturing Window (Advanced) The Manufacturing Window is the heart of the VISUAL system. Explore the basic, and more advanced functionality to ensure you are using it to its greatest potential.

Thursday, February 11—2:00PM

VA:001 Return Material Authorization (Advanced) Walk through the different types of Return Material Authorizations, and work through each different scenario.

Thursday, February 18—9:00AM

VA:013 Accounting Window & General Journal Entry Learn how to drill down from the GL Account to the posted transaction detail, print your ledger reports, check posted batches, and create journal entries.

Thursday, February 18—2:00 PM

VA:016 Inventory Cost-Flow Overview Techniques for using the information and functionality from your VISUAL system to better manage inventory costs without compromising customer service levels will be discussed. This session will focus on the tools available within the software to address possible issues that arise with costing. Learn the standard auditing tools and techniques to find and correct issues, including the underlying theory.

Tuesday, February 23—9:00AM

VA:005 Scheduling Learn how to use Scheduler and the Scheduling Window. Scheduling is planning within the manufacturing process. Creating a schedule is primarily to understand capacity, identify possible threats to on-time delivery, to assist production, procurement and sales to work together.

Tuesday, February 23—9:00AM

VA:007 Throughput (Advanced) Know in advance what promises you can keep. Find out the real power of the Visual Concurrent Scheduler by using the Visual Throughput Window to help you make the right production, expediting, and scheduling decisions.