

# SYNERGY VISUAL WORKSHOP

## **PART TRACE**

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### **WORKSHOP TOPIC:**

You can create and record part trace requirements for tracking serial numbers, lot numbers, and even expiration dates within the VISUAL ERP system. Users can define trace requirements for different types of parts, from raw material to finished goods, as well as later find these records through Visual trace search functionality.

### **WHY USE:**

For those companies where tracing lot and/or serial numbers throughout the production process is required, having this information linked to your parts and inventory transactions brings efficiency to record creation and searching. VISUAL's part trace allows you to define auto-numbering, apply trace to receipt, issue, dispatch, and even labor ticket transactions. Eliminate offline spreadsheets or databases where this information may be tracked manually outside of the ERP system today

### **WORKSHOP DESCRIPTION:**

The session will cover how to create a part trace profile, auto-numbering profile, and understanding the impact of the various profile settings. Participants will walk through the creation of part trace records, and review the part trace searching options within Visual. There will also be a discussion on how to deploy part trace profiles within Visual when they are not in use today.

### **WHO SHOULD ATTEND:**

Managers, Supervisors and Group Leaders of Supply Chain, Inventory, Manufacturing, Shipping, and Quality Departments.

### **LEARNING OBJECTIVES:**

Upon completion of this workshop attendees will understand how to create basic part trace profiles and process trace transactions in their VISUAL ERP system.

### **WORKSHOP PREREQUISITE:**

This is a hands-on workshop. Attendees should have working knowledge of the VISUAL ERP system. Attendees must also have security rights and access to a recent copy of a restored test database.

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