



# Onboarding Process

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**VELOCITY**



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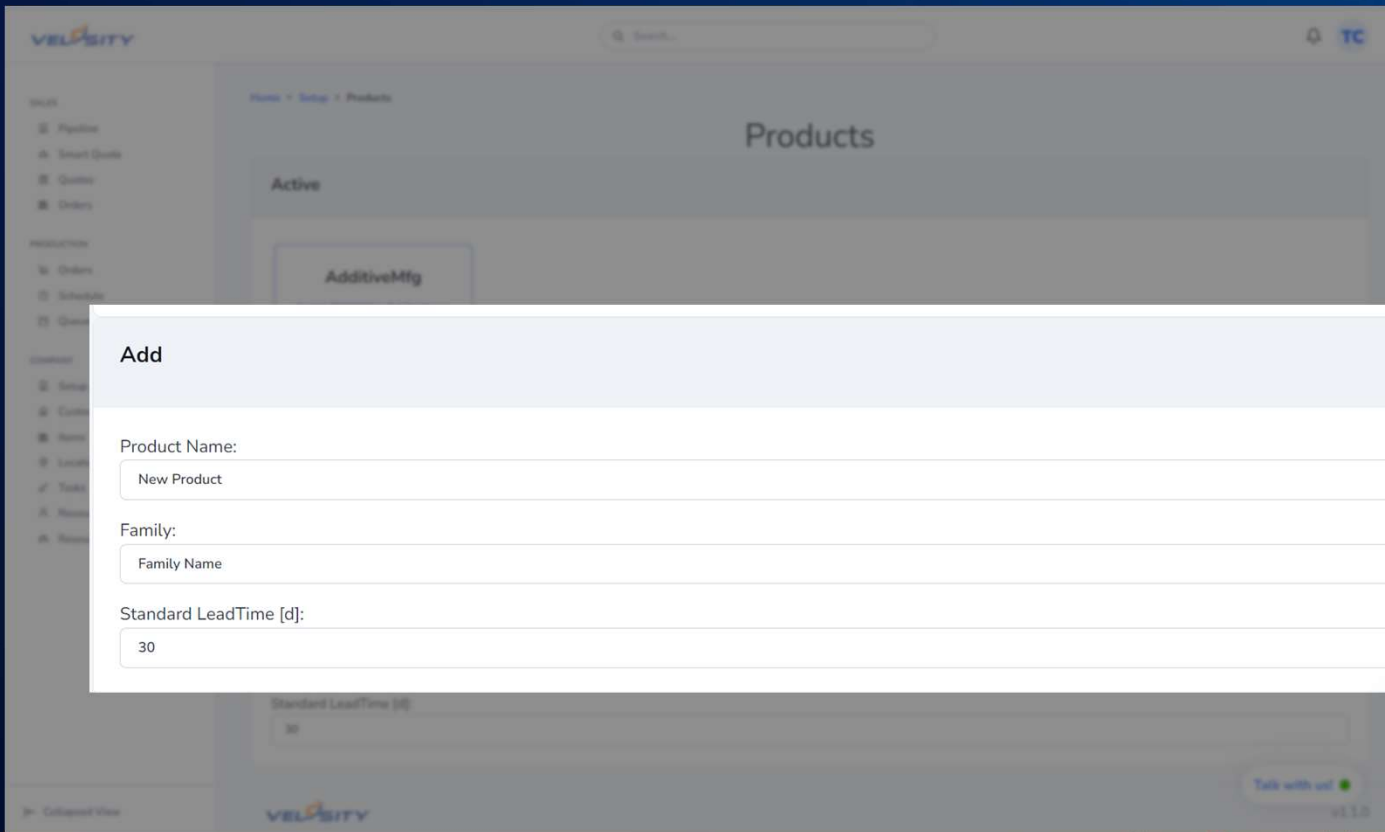
## Overview: *An Iterative Process*





## Step 1: Product Creation

Begin by selecting the first product you wish to setup



The screenshot shows the VELVITY 'Products' page. A modal titled 'Add' is open, allowing for the creation of a new product. The modal contains three input fields: 'Product Name' (with the placeholder 'New Product'), 'Family' (with the placeholder 'Family Name'), and 'Standard LeadTime [d]' (with the value '30'). A red 'Add' button is located in the top right corner of the modal. The background shows the 'Products' page with a search bar, a 'TC' icon, and a list of products including 'AdditiveMfg'.

VELVITY

Search...

TC

Home > Setup > Products

Products

Active

AdditiveMfg

Add

Product Name:

New Product

Family:

Family Name

Standard LeadTime [d]:

30

Standard LeadTime [d]

30

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VELVITY

Collapsed View

## Step 2: Task Creation

Create a task for each discrete process used to transform raw materials into a finished product

VELOCITY

Q Search...

TC

SALES

- Pipeline
- Smart Quote
- Quotes
- Orders

PRODUCTION

- Orders
- Schedule
- Queues

COMPANY

- Setup
- Customers
- Items
- Locations
- Tasks
- Resources
- Resource Groups

Home > Setup > Tasks > Add

Add Task

Add

Location	Task #	Name	Work Center	Description
LOC1 (Main Office)	250	MACHINING	MACHINING	Machining

Pricing Component	Markup	Hourly Rate	Capacity Type
Base	1.5	\$ 50	Finite

Resource Groups	Setup Time	Teardown Time	Transfer Time
	30	30	10

\*\* CTRL+Click to select multiple

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v1.1.0

## Step 3: Attribute Creation

Create attributes  
(features) that drive  
changes in time or cost

VELOCITY

Search...

TC

SALES

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PRODUCTION

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COMPANY

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Home > Setup > Test Product > Attributes > Detail > Edit

Attribute Edit

Basics

Update

Name	Description	Show On Quote	Active
FIN_X	Finished Part X [IN]	Y	Y

Short abbreviated names recommended  
Auto capitalized on save

Data Type

Method

DIM (dimension)

SELECTED

Units (Dimension)

Update

IN

Page & Style

Update

Page	Entry Type	Hint
Basics	ENTRY	Optional

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← Collapsed View

## Step 4: Page Grouping

Group similar attributes (variables) into organized “Pages” for easy navigation and understanding.

Home > Setup > Products > Test Product > Pages

Pages

[Add](#) [Attributes](#) [Rules](#) [Item Mapping](#)

Name	Sort Order	Show When	Hide When	IsActive	Last Update
Basics	10			<span style="color: green;">●</span>	08/20/2023

Velocity v1.1.0

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## Step 5: Items (Materials)

Import or create Raw Materials and other Bill of Materials (BOM) elements used in creation of the product

**VELVITY**

Search...

TC

SALES

Pipeline

Smart Quote

Quotes

Orders

PRODUCTION

Orders

Schedule

Queues

COMPANY

Setup

Customers

Items

Locations

Tasks

Resources

Resource Groups

Home > Items > Detail > Edit

Item Edit

Update Markup (Price)

Router

Item Number

Description

MaterialOne

Material One

Category

UOM

Unit Cost (\$)

Unit Price (\$)

Raw Materials

KG

40.00

60.00

\*\* Note: Item cost and price are readonly if a router is defined

Leadtime [Days]

IsInventory

Serialization Required

Traceability Required

Pricing Component c3

0

Y

N

N

Base

Update

References (Rules)

AdditiveMfg: Build\_MaterialOne

References (Dynamic BOM)

Collapsed View

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## Step 5: Customers

Import or create  
Customers

VELOCITY

Q Search...

TC

SALES

- Pipeline
- Smart Quote
- Quotes
- Orders

PRODUCTION

- Orders
- Schedule
- Queues

COMPANY

- Setup
- Customers
- Items
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- Resource Groups

Home > Customers > Detail

Customer Detail

New Quote

Edit

Duplicate

Delete

Sales Quotes >

Sales Orders >

Contract Pricing

Analysis

Number	Name	Gross Margin Target	Payment Terms
C1000	Customer One	20%	

Address	City	State	ZIP	Country
123 Any St	Houston	TX	77005	United States

Notes 

Add

Date	Note	By
------	------	----

Line Item Templates

Product	Description	Cost	Price	Gross Margin
---------	-------------	------	-------	--------------

People 

Add

First	Last	Email	Mobile
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Collapsed View

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Overview

Onboarding Process

Case Study

Conclusion

## The Cycle Continues

Repeat this process for each product to replicate your entire manufacturing process in Velocity.



- Onboarding becomes more streamlined with each product addition.
- Leverage overlapping manufacturing processes to save time.
- Aim to mirror your entire manufacturing portfolio within Velocity for optimal benefits.

# Tips For a Smooth Onboarding



Ensure all relevant team members are involved



Gather all necessary product, task, and attribute information before hand



Utilize Velocity support resources for any uncertainties



Regularly review and update the details as products and processes evolve.

## Case Study: *Acme Sign Company*

**Product:** Stop Sign

**Tasks:** Punch Press Machine, Laminating, Cutting, Oven, etc.

**Attributes:** Height, Width, Thickness, Material, Paint, Colors, etc.

**Pages:** Dimensions, Materials, Finish, etc.

**Items:** Raw Material Costs, Potential Expedite Fees, Other BOM Considerations.



***Attributes + Pages + Items are created for each Product***



## Contact

We are excited to be on this journey  
with you

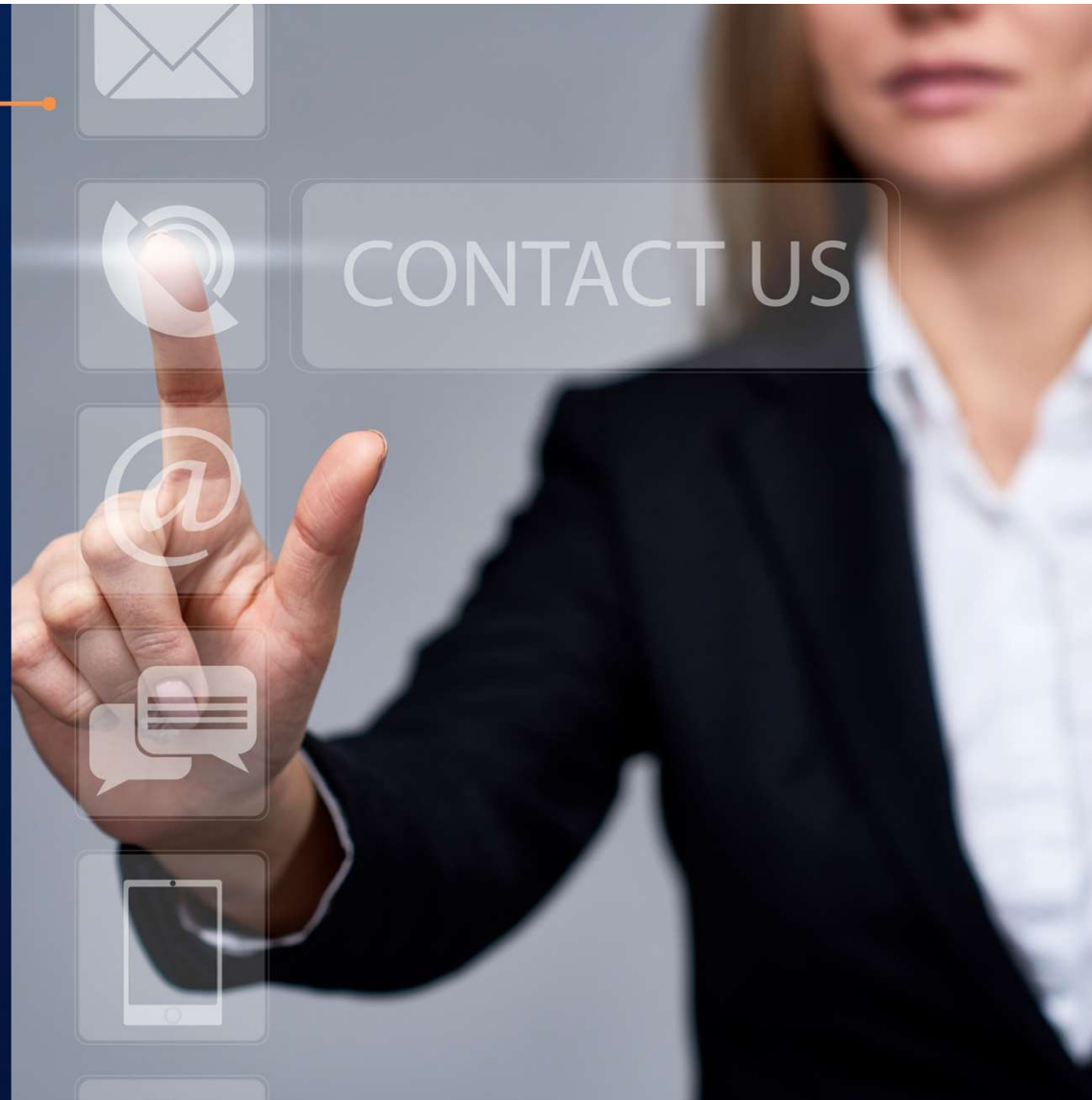
Our team is here to assist you every  
step of the way

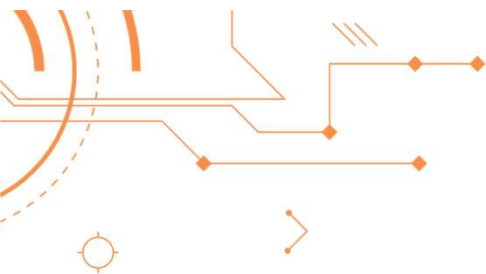
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# THANK YOU

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