Onboarding Process

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VP of Sales

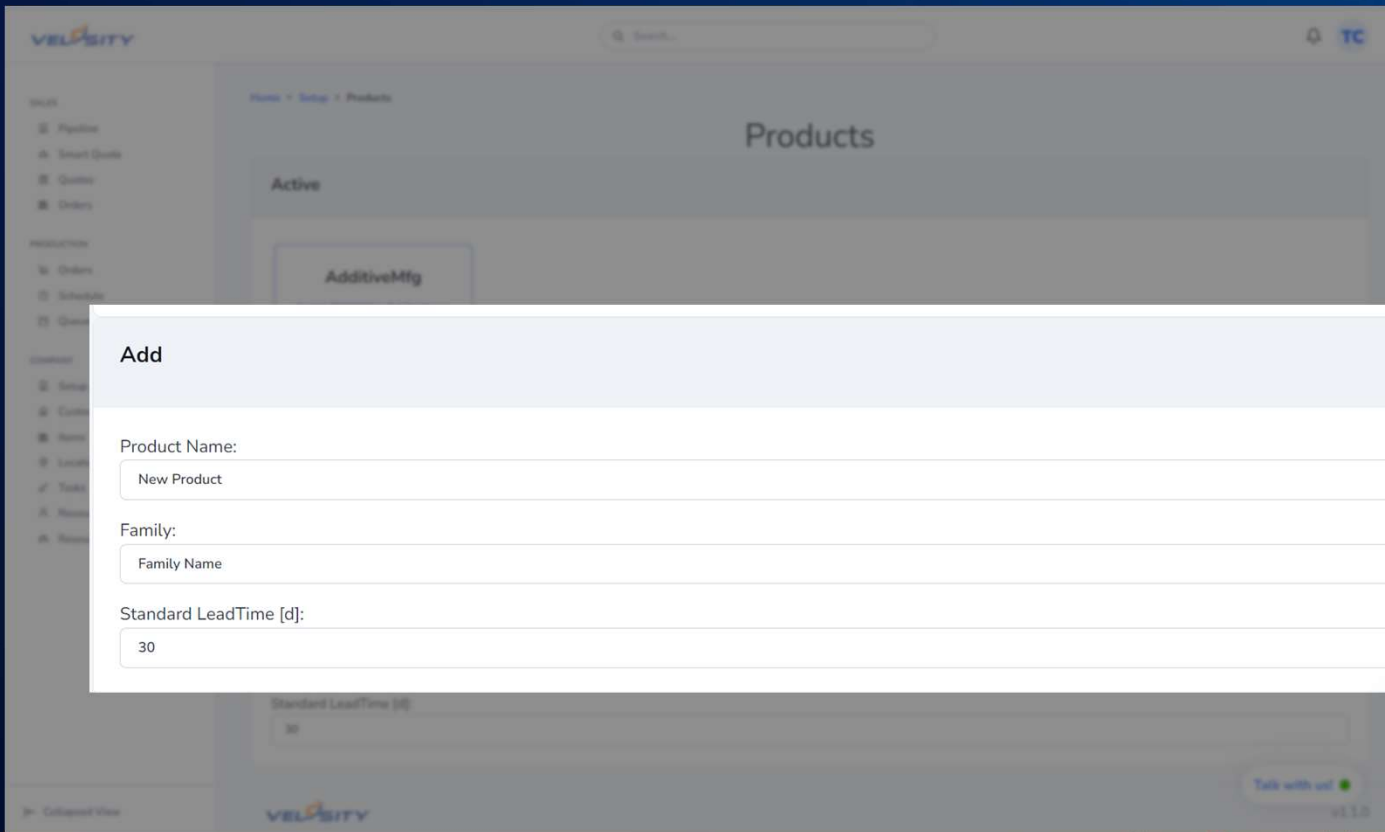# Overview: *An Iterative Process*

Product Selection

1

Item Consideration **5**

2 **Task Identification**

Page Grouping **4**

3 **Variable Attribution**

Step 1: Product Creation

Begin by selecting the first product you wish to setup

Step 2: Task Creation

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

Step 3: Attribute Creation

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

Step 4: Page Grouping

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

Step 5: Items (Materials)

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

Step 5: Customers

Import or create Customers

The Cycle Continues

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

• Onboarding becomes more streamlined with each product addition.

• Leverage overlapping manufacturing processes to save time.

• Aim to mirror your entire manufacturing portfolio within Velosity 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 **Velosity 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
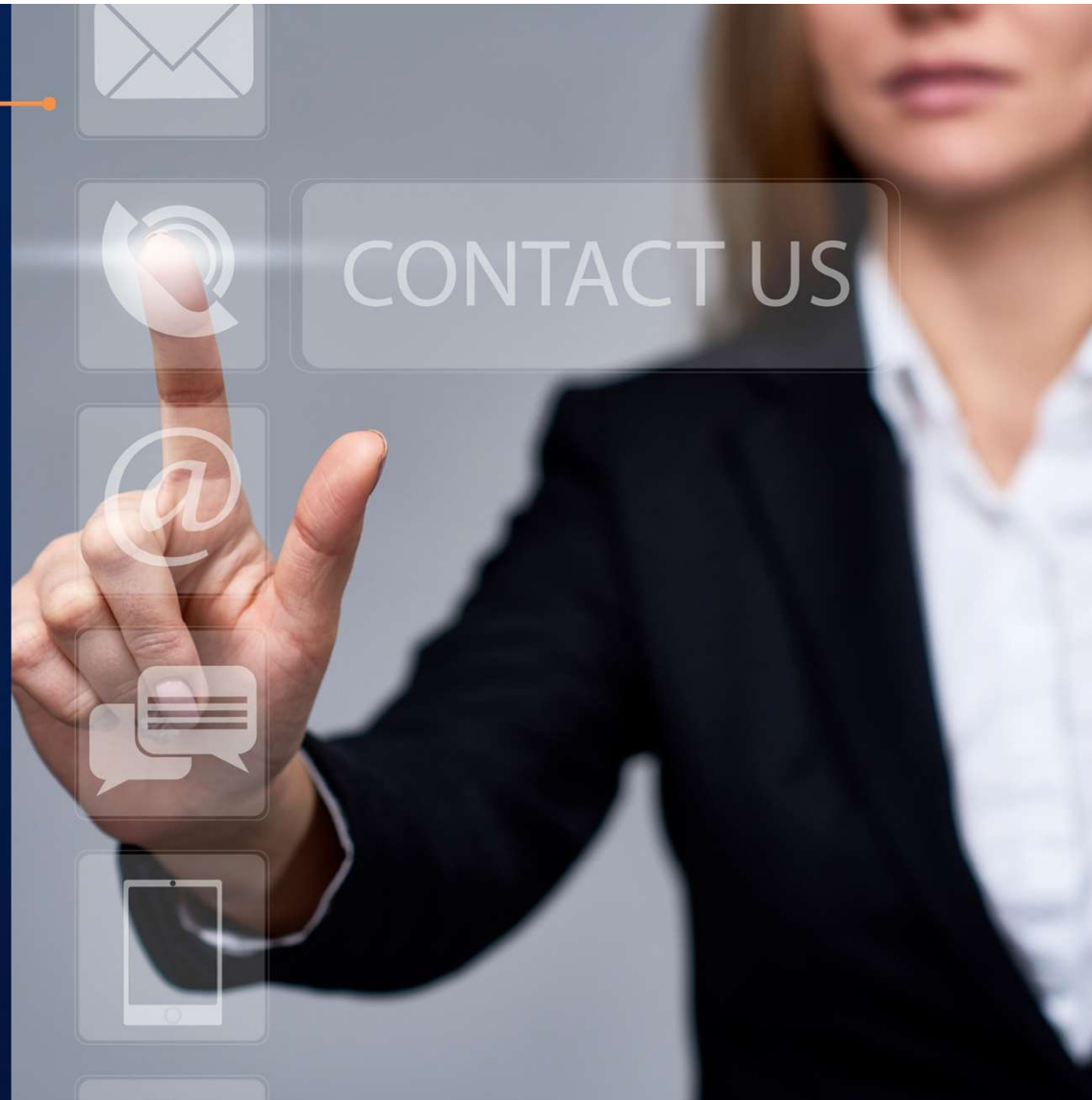
Contact

We are excited to be on this journey with you
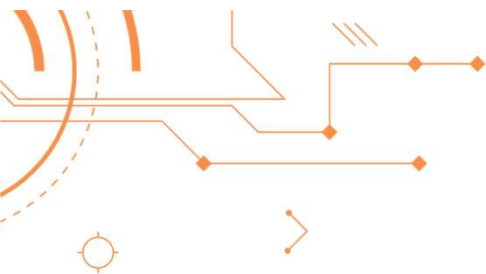
Our team is here to assist you every step of the way

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THANK YOU

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