

## Work Instruction: Creating a Letterhead Certification

### 1. Audience

Engineering scheduler, or qualified engineering personnel.

### 2. Objective:

The purpose of this work instruction is to create a letterhead certification for the requesting customer.

### 3. Revision and Approval

| Rev. | Date    | Nature of Changes | Approved By |
|------|---------|-------------------|-------------|
| N    | 6/15/18 | Original issue.   | Eicher      |
|      |         |                   |             |
|      |         |                   |             |

### 4. Scope

The scope of this work instruction is to create a letterhead certification for the requesting customer.

### 5. Prerequisites

M1 competence, Microsoft word, and Engineering database folder navigation and write access.

### 6. Records

Templates based on product line, private branding, and age (preBTH, or BTH compliant) are located:

N:\EngDocs\Letterhead Certs

New files created will get place in folder layout based on the brand, or standard designation.

N:\EngDocs\Letterhead Certs\CM Cady Standard Certifications

N:\EngDocs\Letterhead Certs\Hercules Certifications

N:\EngDocs\Letterhead Certs\Lift-All Certifications

Special or standard

N:\EngDocs\Letterhead Certs\Special Instructions

N:\EngDocs\Letterhead Certs\Standard Certifications

### 7. Associated Documents

- Describe the specific records to be maintained and where they will be maintained. If the records are electronic, note that here.
- List forms used to create the records, if any.

### 8. Evaluative Factors

- M1 > Sales Order Backlog (Manuals)

## 9. Responsibility

Engineering currently produces all Letter Head Certs.

## 10. Instructions

**Step 1:** Using M1 find the Job number needing a LHC (Letter Head Cert). One way to identify jobs needing LHC's is accessing the Sales Order Backlog(letterhead certs) KPI. In the sales order details Identify if it is private branded(CM Cady, Liftall, Hercules) or a Caldwell product and what model line and size it consists of.

M1 Explorer - The Caldwell Group- \*\*\*Live\*\*\* Database - bwagner

Thursday, June 14, 2018

**KPIs**

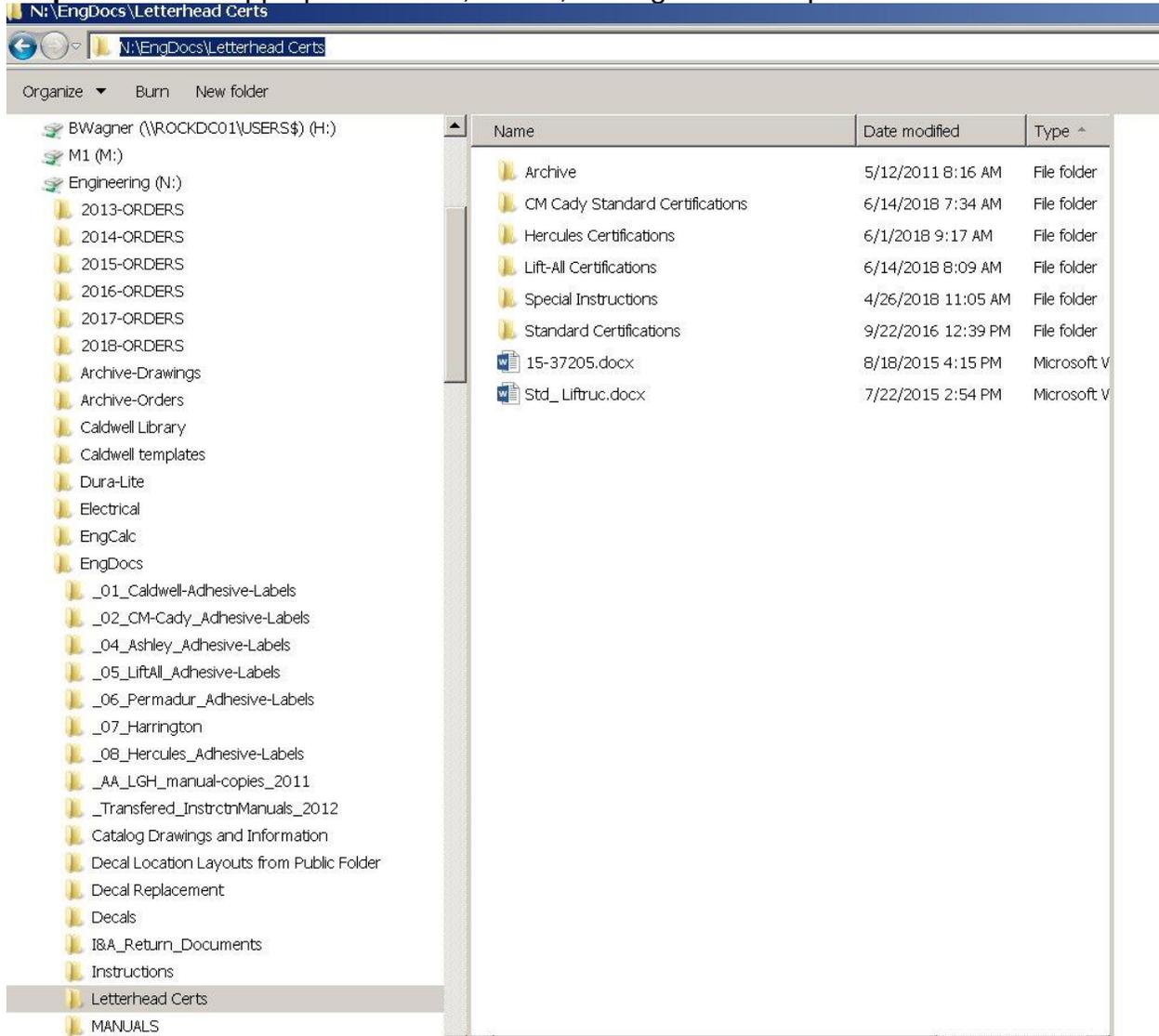
Action items

| Description                                       |       |               |  |
|---|-------|---------------|--|
| Unprocessed Sales Order Lines (Eng)               | 8     |               |  |
| Unprocessed Sales Orders                          | 29    |               |  |
| Engineering Operations Behind Schedule            | 51    |               |  |
| Jobs To Be Planned no Eng Req                     | 5     |               |  |
| Sales Order Backlog Caldwell Mfg                  | 672   | 2,563,787.216 |  |
| Sales Order Backlog Renfroe Mfg                   | 403   | 389,712.61    |  |
| Jobs To Be Planned Released Eng                   | 5     |               |  |
| <b>Sales Order Backlog (LetterheadCerts)</b>      |       | <b>0.00</b>   |  |
| Sales Order Backlog (Manuals)                     |       | 0.00          |  |
| Engineering Operations By Engineer (Brian Wagner) | 8     |               |  |
| Unprocessed Sales Orders (Dwgs and Ltrs)          | 1     |               |  |
| On Hold Jobs                                      | 22    |               |  |
| Sales Order Backlog                               | 1,219 | 4,170,161.686 |  |
| Sales Order Backlog (All Manufacturing)           | 1,075 | 2,953,499.826 |  |
| Sales Order Lines with Eng Req Problem            | 0     |               |  |
| Active Employees                                  | 145   |               |  |
| Engineering Operations                            | 163   |               |  |
| Electrical Backlog Approvals                      | 1     |               |  |
| Electrical Backlog Design                         | 6     |               |  |
| Electrical Backlog Assembly                       | 33    |               |  |
| Open Jobs Awaiting Engineering Final Review       | 1     |               |  |
| Open Jobs Waiting for Engineering Review          | 5,739 |               |  |
| Instruction Manuals                               | 0     |               |  |
| Waiting for Customer Approval                     | 5     |               |  |

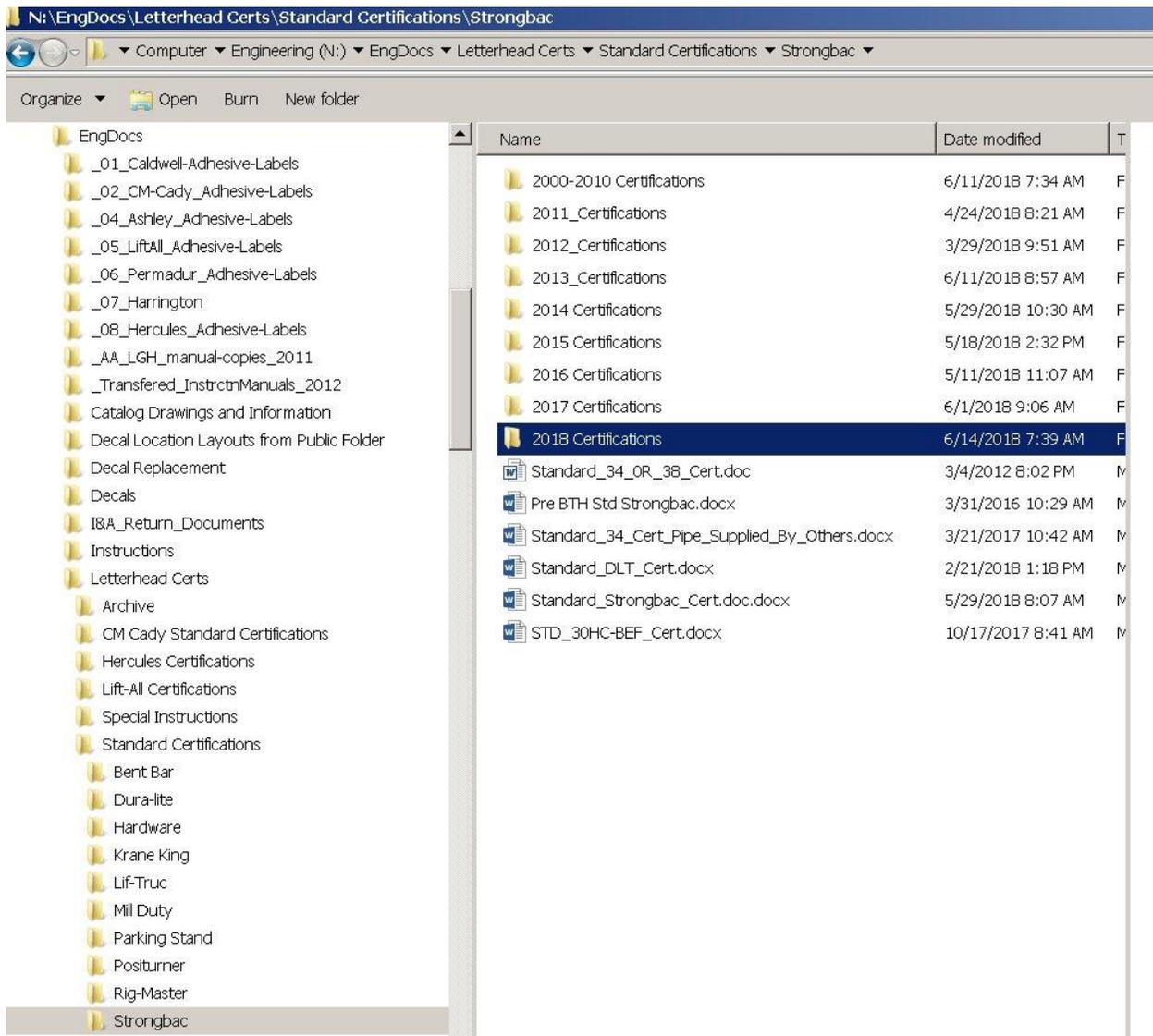
Review items

| Description                       |        |              |  |
|-----------------------------------|--------|--------------|--|
| Net Sales by Class                | 68,440 |              |  |
| Organizations                     | 4,764  |              |  |
| Sales Order Backlog (Engineering) | 144    | 1,216,661.86 |  |

**Step 2: Find the appropriate brand, model, and age for a template.**



Copy the proper template and paste into the appropriate year folder to which it applies. Rename it to match the two digit year-project number for further identification.



**Step 3:** Open the new copy and edit the Model number, Date created, and product title and description, add serial Number, and any other required information.



Headquarters, Customer Service & Manufacturing  
1909 McFarland Drive, 800-909-1964  
Landisville, PA 17538-1810 FAX: 717-898-1215  
E-Mail: [lift-all@lift-all.com](mailto:lift-all@lift-all.com) www.lift-all.com

|                |  |
|----------------|--|
| Date           | <b>6/12/18</b>                         |
| Model Number   | <b>17-4-8, Adjustable Lifting Beam</b> |
| Rated Capacity | <b>8,000 Pounds</b>                    |
| Serial Number  | <b>34763</b>                           |
| Order          | <b>18-91005</b>                        |

Lift-All Company certifies the equipment, referenced above, meets ASME B30.20 standards and structural design criteria per ASME BTH-1 design category B, service class 2 effective at the time of manufacture.

Refer to current ASME B30.20 standards for inspection, testing, and maintenance for all Lift-All Company equipment.

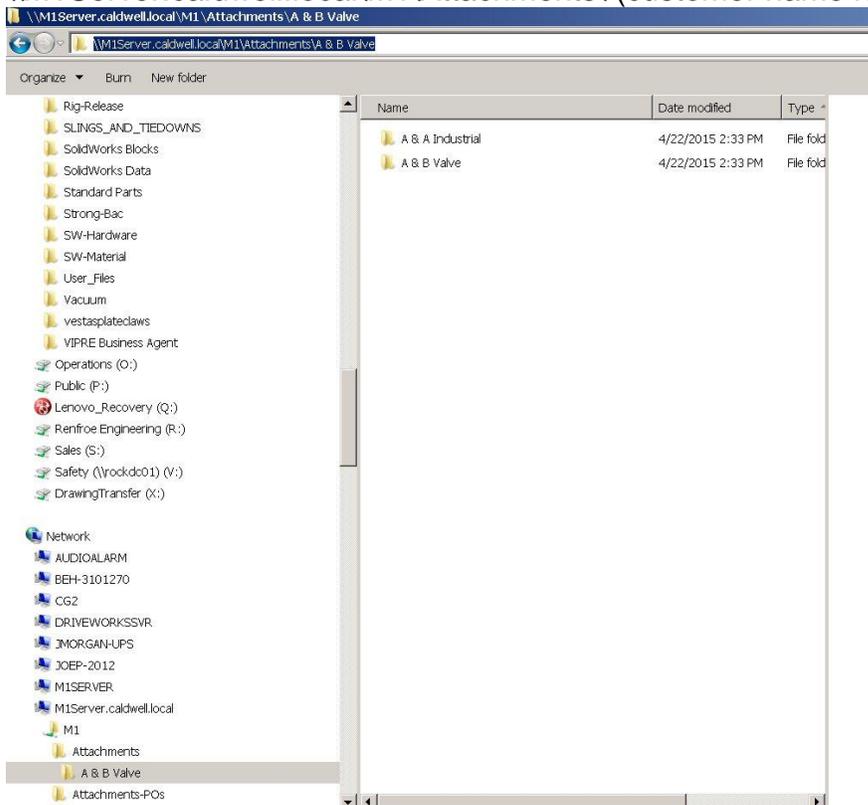
Lift-All Company certification is based on the design and condition of the product when shipped from Lift-All Company.

Lift-All Company certification does not account for repairs or modifications completed by others.

The rated capacity of each unit is recorded on the identification tag attached to all

**Step 4:** Output pdf, and save in the sales job folder.

\\M1Server.caldwell.local\M1\Attachments\ (customer name folder) \



**STEP 5: Attach the PDF file to the Sales order.**

192919 - Sales Order Entry (The Caldwell Group - Live Database)

File Edit View Actions Help

New Next ID

### Attachment 192919

Table of Contents

- Sales Orders
  - 89718 - 2134 - 5/24/2018
    - Sales Order Lines
    - Calls
    - Sales Order Memos
      - 2 - 6/8/2018 - Late shipping (6/14) Customer
      - 1 - 5/14/2018 - pricing & free freight
    - Attachments
      - 192166 - - 5/9/2018 - po
      - 192919 - PDF - 5/16/2018 - LHC, 108U-1/2-2\*/4\***
      - 192920 - PDF - 5/16/2018 - LHC, 108U-1-4\*/8\*

ID Info

Attachment ID\* 192919

Attachment Type PDF

Attachment Info

Date\* 05/16/2018

Description\* LHC, 108U-1/2-2\*/4\*

Long Description

Location W:\Server.caldwell.local\M1\Attachments\Kennedy\18-89718-1-4\_LHC.pdf

Reviewed?  Uploaded From Web?  Do Not Allow Download?

Print?  Email?

Source Info

|                     |                   |               |                   |
|---------------------|-------------------|---------------|-------------------|
| Organization ID     | Location ID       | Contact ID    | Customer Group ID |
| 2134                | 00003             |               | <None>            |
| Call ID             | Lead ID           | Quote ID      | Order ID          |
|                     |                   |               | 89718             |
| AR Invoice ID       | PO ID             | Receipt ID    | AP Invoice ID     |
|                     |                   |               |                   |
| RMA Claim ID        | DMR Claim ID      | Request ID    | Page ID           |
|                     |                   |               |                   |
| Job ID              | Part ID           |               |                   |
|                     |                   |               |                   |
| Quality Register ID | NonConformance ID | Inspection ID | Inspection Line   |
|                     |                   |               | 0                 |