

Work Instruction: Managing Instruction Manuals for Engineered Jobs

1. Audience

Customer Service, Engineering, Shipping

2. Objective:

Attaching a standard instruction manual or creating a special instruction manual line for an Engineered product.

3. Revision and Approval

Rev.	Date	Nature of Changes	Approved By
N	06/02/2018	Original issue.	Wagner

4. Scope

Products require an instruction manual to be sent with the product. Products will require a special or standard instruction manual. .

5. Prerequisites

- Knowledge of products to determine if a standard or special manual is required on jobs that require engineering design.
- Knowledge on Operating M1

6. Records

The manual will be attached to the M1 order.
Job and Sales Order Record (Electronic)

7. Associated Documents

- Electronic manual is located in M1 attachments
- Sales Order Backlog (Manuals) KPI used to keep track special manuals that need to be created.

8. Evaluative Factors

Completed Manual Operations

9. Responsibility

Engineering

10. Instructions

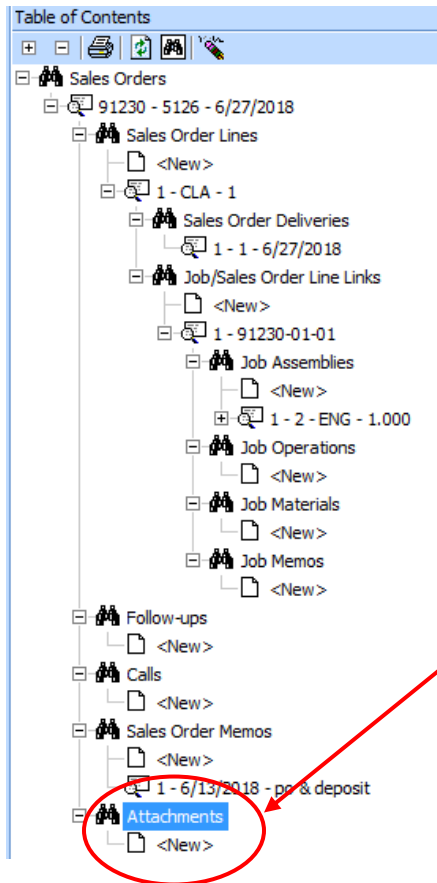
Products that ship from Caldwell require an instruction manual. When an order comes through Engineering design, it needs to be determined whether a standard manual or a

Special Instruction Manual needs to be created. If a unit is motorized or not a standard product, a Special Instruction Manual shall be created.

Note: Any orders for private branded customers require manuals to include the letterhead for their company. There are specific folders for private branded company instruction manuals.

Attaching a standard manual to an order:

Step 1



After Creating an Engineering Job (WI-20-039), click on <New> under "Attachments" in the sales order.

Step 2

Table of Contents

Sales Orders

91230 - 5126 - 6/27/2018

Sales Order Lines

1 - CLA - 1

Sales Order Deliveries

1 - 1 - 6/27/2018

Job/Sales Order Line Links

1 - 91230-01-01

Job Assemblies

1 - 2 - ENG - 1.000

Job Operations

Job Materials

Job Memos

Follow-ups

Calls

Sales Order Memos

1 - 6/13/2018 - po & deposit

Attachments

195765 - PDF - 6/14/2018 - Std Manual

ID Info

Attachment ID* 195765

Attachment Type PDF

Attachment Info

Date* 6/14/2018

Description* Std Manual

Long Description

Location \\M1Server.caldwell.local\M1\Attachments\

Reviewed? ☐ Uploaded From Web? ☐ Do Not Allow Download? ☐

Print? ☐ Email? ☐

Source Info

Organization ID 5126

Location ID

Contact ID

Customer Group ID <None>

Call ID

Lead ID

Quote ID

Order ID 91230

Shipment ID

AR Invoice ID

PO ID

Receipt ID

AP Invoice ID

Project ID

RMA Claim ID

DMR Claim ID

Request ID

Page ID

RFQ ID

Job ID 91230-01-01

Part ID

Quality Register ID

NonConformance ID

Inspection ID

Inspection Line 0

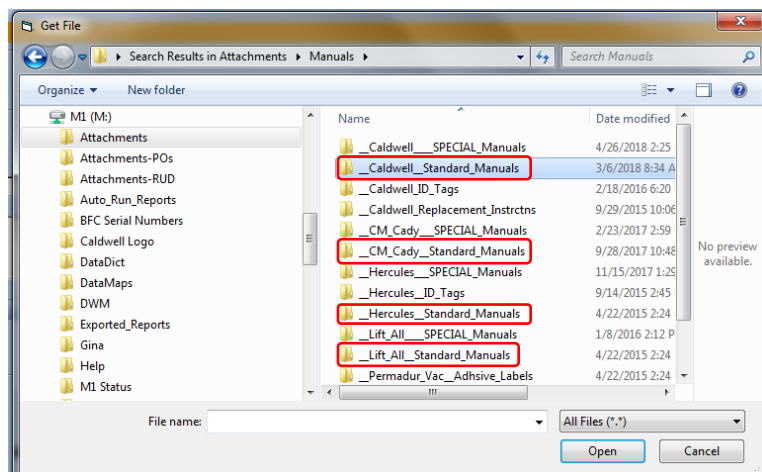
Choose "PDF" in Attachment Type.

Type "Std Manual" into Description.

Click on browse icon.

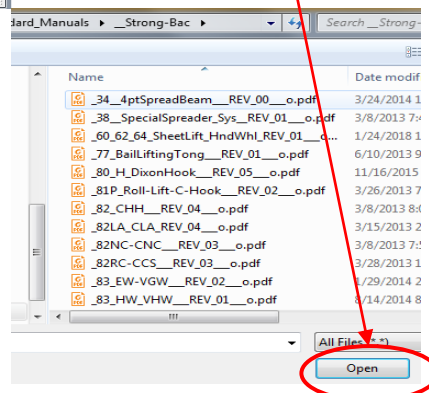
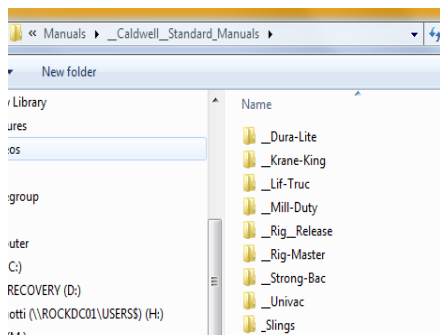
Step 3

Go to M1(M:)\Attachments\Manuals. Open standard folders required to find the product group and model number that matches the product in the order.

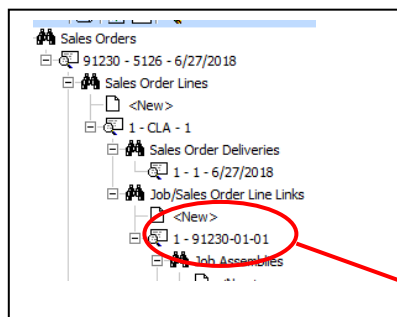


Click on the model number desired.

Click on "Open" to attach it to the order



Step 4



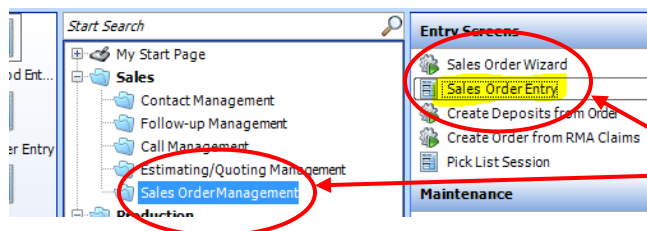
After attaching manual, type the revision number of the manual chosen in the Long Description.

Add the Job ID that this manual relates to. This will attach the manual to the job side in M1.

Adding a “Special Instruction Manual” Line to a Sales Order

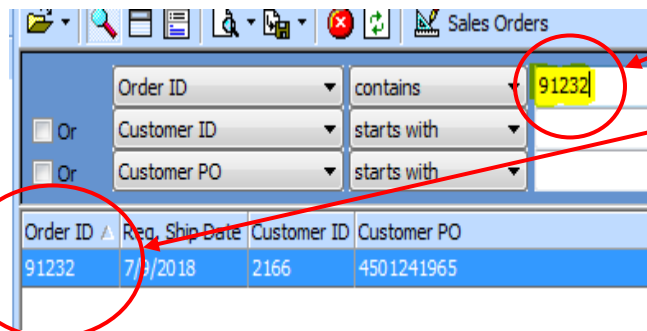
If a special instruction manual is determined to be required, a “Special Instruction Manual” line must be added to the order.

Step 5



Open the sales order requiring a manual.

Click on “Sales Order Management” then click on “Sales Order Entry.”



Type in Sales the order number.

Double click on the appropriate line to open the sales order.

Step 6

Table of Contents

- Sales Orders
 - 91232 - 2166 - 7/9/2018
 - Sales Order Lines
 - <New>
 - 1 - 1 - 7/9/2018
 - Sales Order Deliveries
 - Job/Sales Order Line Links
 - <New>
 - 1 - 91232-01-01
 - 2 - 36-121 - 2
 - Sales Order Deliveries
 - Job/Sales Order Line Links
 - <New>
 - 1 - 2 - 10/10/2020
 - 3 - SPECIAL INSTRUCTION MANU
 - Sales Order Deliveries
 - Job/Sales Order Line Links
 - <New>
 - 1 - 1 - 10/10/2020
 - Follow-ups
 - <New>
 - Calls
 - <New>
 - Sales Order Memos
 - <New>
 - Attachments
 - <New>
 - 195628 - - 6/13/2018 - po

ID Info

Order ID* 91232 Order Line* 3 Engineering Required

Part Info

Part ID* SPECIAL INSTRUCTION MANUAL Revision

Part Description* 60MS-10-60 UoM EA Part Group ENG-Cor

Long Description For line item #1

Price Info

Order Qty* 1 Full Unit Price 0.00000 Full Extended Price \$0.00

Discount % 0.00 Unit Discount 0.00000 Extended Discount \$0.00

Unit Price 0.00000 Extended Price \$0.00

Tax ID <None> Non-tax Reason <None>

Second Tax ID <None>

Related Documents

Source Info

RMA Claim ID RMA Claim Line Quote ID

0 0

Deposit Info

Calculate Deposit? Deposit % 0.00 Deposit Amount \$0.00

Deliveries

Order Delivery	Delivery Qty	Delivery Date	Delivery To
1	1	10/10/2020	Full from

Record: 1 of 1

Click on <New> under "Sales Order Lines"

Type "Special Instruction Manual" in the "Part ID*" field.

Type in model number of product manual is required for.

Type in "For line item # ____". This number is the Sales Order Line number.

Type in number of manuals needed in "Order Qty*".

If approvals are required, change the ship date to "10/10/20". If no approvals are required, the date stays as is, which is the scheduled ship date.