



Webinar Topics

General

PowerShift Navigation

Effectively using date shortcuts, report & inquiry options, setting up favorites, accessing the help system, navigating the menu system, using lookups and other global system features can be huge time-savers! Attend this webinar to learn how you can use PowerShift most efficiently.

JOBS: The PowerShift Job Scheduler

Learn how your company can use the PowerShift job scheduler to automatically generate reports any time. This session covers the options for standard PowerShift report programs, as well as the set up for custom Report Generator and QICLOOK reports. Examples with output of various types (printed, emailed, etc.) will be discussed.

Notes

Learn how you can use notes in PowerShift to better communicate information about customers, vendors and products inside and outside your company. You'll learn how to copy and paste notes from the clipboard, transfer notes from one application to another, and control which notes print on various document copies.

System Administration

System Management

Covers system security, setting up users and devices, customizing menus, and tips for keeping PowerShift running smoothly and efficiently.

Document Management

PowerShift's document management system is a powerful tool for outputting (emailing, faxing, printing) form documents (e.g., POs, sales orders, invoices). This webinar covers how the document management system can be tailored to your business needs and to the output preferences of customers and vendors.

Master File Export/Import

Learn how to use export and import programs to add and maintain master file data outside of PowerShift.

Approvals

Setting up approval cycles in PowerShift is a simple process that could save you time and money! Learn how implementing an approval cycle can give you more control over the purchasing, sales, invoicing and manufacturing cycles within your company.

Sales and Shipping

Pricing

PowerShift can calculate prices the way you do! This webinar covers the many options for product pricing including: list, cost, or margin with a mark up or mark down percent or amount, volume discounts, effective dates, and applying pricing by item and/or customer.

Sales Order Quotes

A sales quotation is a “what if” order which does not affect inventory or financial data. This webinar covers the entry and maintenance of sales order quotations and the transfer of sales quotes to “live” orders.

Sales Order Processing

This webinar covers entering and maintaining customer orders, printing and emailing packing lists and acknowledgements, assigning deposits, and vendor-to-customer drop shipments. Features to expedite entry and improve customer service are highlighted.

Sales Order Shipping

Covers shipment creation, the confirmation process, and features PowerShift offers so you can process shipments and provide your customers up-to-date order status information most efficiently.

RF Shipping

Real-time wireless connectivity will keep your shipping department operating at peak efficiency, enabling instant decision-making and seamless communications throughout the enterprise. The focus of this webinar is how to use RF devices in the shipping process to maximize accuracy and efficiency.

Bills of Lading

You may be able to save on freight costs by consolidating shipments to a single bill of lading. This webinar covers the creation and printing of bills of lading. Commercial invoices and support for international shipments is also discussed.

Commissions

PowerShift can calculate commissions whether you pay a flat rate or a rate that varies based on the customer or item sold. You define the rules that determine who to pay and at what rate for each order, opting to include discounts and other charges. This webinar covers commission setup, maintenance and processing, and the options of interfacing commissions directly to accounts payable or generating an output file for your payroll system.

Sales Tax Import

PowerShift can import tax tables and use zip+4 tax rates. This webinar covers the import process and demonstrates how the tax report helps to get the numbers required to complete sales tax forms for the various taxing entities.

Configured Products

If your company sells a number of similar products that vary only by the options your customer chooses, using PowerShift’s product configurator could have a huge impact on the management of orders for those products and the costs associated with them. This webinar covers creating bills of material for configured products and kits as well as the sales order entry process and pricing for configured products.

RMAs

This webinar covers how to use return material authorizations to effectively track and control goods previously sold and shipped to your customers, including replacement, exchange and repair of returned goods and the issuing of credit.

Service Agreement Tracking

If you offer warranties on the goods you sell, you'll want to attend this webinar to learn about the features PowerShift offers for tracking product warranties and service agreements.

Inventory

The Inventory File

This webinar covers enterprise and branch-level inventory records and the data elements that determine how each item is stocked, manufactured, bought, sold and planned.

Cost Rollup

This webinar explains the item cost fields, how costs for different types of items are rolled up, the calculations for labor, overhead and service, the options that control when costs are updated and the associated GL postings.

Inventory Adjustments

This webinar covers the Material Issues and Adjustments (IMI) program and the impact of adjusting on-hand and floor stock quantities, moving inventory from one location to another, issuing material to and from floor stock, consuming goods that are not otherwise tracked (i.e., like reams of paper not specifically used in the manufacturing process) and scrapping inventory.

Inventory Movements and Adjustments Using RF devices

Learn how to eliminate the manual entry of item numbers, locations and control numbers to complete inventory movement and adjustment transactions more accurately and more efficiently.

Branch Transfers

This webinar describes the branch transfer process and notes the affect on inventory as goods move from one branch to another. Documents produced and associated GL postings are discussed.

Receiving

This webinar covers receiving (manufacturing orders, POs, transfers and RMAs), inspection of goods received, and using the material review board to track rejected goods.

RF Receiving

Eliminate the manual entry of item numbers, locations and control numbers by using RF devices to efficiently and accurately receive POs, manufacturing orders, RMAs and branch transfers. You'll also learn how you can trigger printing of custom inventory labels when the receiving document is generated.

Bulk Material Handling

You may buy some items in large containers, use a small quantity and either use the remainder for the next order or return it to your stockroom. This webinar covers the Automated Location Warehouse Movement (ALWM) feature whereby PowerShift tracks the location and availability of bulk materials.

Consignment Inventory

If you accept components or raw material items on consignment and pay for the goods when they are consumed, you'll want to attend this webinar to learn about the features PowerShift offers to manage consignment inventory within your facility and at customer sites.

Substitute Items

Learn how to set up substitute items to increase your ability to fill orders and provide faster order throughput.

Physical Inventory

This webinar covers PowerShift's features for more efficient cycle counts and/or annual physicals, including counting floor stock, setting up controlled batches, reporting missing tags and recording variances.

RF Physical Inventory

Learn how efficiently physical inventory counts can be entered using an RF device in the warehouse, freeing you to concentrate on the counts without painstakingly having to key in item numbers, locations, and control numbers.

Manufacturing**Bills of Material, Routings and Work Centers**

This webinar covers the basics of setting up bills of material (also known as product structures), work centers and machines, standard operations, and the shop floor instructions (i.e., routing) to build a product.

Manufacturing Order Processing

Covers manufacturing order release, shop paper printing, and picking. Discussion includes when cost updates occur, how costs are calculated, and highlights the programs available for tracking manufacturing costs.

Cascading Manufacturing Orders

Using PowerShift's cascading manufacturing orders feature streamlines manufacturing order processing. Come to the webinar to learn how the entry of order for a parent item can trigger the release of manufacturing orders for required subassemblies.

Labor Entry

This webinar covers labor entry, importing labor data from a third-party labor collection application and productivity reporting. Exporting labor data for payroll and human resources programs for tracking employees' personal information and job certifications are also covered.

Labor Data Collection

PowerShift's shop floor data collection programs dynamically update employee, labor and work in process files. This webinar will show you the benefits of having production updated, material and capacity consumed, and costs calculated in a real time environment.

Forecast Import

PowerShift supports the import of sales forecasts. This webinar covers the import file (i.e., supported file formats and content), the import process, and maintaining the forecast once data is imported.

Planning

Planning Overview

The Planning Overview is a higher-level session that discusses the benefits of using PowerShift's planning functions. Terminology, calculation considerations, the impact of horizon dates, the action file, and more will be introduced as well.

Planning: Item Characteristics

Several fields in PowerShift's enterprise and branch inventory files influence how an item is planned. This webinar de-mystifies how the Order code, Min order qty, Lot size, Max plan period and various lead time fields are used by the planning system to calculate order quantities and start dates.

Project System

Projects

Use PowerShift's project system to define new products – including components, bills of material, and routings – and develop estimates for new or existing customers. This webinar demonstrates how to enter and maintain project information, roll up costs, manipulate pricing, analyze margins and transfer project data to the live system on acceptance.

Accounts Receivable

AR Invoicing

The focus of this webinar is accounts receivable invoicing, with an emphasis on streamlining customer invoice and statement generation. Features such as user-definable aging categories, progress billing, and reporting flexibility are highlighted.

AR Cash Entry

This webinar covers cash entry, customer deposits and applying payments using different payment types including checks, credit cards and electronic funds transfer. Learn how PowerShift can help your cash flow by analyzing your customer's debt and providing tools to help you collect payments smoothly, quickly, and efficiently.

One-Step Invoices, CMs and DMs

The One-Step Invoice Entry (RE) program can do a lot more than just allow entry and confirmation of an order in a single process! Learn how to reverse invoices, adjust how much a customer owes, and create debit memos and credit memos to keep your customers happy and your AR accounts in order.

Purchasing & Accounts Payable

Purchasing

Covers vendor pricing and price breaks, converting requisitions into purchase orders, purchase order entry and maintenance, blanket POs, and the many inquiries and reports that PowerShift offers to support purchasing and associated functions.

Supply Chain

Learn how you can use PowerShift's supply chain functionality to oversee the flow of goods, information, and finances as they move from your supplier to your manufacturing facility and on to your customer to ensure efficient and timely delivery of goods.

AP Invoice Entry

Covers the entry of vendor invoices and the processing of invoices generated from fixed expenses, sales commissions, consignment inventory, vendor returns, and ERS (evaluated receipt settlement) and associated GL postings.

AP Check Processing

Covers invoice selection and payment processing and highlights how using PowerShift's positive pay feature virtually eliminates check fraud. Electronic payments are covered, as is designing plain paper checks that reflect your company's image.

Landed Costs

Shipments received from certain vendors or locales may incur landed costs, such as import duties and broker, trailer, freight, and storage fees. This webinar covers the different methods of landed cost tracking that PowerShift offers.

General Ledger**General Ledger Posting**

Covers the various tools PowerShift offers to expedite GL journal entry, including recurring and allocating journals, journal templates and automatic journal importing and posting.

Financial Statements

The financial statement generator (FSG) enables you to build custom financial statements. Setup and printing of a variety of financial reports will be covered, including options for precision, rounding and the various ways numbers can be presented for readability.

Inventory Accounting

The PowerShift inventory to general ledger interface provides inventory accounting: the GL is updated whenever a transaction affects inventory. The requirements for setup and the effects of the inventory-GL interface are described, including setting up accounts and establishing posting criteria.