

Sierra Manufacturing Odoo ERP Launch Requirements Document

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Project Summary and General Requirements

Document Resources

- [Odoo ERP Integration Action Items Checklist](#)
- [Odoo ERP Requirements Document](#)
- [Sierra Odoo Login](#)
- [Sierra Manufacturing and ToolTech Customer Profile](#)
- [Project Folder](#)
- [Logos and Branding](#)

Project Managers Contact Information

Sierra Manufacturing	Odoo
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M.Sc. Shannon Marie Martin Administradora Ejecutiva al Presidente y Gerente General Sierra Manufacturing, Inc., SA de CV Tel.: 01 (444) 824-1060 Tel. Móvil: 52 33.22.98.03.97	Edward Ellin Especialista Estratégico de Negocios 250 Executive Park Blvd. – Suite 3400 San Francisco, CA 94124 Celular: +1 (650) 276-3909

Apps To Configure and Phased Launch



Objective: Launch Odoo in phases starting with the least disruptive to the most with a final complete launch by February 3rd, 2020

Phase		Applications	Owner	Notes
1	Customer Relationship Management	- CRM - Contacts - Calendar	- Andrew - Ulises	
2	Customer Management	- Helpdesk - Surveys	- Andrew - Shannon - Ulises	
3	Manufacturing and QC	- Manufacturing - Inventory - Barcode	- Andrew - Ottmar	
4	Billing System			

Discuss Approvals Contacts Sales Website Helpdesk Inventory Accounting Barcode PLM Employees Attendan Dashboards Settings		•		

About Sierra Manufacturing

Established in 1995, Sierra Manufacturing, Inc., S.A. de C.V. is a privately held first and second generation family owned and operated corporation based in San Luis Potosí, México. Sierra serves the global marketplace delivering the highest quality cutting tools delivered on time and competitively priced. [Sierra Manufacturing](#) specializes in the fabrication, sales and service of machine cutting tools used primarily in the automotive industry in the Mexican marketplace and the regrinding and remanufacturing of precision inserts delivering maximum customer savings with a lesser environmental footprint compared to the cost of new tooling.

Manufacturing Process Overview

Fabrication and Distribution Models

Summary

Sierra Manufacturing utilizes 3 models of fabrication:

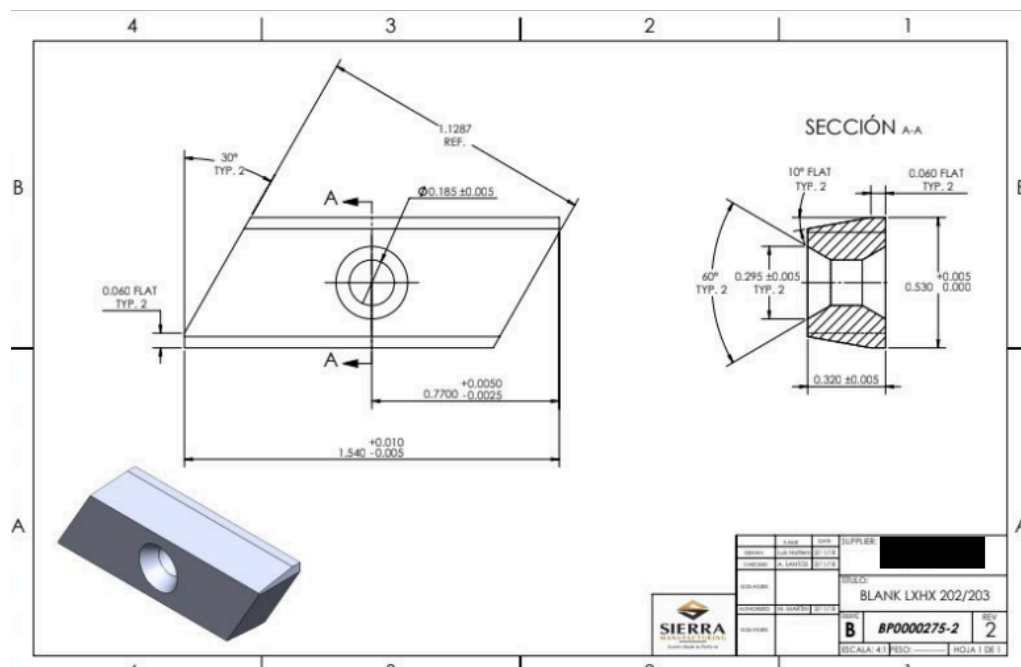
1. **In-House Manufacturing** - This is where we transform raw materials via various processes into a finished good with or without outsourced manufacturing services.

2. **Outsourced Manufacturing** - This is we outsource part or all of the work to a third party. We may perform some internal processes to finish the good or we may not. We may supply the raw material or we may not. We always inspect the product.
3. **Resale** - This is a simple purchase of a finished good, inspection of said good and resale to client.

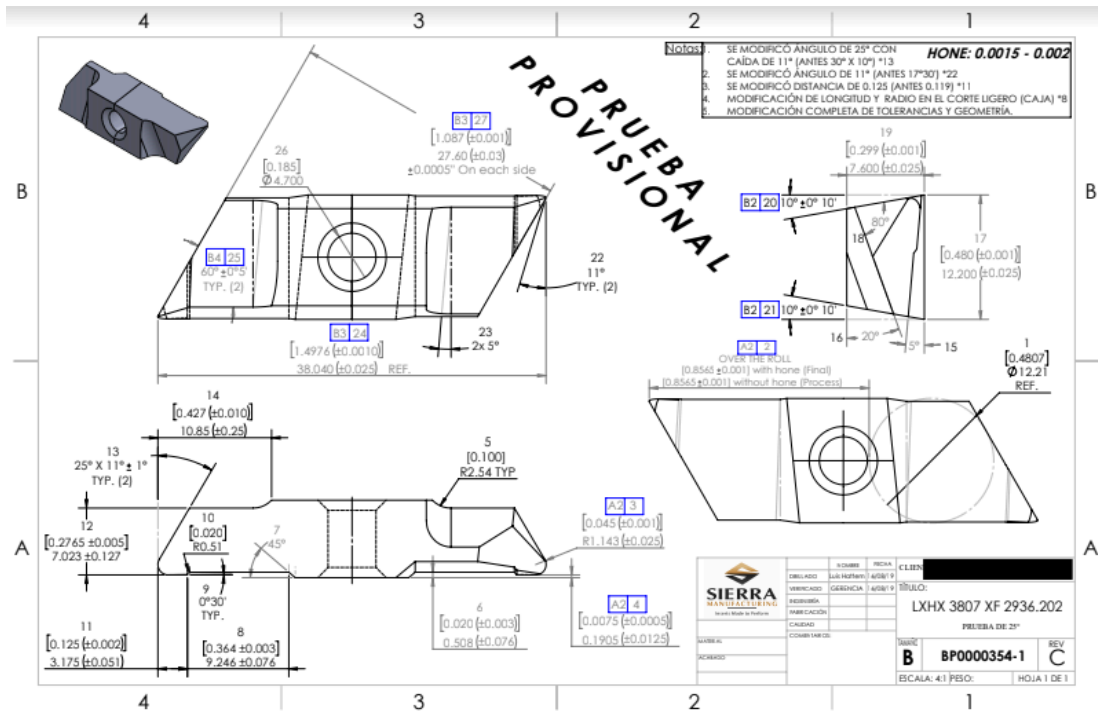
In-House Manufacturing - Most Common

Under this model, Sierra purchases raw material from a series of vendors as defined in our [BOM](#). We transform this raw material into a finished good via a series of steps in what we call a [sequence as defined in a job ticket](#). Sequences are based off of blueprints of the final good which we store in a [Blueprint Table](#). We manage both make to stock and make to order models based on predefined minimums and maximums.

Sample Raw Material Blueprint



Sample Finished Good Blueprint



These transformation processes are made via employees in various work centers. There are two types of work centers:



1. Surface Grinder - Which is a general machine that can complete many operations or sequences.



2. Operations Specific Work Center





Each work center requires its own tooling which are primarily two things:

1. A diamond wheel



2. A toolholder



And each operator has certain abilities and can do certain operations or run certain machines/work centers. This I have defined here on this [operator skills matrix](#).

Outsourced Manufacturing

In this instance, we place a PO (which may or may not require the purchase of raw material) per the BOM for material and then complete (sometimes again depending on the BOM) some processes internally

Localizations and Integration

- Google Drive
- Gmail
- Dual Currency (Mexican Peso/USD)
- Electronic Invoicing (Mexican Accounting and Fiscal Requirements Compliance)

Current Systems

- G-Suite (Drive, Gmail, Calendar, Docs, Sheets, Slides, etc.)
- Smartsheet
- XERO -
- Zendesk - support@sierramfg.zendesk.com

Code Nomenclatures

Blueprint Nomenclature

1. Client Name
2. Insert/Tool Name
3. Revision Date (MMDDYY)
4. Status: Draft/ or Final

All separated by an underscore

Examples:

1. Final Document: TRW_ECT105_01012014_Final
2. Document in Revision: TRW_ECT105_01012014_Draft

Quote Nomenclature

1. Client Name
2. Insert/Tool Name
3. Quote Number
3. Revision Date (MMDDYY)
4. Status: Draft/ or Final

All separated by an underscore

Example: TRW_ECT105_QT0123456_12172013

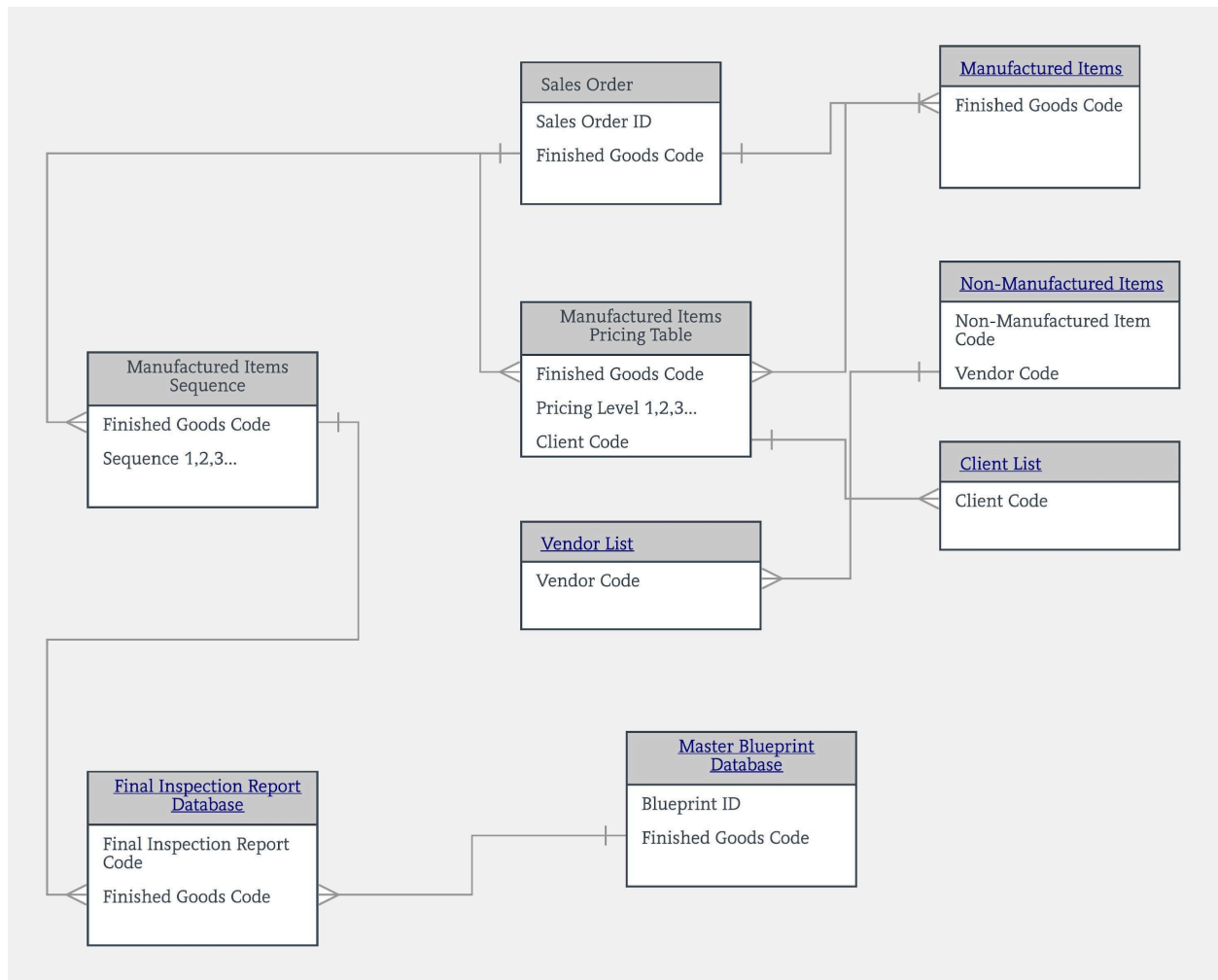
Invoice Nomenclature (Determined by XERO)

Client Ticket Nomenclature (Determined by

Contact Information

Training Information

Our Manufacturing Process

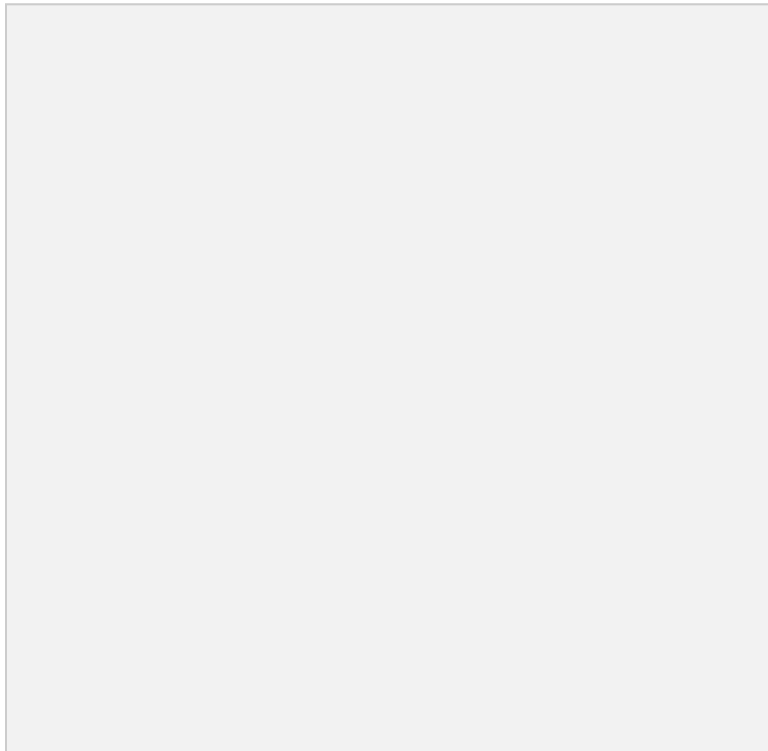


Sierra Manufacturing ERP 2019

Process for Creating New Finished Goods or Raw Materials

Raw Materials

1. The first step of creating new Raw Materials is to request a code via the [Request Input Form](#). In the request input form, the following information should be applied in the form or via attachment.
 - a. Vendor
 - b. Description of Raw Material
 - c. Price Per Unit
 - d. Blueprint of Raw Material



Request Tracker									
File Alerts & Actions Forms									
Grid View IT Requests Arial 10 B I U S A ...									
URGENT		Request ID	Request Description				Requestor Name	Department	Request Type
5		RQID-0000034	Please Create new Codes in Inventory, MP and Finished Goods Tables				Alishon Ola	IT	IT

Request ID	Request Description	Requestor Name	Department	Request Type	Vendor or Location	Related Project
RQID-0000034	Row 5 Attachments (6) Attach Sorted by Date Actions BP0000275-1.PDF January 31, 2019 12:02 PM by Andrew Martin (100k) LXHX 3707 XF 2936.203.PDF January 28, 2019 2:56 PM by Luis Ángel Hattem Saldierna (177k) lxhx 3807 xf 2936.202 (1).PDF January 28, 2019 2:39 PM by Luis Ángel Hattem Saldierna (107k) Shippment-2018111001-Mexico.pdf January 25, 2019 11:10 AM by Andrew Martin (96k) image003.jpg Row 5, Comment January 25, 2019 11:08 AM by Andrew Martin (119k) Close					

Inactive	Raw Material ID	Raw Material Item Description	Price Vol. Level 1	Price Vol. Level 2	Price Vol. Level 3	Price Vol. Level 4	Price Vol. Level 5	Type	Vendor ID
☐	MP0001311	Rough Molded Blank for PGMSLP-PT0000598 and PGMSLP-PT0000599	\$5.75	\$5.18	\$4.66			MP-Raw Material	JINTEC

Finished Goods

Bill of Materials

- [Sierra ERP Bill of Materials](#)
- **Definition:** The Bill of Materials Table in Smartsheet designates what raw materials (MP or NM Codes) or Services (SE Code) are required for a particular Finished Good as laid out in the [Finished Goods Table](#). Any change to how the material is a
- For Finished Goods manufactured in Sierra, the corresponding MP codes should be listed underneath as a hierarchy (Bill of Materials Example 1)
- For Finished Goods manufactured by a 3rd party, the corresponding NM (non-manufactured code(s)) should be listed underneath the hierarchy (Bill of Materials Example 2)
- For Finished Goods that are regrinds manufactured by Sierra, there will be a corresponding CS (Consigned Code) which is the customer material that we are regrinding. If this material is being sent to a 3rd party for regrinding we would see another scenario with both a CS (client Consigned Material) and

- an SE (Service Code) for their regrind Service
- And potentially an NM Code if we are purchasing the good as new but selling as a “regrind”, “re-tip”, etc.

Bill of Materials Example 1 - Finished Good Manufactured at Sierra

Finished Goods ID	Finished Goods Description	Raw Material ID	Raw Materials Description	Vendor Code	Required Quantity
PGMSLP-PT0000598	LXHX 3707 XF 2936.203 INSERT				1
		MP0001124	.320 X .510 X 1.525 T 111	TUNGST	1
		SE0000832	HP Milling (Alcrona Pro)	PRIMUS	1

Bill of Materials Example 2 - Finished Good Manufactured by a 3rd Party Vendor

Finished Goods ID	Finished Goods Description	Raw Material ID	Raw Materials Description	Vendor Code	Required Quantity
PGMSLP-PT0000519	50036954-PCD (SPU 620 Equiv) Insert				
		NM0000940	50036954-PCD (Ecomill)	WEIYIN	1

Bill of Materials Example 3 - Regrind Finished Goods Manufactured by Sierra Manufacturing

Finished Goods ID	Finished Goods Description	Raw Material ID	Raw Materials Description	Vendor Code	Required Quantity
AAMMMS-RS0000332	CNGA 433 (2 TIPS) INSERT REGRIND				
		CS0000620	CNGA 433 2 Tips CLIENT SUPPLIED	SERIMG	1

Document Section Revision History

Section	Status	Last Revision Date	Notes
Sales Order Acknowledgement and Production Planning and Prioritization Process	In Process	10/31/2017	

Production Purchase and Stock Planning

Sales Order Acknowledgement and Production Planning and Prioritization Process

Sales Order Receipt and Order Acknowledgement

Overview

All sales orders should be sent directly to or resent to orders@sierramfg.mx. From there...

Purchase Order Management

Smartsheet Outstanding Purchases

- Created filters for late POs, 2 Weeks Out, This Week and This Month
 -
- Operating Procedures
 - For Late POs
 - These require an immediate email and phone call same day
 - Notes should be made in the Manudyn PO Note field with date and initials of who is making the note (e.g., 3.87.17 amm - called Ceratizit. Order is shipping today on zzz1234356.)
 - For Orders 2 weeks out
 - Batch and email supplier to ensure order is shipping on time

Notes should be made in the Manudyn PO Note field with date and initials of who is making the note (e.g., 3.87.17 amm - called Ceratizit. Order is shipping today on zzz1234356.)

Quality Assurance and Process Improvement

Inspections

Inspecting inserts

Sierra manufactures and inspects all its tooling based off of the blueprint. Any non-dimensioned measurements will not be checked. Furthermore, all special insert lots are checked at 100% during Final Inspection which occurs after the coating process and is completed with various measuring instruments. Measurements are performed in an Mitutoyo Optical Comparator and electronic microscope at 100X. Optical calibration occurs every 6 months generically and every 3 months for the master optical comparator.

Summary

All Blueprints are stored electronically with unique IDs and version control on a 7 digit code BP1234567 linked to a finished good also with a unique 7 digit ID per material per client EWIEMS-PT1234567. The prefix designates the client and the suffix designates what type of good it is. In this case a finished Good PT. All orders have an electronic BOL which includes the raw material identified by a 7 digit MP1234567 code, a coating Code (if applicable) SE1234567, how the inserts are to be checked in process and a link to how they are checked in Final Inspection which has a unique FI1234567 Code. Manufacturing QC is managed in process and during final inspection. Once final inspection occurs and the lot passed the inserts are certified via a “sticker process” and shipped or delivered to the client.

In process inspection

All inserts are checked in process and employees follow the electronic BOL and enter their time in quasi real time. All cuts are validated the first 3 inserts by a MOD (manager on duty) before the lot continues. Thereafter employees self-check every 10th insert. Should any insert be found to be out of tolerance, a MOD is called and they work in reverse order until the issue is identified. All in process QC is entered into a terminal. Scrap rates exceeding the 1/10 rule trigger a review by the plant manager who is alerted systemically.

Final inspection

Final inspection is completed via various measurement tools but primarily via optical comparator. In the case of coated inserts, Final Inspection occurs **before and after** coating. The final inspection is based off of the Blueprint BP1234567 and defined in a Final Inspection Report Database, FIRDB with a unique FIR Code. Special inserts are checked at 100%. Standard

inserts are checked at 10% randomly. If defects exceed 2% the lot is checked at 100%. Once completed a Final Inspection Report is generated with a unique FI1234567 ID. Certification stickers are generated including the Item, Client, Client Item Code, Work Order/Lot Number and Quantity and either delivered to client or warehoused.

Internal audit process in case of ticket creation.

1. **Review of Blueprint** Ensuring correct and latest integration is attached to the Sierra Production System.
2. **Review of the Final Inspection Reports** Review if any issues with the inserts were reported.
3. **Site Visit** - Site visits are made in order to have face to face communication, swap up inserts, etc.

Raw material Tests

As soon as we have an inkling there may be an issue with the raw material we punched immediate batches both from the original supplier and from a competitor, and submit them to A/B tests.

Input Tables for Conversion

	Smartsheet	Description	Unique ID	ManuDyn Equiv
Databases	Client List	This is where all clients and their associated basic information is stored.	Customer Code (6 Digit Alpha)	Database Entry > Companies (Customer Togled)
	Vendor List	This is where all our vendors (raw materials and otherwise) and their associated basic information is stored.	Vendor Code (6 Digit Alpha)	Database Entry > Companies (Vendor Togled)
	Manufactured Items List	These are the finished goods we manufacture and or sell to our clients. See here .	Finished Goods Code (15 digit alphanumeric code)	Database Entry > Manufactured Items
	Non-Manufactured Items List	These are the raw materials we purchase, resales items, outsourced services etc we use in the manufacture of our Finished Goods or Manufactured Items List. goods we manufacture and or sell to our clients. See here .	Non-Manufactured Item Code (9 digit alphanumeric code)	Database Entry > Material Items
	Master Blueprint Database	These are where all the blueprints are managed. All finished goods should have an associated blueprint.	2 Digit Alpha (BP) followed by unique 9 characters	Database Entry > Manufactured Items> Attachments
	Final Inspection Report Database	This is a Quality Assurance database on how each tool should be checked. This is derived from the Blueprint	2 Digit Alpha (FR) followed by unique 9 characters	This is not included anywhere in ManuDyn (an

		Master Blueprint Database and linked to Manufactured Item Manufactured Items List .		improvement requirement)
Databases	Client List	This is where all clients and their associated basic information is stored.	Customer Code (6 Digit Alpha)	Database Entry > Companies (Customer Togled)

How to create codes for new products

From Sierrapedia

First, if its a new client or vendor you have to register it in Smartsheet.

New Client Setup

1. Go to Smartsheet>[Client List](#)
2. Eliminate all kind of filters
3. Go to the end of the sheet
4. Create a 6 digits code for the client
5. Fill out the next information in its correspondent cell
 1. Credit limit (drop down list)
 2. Credit days
 3. Name and client code
 4. Currency
 5. Taxes
 6. Address information
 7. City and state (drop down list)
 8. Email and website

customer									
You're collaborating as a free user. Get the basics and see what's possible with our new Collaborator's Guide .									
Home Non-Manufactured Items List ManuDyn Manufactured Items List Master Quote Tracker Customer Service Tickets ManuDyn Customer List ManuDyn Vendor List Master Blueprint Database In Process Inspection Master schedule									
File Alerts & Actions Forms									
Grid View Filter Print Zoom Refresh Export Import Search									
ManuDyn Customer Code	Customer Code Length	Credit Limit	Days of Credit	Company Name and Code	Company Name	Currency	Tax ID		
1	AAMMS	6	\$15,000.00	60 AAMMS - AAM MAQUILADORA MEXICO S. DE R.L. DE C.V.	AAM MAQUILADORA MEXICO S. DE R.L. DE C.V.	USD	AMM060130M44		
2	AFINTE	6	\$0.00	AFINTE - AFILADOS INTERTOOL SA DE CV	AFILADOS INTERTOOL SA DE CV	USD			
3	AMCARB	6	\$5,000.00	30 AMCARB - AMERICAN CARBIDE DRILLS SA DE CV	AMERICAN CARBIDE DRILLS SA DE CV	USD			
4	APINDS	6	\$5,000.00	30 APINDS - AP INDUSTRIAL SA DE CV	AP INDUSTRIAL SA DE CV	USD	AIN080905718		
5	BALDOR	6	\$0.00	0 BALDOR - BALDOR ELECTRIC COMPANY DE MEXICO SA. DE CV.	BALDOR ELECTRIC COMPANY DE MEXICO SA. DE CV.	USD	BEM790701309		
6	BLACKH	6	\$0.00	0 BLACKH - BLACKHAWK INDUSTRIAL DE MEXICO	BLACKHAWK INDUSTRIAL DE MEXICO	USD	DSO080930N86		
7	BOMBAS	6	\$10,000.00	30 BOMBAS - BOMBAS GRUNDOS DE MEXICO MANUFACTURING S.A. DE C.V.	BOMBAS GRUNDOS DE MEXICO MANUFACTURING S.A. DE C.V.	USD	BGM010926TJA		
8	BREMO	6	\$0.00	0 BREMO - BREMO MEXICO S.A. DE C.V.	BREMO MEXICO S.A. DE C.V.	USD	BME9604186V4		
9	CARDEN	6	\$1,500.00	45 CARDEN - GABRIEL ALAN CARDENAS SOLIS	GABRIEL ALAN CARDENAS SOLIS	USD	CASG800022EY1		
10	CIECEL	6	\$0.00	0 CIECEL - CIE CELAYA, S.A.P.I. DE C.V.	CIE CELAYA, S.A.P.I. DE C.V.	USD			
11	CLGMSA	6	\$20,000.00	60 CLGMSA - CLG DE MEXICO, S DE RL DE CV	CLG DE MEXICO, S DE RL DE CV	USD	CME080109MR2		
12	COMINI	6	\$10,000.00	30 COMINI - COMINIX MEXICO, S.A. DE C.V.	COMINIX MEXICO, S.A. DE C.V.	USD	CME121009V27		
13	CUMMIN	6	\$0.00	0 CUMMIN - CUMMINS GRUPO INDUSTRIAL S.de R.L. de C.V.	CUMMINS GRUPO INDUSTRIAL S.de R.L. de C.V.	USD	CJUR41215ISA		
14	DANACA	6		DANACA - DANA CARDANES	DANA CARDANES	USD			
15	DAYCOP	6	\$25,000.00	30 DAYCOP - DAYCO PRODUCTS S.A. DE C.V.	DAYCO PRODUCTS S.A. DE C.V.	USD	DFR9411175A0		
16	DISTR1	6	\$0.00	0 DISTR1 - DISTRIBUIDORA CORO SAND S.A. DE C.V.	DISTRIBUIDORA CORO SAND S.A. DE C.V.	USD	DCS971010LX3		
17	DOALLC	6	\$10,000.00	30 DOALLC - DO ALL MEXICANA, S.A. DE C.V. - CLIENT	DO ALL MEXICANA, S.A. DE C.V. - CLIENT	USD	DAM94031CD2		
18	DRILLC	6	\$10,000.00	60 DRILLC - DRILL COMPANY S.A DE C.V.	DRILL COMPANY S.A DE C.V.	USD	DRI 0209273M1		
19	DRLUI	6		DRLUI - DR. LUII	DR. LUII	USD			
20	EMERSO	6	\$5,000.00	60 EMERSO - TRANSMISIONES DE POTENCIA EMERSON S A DE C V	TRANSMISIONES DE POTENCIA EMERSON S A DE C V	USD	TPE891209HD2		
21	EWIEMS	6	\$30,000.00	60 EWIEMS - EWIE de Mexico S de RL de CV	EWIE de Mexico S de RL de CV	USD	FME031107FP6		
22	FERKAY	6	\$2,000.00	30 FERKAY - FERKAY MATERIALES INDUSTRIALES SA DE CV	FERKAY MATERIALES INDUSTRIALES SA DE CV	USD	FME10101536A		
23	FRENOS	6	\$25,000.00	60 FRENOS - FRENOS Y MECANISMOS S DE R.L DE CV	FRENOS Y MECANISMOS S DE R.L DE CV	USD	FME841214V55		
24	FUMAQS	6	\$5,000.00	45 FUMAQS - FUMAQ, S.A. DE C.V.	FUMAQ, S.A. DE C.V.	USD	FUM951124F39		
25	GAMAGS	6	\$0.00	0 GAMAGS - GRUPO AMAG SA DE CV	GRUPO AMAG SA DE CV	USD			
26	GETOSH	6	\$5,000.00	30 GETOSH - GE TOSHBA TURBINE COMPONENTS DE MEXICO S DE RL DE CV	GE TOSHBA TURBINE COMPONENTS DE MEXICO S DE RL DE CV	USD	GTT980623DUA		
27	GKNAER	6	\$0.00	30 GKNAER - GKN AEROSPACE SAN LUIS POTOSI S DE R.L. DE C.V.	GKN AEROSPACE SAN LUIS POTOSI S DE R.L. DE C.V.	USD	GA5010101622		
28	GPIMAM	6	\$10,000.00	45 GPIMAM - GP INNOVATIVE MACHINING & ASSEMBLY DE MEXICO S DE RL DE CV	GP INNOVATIVE MACHINING & ASSEMBLY DE MEXICO S DE RL DI	USD	GIM1012216W4		

customer

Upgrade

Help

Notifications

Home

Non-Manufactured Items List

ManuDyn Manufactured Items List

Master Quote Tracker

Customer Service Tickets

ManuDyn Customer List

ManuDyn Vendor List

Master Blueprint Database

In Process Inspection

Master schedule

Share

File

Alerts & Actions

Forms

Grid View

Filter

Print

Zoom

Refresh

Export

Import

Search

	Prompt Payment	Street	Suburb	Street No.	Store No.	Zip	Country	State/Province	City	email	website
1	3M44	0 AVENIDA COMERCIANTES 1300 PARQUE IND	CARRETERA SILAO IRAPUATO KM 5.3	1300		36100	MEXICO	GUANAJUATO	SILAO	marlene.garcia@aam.com	
2							MEXICO	San Luis Potosi	San Luis Potosi	adriana.agular@afiladosinter	
3											
4	718	0 AV. MARIA	FRACCIONAMIENTO RESIDENCIAS	64	21280	MEXICO	BAJA CALIFORNIA	MEXICALI	JALISCO		
5	1309	0 CALLE "A"	PARQUE INDUSTRIAL	No. 170	45680	MEXICO	GUADALAJARA	JALISCO			
6	4986	0 Angel Unaza 314	Col. Del Valle Del Benito Juarez		03100	MEXICO	DF	MEXICO		ivonne.dmas@blackhawkid.c	
7	17JA	0 CIRCUITO EXPORTACION	PARQUE INDUSTRIAL TRES NACIONES	272	78395	MEXICO	S.L.P.	S.L.P.			
8	16V4	0 KALOS PARQUE INDUSTRIAL	CARRETERA MIGUEL AI	100	66600	MEXICO	NUEVO LEON	NUEVO LEON			
9	12EY1	0 JORGE DEL MORAL	LOMAS DEL ROBLE SECTOR 1	648	66450	MEXICO	NUEVO LEON	SAN NICOLAS DE LOS GARZA			
10											
11	1M22	0 Ave. Venustiano Carranza	Tangamanga	1060	501-502	78250	MEXICO	San Luis Potosi	San Luis Potosi	mdiaz@clgintl.com	www.clgintl.com
12	1V27	0 DIAZ ORDAZ	JARDINES DE IRAPUATO	1370	505	36660	MEXICO	GTO.	GUANAJUATO	cominix.omar@gmail.com	
13	1SA	0 BLVD JUAN PABLO II	CIUDAD RIO BRAVO	1951		32550	MEXICO	CHIHUAHUA	CHIHUAHUA		
14											
15	5A0	0 VIA JOSE LOPEZ PORTILLO	SAN FRANCISCO CHILPAN	86	B00 1	54944	MEXICO	EDO. DE MEXICO		manuel.gutierrez@dayco.com	
16	1X3	0 RIO LA PAZ	COL. RANCHO CLANCO	2706	3	44890	MEXICO	GUADALAJARA	JALISCO		
17	1CD2	10 BOULEVARD TLC	PARQUE INDUSTRIAL STRIA	57	A	66626	MEXICO	N.L.			
18	3M1	0 7 PONIENTE	COLONIA CENTRO	314	6	72000	MEXICO	PUEBLA	PUEBLA	drilhaagen@prodigy.net.mx	
19											
20	1H2	0 KM. 11.4 CARRETERA GUADALAJARA	EL CASTILLO, EL SALTO	SN		45695	MEXICO	JAL.	JALISCO		
21	1FP6	0 Los Nogales	20 Aniversario	805		31137	MEXICO	Chihuahua	Chihuahua	dagume@ewie.com	
22	16A	0 ADOLFO LOPEZ MATEOS	CRUZ DEL MONTE NAUCALPAN DE JUAREZ	8	5	53110	MEXICO	MEXICO			
23	1V55	0 LA GRIEGA	COL. MELCHOR OCAMPO	101		76220	MEXICO	QRO.	QRO.		WWW.TRW.COM
24	1F39	0 CALLE MORELOS	CENTRO	191	PISO 1	76000	MEXICO	QRO.	QUERETARO		
25		Cametena Irapuato a la Piedad					GUANAJUATO	SANTA ANA PACHUECO			
26	1DUA	0 A. TEXAS	PARQUE INDUSTRIAL NACIONAL	230		65550	MEXICO	N.L.	NUEVO LEON	mireya.silvaalamos@ge.com	
27	122	0 AV. COMISION FEDERAL DE ELECTRICIDAD	PARQUE INDUSTRIAL MILENNIUM	790		78395	MEXICO	S.L.P.	SAN LUIS POTOSI		
28	16W4	0 AVENIDA EJE DOS	LOTE 251 M1 PARQUE INDUSTRIAL LOGISTIK	296		79626	MEXICO	S.L.P.	SAN LUIS POTOSI		

New Vendor Setup

1. Go to Smarthseet>[Vendor List](#)
2. Eliminate all kind of filters
3. Go to the end of the sheet
4. Create 6 digit code for the vendor
5. Fill in the next information in its correspondent cell
 1. Company's name

- Status (drop down list, current or potential)
- Type (drop down list, manufactured or non manufactured)
- Taxes
- Credit limit (drop down list)
- Credit days (drop down list)
- Address information
- Country, city and state
- Phone number, email and website

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File Alerts & Actions Forms

Grid View Filter

ManuDyn Vendor Code	Vendor Code Length	Company Name	Status	Type	Tax ID	Credit Limit	Days of Credit	Street	Street No.	St. No.	City
1	PROSEA	6	PROSEA productos y servicios electromecanica y automatizaci	Actual	Non-Manufacture		0	0.0	Rio Suchate #4 Atzacapan de Zaragoza, Edo. de mexico		Estado de Mexico
2	GEMETY	6	GEMETYTEC DE GUADALAJARA SA DE CV	Actual	Non-Manufacture	GGU1201126R			Calzada Norte	189	Ciudad Granja Zapopan Jalisco
3	FUNKU	6	Funk Ultrahard Material Co., LTD.	Actual	Non-Manufacture	9141 0000 271	0.0	0.0	No 16 Dongging Street, High-Technology Development Zone,	16	Zhengzhou, China
4	VENTRA	6	Vantrans Intelligent Manufacturing Co. Ltd	Actual	Non-Manufacture	91410100MA3	0.0	0.0	12th Fl, Bldg J, No 11, Changchun Road, National University Science Par	11	Zhengzhou,
5	ADMON	6	ADMON Y SERVICIOS COMPUTACIONALES, SA DE CV	Actual	Non-Manufacture		0	25	Circuito Mexico	120	Parque Industrial Tres Naciones
6	AUTOBA	6	AUTOBALEROS ABASTOS, S.A. de C.V.	Actual	Manufacture		0	0	PASEO DE VERACRUZ	112	PALMA REAL
7	AUTOLO	6	AUTOMOTRIZ LOMAS SAN LUIS SA CV	Actual	Non-Manufacture		0	0	BLVD ADOLFO LOPEZ MATEOS	653	COL CENTRO
8	BEIJIN	6	BEIJING WORLDIA DIAMOND TOOLS	Actual	Manufacture						
9	BESOC	6	DONGYING JUNCHENG IMPORT AND EXPORT CO.,LTD	Actual	Non-Manufacture		0	0	Room No. 402, 1 Building, 111, Dongsan Road		Dongying City
10	CERATI	6	CERATIZIT USA INC.	Actual	Manufacture	XEXX01010109	0	7	STEPHENS DRIVE	11530	WARREN MI,48089-1833
11	CHENG	6	CHENGDU DIAMOND TOOLS CO., LTD	Actual	Manufacture		0	0	Building No.3, Huanghai RD		Industry Port, Qingyang District
12	CIFERI	6	CIFERIN	Actual	Manufacture	CIF0409303R5	15		Agua Marina 2000, Fracc. Industrias		
13	DIAMAN	6	DIAMANTES INDUSTRIALES DE MEXICO SA DE CV	Actual	Manufacture	DM93051012	0	30	GRAL GOMEZ PEDRAZA	11203	SAN MIGUEL CHAPULTEPEC
14	DOALLV	6	DO ALL MEXICANA, S.A. DE C.V. - VENDOR	Actual	Manufacture	DAM940301CC	\$10.00	30	BOULEVARD TLC	57	A
15	ENGISC	6	ENGIS CORPORATION	Actual	Manufacture	XEXX01010109	0	30	WEST HINTZ ROAD	105	
16	GLOBAS	6	GLOBAL SERVICES DE MEXICO S.A DE C.V.	Actual	Manufacture	CSS061009A3	0	30	REY CARLO MAGNO	795	CLO. MATEHUALA
17	GLOPAC	6	SSANGYONG MATERIALS CORPORATION	Actual	Manufacture		0	30	WOLAM-DONG	185	DALSEO-GU
18	GRAING	6	GRAINGER S.A. DE C.V.	Actual	Non-Manufacture		0	30	AV. DESARROLLO	No. 500	GUADALUPE
19	IHLON	6	IH lonbond, Inc.	Actual	Non-Manufacture	22-332481			24700 Highway Road		
20	INDEXV	6	INDEXABLE CUTTING TOOLS - VENDOR	Actual	Manufacture	XEXX01010109	\$65.00	60	CLARK STREET	66	ONTARIO
21	JINTEC	6	ZHUZHOU JINTE CEMENTED CARBIDE CO.,LTD	Actual	Manufacture				Jinshan Industrial Park	508	Hetang District
22	METATR	6	INDUSTRIAS CERTANUM, S.A. DE C.V.	Actual	Manufacture				Rio Rho	56,6'	
23	OERLIK	6	OERLIKON BALZERS COATING DE MEXICO S.A. de C.V.	Actual	Manufacture	OBC9095057Y	0	45	ACCESO III	304	306 FRACC. INDUSTRIAL LA MONTAÑA QL
24	OLSCAR	6	Olson Carbide, Inc.	Actual	Manufacture		0	30	Terna Industrial Dr	25225	Chesterfield
25	PRIMUS	6	PRIMUS COATING	Actual	Manufacture		0	45			
26	PRODIA	6	PRODIATSA	Actual	Manufacture	PDT840627GP	0	30	PASE DE LAS JACARANDAS	42	FRACC. LAS GRANJAS
27	PSTPRO	6	PTS PRODUCTION TOOL SUPPLY	Actual	Manufacture		0	30	E. EIGHT MILE RD	8655	WARREN
28	RMCTOO	6	RMC TOOLING	Actual	Manufacture		0	30	Rotary Drive	1923	Humble TX

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File Alerts & Actions Forms

Grid View Filter

Street No.	St. No.	City	State/Prov.	Zip	Country	Tel 1	Tel 2	Prompt Payment	Suburb	email	website
1	Edo. de mexico	Estado de Mexico	Estado de Mex	52028	MEXICO	015558775815				ventas4@prosea.com.mx	
2	189	Ciudad Granja Zapopan Jalisco	Guadalajara	45010	MEXIOC	Tel. (33) 37-77-74	Fax. (33) 37-			ventas4@etytec.com	www.etytec.com
3	Development Zone,	Zhengzhou, China	China		CHINA	86-371-67918005				yaming1@funk.com	http://www.funk.com
4	National University Science Par	Zhengzhou,	China		CHINA	0086 371 865517	0086 139 31			ASHLEYGUO@vantrans.net	http://www.totalltools.org
5	120	Parque Industrial Tres Naciones	San Luis Potos	78395	MEXIOC	834-71-74	824-01-85				
6	112	PALMA REAL	VERACRUZ	91826	MEXICO	01-229-217-3043					
7	653	COL CENTRO	MEXICO	59300							
8											
9	i Road	Dongying City	Shandong		CHINA	TEL 86-0546-716					
10	11530	WARREN MI,48089-1833	MI	48089	USA	(724) 694 8100					
11		Industry Port, Qingyang District	Chengdu		CHINA	86-28-8707 5862				nicole.lee@cndiamond.com.cn	
12											
13	11203	SAN MIGUEL CHAPULTEPEC	MEXICO	11850	MEXICO	0155 5271-2707	0155 5271-1				
14	57	A	N.L.	66626	MEXICO				10	PARQUE INDUSTRIAL STIVA	
15	105		WELLING		USA						
16	795	CLO. MATEHUALA	SAN LUIS POT	78174	MEXICO	444 1231627					
17	185	DALSEO-GU	REP COREA D		KOREA						
18	No. 500	GUADALUPE	NEWJO LEON	67132	MEXICO	800-889-90-90					
19			Beechwood, OH	44122	USA	1 216 831 0880 e					
20	66	ONTARIO	ONTARIO		CANADA			0	WELLAND ONTARIO L3B 9W6		
21	508	Hetang District	Zhuozhou		CHINA	Tel. 0086-0731-22	Whatsapp: 0			sales1@jcarbide.com	http://www.jcarbide.com
22	56,6'		Ciudad de Mxi								
23	304	306	FRACC. INDUSTRIAL LA MONTAÑA QUERI	76150	MEXICO	52-442 2096800	01 800 522				
24	25225	Chesterfield	MI 48051, USA	48051	USA	588 598 4610					
25											
26	42	FRACC. LAS GRANJAS			56600	MEXICO					
27	8655	WARREN	MI	48089	USA	001800 366 3600					
28	1923	Humble TX		77338	USA	281-548-1748	281-548-341				

6. Once you've created the client or vendor code and information, the next step is to create a code for the item that we're going to be selling or that we are going to buy from a supplier.

First, you have to identify if the product is manufactured or non manufactured.

Manufactured Items as the name would indicate, require manufacture either at Sierra or a partner company. Non-Manufactured Items, are items which are either consumibles or direct resale (like clamps, screws and standard inserts).

Manufactured Items

The ManuDyn coding structure consist of 15 characters total in with the following logic:

1. The first 6 characters are Alphabetic and represent the company to which the product is sold and which can be found in the ManuDyn Customer List (see below).
2. A "-" separator
3. Another prefix (PT or RS)
4. A series of 7 digits generated automatically by Smartsheet

Second Prefix	Explanation
PT	PT stands for producto terminado and is the final good delivered to the client.
RS	RS stands for resharp or regrind and is used in cases where we are regrinding, remanufacturing, retipping etc an insert or tool.

1. Go to Smartsheet>[Manufactured Items List](#)
2. Eliminate all kind of filters
3. Go to the end of the sheet
4. Create the code according to the instructions given above.
5. Fill out the information such as; description, company, type of work.
6. Attach the blueprint, quote, emails or another important documents.
7. Click on save.

NM	Non-Manufactured Finished Goods	These are standard finished goods sold directly to a customer such as resale CNMA and CNMX.
RQ	RFQ Provisionary Code	This code is seldomly used and when it is it is only a placeholder for an insert in testing before it goes live.
SC	Scrap	This code is used for scrap which is tracked.
SE	Service	This code is used for outsourced services such as coating, honing, etc. but not full manufacture.
SP	Spare Parts	This code is for spare parts and accessories used internally or sold to the client such as screws, clamps, toolholders (not used internally which would have an MA code).

2. Go to Smartsheet>[Non-Manufactured Items List](#)

3. Eliminate all kind of filters.

4. Go to the end of the sheet.

5. Fill out the next information;

-Description

-Type of product

- Supplier

Standard Delivery Time SLAs

The below are standard Service Level Agreements (SLAs). These are the dates from receipt of sales order that should be used in the Due Date in ManuDyn. That said, these dates may differ depending on the particular quote or circumstances. Always reference the quote when and if possible in the [Master Quote Tracker](#) in Smartsheet.

	Standard SLAs		
	Weeks	Days (Min)	Days (Max)
Standard	4-6 Weeks	30	45
Special	6-8 Weeks	40	60
Regrind	2-3 Weeks	15	21

Retrieved from

["http://sierra.mywikis.net/w/index.php?title=Standard_Delivery_Time_SLAs&oldid=160"](http://sierra.mywikis.net/w/index.php?title=Standard_Delivery_Time_SLAs&oldid=160)

Questio

Things we Want to Accomplish but don't know how to do

- How do we see client visits
 - How do we ensure client visits so many times and by whom and by client type, etc.
-

Websites

Website Builder

Live Chat

Sales

Sales

CRM

Client Service SLAs and Action Items and Quota

Direct Sales Channel										
	Desired Client Mix		2019		2020		2021		2022	
Tier 1 Client	1	20%	Account Rep 1	\$18,000	Account Rep 1	\$23,400	Account Rep 1	\$29,250	Account Rep 1	\$35,100
	2	20%		\$18,000		\$23,400		\$29,250		\$35,100
Tier 2 Clients	1	5%		\$4,500		\$5,850		\$7,313		\$8,775
	2	5%		\$4,500		\$5,850		\$7,313		\$8,775
Rep 1 Total				\$45,000		\$58,500		\$73,125		\$87,750
Tier 1 Client	3	20%	Account Rep 2	\$18,000	Account Rep 2	\$23,400	Account Rep 2	\$29,250	Account Rep 2	\$35,100
	4	20%		\$18,000		\$23,400		\$29,250		\$35,100
Tier 2 Clients	3	5%		\$4,500		\$5,850		\$7,313		\$8,775
	4	5%		\$4,500		\$5,850		\$7,313		\$8,775
Rep 2 Total				\$45,000		\$58,500		\$73,125		\$87,750
	Total	100%		\$90,000		\$117,000		\$146,250		\$175,500

Tiers

Client Tier Level	Monthly Sales 2020	Monthly Sales 2021	Monthly Sales 2022
Tier 1	X >= \$20,000 (USD)	X >= \$30,000 (USD)	X >= \$40,000 (USD)
Tier 2	X >= \$5,000 (USD)	X >= \$7,500 (USD)	X >= \$10,000
Tier 3	X < \$5,000 (USD)	X < \$7,500	X < \$10,000

Service Levels by Tier - Personal Visit

	Deliveries	Account Rep Visit	Technical Visit	Channel Manager	Executive Manager
Tier 1	In Person	2 times per week min	2 times per week min	1 time every 2 weeks	1 timer per month
Tier 2	In Person (if in SLP or if in a cluster)	1 timer per week (if in SLP or 1 every 2 weeks if not)	1 time every 2 weeks (if in SLP) and 1 time per month if outside of SLP.	1 time per month	1 timer per quarter
Tier 3	In Person (only if in SLP)	Conditionally based on needs.	Conditionally based on needs.	New Sales Opportunity that would move it up a tier.	New Sales Opportunity that would move it up a tier.

Service Levels by Tier - Not In-Person Visit

	Account Rep	Technical	Channel Manager	Executive Manager
Tier 1	1 time per week	1 time per week	1 every 2 weeks	1 a month
Tier 2	1 time per week	1 time per week	1 every 2 weeks	1 a month
Tier 3	1 timer every 2 weeks	1 timer every 2 weeks	As needed	As needed

Action Item

- ☐ Add tiers to Clients based on sales. Review quarterly.
- ☐ Define Clients by Region
- ☐ Define Client by Ejectivo(s)
- ☐ Define Client (Direct/Indirect or what sales Channel)
- ☐ Create pipeline win probability (fix at admin level)

Sales Per Rep (Quota)

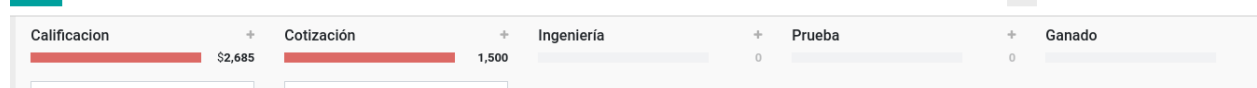
	Sales Channel	2020	2021	2022
Rep 1	Direct	\$58,500	\$73,125	\$87,750
Rep 2	Direct	\$58,500	\$73,125	\$87,750
Rep 3	Alternate	\$15,000	\$22,500	\$33,750

Quote SLAs

- 48 Hours after we have the basic engineering information (need to create a hierarchy of information)
- ☐ Add another stage before quote that is to get engineering information

Prospect to Close SLA -- create kill switch

- Specials 4 months
- Resale 3 months
- Standard 2 months



Sales Funnel	1	2	3	4	5
	Cal	Cot	Ing	Prod	Prueba
Channel Conversion	2	3	14	60	30

- In the Qualification phase create management review if there is no proactive activity (define) within a week.

Sales Cycle Point of Equilibrium Should based on the following factors

- Expected Revenue
 - Estimated Close Rate
 - Cost of Raw Material
 - Cost of Labor
 - Client Service Costs
 - Test Costs
- A no would be when the time value of money invested exceeds 3 months of expected revenue

? Are you able to move something that is in your pipeline back to a Lead?

Expected Revenue	Chance of Win	Forecasted Revenue	Total Cost	3 Month Revenue	ROI	Test RYG
\$5,000	50%	\$2,500	\$2,500	\$7,500	\$5,000	66.67%
Expected Revenue	Chance of Win	Forecasted Revenue	Total Cost	3 Month Revenue	ROI	
\$5,000	50%	\$2,500	\$10,000	\$7,500	-\$2,500	-33.33%
Expected Revenue	Chance of Win	Forecasted Revenue	Total Cost	3 Month Revenue	ROI	
\$5,000	50%	\$2,500	\$7,500	\$7,500	\$0	0.00%

Test Expiration Date

- If there is not movement within 2 months from start of test. Move to close (define exception circumstances) (e.g. If age in Testing is ≥ 60 then create task to have management review for kill/no kill)

- ☐ Add this task to each time we get a RFQ ([Engineering Intake Form](#))
- ☐ Create non-engineering sales questionnaire tree (diagrama de flujo)

-? Can we add a report card on the accuracy of the forecast

- Quote to Sales Close Time
- Client Visits
- Client Size

Operations

Accounting

Project

Human Resources

Employees

Expenses

Appraisal

Inventory

Purchase

Manufacturing

Manufacturing

PLM

Maintenance

Quality

Helpdesk

Productivity Tools

Communication

Discuss

Timesheet

Survey

Client

Sales Targets

Regions