



## Computer Insights Inc

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# STOP MISTAKES AND SAVE TIME WITH CERTIFICATE MANAGEMENT

## *Certificate Management is a Big Problem*

In the Fastener Industry, maintaining and delivering proper certification is as important as delivering the proper part in many instances. If a part requires certification, it can become a very complicated part to handle. Each part may have varying certification requirements for each customer. When a part like this is purchased, the Fastener Distributor must specify the type of certifications required. That means that someone in the Purchasing Department must specify the requirements when they place the Purchase Order.

## *Warehouse Handling*

When this part comes in, someone in Receiving or Quality Assurance needs to know what Certification or Certifications (Certs) are needed and they must be certain that they go with the product. Certs are often different for different customer requirements, e.g. it might be Cert to a Boeing number, or simply Mechanical or Chemical Certs or both.

The warehouse personnel need to be able to identify the correct lot of the product that has the required Certs on file and they need to be sure that the Certs go out with the product. If any step in this process is missed, there is big trouble. The customer is likely to reject the parts and insist that all the missing documentation be produced. Worse yet, the customer is likely to "write the distributor up" in their Quality System with a non-conformance or problem report. If the distributor gets too many of those, they could lose the customer altogether.

## *Sales Department*

When a customer orders a part that normally requires Certs, they may or may not specify them this time, even though they need them. When the Customer

Service Rep is taking the order, they may or may not remember to specify the correct Certs, even if the customer was quite clear about the requirements.

## *Tight Controls Require Many Manual Steps*

At each stage of the handling of these parts, there are usually manual safeguards and double checks to assure that the proper Certs go out. This is time consuming and error prone. This checking and re-checking is tedious, time consuming and only partially effective.

## *Problem Solved with **The BUSINESS EDGE 2.0***

The BUSINESS EDGE 2.0™ Certificate Management System offers the ability to receive lot certificates from a vendor and automatically send them to the customer. In conjunction with the documentConnection™ module, all certificates are stored electronically for easy retrieval.

## *Certificate Categories*

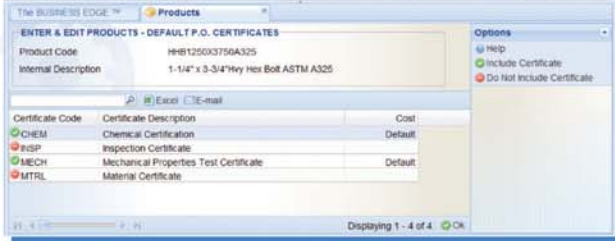
Each installation of The BUSINESS EDGE 2.0™ creates their own list of certificate types that they want to be able to receive from vendors and give to customers. Each certificate type has a default cost for purchase orders and a default price for sales orders.

The screenshot shows a software window titled 'The BUSINESS EDGE 2.0' with a sub-header 'Certificate Type'. The main area is titled 'ENTER & EDIT CERTIFICATE TYPE' and contains several input fields and dropdown menus. The fields are: Certificate Type Code (CHEM), Certificate Type Description (Chemical Certification), Include Cert on PO Form? (Yes), Cost Expense Account (5016 Inventory Adjustments and Price Discrepancies), Default Cost (\$ 10), Sales Revenue Account (4006 Sales Certs), Default Price (\$ 10), Tax Type (Regular), Active (Yes), and Initiated (ROOT 03-10-11 15:20:08). There are also buttons for 'Delete', 'OK', and 'Cancel' at the bottom right.

# The BUSINESS EDGE 2.0

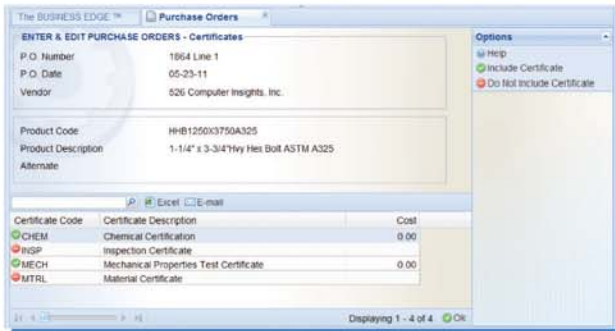
## Default Certificates for Purchasing

Since each product requires different types of certificates, The BUSINESS EDGE 2.0™ defines a unique default list of certificate requirements for each product. These defaults are used for when the product is placed on a purchase order. The defaults are used not only for which certificates should be received from the vendor, but also an override of the cost if needed.



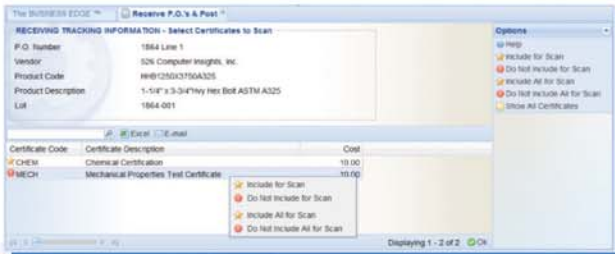
## Changing Certificates for a Purchase Order

When entering a Purchase Order in The BUSINESS EDGE 2.0™, the system uses the default certificates for the product, but then the user can request or remove specific certificates, allowing for specific certificate requirements for a specific Purchase Order.



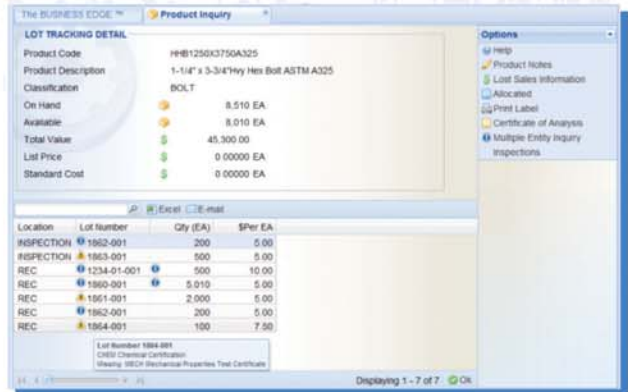
## Receiving the Purchase Order is Simple

Upon receiving, the system prompts for scanning the different required certificates. The system allows for scanning of one document that fulfills multiple certificate types. The documents are scanned into the documentConnection™ and linked to the specific product, lot and certificate type(s).



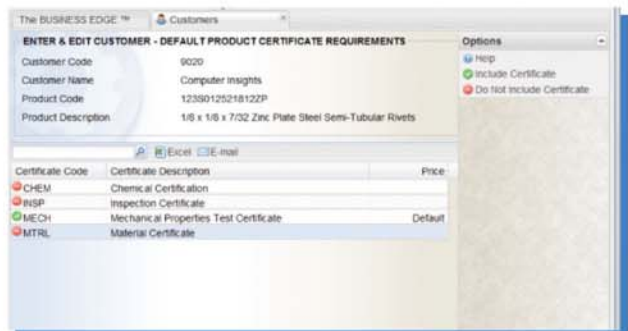
## Confirming Receipt of all Document Types

When doing a product inquiry, the system shows you which lots have all required certificates scanned in and which ones are missing required certificates. The system also warns the accounts payable clerk when entering the vendor invoice if all the certificates were not scanned in. Additionally, there is a report that shows all lots missing required certificates.



## Default Certificates per Customer

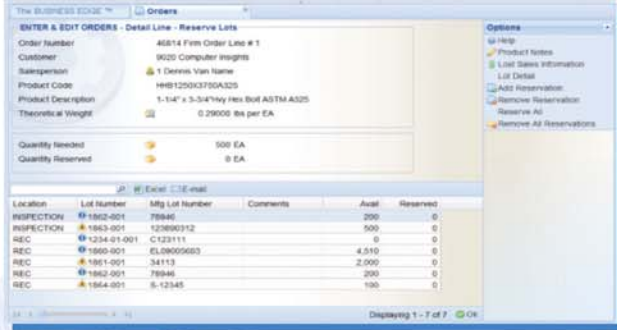
There are two different ways of setting up default certificates for the Customer. First, you can choose which certificates the customer will get for all products on all orders. This is useful for when a customer always requires a certificate type for all orders. Second, The BUSINESS EDGE 2.0™ also allows default certificates for a specific product for a customer. This allows for customers to have different certificate requirements on different products.



# The BUSINESS EDGE 2.0

## Creating Sales Orders with Specific Requirements

Each sales order's product defaults to the customer's requirements. Once the product entered on the order, the user can change the requirements to fit exactly what the customer requires this time. When allocating lots, the system will not allow the user to use a lot that does not fulfill the customer requirements. When printing the packing list and/or invoice, the certificates print out automatically.



## Tight Control - Automatic - Easy to Use

The BUSINESS EDGE 2.0™ is designed exclusively for Fastener Distributors and the Certificate Management System is just one more example of how it is saving Fastener Distributors time and money. The Certificate Management System doesn't just make these steps easier, it actually eliminates many steps altogether. If the system automates the entire process without human intervention, how can you go wrong? Countless hours of tedious, boring and unproductive work simply disappear. That is what is needed as customers continue to demand more and more from their Fastener Distributors, while at the same time they are keeping pressure on prices.

## More Information

Computer Insights, Inc. can be reached at 108 3rd Street Unit 4, Bloomingdale, IL 60108. Their telephone number is 1-800-539-1233, Email sales@ci-inc.com or visit [www.ci-inc.com](http://www.ci-inc.com).