**System Overview**

**Stop Searching!** Discover how easy shop management software can be with the latest version of Visual EstiTrack™ Lean-enabled ERP software for Windows. For 20 successful years Henning Industrial Software has been providing job shops, make-to-order manufacturers, high-production shops and distributors an innovative, affordable solution to their Shop Management needs. Visual EstiTrack™ Software is a proven, user-friendly system designed to keep you competitive, accurate and ahead of the competition. Visual EstiTrack™ is a completely integrated Shop Management System beginning with Estimating through Sales Orders, Shop Orders, Job Cost Tracking, Time Tracking, Visual Scheduling, Inventory (FIFO/LIFO Lots with multiple locations and bins), Purchasing, Receiving, Shipping, and Invoicing. Visual EstiTrack™ can be bundled with Visual Books™ which will provide you with a fully integrated accounting system.

Simply stated, Visual EstiTrack™ offers customers a rich feature set. It is the depth and breadth of these features that sets us apart from our competition.

This brochure is designed to provide a brief overview of Visual EstiTrack’s subsystems. Be sure to get our demo disk or call us for an on-line demo so you can gain a complete understanding of Visual EstiTrack’s capabilities.
Thank you for taking the time to learn more about Henning Software’s Visual EstiTrack™ (lean-enabled) manufacturing system and Visual Books™ integrated accounting system. After you review this information you’ll see what a dramatic impact Visual EstiTrack™ can have on streamlining your organization thus allowing you to run your operations more efficiently and profitably.

The Problems...

If your operations operate like many shops, you probably find it difficult to maintain tight job control. With customers constantly changing their order requirements, release quantities and delivery dates, scheduling can become a nightmare. Without accurate production and costing data, requoting repeat orders or reviewing the profitability of orders becomes guesswork at best.

Some of the typical problems that plague shops includes:

- Unprofitable estimates and jobs
- Late Orders
- Unrealistic Delivery Dates
- Lack of timely operation and employee efficiency/performance information
- Inefficient/Inaccurate Job scheduling methods
- Unrealistic schedules, deadlines resulting in late orders
- Lack of accurate and timely production/progress information
- Inaccurate/Inefficient manual inventory control systems
- Lack of accurate job recap, costing and profitability data

Making sure orders get out on time, minimizing backorders, scheduling and identifying unprofitable jobs and customers requires accurate production data and planning. Without tight controls customer erosion is inevitable.

The Solution...

Visual EstiTrack™ and Visual Books™ gives you the means to resolve these problems and more. EstiTrack starts by allowing you to create job estimates quickly and easily. With EstiTrack you can track all aspects of your orders from start to finish.

The following pages review each major subsystem but this is only a very brief review of EstiTrack’s true capabilities. Please be sure to contact us for an on-line demonstration so that you can experience first-hand the depth and breadth of features this software can offer you.
Key Features:

- Customer Maintenance
- Unlimited Ship To Addresses
- Order History / Recaps
- Unlimited Contacts
- Relationship Management
- Customer Monitoring
- Customer Reports
- Customer Mail Labels
- On-Time Delivery Report
- Invoice Maintenance
- Post/Unpost Invoices
- EDI (830s / 862s / 856s)

Visual EstiTrack™ allows you to capture and track all your important customer and lead information within customer maintenance. From the customer maintenance screen you can define multiple ship to addresses, unlimited contacts, track customer related tasks (CRM), define customer specific alert messages that can be automatically popped up throughout the system, setup bar code label standards, review historic sales and transactions, and review your customer’s quote and order history.
Visual EstiTrack’s™ Job Estimating system allows you to quickly and accurately generate quotes. Because Visual EstiTrack automates most quote calculations you can spend more time performing important what-if analysis. With EstiTrack many quotation alternatives can be quickly generated so that the BEST one can be selected, not just the first one. You can also easily copy from operation libraries, other quotes or shop orders as a way of starting a new quote. In this way you are simply modifying a duplicate copy of a previous quote that has similar characteristics to the part you are estimating.

EstiTrack’s powerful raw material calculators allow you to define cut sizes so overall material requirements can be rapidly defined. You can define both non-inventoried direct buy items as well as inventoried items in our material worksheets. EstiTrack includes a theoretical speeds and feeds calculator to help you with cycle time calculations. You can also alternatively enter cycle times in either seconds, minutes or hours per part. EstiTrack also allows you define lot-based jobs as well if you are not a piece-based operation.

EstiTrack’s one-time charge worksheet allows you to separate out one time tooling or engineering charges from your piece price. You can also define up to ten quote quantities simultaneously with separate markup for material and manufacturing operations.
Key Features:

- Piece or Lot Based
- Cut size based Material Calculators
- Theoretical Speeds and Feeds
- Cycle times entered by seconds, minutes or hours
- Copy from master to another or actuals from a previously run shop order
- Drag & Drop to Sales Order or Shop Order
- Revision Tracking
- Operations and note Library
- MicroEstimating™ interface

**Visual EstiTrack’s™** Engineering Master screen allows the engineering department to quickly define part layout sheets. This includes defining a part’s material and operational standards. The revision maintenance feature allows engineer’s to track historic material or routing changes.

You can also easily copy from operation libraries, other engineering masters or shop orders as a way of starting a new engineering master. In this way you are simply modifying a duplicate copy of a previous master that has similar characteristics to the part you are defining.

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**Visual EstiTrack**™ Product Structure screen allows you to easily create and navigate your product structures. If you are defining a single component part or a complex multi-component part you can build it with EstiTrack’s product structure screen. EstiTrack supports unlimited product structure levels. Its unique interface allows you to define and navigate informal structures defined by simply relating parent and child job estimates without having to define any type of formal inventory item for each component. For make-to-stock manufacturers you can define a formal item master to item master product structure relationship so you can track all your parent and sub-component items through inventory.

The product structure screen also enables you to depict a parts operations and materials in one overall graphical view. Each node in the screen is “hot” allowing you to click on it to pop-up a menu that will provide you a way to quickly navigate to a detailed transaction screen of interest (e.g., easily jump out to the inventory, purchase order, shop order, engineering master directly from the product screen).
Key Features:

• Allows you to define Sales Orders (which are a reflection of your customer’s PO)
• Each Sales Order can have an unlimited number of line items
• Sales Order can be generated directly from job estimates, finished good inventory items or engineering masters.
• Each Sales Order line item can have its own release schedule for blanket customer POs.
• Ship to Addresses can be updated directly in the Sales Order without having to go back to the Customer
• Enforceable Credit Limits
• Sales Order Discount Structures
• Pick Lists / Acknowledgements
• Sales Order Change Order screen makes quantity and release date changes easy
• Revision Control
• Currency Exchange

• Visual EstiTrack’s Sales Order subsystem enables you to define your customer orders and delivery schedules. Sales Orders are a reflection of your customer’s purchase order. They allow you to define the items being ordered. This includes defining the item, quantity, unit price, discount percent and discounted price. Each Sales Order can be associated with one or more Sales Order releases. Each sales order release contains a quantity, delivery date, promise date and a ship by date so you can inform your shipping department when things need to be shipped by to achieve on-time deliveries. Transit days can be defined at the customer ship to address level so we can automatically calculate the ship by date for each release.

Sales Orders can automatically be created from your job estimate using drag and drop techniques. If you are a make-to-stock type manufacturer and thus sell from finished goods inventory you can use the Sales Order to initially issue your client a quotation and then, if you get the order, quickly change its status to an actual Sales Order.

The Sales Order change order screen provides users an easy way to quickly modify sales order delivery schedules and quantities. For those needing EDI Henning optionally offers an EDI interface for incoming 830 and 862 EDI transaction types.
Key Features:

- Shop Orders can be directly generated from a Sales Order, engineering master or job estimate.

- Automated Shop Order generators enable users to quickly generate needed shop orders based on firm customer specific demands (Pull System).

- Create suborders for complex multi-level component jobs.

- Drag and drop enabled order creation provides yet another quick way to generate Shop Orders.

- Easily Generate Shop Travelers, Routers or Mini-routers for Lot and container Tracking.

- Define and update material requirements or alternate materials.

- Define Operations and cycle times by seconds, minutes or hours.

- Theoretical Speeds & Feeds Calcs

- Shop Order Recap Reports compare estimates to actuals

- Time & Material Reports

- Revision Control

- Order Monitoring

Visual EstiTrack’s™ Shop Order subsystem enables you to define your manufacturing and shop floor orders with due dates. Shop Orders reflect what needs to be made to fulfill customer sales order requirements or to replenish inventory that has fallen below minimum safety stock levels. Shop Orders can be manually created or based off a previously defined job estimate or engineering master. You can have one-to-many shop order releases on a shop order. Shop Orders allow users to allocate raw materials. Allocating raw materials places demands on raw materials so that their demand can be viewed by your purchasing department for procurement. Both non-inventoried direct buy and inventoried materials can be allocated.

The shop order subsystem contains extensive reports to review shop order status, late running jobs, cost recaps, assembly job statuses, efficiency, hours and profitability.

EstiTrack contains many shop order generators to enable rapid deployment of shop orders to the shop floor. Shop orders can be formally scheduled using both infinite and finite scheduling techniques.
Visual EstiTrack™ has a sophisticated yet easy to use infinite and finite scheduling system that can be used simultaneously. You can use infinite backward scheduling from the shop order’s due date to establish ideal operational due dates (planned due dates) for each shop order operation. These planned dates are automatically generated when you create a shop order but can be user modified using an interactive drag and drop gantt chart. EstiTrack also has a forward finite scheduling system that is capacity constrained by capacity limiting calendars associated with each workcenter or workcell. EstiTrack’s drag and drop scheduling screen allows users to quickly queue up and sort shop order operations on a workcenter using a wide variety of sort criteria. You can sort down a workcenter queue by shop order due date, operation due date or just by your own drag and drop sequence preference. If you are a cell based operation with part families you can also sort a workcenter queue by a part family, and then and then by a shop order due date or an operation’s due date.

You can use the icon based Visual Shop Floor screen to view shop floor loading, gantt charts and to move or split shop order operations across alternative workcenters.
**Key Features:**

- Purchase Orders can be manually created or automatically generated using a variety of Purchase Order generators.

- Each line item of a purchase order can be directly tied back to a shop order if you wish to buy directly to the job.

- A shop order can reference an inventory number to pull its detailed description from inventory.

- P.O. generators provide the buyer a way to consolidate and aggregate all shop order requirements on to a single purchase order or you can optionally use our direct buy PO generator to buy directly to job.

- Material Requirements report can be easily generated based on firm shop orders as well as planned needs based on customer sales orders that have not yet hit the shop.

- EstiTrack also contains a Requisition system that will enable your shop to request items to be ordered without giving them direct access to purchasing. A requisition-based P.O. generator can be used to review, approve and generate P.O.s.

- Vendor Efficiency based on-time delivery reports

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**Visual EstiTrack™ Purchasing**

Visual EstiTrack™ Purchasing subsystem has many automation tools to make your purchasing department more efficient. Purchase Orders can be automatically generated through EstiTracks wide assortment of purchase order generators. You can also manually generate Purchase Orders. Each purchase order can be assigned a due date so that on-time delivery can be monitored. EstiTrack also supports multi-release blanket purchase order generation. Material requirement release schedules can be generated based on your firm shop orders and planned customer deliveries not yet released to the shop floor. Vendor efficiency reports will help you monitor and report vendor on-time performance.

Vendors can also be assigned an approval status if you are trying to enforce purchasing of materials from approved vendors only. You can also purchase in a different unit of measure (e.g., pounds) than what you stock your inventory in (e.g., pieces). The system will convert both cost and quantity to the stock unit of measure set in inventory when items are received.
Key Features:

- Specialized receiving screen allows users to enter in multiple receipts for each purchase order line item.
- Each receipt can be tied to both a system-assigned or user-defined Lot number and a supplier defined Heat/Serial number.
- Receipts associated with inventory numbers can directly update and create inventory lots in inventory with associated lot and heat/serial numbers.
- Scanned material certifications can be associated with each inventory lot received and automatically printed when parts made from that material are shipped.
- Receiving screen directly tied to quality action requests and non-conformance forms so received materials can be tagged as suspect or rejected.
- Reports include receiving log, receiving tags, suspect and reject material tags.

Visual EstiTrack™ Receiving screen allows users to rapidly receive in items purchased. EstiTrack’s receiving screen supports both manual and automatic entry. The automatic receiving feature enables users to highlight one or more purchase order line items and then simply click the auto receive button to create a receipt based on the balance to receive for each highlighted line item. EstiTrack also supports tight raw material lot control. You can receive one or more receipts for each purchase order line item. Each receipt can be associated with a one or more bundles. Each receipt can also be assigned a unique lot number, heat number and can be associated with scanned in raw material certifications. The receiving screen also supports entering in action requests for suspect materials, printing suspect or reject tags and receiving tags so the materials disposition can be easily identified.

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Key Features:

- Track Raw Material, work in process, finished goods, supplies and tools.
- Supports true lot tracking and control. Each lot can be associated with its own lot number, heat/serial number, shop order that created it and or supplier.
- Supports standard, average, FIFO or LIFO methods.
- Unlimited user-defined locations and bins. Each location can be flagged as being a production, wip, package and hold, shippable or non-shippable making it easy to create quarantine areas for material review.
- Supports part aliases and customer specific pricing.
- Support preferred and alternate suppliers, part numbers and pricing.
- Journal tracks all in/out activity and history.
- Set reorder levels, quantities.
- Inventory adjuster and monthly reconciliation screens

**Visual EstiTrack™** Inventory subsystem makes it easy to track all your raw material, work-in-process and finished goods inventory. EstiTrack supports a true lot-based inventory management system. All in/out transactions are journaled making it easy to report monthly activity. EstiTrack allows users to track detailed raw material specifications in inventory (i.e., material shape, alloy and size information). The detailed raw material information can then be automatically included on purchase orders to eliminate redundant typing or used directly in Job Estimates or Shop Orders. Each inventory lot can be associated with a lot number, heat/serial number and be linked to certifications. EstiTrack supports part aliases, discounts, alternate suppliers and reorder levels. The allocations screen shows the current demand that an inventory item has based on open sales or shop orders thus driving procurement activities. Powerful inventory adjustment generator screens makes it easy to perform physical inventories. The monthly inventory reconciliation screen allows users to generate general journal entries for inventory and cost of goods movements.
**Visual EstiTrack™**

**Shipping**

**Key Features:**

- Create shippers, packing slips based on Sales Orders and or shop orders.
- Track box, carton and skid information including quantities and weights.
- Reduce finished good inventory or kit inventory components.
- Create packing slips and commercial invoices.
- Generate Bill of Lading and bar coded shipping labels.
- Automatically close and update sales order and shop order releases and quantities.
- Optionally generate EDI 856 Advanced Shipment Notifications.
- Shipment monitor makes it easy to review shipping activity.

**Visual EstiTrack™** Shipping subsystem makes it easy to create shipments, reduce inventory and produce packing slips, labels and bill of lading.

Each line item of the shipment can be detailed with box and skid information including quantities, box and tare weights. This information then can be used to create shipping labels and bill of lading. If you are shipping against a sales order, information is automatically defaulted into the shipping screen so that only quantity shipped information needs to be entered.
**Visual EstiTrack’s™ Quality subsystem makes it easier for customers to comply with yearly ISO and QS certification and ongoing conformance requirements. Henning Software modeled the new system after the most current ISO, QS and TS requirements.**

Now action requests (e.g., concerns, non-conformances, and improvements) can be easily defined, tracked, or assigned a status, and as a result of subsequent review, determinations can be made whether corrective actions are needed. The system methodically leads shop quality personnel through the 8Ds (i.e., 8 Disciplines) to track corrective actions while investigating opportunities for improvement or when following a suspicion of nonconforming materials. The system guides personnel in determining root problem causes, in making assignments of the different segments to different personnel, and other features.

Henning’s quality subsystem supports basic reporting against first/final article inspection results. It provides a capability for defining dimensional characteristics of parts, prints inspection worksheets, and allows inspections to be performed and captured.

A Dock Audit capability permits setting the frequency for prompting personnel to review specific Shipper items against the actual shipment, including correct part or revision numbers, or the proper piece count per box.
Key Features:

- Fully integrated with Visual EstiTrack Manufacturing System.
- Accounts Receivable
- Accounts Payable
- General Ledger
- Bank Reconciliation
- Payroll
- W2s, W3s
- Visual Navigator
- Form 941 - Federal Deposit
- Laser check printing

Visual Books™ is a fully integrated accounting system completely written and supported by Henning Software. While our competition at times supplements their accounting system’s with third-party components (e.g., payroll), Henning offers its clients a one-stop shop for their manufacturing and accounting needs.
Key Features:

- Use bar coded travelers and workcenter-based scheduling reports to collect time against shop orders.

- Track payroll time separately from job time. Compare times to measure employee productivity.

- Define unlimited shifts with their own start, end, break and lunch times.

- Define grace periods for automatic rounding of time cards.

- Use Visual Shop Floor to monitor real-time activities.

- Create employee schedules.

- Directly interfaces to payroll.

**Remote Time Collection**

*Visual EstiTrack’s™* remote time collection system provides your shop a way to capture both payroll and job time. Time can be captured by scanning bar codes from travelers. Events such as setup, production and downtime can be easily captured. The manual job card feature is ideal for setup and repair personnel to enter their time directly. The time collection system also allows the capture of quality data such as non-conformance and defects. Henning also optionally offers touch-screen terminal interfaces for those shops that don’t want to put an actual computer workstation in their shop.
Visual EstiTrack’s™ Executive Summary and Shop Advisor summarizes critical operational and financial data into concise screens. The exception reporting tool provides the busy executive an easy way to see issues such as late orders, operational efficiencies falling below user-defined boundaries and staff attendance information. Our optional graphically rich, state-of-the-art Executive Dashboard provides management with a birds-eye view of critical business metrics and trends.
WHAT HAPPENS AFTER I BUY?

PLANNING

Probably the most important step of implementing any manufacturing management system is planning the project. Management and the implementation team need to have a clear understanding of the task at hand. Goals should be set and responsibilities and authorities clearly defined. Without these essentials, the implementation will drag on and you could experience many difficulties.

MANAGEMENT ORIENTATION AND ORGANIZATION

Your executive management team should review Visual EstiTrack thoroughly to understand its capability and functionality. They should decide who the responsible individuals will be for implementing the system. While many people may be responsible for various aspects of the project, it is highly recommended that a single individual spearhead or champion the effort. This will help keep the project on track and prevents internal groups from working on diverging paths and lengthening the implementation time.

EDUCATION

Henning Software provides education and training either in our Hudson, OH facility or at your site. The biggest advantage of classroom training is that it gets you away from the hustle and bustle of the shop and the constant interruptions that often distract you from the task at hand … learning the software. On the other hand, you may want to bring in multiple people and that can get more expensive.

Onsite Training

Onsite training provides a more personal touch. Live customer data should be used and it helps to make more practical examples. It does, however, take some discipline and concentration to avoid the distractions of the shop. Also, you should have proper facilities to train several people at your site. This would mean having a few computers handy which could be located in a conference room where everyone can see and participate. Perhaps the ideal solution is to schedule 3-4 days of initial training at your facility and then schedule follow-up training and consulting at your site at a later date. This will allow you to learn the software and later, generate some specific questions that meet your needs.

On-line Training

Scheduled On-line training via the internet is available for those that don’t want to have travel expenses. On-line training can be very effective for both initial training or follow-up training.