**Questions for Manufacturing Prospects**

**Infrastructure**

QuickBooks

* Will you be connecting to QBO?
* What version and edition?
* How many current users?
* How long have you been using QBO?

Network and Computers

* Is the Internet connection sufficient for all users? Do you experience any outages?
* Does the company have a dedicated IT person or is that responsibility outsourced?

Company

* How is the company hierarchy structured?
* Are rules and regulations in place for processes?
* Who are the ‘decision makers?’ The ‘Influencers?’
* What percentage are your products:
  + Make-to-Stock (MTS)
  + Make-to-Order (MTO)
  + Assemble-to-Order (ATO)
  + Engineer-to-Order (ETO)

**Workflow Processes**

**-- Sales Order**

* How would you group your customers together? Who are they, and what channels do you service them through?
* Do you sell through a web store? If so, what shopping cart do you use?
* Do you sell through a Customer Resource Manager (CRM)? If so, which one?
* Do you charge different prices based on the customer?
* Do you use estimates or quotes?
* Do you have ‘stages’ of sales orders (i.e., prepayments or booked sales)?
* Do you take many prepayments?
* Is there a process for receiving in Returned Materials?
* Are you OK with sending invoices from another program?

**-- Purchase Order**

* Do you need or want secondary approval of POs before issuing?
* Do you do a lot of drop shipping?
* Have you calculated lead times, and is it crucial for ordering?
* Have you used purchase orders in the past? Are you willing to do so now?

**-- Receiving**

* Do Bills of Lading usually only include manufacturer numbers?
* Are you, or do you, want to scan items in?

**-- Assemblies**

* What is the ‘health’ of your existing Bills of Material?
* Do you frequently need to add substitutions for parts?
* Do you employ work orders?
* How many sub-assembly levels do you use?
* Do you need to track revisions?

**-- Manufacturing**

* Do you need production scheduling? If yes, explain.
* Do you need floor shop controls? If yes, explain.
* How many workstations do you have?
* How many decimal points are the units of measure?
* Do you incorporate labor into all builds?
* Do you involve any subcontractors (sending items out for adding value to products)? If so, how many and describe generally?

**-- Fulfillment**

* How do you prioritize the orders?
* Who decides which orders to fill, and based on what criteria?

**-- Picking**

* Is there a dedicated ‘pick’ person?
* How often do you pick? If only once a day, do you need a consolidated pick ticket to take through the warehouse?
* Do you have someone else perform a QC check on the items before packing?
* Are the items being scanned before they are picked?

**-- Packing**

* Is each item individually wrapped and tracked?
* Do the packing materials needed to be included in COGS?

**-- Shipping**

* Are you using any shipping programs, like ‘Ship Gear,’ ‘Ship Station,’ or something like that?
* Who are the providers and what methods are you using, such as overnight, 2nd day air, etc.?

**Warehousing**

* List the separate storage facilities you have and identify if they are for production and/or warehousing.
* What are the Internet speeds at each warehouse location?
* Do you need to track inventory within a warehouse or storage facility by location on the floor, such as a shelf or bin?
* What is the approximate size of the warehouse(s)?
* Are you using a ‘3PL’ for storage or transport?

**Inventory**

* Approximately how many SKUs do you have?
* Do you have or want lot or serial number tracking?
* Do you need or want to track the expiration and/or obsolescence of the inventory items?
* Do you want or need to track scrap inventory as the result of the manufacture of products?
* Does the company produce a Bill of Lading when shipping products to customers?
* When was the last time a physical inventory count was made?
* Do you have the units of measure worked out?

**Staff**

* How many people need training in MRPeasy?
* Do you need to clock your employees in and out?

**Reporting**

* What kinds of reports do you want to get out of a manufacturing system? Such as, Item Profitability, Item Turns, Purchasing, Manufacturing statistics, etc.?
* Who needs to see the reports, and how should they be delivered?