



Master Training Checklist

Training Items Outlined By Department

Training #	Functional Area	Job/Action in Cetec ERP	User/Assignment	Can Do?
Session 1 - Sales	Customer Service	Look up Customers/Quotes/Orders/Invoices/POs/Parts (and search and filter)		
Session 1 - Sales	Inside Sales	Enter New Quote // Clone Quote // Clone Quote Line		
Session 1 - Sales	Inside Sales	Perform stock check and pricing check on part		
Session 1 - Sales	Inside Sales	Lookup closed quotes and clone to new quote; look up sales history (invoices)		
Session 1 - Sales	Inside Sales	Write a note on a quote / set reminder		
Session 1 - Sales	Inside Sales	Convert Quote To Sales Order		
Session 1 - Sales	Inside Sales	Use Quote Workflow		
Session 1 - Sales	Inside Sales	Attach Document to Quote, PO, Part, etc.		
Session 1 - Sales	Inside Sales	Set up auto-email invoicing per customer		
Session 1 - Sales	Inside Sales	Set item qty to ship; print packing slip; create invoice to close order		
Session 1 - Sales	Inside Sales	Create/Edit Customer Files / Customer Contact Info		
Session 1 - Sales	Inside Sales	Add/Edit/Delete Open Order information (e.g. change order qty, parts ordered, etc.)		

Session 1 - Sales	Inside Sales	Modify Default Item Pricing		
Session 1 - Sales	Outside Sales	Create a customer // create a lead // write notes		
Session 1 - Sales	Outside Sales	Enter Quote (future)		
Session 2 - Procurement / Warehousing	Purchasing	Enter pQuote, convert to PO, send PO pdf to vendor, acknowledge PO was received by vendor		
Session 2 - Procurement / Warehousing	Purchasing	Add/Edit/Delete Open PO information (e.g. change order qty, parts ordered, inventory versus non-inventory item, etc.)		
Session 2 - Procurement / Warehousing	Purchasing	Create/Edit Vendor Files / Vendor Contact Info		
Session 2 - Procurement / Warehousing	Purchasing	Assisted Purchasing (receive and justify signal to initiate internal work orders for repair, repair/replace, new fab shop orders, machine shop build-for-stock orders)		
Session 2 - Procurement / Warehousing	Purchasing	Outsourcing processes		
Session 2 - Procurement / Warehousing	Warehousing	Receiving: receive material (with PO and without PO)		
Session 2 - Procurement / Warehousing	Warehousing	Receipt management (change receipt date, undo receipt, etc.)		
Session 2 - Procurement / Warehousing	Warehousing	Stocking/Put-away: Put away received material into a bin (future plan)		
Session 2 - Procurement / Warehousing	Warehousing	Perform cycle counts & full inventory counts in Cetec ERP.		
Sessions 3/4 - Production, Operations, QA	Ops / Inv / Prod Mgmt	Pick parts, complete (i.e. "ship/invoice") subassemblies to stock, etc.		

Sessions 3/4 - Production, Operations, QA	Ops / Inv / Prod Mgmt	Create & Edit Part Records and Inventory Records (Re-Order Point Value, Part Descriptions, Inventory Adjustments with reason codes, etc.)		
Sessions 3/4 - Production, Operations, QA	Ops / Inv / Prod Mgmt	Create & Edit BOM records (raw material, subassemblies, qty per top, etc.) - Permanent BOM records and order-specific BOMs. BOM overview costing review BOM Quoting for custom MFG		
Sessions 3/4 - Production, Operations, QA	Ops / Inv / Prod Mgmt	Attach document (e.g. drawing, router, etc.) to BOM; look up work order specific docs (e.g. BOM docs as “related docs” on work order)		
Sessions 3/4 - Production, Operations, QA	Ops / Inv / Prod Mgmt	Scheduling/Fulfillment: Review open and unreleased work orders and prioritize releases to production based on dates, stock levels, etc.		
Sessions 3/4 - Production, Operations, QA	Ops / Inv / Prod Mgmt	Scheduling/Fulfillment: Release pending production work orders to the floor for production: print traveler (license plate, BOM overview, pick list etc.) for assembly and/or sub-assembly work orders.		
Sessions 3/4 - Production, Operations, QA	Ops / Inv / Prod Mgmt	Sales Order editing // Order Specific BOM management.		
Sessions 3/4 - Production, Operations, QA	Ops / Inv / Prod Mgmt	Work Order Tracking/Costing: log labor time and/or overhead to order; update work location on router.		
Sessions 3/4 - Production, Operations, QA	Ops / Inv / Prod Mgmt	Scheduling/Fulfillment: complete subassembly work orders, i.e. ship/invoice internal work order to receive finished goods into stock. If multi-level BOM, pick finished subassembly for top-level internal work order.		
Sessions 3/4 - Production, Operations, QA	Ops / Inv / Prod Mgmt	Work order mgmt: Locate work orders in production.		
Sessions 3/4 - Production, Operations, QA	Quality	Perform QC Inspection on work order, log failures, etc. Update work order location in router.		
Sessions 3/4 -	Quality	Manage NCRs and CARs in Cetec ERP.		

Production, Operations, QA				
Sessions 3/4 - Production, Operations, QA	Accounting (costing, inventory, G/L, etc.)	Look up invoice, look up part details to review material and labor costing, adjust invoice, etc.		
Session 5	Accounting (A/R)	Basic AR process		
Session 5	Accounting (A/P)	Basic AP process		
Session 5	Month End / Year End Procedures	Month End / Year End Procedures (e.g. exports of reports, etc.)		
Session 5	Management Reporting / Financials	Run P&L, Balance Sheet, etc.		
Session 5	General Ledger	View ledger, search ledger, edit entries, backdated ledger entries, etc.		
Session 6	Admin Usage	Configuration settings, user maintenance, user roles, custom fields, etc.		