

# Cetec ERP

## Cetec ERP 101 - The Basics

...

Web browser usage

Cetec Overview - Records, Reports

Follow Processes

Workorder

Purchasing

Complete Workorder

Sales Order

# Where We're Going

Cetec ERP Intro & Overview

Creating & Editing Records

Cetec ERP Process

# Cetec ERP Overview

Web Browser Intro

Homepage

Modules

Basic Navigation

# Web Browser Intro

## Shortcuts

New Tab	ctrl+t
Scrolling Between Tabs	right: ctrl+tab left: ctrl+shift+tab
Closing Tabs	ctrl+w
Reopening Tabs	ctrl+shift+t
Page Search	ctrl+f

Use shortcuts to more efficiently navigate through Cetec and open tasks. Using separate tabs in Cetec can prevent you from clicking into a link and then having to “go back” as the page is still loaded.

Here are a few to help get started. You can google other shortcuts, like separate windows, bold, underline, italicize, etc.

Active Work in 143.1

INVOICE VALUES

	Ext Resale	Cost	GP Value	GM %
Yesterday	\$0.00	\$0.00	\$0.00	0%
Today	\$0.00	\$0.00	\$0.00	0%
MTD	\$1,736.97	\$1,213.17	\$523.81	30%
Prior MTD	\$33,499.00	\$306.00	\$33,193.00	99%
Prior Year MTD	\$-160.00	\$-19.68	\$-140.32	0%
Prior Month	\$33,499.00	\$306.00	\$33,193.00	99%
YTD	\$922,788.33	\$235,695.56	\$687,092.76	74%
Prior YTD	\$83,090.00	\$3,897.56	\$79,192.44	95%
Prior Year	\$87,074.99	\$7,281.41	\$79,793.58	91%

**Information:**  
 No Billing Credit Card On File! There are 3 days remain before your trial ends!! Please provide credit card information [in your profile](#) [Dismiss](#)



- SUB
- NEU
- PRT
- RAW
- Other

Help

OPEN ORDER BACKLOG

# Open Order Lines: 20      Total Resale: \$238,583.19      Total GP: \$-80,992.48

Order #	Line #	Customer	Part #	Resale	Ship Date
37.1	1	Products & More	JOB-37	\$0.00	2018-12-04
36.1	1	Products & More	JOB-36	\$150.00	2019-02-01
44.1	1	Products & More	NEUGRAVEL-BOX-HIMB	\$74,775.80	2019-04-04
50.1	1	Products & More	JOB50	\$749.99	2019-06-06
90.1	1	Custom House	JOB-NEWSTAIRCASE2	\$153,493.50	2019-06-28
103.1	1	Products & More	RAW2847199	\$0.38	2019-07-30

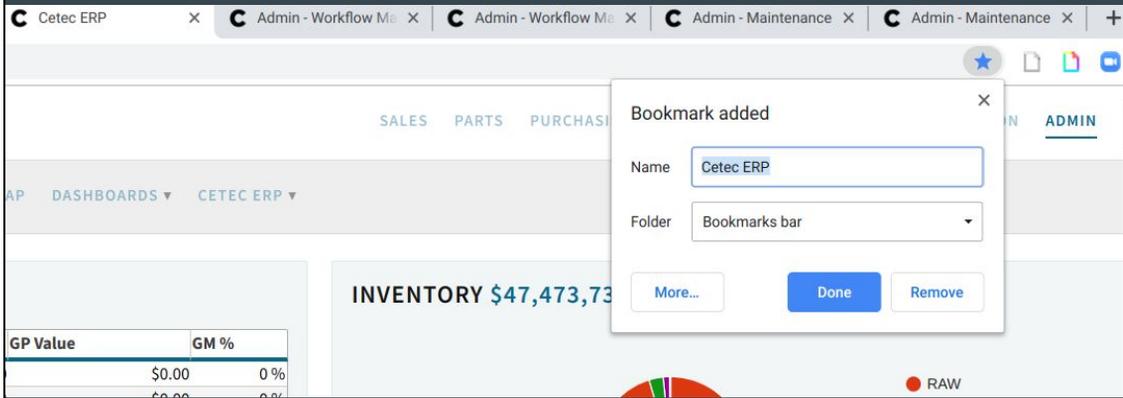
OPEN SALES ORDERS



# Web Browser Intro

## Bookmarks

Navigate to web pages quickly



Welcome Cetec ERP Support Team! (You Are On The LITE Support Plan)

SELL EXISTING STOCK BUILD A PART BUY FROM A VENDOR

INVOICE VALUES

	Ext Resale	Cost	GP Value	GM %
Yesterday	\$0.00	\$0.00	\$0.00	0%
Today	\$0.00	\$0.00	\$0.00	0%
MTD	\$0.00	\$0.00	\$0.00	0%
Prior MTD	\$0.00	\$0.00	\$0.00	0%
Prior Year MTD	\$0.00	\$0.00	\$0.00	0%
Prior Month	\$33,499.00	\$306.00	\$33,193.00	99%
YTD	\$921,051.35	\$234,482.39	\$686,568.96	74%
Prior YTD	\$83,250.00	\$3,917.24	\$79,332.76	95%
Prior Year	\$87,074.99	\$7,281.41	\$79,793.58	91%

INVENTORY \$47,473,478.64



OPEN ORDER BACKLOG

# Open Order Lines: 20      Total Resale: \$241,183.19      Total GP: \$-80,502.56

Order #	Line #	Customer	Part #	Resale	Ship Date
14.1	1	Products & More	FIGPRODUCT	\$3,000.00	2018-03-16
37.1	1	Products & More	JOB-37	\$0.00	2018-12-04
36.1	1	Products & More	JOB-36	\$150.00	2019-02-01
44.1	1	Products & More	NEUGRAVEL-BOX-HIMB	\$74,775.80	2019-04-04
50.1	1	Products & More	JOB50	\$749.99	2019-06-06
90.1	1	Custom House	JOB-NEWSTAIRCASE2	\$153,493.50	2019-06-28

(Go To Order)  View All Orders

OPEN SALES ORDERS



Help

# Modules

**CETEC ERP** SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ▾ ORDERS ▾ INVOICES ▾ CUSTOMERS ▾ LEADS ▾ OPPORTUNITIES ▾ FORECASTS ▾ REPORTS ▾

### INVOICE VALUES

	Ext Resale	Cost	GP Value	GM %
Yesterday	\$0.00	\$0.00	\$0.00	0%
Today	\$0.00	\$0.00	\$0.00	0%
MTD	\$0.00	\$0.00	\$0.00	0%
Prior MTD	\$0.00	\$0.00	\$0.00	0%
Prior Year MTD	\$0.00	\$0.00	\$0.00	0%
Prior Month	\$33,499.00	\$306.00	\$33,193.00	99%
YTD	\$921,051.35	\$724,482.20	\$686,569.05	74%

### INVENTORY \$47,473,478.64

95.3%

- PRT
- SUB
- NEU
- RAW
- Other

Each module at the top represents a different department. Each has a dropdown for the processes, functions, reports, etc., related to each.

For example, under SALES, you've got quoting and orders (order entry), Invoices (sales history), CRM: customers, leads, opportunities, and then forecasting and reports.

# Global search/sandwich menu

The screenshot displays the Cetec ERP dashboard. At the top, the 'CETEC ERP' logo is on the left, and navigation tabs for 'SALES', 'PARTS', 'PURCHASING', 'WAREHOUSE', and 'ACCOUNTING' are in the center. A red arrow points to a search bar on the right. Below the navigation is a secondary menu with options like 'QUOTES', 'ORDERS', 'INVOICES', etc. On the far right, a 'sandwich menu' is open, showing a user greeting and a list of personal and system settings. The main content area is divided into several sections: 'INVOICE VALUES' with a table, 'INVENTORY' with a pie chart, 'OPEN ORDER BACKLOG' with summary statistics, and 'OPEN SALES ORDERS' with a legend. A legend on the right side of the inventory chart identifies categories: PRT (orange), SUB (purple), NEU (teal), RAW (pink), and Other (grey).

	Ext Resale	Cost	GP Value	GM %
Yesterday	\$0.00	\$0.00	\$0.00	0 %
Today	\$0.00	\$0.00	\$0.00	0 %
MTD	\$0.00	\$0.00	\$0.00	0 %
Prior MTD	\$0.00	\$0.00	\$0.00	0 %
Prior Year MTD	\$0.00	\$0.00	\$0.00	0 %
Prior Month	\$33,499.00	\$306.00	\$33,193.00	99 %
YTD	\$921,051.35	\$234,482.39	\$686,568.96	74 %
Prior YTD	\$83,250.00	\$3,917.24	\$79,332.76	95 %
Prior Year	\$87,074.99	\$7,281.41	\$79,793.58	91 %

**INVENTORY \$47,473,478.64**

95.3%

- PRT
- SUB
- NEU
- RAW
- Other

**OPEN ORDER BACKLOG**

# Open Order Lines: 20      Total Resale: \$241,183.19      Total GP: 5-80,502.56

**OPEN SALES ORDERS**

- This Month
- Next Month
- Third Month
- Remaining

Two helpful tools for navigating and using Cetec are the Global search and the Sandwich menu in the top right of the screen.

The Global Search: you can search the entirety of your Cetec instance w/ the global search - parts, customers, POs, Invoices, etc. There will be a dropdown with possible options, these will be a link. Be sure to click the link rather than hitting "enter".

Sandwich dropdown: you can use these options to customize and better use Cetec according to your day-to-day job. Bookmark specific pages or reports you look at daily, set up and change your profile, see your time - both logged and passive, see your documents. There's also a few shortcuts at the bottom.

# Searching & Viewing Records

Global Search

Lists - Parts, Customers, Vendors

We'll look at a couple records for parts, customers, vendors. And then reports/lists related to each.

What you'll notice is that the general format and layout is the same, but with data and fields specific to that record.



[VIEWS/LISTS](#) ▾ [PRICING MAINTENANCE](#) ▾ [VENDOR RETURNS](#) ▾ [PART SPEC GROUPS](#) ▾ [PRC LIST](#) ▾ [REPORTS](#) ▾

## Parts

Prcpart/Description    Preferred Vendor  Creation Date (from) - (to)

Status  UOM  Non-Inventory

Note: Exports with more than 1000 rows will not include all columns. More Options ▾

<< Previous | 1 2 3 4 | Next >>  
 Displaying 26 - 50 of 83 [Export](#) +/- Columns

PRC	Prcpart	BOM?	QOH	QR	QOO	UOM	Default Cost	Default Resale	Info
JOB	JOB5	Yes	0	0	0		\$816.90	\$100.00	<a href="#">i</a>
JOB	JOB50	Yes	0	0	0		\$0.00	\$749.99	<a href="#">i</a>
JOB	JOBEXCSTAIRCASE123	Yes	0	0	0		\$0.00	\$0.00	<a href="#">i</a>
NEU	NEU-BOX-MODS	Yes	198	2	16		\$357.00	\$0.00	<a href="#">i</a>

We can run a report on all parts in Cetec by hitting submit. There are a number of search fields you can use to filter these down. Each column shows the data in the part record.

Click into a part to see the part record

## Part JOB50

VIEW  
EDIT  
BOM OVERVIEW (1)  
EDIT BOM  
EXPORT BOM  
BUILD ESTIMATE  
BUILD W/ SUBS  
PRICING  
QUOTES (0)  
ORDERS (1)  
SALES HIST (0)  
SHIP AND DEBITS  
PQUOTES (0)  
OPEN POS (0)  
WATERFALL  
PO HISTORY (0)  
NCRS (0)  
ECOS (0)  
RMAS (0)  
ORDERS W/ NEED  
(YES)  
PART REQS (0)  
TOOLS  
HISTORY  
CROSSES (0)  
MAINT +  
CHARGES  
REVISIONS

### PART INFO

Description	Revision			
<a href="#">Default Cost</a>	\$0.00000	<a href="#">Default Resale</a>	\$749.99000	<a href="#">Pricing Rules</a>
<a href="#">Last Buy Cost</a>	\$0.00000	<a href="#">Created On</a>	2019-04-04	<a href="#">Shelf Life</a> 0
<a href="#">Revenue G/L Account</a>		<a href="#">COS G/L Account</a>		<a href="#">RoHS</a> Yes
<a href="#">Preferred Vendor</a>		<a href="#">Preferred Manufacturer</a>		<a href="#">OEM Part #</a>
<a href="#">UOM</a>	(none)	<a href="#">Purchase UOM</a>	(none)	<a href="#">Export (ECCN)</a>
<a href="#">CHECK FOR MISSING PARTS</a>	No			

### WAREHOUSE: MN - MANUFACTURING SOLUTIONS

[Warehouse Transfer](#) [Vendor Return](#)

<a href="#">Avg Cost</a>	\$0.00000				
<a href="#">Cost For Loc</a>	\$0.00000	<a href="#">Resale For Loc</a>			
<a href="#">QOH</a>	0	<a href="#">QR</a>	0	<a href="#">Qty Avail</a>	0
<a href="#">QOO</a>	0	<a href="#">Total Backlog</a>	1	<a href="#">MOQ</a>	(1)
<a href="#">Std Cost</a>	0	<a href="#">Std Package</a>		<a href="#">Lead Time (in days)</a>	
<a href="#">Commodity Code</a>		<a href="#">ABC Code</a>		<a href="#">Country of Origin</a>	

On the left, you'll see the lefthand navigation, which shows data related to the part: Revisions, BOM overview for BOMs, quotes, orders, sales history, pquotes, etc.

We have basic Part Info up top and then warehouse info below. To edit Part info, click Edit in the lefthand navigation. To edit the Warehouse info, select the pencil icon next to the Warehouse.

# Documents; Notes

QUOTES (0)	CHECK FOR MISSING PARTS	No			
OPEN POS (0)	- WAREHOUSE: MN - MANUFACTURING SOLUTIONS				
WATERFALL				<a href="#">Warehouse Transfer</a>	<a href="#">Vendor</a>
PO HISTORY (0)	<b>Avg Cost</b>	\$0.00000			
NCRS (0)	<b>Cost For Loc</b>	\$0.00000	<b>Resale For Loc</b>		
ECOS (0)	<b>QOH</b>	0	<b>QR</b>	0	<b>Qty Avail</b>
RMAS (0)	<b>QOO</b>	0	<b>Total Backlog</b>	1	<b>MOQ</b>
ORDERS W/ NEED (YES)	<b>Std Cost</b>	0	<b>Std Package</b>		<b>Lead Time (in days)</b>
PART REQS (0)	<b>Commodity Code</b>		<b>ABC Code</b>		<b>Country of Origin</b>
TOOLS	<b>Tariff (HTS)</b>				
HISTORY	<b>Last Updated</b>	N/A	<b>Last Counted</b>	N/A	<b>ROP</b>
CROSSES (0)					
MAINT + CHARGES					
REVISIONS					
QUALITY ALERTS (0)					
PRINT LABELS					
DOCUMENTS (0)					
NOTES (0)					

Each record - parts, customers, vendors have the documents and notes links.

You can upload documents to a specific part record, like a drawing, instructions, etc.  
Notes can be used for internal communication

## Part JOB50

- VIEW
- EDIT
- BOM OVERVIEW (1)
- EDIT BOM
- EXPORT BOM
- BUILD ESTIMATE
- BUILD W/ SUBS
- PRICING
- QUOTES (0)
- ORDERS (1)
- SALES HIST (0)
- SHIP AND DEBITS
- PQUOTES (0)
- OPEN POS (0)
- WATERFALL
- PO HISTORY (0)
- NCRS (0)
- ECOS (0)
- RMAS (0)
- ORDERS W/ NEED (YES)
- PART REQS (0)
- TOOLS
- HISTORY
- CROSSES (0)
- MAINT +

Description	<input type="text"/>	Created On	2019-04-04
UOM	(none) ▼	Default Transcode	(use default) ▼
Last Resort Cost	\$0.00000 ⓘ	Revenue G/L Account	(use default) ⓘ ▼
COS G/L Account	(use default) ⓘ ▼	Default Voucher GL Account	(use default) ⓘ ▼
Preferred Manufacturer	<input type="text"/>	Preferred Vendor	<input type="text" value="Search vendors..."/> 🔍
UPC	<input type="text"/>	OEM Part #	<input type="text"/>
Non-Inventory?	<input type="checkbox"/>	Block Autopick?	<input type="checkbox"/> ⓘ
Serial Format	<input type="text"/> (More)	Shelf Life	0 <input type="text"/>
		Default Warranty	<input type="text"/> (none) ▼
		Default Selling Location	(choose location) ▼

Help

This is the Part edit screen. You edit the fields, or not.

DOCUMENTS (0)  
NOTES (0)

Force Resale  ⓘ

Export (ECCN)  Default Not-Taxable?

Part Dimensions Weight  (0) (weig ▾) Width  Height  Depth  (mea: ▾)

CHECK FOR MISSING PARTS

Tech Description

Incoming Inspection Instructions (shows at receiving)

Shipping/Packing Instructions (shows at shipping/invoicing)

Image (URL)

   (Remove As BOM dis

Created by n/a on 2019-04-04.

Then to save your changes, click update.

# Customer List

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES FORECASTS REPORTS

**Customer List**

- CUSTOMER LIST
- CONTACT LIST
- CUSTOMER ADDRESS LIST
- SATISFACTION CASES

Customer

Newest Note Date (from) - (to)

Active

Billto State

Billto Country

Credit Hold?

Shipto State

Shipto Country

External Key

More Options ▾

Displaying 1 - 8 of 8 Export +/- Columns

Customer Name	Bill To Street 1	Ship To Street 1	Inside Sales	Outside Sales	Business Type	Prior Year Sales	Prior Year MTD Sales	Credit Limit	Credit Hold	Newest Note
Custom House	123 Neighborhood Dr	123 Neighborhood Dr				\$0.00	\$0.00	\$0.00	No	
Edge Products	222 main st	222 main st				\$0.00	\$0.00	\$1,000,000.00	Yes	2019-08-23
Intellipower	1234	1234				\$0.00	\$0.00	\$0.00	No	

To see a customer record, we will go to Sales > Customers > Customer List. Set your filter fields and click submit to search customers.

# Vendor List

CETEC ERP

SALES PARTS **PURCHASING** WAREHOUSE ACCOUNTING PRODUCTION ADMIN



QUOTES ▾ PURCHASE ORDERS RECEIPTS ▾ **VENDORS ▾** MRP ▾

**Vendor List**

- VENDOR LIST
- VENDOR PERFORMANCE
- CONTACT LIST
- VENDOR REPS

Vendor Name   Status  1099?

Include Activity?  Activity Dates  -

Displaying 1 - 6 of 6 Export +/- Columns

Vendor Name	Website	Vendor No.	Remit Name	Remit Street 1	Remit Street 2	Remit Street 3	Remit City	Remit State	Remit Zip	Phone	Terms	Status	1099	Min Order Amount	Default G/L
ABCDEFG Rep (Commissioned Rep)		3									N/A	Active	N	0	
Internal Vendor		1									N/A	Active	N	0	
Master Distributor	mdistributor.com	2	Master Distributor	701 Brooks Ave			Thief River Falls	MN	56701	800-781-4820	NET30	Active	N	0	

And similar for Vendors. Purchasing > Vendors > Vendor List

# Creating Records - Parts/BOMs & Customers

Creating a new part record

Specifics for creating a new BOM

Specifics for creating a new Customer



Views/Lists | Pricing Maintenance | Vendor Returns | Part Spec Groups | PRC List | Reports

## Parts

**CREATE PART**

PRC: BOM | Part: (part number) | Location: Manufacturing Solutions

Part Description: (description) | BOM?  Cancel Create

<< Previous | 1 2 3 4 | Next >>  
Displaying 1 - 25 of 83 | Export | +/- Columns

PRC	Prctpart	BOM?	QOH	QR	QOO	UOM	Default Cost	Default Resale	Info
-----	----------	------	-----	----	-----	-----	--------------	----------------	------

Designate a PRC, or product code, which is a key piece of how Cetec identifies part records - a prcpart. PRC is a group or category of your inventory, and part would be the SKU or part number. Neither one of these alone are unique, but the PRCpart is the unique id of the part record in Cetec.

Then designate if BOM or not and click create

# RAW

VIEWS/LISTS ▾ PRICING MAINTENANCE ▾ VENDOR RETURNS ▾ PART SPEC GROUPS ▾ PRC LIST ▾ REPORTS ▾

## Part RAW-SOURCEDCOMP

✓ Success: Part Created X

- VIEW
- EDIT ←
- PRICING
- QUOTES (0)
- ORDERS (0)
- SALES HIST (0)
- SHIP AND DEBITS
- PQUOTES (0)
- OPEN POS (0)
- WATERFALL
- PO HISTORY (0)
- NCRS (0)
- ECOS (0)
- RMAS (0)
- ORDERS W/ NEED (YES)
- PART REQS (0)
- TOOLS

Description	<input type="text"/>	Created On	2019-10-02
UOM	(none) ▾	Default Transcode	(use default) ▾
Last Resort Cost	\$0.00000 ⓘ	Revenue G/L Account	(use default) ▾ ⓘ
COS G/L Account	(use default) ▾ ⓘ	Default Voucher GL Account	(use default) ▾ ⓘ
RoHS?	No ▾	Preferred Vendor	Search vendors... 🔍
Preferred Manufacturer	<input type="text"/>	OEM Part #	<input type="text"/>
UPC	<input type="text"/>	Block Autopick?	<input type="checkbox"/> ⓘ

For a component, you'll be taken immediately to the part edit screen where you can enter part info

# FIG (BOM)

VIEWS/LISTS ▾ PRICING MAINTENANCE ▾ VENDOR RETURNS PART SPEC GROUPS PRC LIST REPORTS ▾

## Revision (Unnamed), Part FIG-FINISHEDPRODUCT

Success: Components Added: 1

TO PART RECORD [← back to REVISIONS](#)

WORK INST

LABOR PLAN

INSPECTION INST.

EDIT REVISION BOM

IMPORT BOM

WORK REPORT

WORK INST. HISTORY

Note: Cost defaults to Inventory cost unless provided.  
Note: Selecting (unset) for revision defaults to the current revision

### Edit Revision BOM

+/- Columns

Comp #	Prcpart	Revision	Description	Work Loc	Qty Per Top	Scrap Factor	Scrap Adder	Reference Designator	Cost	Total Weight	Preferred MFG	Preferred Vendor	Vendor Part	
1	RAW123	(unset)	source component 123	(cho)	1		0		\$2.00	0				<a href="#">i</a> <a href="#">x</a>
2	RAW1214366	(unset)	Bolt	(cho)	5 EA		0		\$0.05	0			9999	<a href="#">i</a> <a href="#">x</a>
(new)				(choose)	1									<a href="#">Update</a>
Material Cost: \$2.25										0				<a href="#">Delete</a>

[Show Batch Component Add](#)

If you are creating a new finished good, or sub assembly, in Cetec (a BOM), then you'll be taken to the Edit BOM Revision page.

Add each component and qty per top and click update.

# Customer

CETEC CRM

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ▾ ORDERS ▾ INVOICES ▾ CUSTOMERS ▾ LEADS ▾ OPPORTUNITIES ▾ FORECASTS ▾ REPORTS ▾

## Customer List

- CUSTOMER LIST ←
- CONTACT LIST
- CUSTOMER ADDRESS LIST
- SATISFACTION CASES

Customer	<input type="text" value="Search customers..."/>	Q	Newest Note Date	(from) - (to)	Active	Active ▾
Billto State	All ▾		Billto Country	All ▾	Credit Hold?	All ▾
Shipto State	All ▾		Shipto Country	All ▾	External Key	<input type="text" value="Search external key..."/>
More Options ▾					<input type="button" value="Submit"/>	<input type="button" value="Create New"/>

Then we will create a customer to sell our product to.

Under the Customer list, we have the create new button. Click that

## Customer New Customer (14)

VIEW [Back To List](#) Help

EDIT **Customer Is On Credit Hold; Customer Credit Code is Restricted**

CREATE QUOTE

QUOTES

ORDERS

INVOICES

CASES

CONSOLIDATED

LOST BUSINESS

VENDOR REPS

A/R STATEMENT

TAKE PAYMENT

CREDIT MEMOS (0) +

RMA (0)

NOTIFICATIONS

PRODUCTION SETUP

CARRIER ACCOUNTS

CUSTOM DOCUMENTS

DOCUMENTS (0)

NOTES (0)

### Customer Information

Name:  Created By Cetec ERP Support Team On 2019-10-02 [Update](#) [Delete](#)

Credit Limit ⓘ	<input type="text" value="\$0.00"/> (Current) A/R: \$0.00	Credit Code	<input type="text" value="1 - Restricted Account"/>
Terms Code	<input type="text" value="NET30 (Code: 1)"/>	Ship Via	<input type="text" value="N/A"/>
Business Type	<input type="text" value="N/A"/>	Inter-Company Account	<input type="text" value="No"/>
Ship Ahead Days	<input type="text" value="7"/>	FOB	<input type="text" value="S - Shipment"/>
Taxable	<input checked="" type="radio"/> Non-Taxable <input type="radio"/> Taxable	Tax Reseller ID	<input type="text"/>
Primary Phone	<input type="text"/>	Primary Fax	<input type="text"/>

A few important notes on the customer: The credit code will default to restricted. You can leave that until verified or you can change to 'good'.

DOCUMENTS (0)  
NOTES (0)

### SALES OVERVIEW

Created On	2019-10-02	First Quoted	Latest Invoice	
MTD Sales	\$0.00	Prior MTD \$0.00	YTD Sales \$0.00	Prior YTD \$0.00
Quote Value	\$0.00	GP \$0.00	GM 0%	# Quotes 0
Order Value	\$0.00	GP \$0.00	GM 0%	# Orders 0

[View Lost Business](#) [Newest Note:](#)

### CONTACTS

[Add Contact](#)

### ADDRESSES

[Add Address](#)

Name	Street	City	State/Province	Zip/Postal	Country	Attn Line	Type	Tax Group	
------	--------	------	----------------	------------	---------	-----------	------	-----------	--

You'll also need to add a bill-to address. Scroll down to "Addresses" and select add address.

**Edit Address**

**Edit Address**

Type: Bill To

Copy Address: (populate from existing address)

Name: New Customer

Street: 123 Main

City - State/Province - Postal: Austin TX 78741

Country: (set country)

Attn Line:

Timezone: America/Chicago

Tax Group: (Customer is Non-Taxable, Tax Group will be ignored!)

Permanent Shipping Instructions

Update

Set your address type to Bill To (ship to will be created automatically as the same bill to).

Then enter the address info, and click update at the bottom of the screen.

# Vendor

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN



PQUOTES PURCHASE ORDERS RECEIPTS VENDORS MRP

- VENDOR LIST
- VENDOR PERFORMANCE
- CONTACT LIST
- VENDOR REPS

## Vendor List

Vendor Name

Status

1099?

Include Activity?

Activity Dates  -

Submit

Create New

CLICK 'SUBMIT' TO VIEW RESULTS

Help

# Vendor Supplier

VIEW [Back To List](#)

- EDIT 
- POS
- CREATE VOUCHER
- CREATE CHECK
- A/P STATEMENT
- PERFORMANCE
- DOCUMENTS (0)
- NOTES (0)

Vendor #	7	Credit Limit	\$0.00	A/P Balance	\$0.00
Buyer		Terms Code	-	Inter-Company	No
Remit Address		Corporate Address			
Website		Default FOB		Created By	techx on 2019-10-10
Default G/L	None	Tax ID		1099?	N
Ext. Vendor ID		Min Order Amount	0	YTD Spent	\$0.00
Avg. PPV	\$0.00				
Email		Phone		Fax	

## CONTACTS

[Add Contact](#)

## ADDITIONAL ADDRESSES

[Add Address](#)

Name	Street	City	State/Province	Zip/Postal	Country
------	--------	------	----------------	------------	---------

Click edit to enter Vendor info, like remit address, etc.

# Cetec ERP Process

Build to Stock - Internal Work Order

Purchasing - MRP; Receiving; Put Away

Release Order; Pick Parts & Production

Complete/Receive Finished Good & Put Away

Sales Order - Quoting & Order Entry

Invoicing

So now that we have a finished good, with the components need to kit it, and a customer to buy it and a vendor to source our material from.

We'll follow a high-level process through Cetec ERP to get and understand the flow and how to navigate through Cetec.

A sales order pulls from stock, so we will start by building our finished good to put it on the shelves.

Cetec can, and does, do ETO, build to order; but will follow this specific process as an intro to the general process

An internal, build to stock order, drives demand for raw components and materials to be purchased. So we'll look at MRP, how to use and understand that tool, and then create a PQuote, convert to PO, and then receive the products and put them away. Because we follow good warehouse practices (HAHAH IF ONLY)

Once we've received the raw material, we can release our workorder to the warehouse for parts to be picked and then production. Once we've logged time and performed inspections, we'll complete/receive the product and put it on the shelf, ready for a sales order.

Then we'll enter a quote, commit it to order, pull it off the shelf, and Invoice and Ship.

# WORKORDER

Internal Order

Build to Stock

Build our finished good and put it on the shelf

ORDERS ▾ QUALITY ▾ PART ▾ KITAUDIT ▾ MGMT ▾ TOOLS ▾ SCHEDULING ▾

- LIST
- NEW BUILD FOR STOCK**
- ECO/ECR
- WIP AGING REPORT
- WIP MATERIAL REPORT
- ORDER VALUE BY LOCATION
- PRODUCTION CALENDAR
- ORDER MATERIAL REPORT

Cost	GP Value	GM %
\$0.00	\$0.00	0%
\$0.00	\$0.00	0%
\$0.00	\$0.00	0%
\$0.00	\$0.00	0%
\$0.00	\$0.00	0%
\$33,499.00	\$306.00	99%
\$921,051.35	\$234,482.39	74%
\$83,250.00	\$3,917.24	95%
\$87,074.99	\$7,281.41	91%

### INVENTORY \$47,473,478.64



- PRT
- SUB
- RAW
- NEU
- Other

### OPEN ORDER BACKLOG

# Open Order Lines: 20

Total Resale: \$241,183.19

Total GP: \$-80,502.56

### OPEN SALES ORDERS

This Month: Next Month: Third Month: Remaining:

**CETEC ERP** SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES FORECASTS REPORTS

**Quote/Order Worksheet 144** Sales Editing: Cetec ERP Support Team

VIEW & EDIT  
 SEND +  
 COMMIT TO ORDER  
 QUOTING TOOLS +  
 COMMISSION  
 DOCUMENTS (0)  
 NOTES (0)  
 PREPAY  
 CREATE PQUOTE

**Build Process 1 2 3 4 5**  
**1. Create Quote / Order Worksheet**

**Build And Add To Stock**  
 Enter a Workorder to build product into stock.

Add Line Change All Lines Show Open Lines Submit

+/- Columns

#	PRC	Part	Ship Date	Dock Date	Qty	Cost	Resale	Ext. Cost	Ext. Resale	Discount	
		<input type="text" value="Q"/>	2019-10-02	2019-10-02	1	Cost	Resale				
Freight Resale Estimate: <input type="text"/> Freight Discount: <input type="text"/>								Final Freight Resale:			
										Tax ( 0% ):	
								Ext. Cost:		Ext. Resale:	
Total Cost:								\$0.00	Total Resale:	<input type="button" value="Delete"/>	

This is a quote/order worksheet. This is part of the order entry process in cetec, whether it's an external sales order or internal workorder.

On this internal workorder, we have an Internal Customer automatically assigned.

So all we need to do is add our lines for the finished good. We can do this either by clicking add line, or a quick add by inputting the PRCpart on the line and selecting Add on the right.

**Build And Add To Stock**  
Enter a Workorder to build product into stock.

[Add Line](#) Show Open Lines Submit

**ADD LINE**

Loc: Manufacturing Solutions    Prcpart (QOH:0): FIG-FINISHEDPRODUCT    Cust Part: FinProd

Work Start Date: 2019-10-02    Ship Date: 2019-10-04    Dock Date: 2019-10-11

Qty	Unit Cost	Unit Resale	Lead Time	Transaction Code
5	0	0	0	Build

[OK](#) [OK & Add](#) [Update Cost](#) More Options

[Change All Lines](#)

If we click Add Line, we'll see different fields show up, including location, place for our prcpart, and dates.

We can enter our qty, adjust cost/resale. Then click OK & Add.

# Dates, Transcode

**Build And Add To Stock**  
Enter a Workorder to build product into stock.

ADD LINE

Loc: Manufacturing Solutions

Prp part (QOH:0): FIG-FINISHEDPRODUCT

Cust Part: FinProd

Work Start Date: 2019-10-02

Ship Date: 2019-10-04

Dock Date: 2019-10-11

Qty	Unit Cost	Unit Resale	Lead Time	Transaction Code
5	0	0	0	Build

More Options =

OK OK & Add Update Cost

Change All Lines

Two important definitions are the dates and the transcodes.

## Dates:

**Work Start Date:** the date intended to begin production; for a build order this will drive our purchasing demand

**Ship date:** is the desired ship date, meaning the product is complete and ready to ship, or receive and put away.

**Dock Date:** this is the date the customer would expect to have the product on their receiving dock.

## Transcodes

# Dates

Work Start: the date intended to begin work on a job

This date will drive demand for Purchasing

Ship Date: the date planned for completion and to be shipped

Dock Date: the date the customer is expecting to receive the product

# Transcodes

Build

Stock

Charge

Qty	Unit Cost	Unit Resale	Lead Time	Transaction Code
5	0	0	0	Build
<b>Resale Estimate Type</b>	Fixed Bid			
<b>Revision</b>				Skip Adding Sub-Assemblies
<b>Comment</b>	Line Comment		<b>Ship Via</b>	N/A
<b>Line Warnings/Alerts</b>	(shows on quote pdf as line warning, does not trans			<b>Part Description</b>
<b>Ship To Address</b>	Use Header-level Ship To			
<b>Tech Description</b>				
<b>Tech Comments</b>	Technical Comments			
<b>Sourcing Comments</b>	(does not display externally, transfers)			
<b>Tags</b>	(Available Important Order Tags: CHECK_FOR_MISSING_PARTS_BC, DOUBLE CHECK FOR PROBLEMS, DO THIS THING ) (Apply to sub orders too?)			
Less Options				
<b>OK</b> <b>OK &amp; Add</b> <b>Update Cost</b>				

We can click more options to add line or technical comments, attach tags, choose a revision, etc.

# Quote/Order Worksheet 144

Sales Editing: Cetec ERP Support Team

- VIEW & EDIT
- SEND +
- COMMIT TO ORDER
- QUOTING TOOLS +
- COMMISSION
- DOCUMENTS (0)
- NOTES (0)
- PREPAY
- CREATE PQQUOTE

Build Process 1 2 3 4 5  
2. Commit Order

**Build And Add To Stock**  
Enter a Workorder to build product into stock.

Add Line Change All Lines

Show Open Lines Submit

+/- Columns

#	PRC	Part	Ship Date	Dock Date	Qty	Cost	Resale	Ext. Cost	Ext. Resale	Discount	
1	FIG	-FINISHEDPRODUCT NEW!	2019-10-04	2019-10-11	5	\$0.00	\$0.00	\$0.00	\$0.00	Add	  
	FIG-FINISHEDPRODUCT	<input type="text"/>	2019-10-02	2019-10-09	1	0	0				<input type="button" value="Add"/>

Freight Resale Estimate:  Freight Discount:  Final Freight Resale:

Now we have our quote line. For all lines w/ transcode build, we can use the BOM worksheet to view, edit, build, our order specific BOM

# BOM Worksheet

## Quote/Order Worksheet 144

Sales Editing: Cetec ERP Support Team

- VIEW & EDIT
- SEND +
- COMMIT TO ORDER
- QUOTING TOOLS +
- COMMISSION
- DOCUMENTS (0)
- NOTES (0)
- PREPAY
- CREATE PQUOTE

Build Process 1 2 3 4 5  
2. Commit Order  
Back to Quote 144

BOM FIG-FINISHEDPRODUCT BOM Type Preexisting Production Line (unset)

Customer Internal Account Qty 5 Revision (unnamed)

Updated By Cetec ERP Support Team 2019-10-02 Refresh BOM Commit BOM Update

Item	Qty	Prcpart	Lead Time	Weight	QOH	Excess Min	Comp Unit Cost	Ext. Unit Cost	Ext. Cost		
1	1	RAW123	[+]	0	0	0	\$2.00	\$2.00	\$10.00		
2	5	RAW1214366	[+]	0	0	1738 EA	\$0.05	\$0.25	\$1.25		
		<input type="text"/>	<input type="text"/>								
Material Total:								\$2.25	\$11.25		

Set our Revision, edit the components, add components, edit the component cost, etc.

# Quote/Order Worksheet 144

Sales Editing: Cetec ERP Support Team

- VIEW & EDIT
- SEND +
- COMMIT TO ORDER
- QUOTING TOOLS +
- COMMISSION
- DOCUMENTS (0)
- NOTES (0)
- PREPAY
- CREATE PQQUOTE

Build Process 1 **2** 3 4 5  
**2. Commit Order**  
 Back to Quote 144

BOM FIG-FINISHEDPRODUCT      BOM Type Preexisting      Production Line (unset)

Customer Internal Account      Qty 5      Revision (unnamed)

Updated By Cetec ERP Support Team 2019-10-02      Refresh BOM      Commit BOM      Update

Item	Qty	Prcpart	Lead Time	Weight	QOH	Excess Min	Comp Unit Cost	Ext. Unit Cost	Ext. Cost	
1	1	RAW123	[+]	0	0	0	\$2.00	\$2.00	\$10.00	
2	5	RAW1214366	[+]	0	0	1738 EA	\$0.05	\$0.25	\$1.25	
										<input type="text" value="1"/> <input type="text"/> <input type="button" value="Add"/>
<b>Material Total:</b>								\$2.25	\$11.25	<input type="button" value="Delete"/>

# Quote/Order Worksheet 144

Sales Editing: Cetec ERP Support Team

- VIEW & EDIT
- SEND +
- COMMIT TO ORDER
- QUOTING TOOLS +
- COMMISSION
- DOCUMENTS (0)
- NOTES (0)
- PREPAY
- CREATE PQQUOTE

**Build Process** 1 2 3 4 5  
**2. Commit Order**  
Back to Quote 144

BOM FIG-FINISHEDPRODUCT      BOM Type Preexisting      Production Line (unset)

Customer Internal Account      Qty 5      Revision (unnamed)

Updated By Cetec ERP Support Team 2019-10-02

Refresh BOM      Commit BOM      Update

+ Component   + Placeholder   +/- Tooling   +/- Ext. Unit Cost   Copy BOM   Copy BOM Wksht   Import BOM   Export BOM

Item	Qty	Prcpart	Lead Time	Weight	QOH	Excess Min	Comp Unit Cost	Ext. Unit Cost	Ext. Cost		
1	1	RAW123	[+]	0	0	0	\$2.00	\$2.00	\$10.00		
2	5	RAW1214366	[+]	0	0	1738 EA	\$0.05	\$0.25	\$1.25		
								Material Total:	\$2.25	\$11.25	

Add

You can load the fixed BOM record by clicking Refresh BOM, or overwrite the permanent BOM record by clicking Commit BOM. Select Update to save changes on the BOM worksheet

Item	Qty	Part	Lead time	Weight	QOH	Excess Inv	Comp Unit Cost	Ext. Unit Cost	Ext. Cost	
1	1	RAW123	[+]	0	0	0	\$2.00	\$2.00	\$10.00	
2	5	RAW1214366	[+]	0	0	1738 EA	\$0.05	\$0.25	\$1.25	
<input type="text" value="1"/> <input type="text"/> <input type="button" value="Add"/>										
Material Total:								\$2.25	\$11.25	<input type="button" value="Delete"/>
Procurement Charges:								\$0.00	\$0.00	<input type="button" value="Edit"/>
Labor Total (based on operations): labor history:								N/A	N/A	<input type="button" value="Edit"/>
Misc Charges Total:								N/A	N/A	<input type="button" value="Edit"/>
Tooling Total:								\$0.00	N/A	<input type="button" value="Edit"/>
Excess Material Total: Cost Added to Quote (Ignored on BOM Wksht)										<input type="button" value="Edit"/>
What are the values above?										
(max lead time = 0 days) Cost Total:								\$2.25	\$11.25	
Total Weight:								0		
Markup Total:								\$0.00	\$0.00	<input type="button" value="Edit"/>
<input type="button" value="Transfer to Quote"/>										

If you're quoting a BOM, you can add costing like labor, excess material, or Mark it up. Click transfer to quote to transfer costing changes to the quote

# Commit to Order

## Quote/Order Worksheet 144

VIEW & EDIT  
SEND +  
COMMIT TO ORDER  
QUOTING TOOLS +  
COMMISSION  
DOCUMENTS (0)  
NOTES (0)  
PREPAY  
CREATE PQUOTE

**Build Process** 1 2 3 4 5  
**2. Commit Order**

**Build And Add To Stock**  
Enter a Workorder to build product into stock.

Add Line Change All Lines Show Open Lines

+/- Columns

#	PRC	Part	Ship Date	Dock Date	Qty	Cost	Resale	Ext. Cost	Ext. Resale	Discount	
1	FIG	-FINISHEDPRODUCT NEW!	2019-10-04	2019-10-11	5		\$2.25	\$0.00	\$11.25	\$0.00	Add
		Q	2019-10-02	2019-10-02	1		Cost		Resale		

Now that we have the quote built out, lines added, we will commit to order. This will drive production scheduling, demand for purchasing.

# Quote/Order Worksheet 144

Sales Editing: Cetec ERP Support T

- VIEW & EDIT
- SEND +
- COMMIT TO ORDER
- QUOTING TOOLS +
- COMMISSION
- DOCUMENTS (0)
- NOTES (0)
- PREPAY
- CREATE PQUOTE

Build Process 1 2 3 4 5

2. Commit Order

**Commit Order** ← Create Separate Order For Each Quote Line?

BOM for FIG-FINISHEDPRODUCT differs from existing BOM and will replace it (View Worksheet).

Intercompany Order, Set Internal Vendor

Receiving Location

### Build And Add To Stock

Enter a Workorder to build product into stock.

Check/Uncheck All Lines  [Change All Lines](#)

+/- Columns

Order?	#	PRC	Part	Ship Date	Dock Date	Qty	Cost	Resale	Ext. Cost	Ext. Resale
<input checked="" type="checkbox"/>	1	FIG	-FINISHEDPRODUCT NEW!	2019-10-04	2019-10-11	5	\$2.25	\$0.00	\$11.25	\$0.00

This is the commit to order screen. Review details and click Commit to Order. If there are issues with the quote, Cetec will flag them and require quote updates before proceeding.

# Order 144.1

**Success:** Created Order MN144.1  
Created PO 128.1

- VIEW
- EDIT
- DETAILS/SERIALS
- COMPLETE/RECEIVE
- DELETE LINE/ALL
- PDF (QUICK)
- PRO FORMA PDF
- COMMISSION
- RELEASE TO WH
- WORKORDER VIEW +
- PREPAY
- PACKING SLIP
- PACKING LABEL
- FULL ORDER PLATE
- DOCUMENTS (0)
- NOTES (0)
- QUOTE 144
- CREATE PQQUOTE
- CREATE WO
- INTERNAL PO 128.1
- OUTSOURCE POS (0)

**Build Process** 1 2 3 4 5  
3. Pick Parts/Material **Line 1**

<b>Customer</b>	Internal Account (1)	<b>Location</b>	MN	<b>Ordered On</b>	2019-10-02
<b>Buyer</b>		<b>P.O. Number</b>		<b>Assembly?</b>	Yes
<b>Ship Via</b>	UPS Ground	<b>Customer Email</b>			
<b>Tax Group</b>	(0%)	<b>Terms</b>		<b>FOB</b>	S - Shipment
<b>Order Type</b>	Scheduled	<b>Ship Type</b>	Partial	<b>Status</b>	New (0)
<b>Carrier Account #</b>					
<b>Inside Sales</b>		<b>Outside Sales</b>			
<b>Ship To</b>	Internal Customer ,				

+/- Columns

#	Qty	Code	Prcpart	Rev	Work Start Date	Ship Date	Status	Ext. Resale
1	5	Build	FIG-FINISHEDPRODUCT	(unnamed)	2019-10-02	2019-10-04	Scheduling	\$11.25
Custpart: FinProd								

Now that we've committed to order, we have our Order View Screen.

# Order 144.1

- VIEW
- EDIT
- DETAILS/SERIALS
- COMPLETE/RECEIVE
- DELETE LINE/ALL
- PDF (QUICK)
- PRO FORMA PDF
- COMMISSION
- RELEASE TO WH
- WORKORDER VIEW +
- LINE 1
- PREPAY
- PACKING SLIP
- PACKING LABEL
- FULL ORDER PLATE
- DOCUMENTS (0)
- NOTES (0)
- QUOTE 144
- CREATE PQQUOTE
- CREATE WO
- INTERNAL PO 128.1
- OUTSOURCE POS (0)

**Build Process** 1 2 3 4 5  
3. Pick Parts/Material **Line 1**

Customer	Internal Account (1)	Location	MN	Ordered On	2019-10-02
Buyer		P.O. Number		Assembly?	Yes
Ship Via	UPS Ground	Customer Email			
Tax Group	(0%)	Terms		FOB	S - Shipment
Order Type	Scheduled	Ship Type	Partial	Status	New (0)
Carrier Account #					
Inside Sales		Outside Sales			
Ship To	Internal Customer ,				

+/- Columns

#	Qty	Code	Prcpart	Rev	Work Start Date	Ship Date	Status	Ext. Resale
1	5	Build	FIG-FINISHEDPRODUCT	(unnamed)	2019-10-02	2019-10-04	Scheduling	\$11.25
Custpart: FinProd								
Comment: Line Comment								

To pick parts, log time, perform inspections, etc., anything related to a specific job, we will click into the Workorder screen, which is home base for production on an order.

**CETEC ERP** SALES PARTS PURCHASING WAREHOUSE ACCOUNTING **PRODUCTION** ADMIN

ORDERS ▾ QUALITY ▾ PART ▾ KITAUDIT ▾ MGMT ▾ TOOLS ▾ SCHEDULING ▾

## Workorder (Build): 144.1 Line Item: 1

Pre-Release: Cetec ERP Support Team ▾

WORKORDER  
OVERVIEW  
COMPLETE/RECEIVE  
HISTORY  
SPLIT LINE  
PICK PARTS  
DEKIT PARTS  
MAINT/ETC +  
SERIALS  
INSPECTIONS  
OUTSOURCE PO  
DOCUMENTS

**Build Process** 1 2 **3** 4 5  
3. Pick Parts/Material **Line 1**

Customer	1 - Internal Account	Prctpart	FIG-FINISHEDPRODUCT	Ship Date	2019-10-04
Description					
Tech Comments Technical Comments					

**Work / Labor Tracking**

Open Work No Open Work

Work Location    (See All)

Work Time Min Used: 0.0, Est: 0.0

Here is the overview of the Workorder screen, or a job. Notice under the modules that we have shifted into the Production tab of Cetec.

This is what your Production people on the floor would use.

**CETEC ERP** SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

ORDERS QUALITY PART KITAUDIT MGMT TOOLS SCHEDULING **Scan**

## Workorder (Build): 144.1 Line Item: 1

Pre-Release: Cetec ERP Support Team

WORKORDER **Build Process** 1 2 3 4 5  
OVERVIEW 3. Pick Parts/Material **Line 1**

HISTORY  
SPLIT LINE  
PICK PARTS  
DEKIT PARTS  
MAINT/ETC +  
SERIALS  
INSPECTIONS  
OUTSOURCE PO  
DOCUMENTS

Customer	1 - Internal Account	Prcpart	FIG-FINISHEDPRODUCT	Ship Date	2019-10-04
Description					
Tech Comments Technical Comments					

### Work / Labor Tracking

**Start Work** Show/Hide Open Work

Open Work No Open Work

Work Location    (See All)

Work Time Min Used: 0.0, Est: 0.0

The first thing we need to do on a job, is to pick the parts needed for manufacturing or kitting. So click into the pick parts screen.

## Pick Parts For Work Order: 144.1 Line Item: 1

WORKORDER  
OVERVIEW  
COMPLETE/RECEIVE  
HISTORY  
SPLIT LINE  
PICK PARTS  
DEKIT PARTS  
MAINT/ETC +  
SERIALS  
INSPECTIONS  
OUTSOURCE PO  
DOCUMENTS

Build Process 1 2 3 4 5														
3. Pick Parts/Material Line 1														
BOM Part Number				FIG-FINISHEDPRODUCT				Customer		1 - Internal Account		First Article?	No	
Qty Due				5				Qty To Ship		0		Location		MN
Shortage Comments				(Shortage Comments)				Hide Picked?		<input type="checkbox"/>				
Prcpart								Printable Version						
Item	Prc	Part	Rev	Qty Need	Qty Picked	Bin	Lot Code	Receipt	Bin Qty	Pick Qty/Serial Number				
1	RAW	123		5	0					Part not available! Add Stock To Inventory				
Part Description: source component 123														
2	RAW	1214366		25 EA	0	6	A-73-99	7	100 EA	<input type="text"/>	0 ▼			
							C-11-31	69	998 EA	<input type="text"/>	0 ▼			
							E-33-88	23904823	72	50 EA	<input type="text"/>	0 ▼		

You'll see data pertinent to the part records for picking - qty need, qty picked. The Bin and bin qty. Bins are organized on the pick parts screen by Receipt/Lot Code.

But we do not have any stock for RAW123, so we have to go out and purchase this material.

# Purchasing

Creating PQuote (New PQuote, from sales/work order)

Converting to a PO

MRP Overview

We will shift hats to our Purchasing department to source the raw materials needed to complete our job.

We'll look at a couple of options for creating a PQuote; walk through the process of converting to a PO; and do an overview of MRP, which will be purchasing's home screen.

**CETEC ERP** SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

PQUOTES ▾ PURCHASE ORDERS RECEIPTS ▾ VENDORS ▾ MRP ▾

LIST  
**NEW PQUOTE** ←  
 PENDING APPROVAL

## Work Order: 144.1 Line Item: 1

WORKORDER  
 OVERVIEW  
 COMPLETE/RECEIVE  
 HISTORY  
 SPLIT LINE  
 PICK PARTS  
 DEKIT PARTS  
 MAINT/ETC +  
 SERIALS  
 INSPECTIONS  
 OUTSOURCE PO  
 DOCUMENTS

**Build Process** 1 2 **3** 4 5  
 3. Pick Parts/Material **Line 1**

BOM Part Number FIG-FINISHEDPRODUCT Customer 1 - Internal Account First Article? No

Qty Due 5 Qty To Ship 0 Location MN

Shortage Comments (Shortage Comments) Hide Picked?

Prcpart  [Printable Version](#)

Item	Prc	Part	Rev	Qty Need	Qty Picked	Bin	Lot Code	Receipt	Bin Qty	Pick Qty/Serial Number
1	RAW	123		5	0	Part not available! Add Stock To Inventory				
Part Description: source component 123										
2	RAW	1214366		25 EA	0	6	A-73-99	7	100 EA	<input type="text"/> 0 ▾
						C-11-31		69	998 EA	<input type="text"/> 0 ▾

We have a couple one-off options for creating a new PQuote.

First is Purchasing > PQuotes > New PQuote

**CETEC ERP** SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

PQUOTES PURCHASE ORDERS RECEIPTS VENDORS MRP

## PQuote/PQuote Worksheet 129

Working: Cetec ERP Support Team

VIEW  
 IMPORT  
 SPREADSHEET  
 CONVERT TO PO  
 CLOSE  
 PDF/EMAIL (QUICK)  
 CLONE  
 DOCUMENTS (0)  
 NOTES (0)  
 HISTORY

**Buy Process 1 2 3**  
**1. Create PQuote / PO Worksheet**

Vendor		Contact	
Status	Open	FOB	S - Shipment
Location	MN	Owner	techx
Created At	10/03/19 11:55 AM	Terms	-
PO Comment		Cost Center	
PQuote Comment			

Add Line Change All Lines

+/- Columns

#	Qty	Prcpart	Vendor Part	Revision	Dock Date	Sched?	Cost ⓘ	PPV	Ext. Cost
new	1				2019-10-03				

new (part) Add

Here is our PQuote Worksheet, where we will enter Vendor info, add pquote lines

# PQuote/PQuote Worksheet 129

Working: Cetec ERP Support Team

VIEW

IMPORT

SPREADSHEET

CONVERT TO PO

CLOSE

PDF/EMAIL (QUICK)

CLONE

DOCUMENTS (0)

NOTES (0)

HISTORY

Buy Process 1 2 3

1. Create PQuote / PO Worksheet

\* Vendor Master Distributor

Contact Choo Create Cont

Status Open

FOB D - Delivery

Ship Via UPS Ground

Acct #

\* Location Manufacturing Solution

Owner techx

Scheduled  Yes  No

More Options

OK Cancel

Fields marked with \* are required for purchase order entry.

Add Line Change All Lines

Input your Vendor, use more options to enter specific PQuote header data (PQuote comments, addresses, etc.)

Click OK to save. Then click "Add Line" to add parts to our PQuote

The image shows a software interface for adding a new line item. At the top, there are two buttons: "Add Line" and "Change All Lines". A red arrow points to the "Add Line" button. Below this is the "Add Line" form, which contains several input fields and dropdown menus. The fields are arranged in a grid-like structure:

Qty	5	(part ▾)	Prcpart	RAW123	Part Desc	source component 123
Unit Cost ⓘ	\$2.00000		Vendor Part # ⓘ	123GRAY	Revision	(unnamed) (current) ▾
Sched	Unsl ▾		Piece Measure ⓘ		Ship Via	N/A ▾
Dock Date	2019-10-03		Req. Arrival Date		Promised Ship Date	
Non-Inventory? ⓘ	<input type="checkbox"/>					

At the bottom of the form, there are two buttons: "OK" and "Cancel". A red arrow points to the "OK" button. To the right of the "OK" button, there is a "More Options ▾" link.

Enter Qty, Prcpart, cost, etc. and click OK to save and add line

# PQuote/PQuote Worksheet 129

Working: Cetec ERP Support Team

- VIEW
- IMPORT
- SPREADSHEET
- CONVERT TO PO
- CLOSE
- PDF/EMAIL (QUICK)
- CLONE
- DOCUMENTS (2)
- NOTES (0)
- HISTORY

Show Sticky Notes

Buy Process 1 2 3  
2. Convert To PO

Vendor	Master Distributor (2)	Contact	
Status	Open	FOB	D - Delivery
Location	MN	Owner	techx
Created At	10/03/19 11:55 AM	Terms	1 - NET30
PO Comment		Scheduled	N
PQuote Comment		Cost Center	
Vendor Phone Number	800-781-4820	Vendor Min Order Amount	\$0.0000

Add Line

Change All Lines

+/- Columns

#	Qty	Prcpart	Vendor Part	Revision	Dock Date	Sched?	Cost	PPV	Ext. Cost	
1	5	RAW123	[+]		2019-10-03	Unsched.	\$2.0000	\$0.0000	\$10.0000	  
2	5	RAW-SOURCEDCOMP	[+]		2019-10-03	Unsched.	\$2.0000	\$2.0000	\$10.0000	  

Once the PQuote is approved, we need to convert to PO

# PQuote 129

- VIEW
- IMPORT
- SPREADSHEET
- CONVERT TO PO
- CLOSE
- PDF/EMAIL (QUICK)
- CLONE
- DOCUMENTS (2)
- NOTES (0)
- HISTORY

Buy Process 1 2 3  
2. Convert To PO

**Place Purchase Order** Verify the PQuote then click the Place Purchase Order button; or go to the View screen to make changes.

<b>Vendor</b>	Master Distributor (2)		<b>Contact</b>	
<b>Status</b>	Open	<b>FOB</b>	D - Delivery	<b>Ship Via</b> UPS Ground
<b>Location</b>	MN	<b>Owner</b>	techx	<b>Taxable</b> No
<b>Created At</b>	10/03/19 11:55 AM	<b>Terms</b>	1 - NET30	<b>Scheduled</b>
<b>PO Comment</b>				<b>Cost Center</b>
<b>PQuote Comment</b>				
<b>Vendor Phone Number</b>	800-781-4820	<b>Vendor Min Order Amount</b>	\$0.0000	



PQUOTES ▾ PURCHASE ORDERS RECEIPTS ▾ VENDORS ▾ MRP ▾

## Purchase Order 129.1 (Location: MN)

✔ Success: PO MN129.1 Created ✕

VIEW

EDIT

DELETE LINE/ALL

ACKNOWLEDGE

PDF/EXPORT (QUICK)

DOCUMENTS (0)

NOTES (0)

CLOSE PO

PQUOTE 129

Buy Process 1 2 3  
3. Receive

**Vendor** Master Distributor (2)      **Location** MN      **Contact**

**Buyer** Cetec ERP Support Team      **P.O. Number** 129.1      **Shipvia** UPS Ground

**FOB** Delivery      **Taxable** No      **Terms** NET30

**Entry Date** 2019-10-03      **Scheduled** No      **Tax Rate** 0

**PO Comment**      **Location** MN      **Cost Center**

+/- Columns

#	Prcpart	Revision	Dock Date	Requested Arrival	Qty	Net Order Qty	Qty Recvd	Ext. Cost	Status
1	RAW123		2019-10-03		5	5	0	\$10.0000	Open Receive
2	RAW-SOURCEDCOMP		2019-10-03		5	5	0	\$10.0000	Open Receive

Now we can send our Purchase Order to our Vendor directly from Cetec-generated PDF

PQUOTES ▾ PURCHASE ORDERS RECEIPTS ▾ VENDORS ▾ MRP ▾

## Purchase Order MN129.1

VIEW  
EDIT  
DELETE LINE/ALL  
ACKNOWLEDGE  
PDF/EXPORT (QUICK)  
DOCUMENTS (0)  
NOTES (0)  
CLOSE PO  
PQUOTE 129

Download PDF Email PO Export CSV Internal PDF

Columns To Show

<input type="checkbox"/> Freight Estimate	<input type="checkbox"/> Prcpart	<input type="checkbox"/> PRC	<input type="checkbox"/> Part Number	<input type="checkbox"/> OEM Part Number	<input checked="" type="checkbox"/> Vendor Part #
<input checked="" type="checkbox"/> Qty	<input checked="" type="checkbox"/> Cost	<input checked="" type="checkbox"/> Ext Cost	<input checked="" type="checkbox"/> Tech Desc	<input type="checkbox"/> Revision	<input checked="" type="checkbox"/> Part Desc
<input type="checkbox"/> Dock Date	<input type="checkbox"/> Comment 1	<input type="checkbox"/> Comment 2	<input type="checkbox"/> Source Comments External	<input type="checkbox"/> Shipvia	<input checked="" type="checkbox"/> Vendor VAT ID
<input type="checkbox"/> Comment 1	<input type="checkbox"/> Weight	<input checked="" type="checkbox"/> Incoming Inspection Instructions	<input type="checkbox"/> ECCN	<input type="checkbox"/> COO	<input checked="" type="checkbox"/> special field
<input type="checkbox"/> Requested Arrival					

Note: Cost is the original unit cost and Ext Cost is the remaining open value to be received.

Set Columns

Preview

### Purchase Order

PO Number: 129.1  
Entry Date: 2019-10-03  
Date Sent: 2019-10-03  
Please Confirm Receipt

CETEC ERP

Help

We can download the PDF, or email directly to our Vendor.

This is a good sample of documents in Cetec. You can edit what data from your PO (or any other object - quote, invoice, etc), using the checkboxes in here. Select what you'd like to appear on the document and click "Set Columns". This will save your settings for the next time you open the Purchase Order PDF

Preview

# Purchase Order



PO Number: 129.1  
Entry Date: 2019-10-03  
Date Sent: 2019-10-03  
Please Confirm Receipt

## Ship To

PO Box 463  
Greenland, NH 03840

## Vendor

Master Distributor  
701 Brooks Ave  
Thief River Falls, MN 56701  
United States  
Vendor #: 2  
Phone: 800-781-4820

## Bill To

408 Tradesmens Park Drive, Suite CHutto, Texas 78634

<b>FOB</b>	Delivery	<b>Terms</b>	NET30
<b>Ship Via</b>	UPS Ground	<b>Buyer</b>	Cetec ERP Support Team
<b>Email</b>	sales@cetecerp.com		
<b>Comments</b>			

#	Qty	Vendor Part	special field	Dock Date	Cost	Ext. Cost
1	5			2019-10-03 or sooner	\$2.0000	\$10.0000
<b>Part Description:</b> source component 123						
2	5			2019-10-03 or sooner	\$2.0000	\$10.0000
<b>Total:</b>						<b>\$20.00</b>

Here's what our PDF will look like.

# Order 144.1

- VIEW
- EDIT
- DETAILS/SERIALS
- COMPLETE/RECEIVE
- DELETE LINE/ALL
- PDF (QUICK)
- PRO FORMA PDF
- COMMISSION
- RELEASE TO WH
- WORKORDER VIEW +
- PREPAY
- PACKING SLIP
- PACKING LABEL
- FULL ORDER PLATE
- DOCUMENTS (0)
- NOTES (0)
- QUOTE 144
- CREATE PQUOTE ←
- CREATE WO
- INTERNAL PO 128.1
- OUTSOURCE POS (0)

**Build Process** 1 2 **3** 4 5  
3. Pick Parts/Material **Line 1**

<b>Customer</b>	Internal Account (1)	<b>Location</b>	MN
<b>Buyer</b>		<b>P.O. Number</b>	
<b>Ship Via</b>	UPS Ground	<b>Customer Email</b>	
<b>Tax Group</b>	(0%)	<b>Terms</b>	
<b>Order Type</b>	Scheduled	<b>Ship Type</b>	Partial
<b>Carrier Account #</b>			
<b>Inside Sales</b>		<b>Outside Sales</b>	
<b>Ship To</b>	Internal Customer ,		

+/- Columns

#	Qty	Code	Prcpart	Rev	Work Start Date
1	5	Build	FIG-FINISHEDPRODUCT	(unnamed)	2019-10-02

Now back on our original order screen..

We can actually create a PQuote directly from the Order, by clicking create PQuote

## Make PQuote from Order 144.1

VIEW  
EDIT  
DETAILS/SERIALS  
COMPLETE/RECEIVE  
DELETE LINE/ALL  
PDF (QUICK)  
PRO FORMA PDF  
COMMISSION  
RELEASE TO WH  
WORKORDER VIEW +  
PREPAY  
PACKING SLIP  
PACKING LABEL  
FULL ORDER PLATE  
DOCUMENTS (0)  
NOTES (0)  
QUOTE 144  
CREATE PQUOTE  
CREATE WO  
INTERNAL PO 128.1  
OUTSOURCE POS (0)

Show 25 entries

Displaying 1 - 3 of 3 Report +/- Columns

Add To PQuote?	Prcpart	Qty Need	QOH	Avail	QOO	Pref Vendor	Most Recent Vendor	Info
<input type="text" value="Qty to Add"/>	RAW-SOURCEDCOMP	5	0	-5	5		Master Distributor	+
<input type="text" value="Qty to Add"/>	RAW1214366	25	1738	-3447	3500		Master Distributor	+
<input type="text" value="Qty to Add"/>	RAW123	5	0	-5	5		Master Distributor	+

Displaying 1 - 3 of 3 Export +/- Columns

Use Order Cost?

**Add Lines To PQuote / PO Worksheet**

(Leave Blank to Create New) (vendor)

You'll see the qty need, qoh, qty available and qoo of each component.

Either manually enter the qty to add to the PQuote or click the "Set Qty Need for All Parts" to auto set all lines.

# Make PQuote from Order 144.1

VIEW  
EDIT Show 25 entries

- DETAILS/SERIALS
- COMPLETE/RECEIVE
- DELETE LINE/ALL
- PDF (QUICK)
- PRO FORMA PDF
- COMMISSION
- RELEASE TO WH
- WORKORDER VIEW +
- PREPAY
- PACKING SLIP
- PACKING LABEL
- FULL ORDER PLATE
- DOCUMENTS (0)
- NOTES (0)
- QUOTE 144
- CREATE PQUOTE**
- CREATE WO
- INTERNAL PO 128.1
- OUTSOURCE POS (0)

Displaying 1 - 3 of 3 Export +/- Columns

Add To PQuote?	Prcpart	Qty Need	QOH	Avail	QOO	Pref Vendor	Most Recent Vendor
5	RAW-SOURCEDCOMP	5	0	-5	5		Master Distributor
25	RAW1214366	25	1738	-3447	3500		Master Distributor
5	RAW123	5	0	-5	5		Master Distributor

Displaying 1 - 3 of 3 Export +/- Columns

Use Order Cost?

Set Qty Need for All Parts

Add Lines To PQuote / PO Worksheet

(Leave Blank to Create New)

Master Distributor (2) (# Outsource POs: 0)

Submit

Then either select a PQuote to add these to, or leave blank and enter a vendor to create a new PQuote.

# MRP

Overview

Waterfall (Supply/Demand)

# Pick Parts For Work Order: : 1

- MRP - BUY
- MRP - BUILD
- MRP - ALL

- WORKORDER
- OVERVIEW
- COMPLETE/RECEIVE
- HISTORY
- SPLIT LINE
- PICK PARTS
- DEKIT PARTS
- MAINT/ETC +
- SERIALS
- INSPECTIONS
- OUTSOURCE PO
- DOCUMENTS

<b>Build Process</b> 1 2 3 4 5			
3. Pick Parts/Material <b>Line 1</b>			
<b>BOM Part Number</b>	FIG-FINISHEDPRODUCT	<b>Customer</b>	1 - Internal Account
<b>Qty Due</b>	5	<b>Qty To Ship</b>	0
<b>Shortage Comments</b>	<input type="text" value="(Shortage Comments)"/>	<b>Location</b>	MN
<b>Prctpart</b>	<input type="text"/>	<b>Hide Picked?</b>	<input type="checkbox"/>
		<a href="#">Printable Version</a>	

PQUOTES ▾ PURCHASE ORDERS RECEIPTS ▾ VENDORS ▾ **MRP ▾**

## MRP Requirements

Standard Mode

MRP generated as of **09/12/19 4:38 PM** in 'Standard' Mode using Allocation data from 2019-10-03 11:42:31.  
Last refresh took **00 minutes, 11 seconds**.

Vendor	All ▾	Location	Manufacturing Solutions ▾	Product Manager	▾
Source Type	All ▾	Prcpart	Search parts... 🔍	Hide Ignore	<input type="checkbox"/>
Expand All Part Info?	No ▾	Order #	<input type="text"/>	Leadtime Qualifier	Cushion days
Internal Vendors	All ▾	BOMs	All ▾	Preferred Vendor	<input type="text"/>

Do you want to buy  ? Or build  ?      Less Options ▾           

**CLICK 'SUBMIT' TO VIEW RESULTS**

MRP runs (or is generated) when you click Refresh. Typically we suggest Refreshing MRP once in the morning and then again after lunch, and work through the updated list twice a day.

PQUOTES ▾ PURCHASE ORDERS RECEIPTS ▾ VENDORS ▾ **MRP** ▾

## MRP Requirements

Standard Mode

MRP generated as of **09/12/19 4:38 PM** in 'Standard' Mode using Allocation data from 2019-10-03 11:42:31.  
Last refresh took **00 minutes, 11 seconds**.

Vendor	All ▾	Location	Manufacturing Solutions ▾	Product Manager	▾
Source Type	All ▾	Prcpart	<input type="text" value="Search parts..."/> <input type="button" value="Q"/>	Hide Ignore	<input type="checkbox"/>
Expand All Part Info?	No ▾	Order #	<input type="text"/>	Leadtime Qualifier	Cushion days
Internal Vendors	All ▾	BOMs	All ▾	Preferred Vendor	<input type="text"/>

Do you want to **buy**  ? Or **build**  ?

**CLICK 'SUBMIT' TO VIEW RESULTS**

You'll see two timestamps on the MRP screen:  
MRP Generation  
Allocation data

Allocation is a program that runs in the background every 2 hours. It gathers data from all of Cetec that is pertinent to stay up to date and accurate on the supply and demand - so having allocation run will speed up refreshing MRP and other areas of Cetec using this breadth of data.

Clicking Submit will open MRP as it was last generated. So not the most current/up-to-date, but will track progress.

Internal Vendors		All	BOMs		All	Preferred Vendor								
Do you want to buy ? Or build ?										Less Options		Submit	Review POs	
Displaying 1 - 13 of 13										Export	+/- Columns			
All?	Part	Description	Leadtime	Need Date	Buy Date	QOH	Cost	Ext Cost	ROP	Sum Req'd Qty	Vendor	Source		
<input type="checkbox"/>	-3385	Type 3385	0			5	\$10.84	\$54.20	10	5	Internal Vendor	ROP		
<input type="checkbox"/>	1714538	Terminal-B	0			75198	\$0.03	\$644.20	100000	24777 EA	Unassigned	ROP		
<input checked="" type="checkbox"/>	1714538	Terminal-A	3	2019-10-06	2018-04-11	2018-04-08	1841	\$1.00	\$1,204.00	0	1204 EA	Master Distributor	Supply/Demand	
<input checked="" type="checkbox"/>	1714538	Cable	0		2018-11-19		95	\$1.50	\$132.00	0	88 FT	Master Distributor	Supply/Demand	
<input type="checkbox"/>	5938173	Terminal Ring	0		2019-06-28		0	\$250.00	\$10,000.00	2000	40 EA	Unassigned	Supply/Demand	

After we've run MRP, we will see our report.

A couple of different dates

Need Date - when the earliest order will need this part;

Buy Date - need date minus leadtime; when you should buy the part (need leadtimes set)

And then Source

ROP: re-order point set in the part record; to keep minimum qty on hand

Supply/Demand: from the Part waterfall, open orders versus placed POs

Internal Vendors		All	BOMs		All	Preferred Vendor							
Do you want to buy ? Or build ?													
Less Options													
Submit <span style="float: right;">Review POs</span>													
Displaying 1 - 13 of 18 <a href="#">Export</a> +/- Columns													
All?	Part	Description	Leadtime	Need Date	Buy Date	QOH	Cost	Ext Cost	ROP	Sum Req'd Qty	Vendor	Source	
<input type="checkbox"/>	-3385	Type 3385	0			5	\$10.84	\$54.20	10	5	Internal Vendor	ROP	
<input type="checkbox"/>	1714538	Terminal-B	0			75198	\$0.03	\$644.20	100000	24777 EA	Unassigned	ROP	
<input checked="" type="checkbox"/>	5938173	Terminal-A	3	2019-10-06	2018-04-11	2018-04-08	1841	\$1.00	\$1,204.00	0	1204 EA	Master Distributor	Supply/Demand
<input checked="" type="checkbox"/>	5938173	Cable	0		2018-11-19		95	\$1.50	\$132.00	0	88 FT	Master Distributor	Supply/Demand
<input type="checkbox"/>	5938173	Terminal Ring	0		2019-06-28		0	\$250.00	\$10,000.00	2000	40 EA	Unassigned	Supply/Demand

Then we can see the current QOH and the required quantity for all open orders and ROP.

# Part Waterfall

Do you want to buy ? Or build ? Less Options [Submit](#) [Review POs](#)

Displaying 1 - 9 of 9 Export +/- Columns

All?	Part	Description	Leadtime	Need Date	Buy Date	QOH	Cost	Ext Cost	ROP	Sum Req'd Qty	Vendor	Source	
<input type="checkbox"/>	-3385	Type 3385	0			5	\$10.84	\$54.20	10	5	Internal Vendor	ROP	<a href="#">i</a>
<input type="checkbox"/>	1714538	Terminal-B	0			75198	\$0.03	\$644.85	100000	24802 EA	Unassigned	ROP	<a href="#">i</a>
<input type="checkbox"/>	5938173	Terminal Ring	0	2019-06-28		0	\$250.00	\$10,000.00	2000	40 EA	Unassigned	Supply/Demand	<a href="#">i</a>

Inv BOM Use(6) Quotes(0) Orders(2) POs(1) **Waterfall** PQuotes(0) Sales Hist(17) PO Hist(0) Tools Notes(0) Crosses(0)

### WATERFALL FOR LOCATION MN

Order	Customer	Qty Need	Piece	Picked	Entry Date	Work Start Date	Date	Projected QOH	PO	Supplier	Qty Gain	Piece
							Starting	0 EA				
90.1-1	Custom House (9)	20 EA	0	0 EA	2019-07-03	2019-06-28						
90.1-1	Custom House (9)	20 EA	0	0 EA	2019-07-03	2019-06-28	2019-06-28	-40.00 EA				
							2019-10-04	-20.00 EA	131.1-1	Master Distributor (2)	+ 20 EA	0

On each row, you can click the blue “i” to open up part record information for this part.

You’ll see BOM use, quotes, orders, pos, sales history, etc.

Particularly, we want to see the Waterfall, which captures our supply/demand for this specific part that drives the MRP flag and can be a very useful report to help make decisions on purchasing.

On the left of the table, you have demand: All Orders requiring this part. These could be external sales orders, OR internal build orders needing the part for kitting.

On the right you have supply, all POs placed that will source this part. Those could be external POs from a vendor, OR for an assembly, these could be internal POs against internal build orders.

The Orders show the dates driving MRP requirements, primarily work start date.

Between the two is the Projected QOH, that “waterfalls” the QOH by line, either subtracting the value for orders using components or adding for POs. So you can see what your projected QOH is for a certain date.

# Purchase Materials

Do you want to buy  ? Or build  ? Less Options ▾ Submit Review POs

Buy  Add/Create PQuote Ignore Checked Lines

Displaying 1 - 13 of 13 Export +/- Columns

<input type="checkbox"/> All?	Part	Description	Leadtime ⓘ	Need Date ⓘ	Buy Date ⓘ	QOH	Cost	Ext Cost	ROP	Sum Req'd Qty ⓘ	Vendor ⓘ	Source		
<input checked="" type="checkbox"/>	-3385	Type 3385	0			5	\$10.84	\$54.20	10	5	Internal Vendor	ROP	ⓘ	
<input checked="" type="checkbox"/>	1714538	Terminal-B	0			75198	\$0.03	\$644.20	100000	24777 EA	Unassigned	ROP	ⓘ	
<input type="checkbox"/>	1424867	Terminal-A	3	2019-10-06	2018-04-11	2018-04-08	1841	\$1.00	\$1,204.00	0	1204 EA	Unassigned	Supply/Demand	ⓘ
<input type="checkbox"/>	1480171	Cable	0	2018-11-19		95	\$1.50	\$132.00	0	88 FT	Unassigned	Supply/Demand	ⓘ	
<input checked="" type="checkbox"/>	5938173	Terminal Ring	0	2019-06-28		0	\$250.00	\$10,000.00	2000	40 EA	Unassigned	Supply/Demand	ⓘ	

Once we've refreshed MRP, we can move quickly through our report to purchase needed parts.

Select the 'buy' radio button, and you'll see the option to either add parts to a pquote or create a new one.

Then select the checkboxes for each row and use the drop down to select a pquote, if you'd like. Then click the orange button.

As you work through MRP without refreshing, lines will actually be crossed off so you know what you've ordered. The next time you refresh will be with a new allocation timestamp, meaning you will be working through a data set of supply and demand.

VIEW  
 IMPORT  
 SPREADSHEET  
 CONVERT TO PO  
 CLOSE  
 PDF/EMAIL (QUICK)  
 CLONE  
 DOCUMENTS (4)  
 NOTES (0)  
 HISTORY  
 PO 131.1

Show Sticky Notes

Buy Process 1 2 3  
 3. Receive

Vendor	Master Distributor (2)	Contact	
Status	Closed PO MN131.1	FOB	D - Delivery
Location	MN	Owner	techx
Created At	10/04/19 12:17 PM	Terms	1 - NET30
PO Comment		Scheduled	N
PQuote Comment		Cost Center	
Vendor Phone Number	800-781-4820	Vendor Min Order Amount	\$0.0000

+/- Columns

#	Qty	Prcpart	Vendor Part	Revision	Dock Date	Sched?	Cost ①	PPV	Ext. Cost
1	20 EA	RAW5938173 [+]			2019-10-04	Unsched.	\$250.0000	\$250.0000	\$5,000.0000
2	1000	RAW452312 [+]			2019-10-04	Unsched.	\$0.0000	\$0.0000	\$0.0000
3	24000 EA	RAW1714538 [+]			2019-10-04	Unsched.	\$0.0000	\$0.0000	\$0.0000

When we create a new PQuote, here's what it will look like from MRP.

Note: If you have the preferred vendor set, vendor info will be prepopulated. But if not, you'll have to enter a vendor.

# Receiving

Receiving parts

Receipts

Put Away

Now we will shift hats from our purchasing department to our Warehouse where we will receive our parts and put them away for future picking and kitting.

**CETEC ERP** SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

RECEIVING ▾ RELEASE TO PICK ▾ INVENTORY ▾ BARCODES ▾

RECEIVE PARTS ← PUT AWAY INCOMING INSPECTIONS

## 131.1 (Location: MN)

VIEW Show Sticky Notes  
 EDIT  
 DELETE LINE/ALL  
 ACKNOWLEDGE  
 PDF/EXPORT (QUICK)  
 DOCUMENTS (0)  
 NOTES (0)  
 CLOSE PO  
 PQUOTE 131

Buy Process 1 2 3  
 3. Receive

Vendor	Master Distributor (2)	Location	MN	Contact	
Buyer	Cetec ERP Support Team	P.O. Number	131.1	Shipvia	UPS Ground
FOB	Delivery	Taxable	No	Terms	NET30
Entry Date	2019-10-14	Scheduled	No	Tax Rate	0
PO Comment		Location	MN	Cost Center	

+/- Columns

#	Prcpart	Revision	Dock Date	Requested Arrival	Qty	Net Order Qty	Qty Recvd	Ext. Cost	Status
---	---------	----------	-----------	-------------------	-----	---------------	-----------	-----------	--------

On the Warehouse floor, you can navigate to Warehouse > Receiving > Receive Parts

**CETEC ERP** SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

RECEIVING ▾ RELEASE TO PICK ▾ INVENTORY ▾ BARCODES ▾

## Receive Parts

[Back to Pending Put Away](#)

PO	<input type="text" value="PO or RMA ID"/>	PO Line	<input type="text" value="(find PO to ass)"/>	Packing Slip #	<input type="text"/>
Prupart	<input type="text" value="Search parts..."/>	Unit Cost	<input type="text"/> <a href="#">Landed Cost</a>	Quantity	<input type="text"/> <a href="#">+ Pieces/Serials</a>
Location	<input type="text" value="Manufacturing Solutions"/>	Date	<input type="text" value="2019-10-14"/>		
Date Code	<input type="text"/>	Lot Code	<input type="text"/>	Revision	<input type="text"/>
Expires On	<input type="text"/>	Lock Bin	<input type="checkbox"/>	<a href="#">Receive</a>	<a href="#">Receive &amp; Keep PO</a>
Inspection Instructions (N/A)					
Qty Accepted	<input type="text"/>	Qty Rejected	<input type="text"/>	Receipt Notes	<input type="text"/>
Inspection Notes	<input type="text"/>				

Help

From our Receive Parts screen, we can receive against a PO, or perform a non-PO receipt (inventory adjustment).

You'll need the PO # to receive against.

For non-PO receipt, add the Prupart and Qty, then simply click receive.

## Receive Parts

[Back to Pending Put Away](#)

PO	131.1	PO Line	1 Part RAW593	Packing Slip #	
Prepart	RAW5938173	Unit Cost	250.000000	Landed Cost	Quantity 20
Location	Manufacturing Solutions	Date	2019-10-14		
Date Code		Lot Code	1942001	Revision	
Expires On		Lock Bin	<input type="checkbox"/>	<a href="#">Receive</a>	<a href="#">Receive &amp; Keep PO</a>
Part Description Terminal Ring					
Part Image					
PO Due Date 2019-10-04 PO Buyer Cetec ERP Support Team					
Inspection Instructions					
Qty Accepted		Qty Rejected		Receipt Notes	
Inspection Notes					

Once the PO # is entered, you can select which PO line to receive against, and the part, qty, cost will all be auto-filled.

You can log your receiving inspection, date code, lot code, exp date, etc. and then click Receive. If you are receiving multiple lines off the same PO click Receive and Keep PO

# Purchase Order 129.1 (Location: MN)

Success: PO MN129.1 Created

- VIEW
- EDIT
- DELETE LINE/ALL
- ACKNOWLEDGE
- PDF/EXPORT (QUICK)
- DOCUMENTS (0)
- NOTES (0)
- CLOSE PO
- PQUOTE 129

Show Sticky Notes

Buy Process 1 2 3  
3. Receive

Vendor	Master Distributor (2)	Location	MN	Contact	
Buyer	Cetec ERP Support Team	P.O. Number	129.1	Shipvia	UPS Ground
FOB	Delivery	Taxable	No	Terms	NET30
Entry Date	2019-10-03	Scheduled	No	Tax Rate	0
PO Comment		Location	MN	Cost Center	

+/- Columns

#	Prcpart	Revision	Dock Date	Requested Arrival	Qty	Net Order Qty	Qty Recvd	Ext. Cost	Status
1	RAW123		2019-10-03		5	5	0	\$10.0000	Open Receive
2	RAW-SOURCEDCOMP		2019-10-03		5	5	0	\$10.0000	Open Receive
Line Subtotal:								\$20.00	
Freight:								\$0.00	

You can also navigate to the receiving screen through the PO lines, where our data will be auto-populated.

Click receive per PO line

**CETEC ERP** SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

RECEIVING ▾ RELEASE TO PICK ▾ INVENTORY ▾ BARCODES ▾

## Receive Parts

Buy Process 1 2 3  
3: Receive  
[Back to Pending Put Away](#)

PO	129.1	PO Line	1 Part RAW123	Packing Slip #	
Prcpart	RAW123	Unit Cost	2.00000000	Landed Cost	Quantity: 5
Location	Manufacturing Solutions	Date	2019-10-03		
Date Code		Lot Code	1940001	Revision	
Expires On		Lock Bin	<input type="checkbox"/>	<input type="button" value="Receive"/> <input type="button" value="Receive &amp; Keep PO"/>	
Part Description source component 123					
Part Image					
PO Due Date 2019-10-03			PO Buyer Cetec ERP Support Team		
Inspection Instructions					

You see our PO # is filled in. We can follow the same receiving process outlined before

PO	129.1	PO Line	1 Part RAW123	Packing Slip #	
Prcpart	RAW123	Unit Cost	2.00000000 Landed Cost	Quantity	5 + Pieces/Serials
Location	Manufacturing Solutions	Date	2019-10-03		
Date Code		Lot Code	1940001	Revision	
Expires On		Lock Bin	<input type="checkbox"/>	Receive	Receive & Keep PO
Part Description source component 123					
Part Image					
PO Due Date 2019-10-03 PO Buyer Cetec ERP Support Team					
Inspection Instructions					
Qty Accepted	5	Qty Rejected	0	Receipt Notes	
Inspection Notes					

Enter your qty accepted/rejected

Click receive

inspection instructions

Qty Accepted	<input type="text"/>	Qty Rejected	<input type="text"/>	Receipt Notes	<input type="text"/>
--------------	----------------------	--------------	----------------------	---------------	----------------------

Inspection Notes

**Parts Received, PO Line Receipt 208 (ID: 89).**  
**Receipt Label**  
**Serial Labels**  
**# Orders Possibly Needing Part: 1**

After receipt, you can see your receipt, receipt label, and the orders possibly needing this part

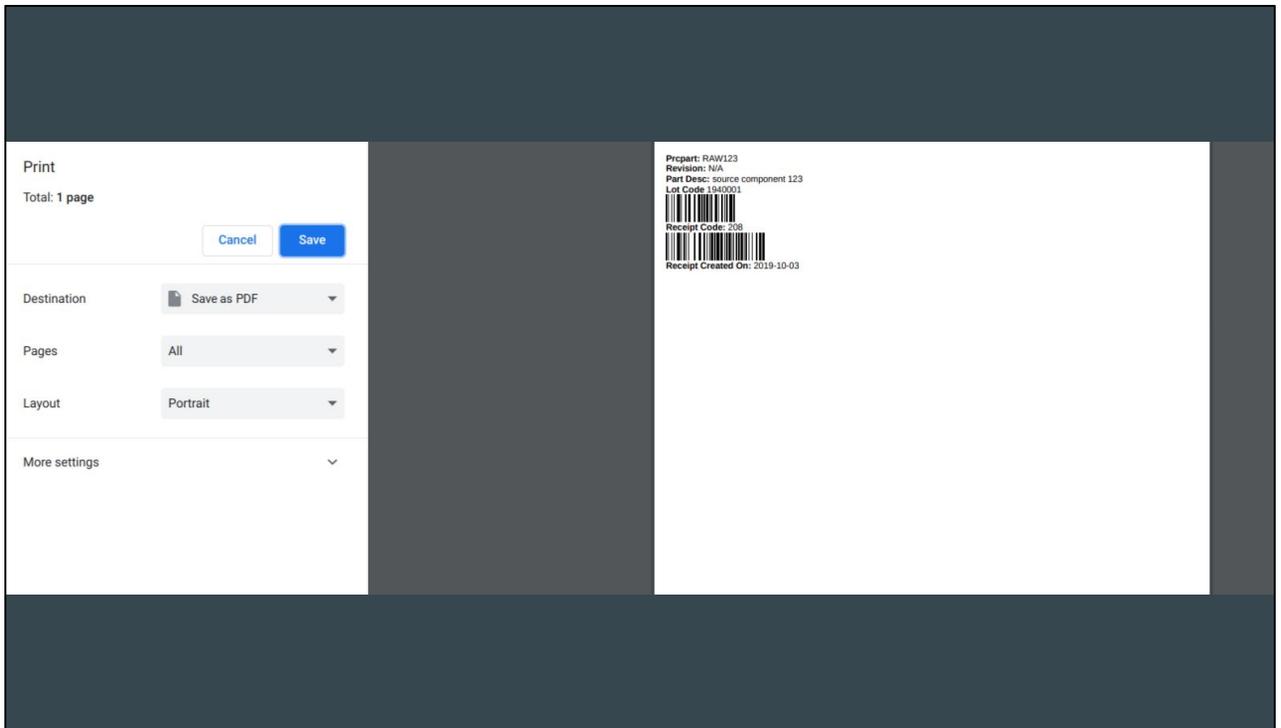
## Receive Parts

Buy Process 1 2 3  
3. Receive

[Back to Pending Put Away](#)

PO	129.1	PO Line	2 Part RAW-SO	Packing Slip #	
Prcpart	RAW-SOURCEDCOMP	Unit Cost	2.00000000 Landed Cost	Quantity	5 + Pieces/Serials
Location	Manufacturing Solutions	Date	2019-10-03		
Date Code		Lot Code	1940002	Revision	
Expires On		Lock Bin	<input type="checkbox"/>	<a href="#">Receive</a>	<a href="#">Receive &amp; Keep PO</a>
Part Image					
PO Due Date	2019-10-03	PO Buyer	Cetec ERP Support Team		
Inspection Instructions					
Qty Accepted	5	Qty Rejected	0	Receipt Notes	
Inspection Notes					

If we keep the PO on receipt, we can use the dropdown to select the next PO line and keep moving through our PO



This is an example of the receipt label, with Prupart, revision, description, Lot Code, Receipt Code and correlating barcodes

## Purchase Order Receipt 208 2019-10-03 (Part RAW123, Qty 5.00000000)

- VIEW
- EDIT
- LEDGER
- LABEL
- SERIAL LABELS
- DOCUMENTS (0)
- NOTES (0)
- PO MN129.1
- INCOMING
- INSPECTION
- CANCEL RECEIPT

Prcpart	RAW123	Received On	2019-10-03	Received By	Cetec ERP Support Team
P.O. Number - Line	129.1 - 1	Packing Slip #		Vendor	Master Distributor (2)
Location	MN	Cost	\$2.00000	Qty	5
Receipt ID	89	Receipt Code	208 <a href="#">View Pieces/Serials</a>	Name	
Receipt Notes					
Incoming Inspection	95				

### CURRENT BINS

	Bin	Date Code	Lot Code	Inv Layer ID	Revision	Quantity
 Move	NEW	N/A	1940001	208		5

(NO SHIPMENTS FROM THIS RECEIPT)

CUSTOMER/FINAL SHIPMENTS FROM THIS RECEIPT

Here is our receipt.

We can perform a put away in the warehouse by clicking “Move”.

**CETEC ERP** SALES PARTS PURCHASING **WAREHOUSE** ACCOUNTING PRODUCTION ADMIN

RECEIVING ▾ RELEASE TO PICK ▾ INVENTORY ▾ BARCODES ▾

RECEIVE PARTS  
**PUT AWAY** ←  
 INCOMING INSPECTIONS

## Receipt 208 2019-10-03 (Part RAW123, Qty 5.00000000)

VIEW	Prcpart	RAW123	Received On	2019-10-03	Received By	Cetec ERP Support Tea
EDIT	P.O. Number - Line	129.1 - 1	Packing Slip #		Vendor	Master Distributor (2)
LEDGER	Location	MN	Cost	\$2.00000	Qty	5
LABEL	Receipt ID	89	Receipt Code	208 <a href="#">View Pieces/Serials</a>	Name	
SERIAL LABELS	Receipt Notes					
DOCUMENTS (0)	Incoming Inspection	95				
NOTES (0)						
PO MN129.1						
INCOMING INSPECTION						
CANCEL RECEIPT						

**CURRENT BINS**

If you have a warehouse worker performing put aways, they would navigate to warehouse > receiving > put away

## Receipts Pending Put Away

View Pending Receipts For Warehouse:

+/- Columns

Receipt	Prcpart	PO - Line	Lotcode	Date code	Revision	Received On	Put Away Qty	
49	FIGPRODUCT2	3.1 - 2	1919001	1919		2019-05-08	24	<a href="#">Put Away</a>
(Non-PO)	RAW9000-B	-				2019-05-17	50	<a href="#">Put Away</a>
(Non-PO)	RAW9000-A	-				2019-05-17	50	<a href="#">Put Away</a>
56	SUB200	68.1 - 1	1922005	1922		2019-05-31	1	<a href="#">Put Away</a>
60	PRT56781234	46.1 - 1	1926002			2019-06-26	5	<a href="#">Put Away</a>
61	PRT56781234	46.1 - 1	1926004	1-2039		2019-06-26	10	<a href="#">Put Away</a>
65	RAWETHANOL	75.1 - 1	ABC123			2019-07-11	98	<a href="#">Put Away</a>
66	FIG-FINISHED CASE OF CBD OIL	76.1 - 1	1928002	1928		2019-07-11	2	<a href="#">Put Away</a>

They'll see the list of all Receipts Pending Put Away

Then click Put Away for each receipt/part

CETEC ERP SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

RECEIVING RELEASE TO PICK INVENTORY BARCODES

### Receipt Put Away: 208-100319

Back To All Receipts

Prcpart	RAW123	Receipt	208-100319	PO - Line	129.1 - 1
Put Away Qty	<input type="text" value="5"/>	Datecode / Lotcode	/ 1940001	Revision	
From Bin	NEW	To Bin	<input type="text" value="A-1-2"/>	<input type="button" value="Submit"/>	

(No other Bins for this Part have Qty in Location MN)

They can then enter the bin and the put away quantity

# Back to workorder

Releasing Orders

Printing travelers (license plates)

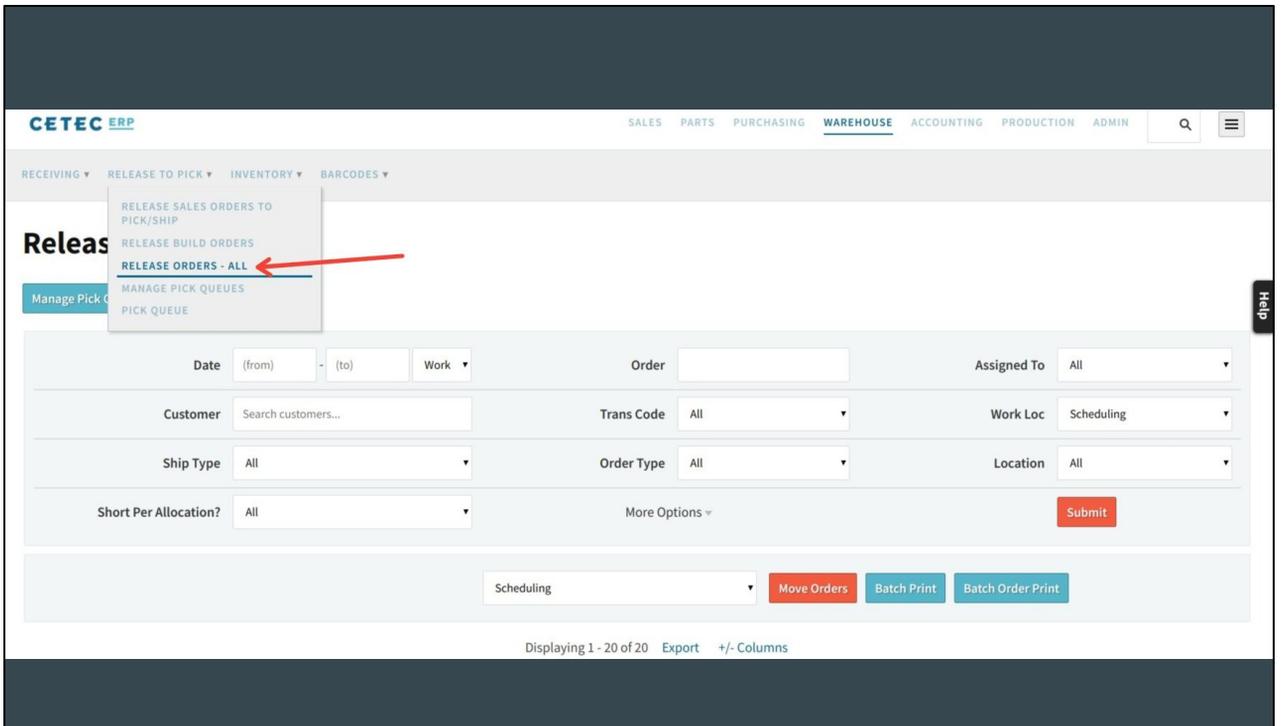
Picking Parts

Logging Time

Completing and Receiving a Job

Now that we've completed our PO, received the parts, and put them away, we can actually pick parts and complete our job.

So we will switch hats back to Production, first the production manager, and then our job floor worker.



The Release to Pick screen is where your Production/Warehouse managers can release orders for picking, assign them to work locations, batch print license plates, etc.

Under Warehouse > Release to Pick > Release Orders

These three options take you to the same screen, just with different search field settings set differently.



Scheduling

Move Orders

Batch Print

Batch Order Print



Displaying 1 - 20 of 20 Export +/- Columns

Help



Order	Line	Tags	Prcpart	Customer	Work Start Date	Ship Date	Dock Date	Short Per Allocation	# Comp	Assign To John Sm	Qty Due	Release Qty	Docs	Order Plate	Plate	Move
14.1	2		PRT12345	Products & More	2019-09-12	2020-01-01	2020-01-03	Shortl (0)	0	John Smit set	5	5	Docs	Order Plate	Plate	<input type="checkbox"/>
40.2	1		SUB100	Internal Account	2018-11-19	2018-11-28	2018-11-28	No	3	John Smit set	30		Docs	Order Plate	Plate	<input type="checkbox"/>
72.1	1		SUB200	Internal Account	2019-05-21	2019-05-28	2019-05-28	No	1	John Smit set	1		Docs	Order Plate	Plate	<input type="checkbox"/>
73.1	1		SUB100	Internal Account	2019-05-31	2019-06-05	2019-06-05	No	3	John Smit set	1		Docs	Order Plate	Plate	<input type="checkbox"/>
90.1	1		JOB-NEWSTAIRCASE2	Custom House	2019-06-28	2019-06-28	2019-06-28	Shortl	29	John Smit set	1		Docs	Order Plate	Plate	<input type="checkbox"/>

Scheduling

Move Orders

Batch Print

Batch Order Print

Displaying 1 - 20 of 20 Export +/- Columns

Help

Order	Line	Tags	Prcpart	Customer	Work Start Date	Ship Date	Dock Date	Short Per Allocation	# Comp	Assign To	Qty Due	Release Qty	Docs	Order Plate	Plate	Move
14.1	2		PRT12345	Products & More	2019-09-12	2020-01-01	2020-01-03	Shortl (0)	0	John Smit set	5	5	Docs	Order Plate	Plate	<input type="checkbox"/>
40.2	1		SUB100	Internal Account	2018-11-19	2018-11-28	2018-11-28	No	3	John Smit set	30		Docs	Order Plate	Plate	<input type="checkbox"/>
72.1	1		SUB200	Internal Account	2019-05-21	2019-05-28	2019-05-28	No	1	John Smit set	1		Docs	Order Plate	Plate	<input type="checkbox"/>
73.1	1		SUB100	Internal Account	2019-05-31	2019-06-05	2019-06-05	No	3	John Smit set	1		Docs	Order Plate	Plate	<input type="checkbox"/>
90.1	1		JOB-NEWSTAIRCASE2	Custom House	2019-06-28	2019-06-28	2019-06-28	Shortl	29	John Smit set	1		Docs	Order Plate	Plate	<input type="checkbox"/>

Scheduling

Move Orders

Batch Print

Batch Order Print

Displaying 1 - 20 of 20 Export +/- Columns

Order	Line	Tags	Prcpart	Customer	Work Start Date	Ship Date	Dock Date	Short Per Allocation	# Comp	Assign To	Qty Due	Release Qty	Docs	Order Plate	Plate	Move
14.1	2		PRT12345	Products & More	2019-09-12	2020-01-01	2020-01-03	Shortl (0)	0	John Smit set	5	5	Docs	Order Plate	Plate	<input type="checkbox"/>
40.2	1		SUB100	Internal Account	2018-11-19	2018-11-28	2018-11-28	No	3	John Smit set	30		Docs	Order Plate	Plate	<input type="checkbox"/>
72.1	1		SUB200	Internal Account	2019-05-21	2019-05-28	2019-05-28	No	1	John Smit set	1		Docs	Order Plate	Plate	<input type="checkbox"/>
73.1	1		SUB100	Internal Account	2019-05-31	2019-06-05	2019-06-05	No	3	John Smit set	1		Docs	Order Plate	Plate	<input type="checkbox"/>
90.1	1		JOB-NEWSTAIRCASE2	Custom House	2019-06-28	2019-06-28	2019-06-28	Shortl	29	John Smit set	1		Docs	Order Plate	Plate	<input type="checkbox"/>

Help

# Full Order Plate

Customer: Products &  
More  
Cust PO #: 02394812

Order: 14.1

Ship Date: 2018-03-16

Part Number: PRODUCT

Work Start Date: 2018-03-16

Revision: 1.0

Labor Estimate: 2540.00 = 2540.00 min  
or 42.33 hrs

Part Desc:

Comment:

Qty: 20



Order Line 14.1 Line Item: 1



Item	Prepart	Description	Qty Per Top	Net Qty Required	Qty Picked
1	FIGPRODUCT	Part Requires Tools:	10	10	0

Ship Date: 2020-01-01

Part Number: 12345

Work Start Date: 2019-09-12

Revision:



# License Plate (Traveler)

## Customer Internal Account (for Products & More)

Ship Date: 2018-11-28

Part Number: 100

Purchase Order: 74298342



Work Start Date: 2018-11-19

Order 40.2 Line Item: 1  
(Part Of 40.1 FIGPRODUCT)

Revision:

Labor Estimate: 3600.00 = 3600.00 min or 60.00 hrs



Part Desc: Subassembly 100

Comment:

Qty: 30

### Pick List

Item	Prcpart	Description	Cust Part	Rev	Qty Per Top	Net Qty Req'd	Qty Picked
1	RAW9462711	Cable			1 FT	30 FT	0
2	RAW6392785	Material-B			1 EA	30 EA	0
3	SUB200	Subassembly 200			1	30	0

### Estimated Labor Plan per Part

1. Scheduling	No Operations Specified
2. Warehouse	No Operations Specified
3. Kit Short Shelf	No Operations Specified
4. Big Saw	No Operations Specified
5. At Vendor Outsourcing	No Operations Specified

The License Plate will print off the pick list for picking, and the labor plan set in the BOM revision.

This is your traveler that would follow the job along the job floor from picking through production

This is what will help your job floor workers quickly navigate into the workorder, either using the order number or the barcode scanner

**CETEC ERP** SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

ORDERS ▾ QUALITY ▾ PART ▾ KITAUDIT ▾ MGMT ▾ TOOLS ▾ SCHEDULING ▾

## Production Order List

Order #  Part # (comma separated) Warehouse All

Revision  Date (from) - (to) Date Type Ship Date

Transcode / Status Open Build Orders First Article? All Shipped Today?

More Options -

Displaying 1 - 27 of 27 Export +/- Columns

Order	Loc	Line	Qty	Ship Qty	QOH	Prcpart	Customer	Work Start Date	Ship Date	Dock Date	Ext. Resale	Work Loc	Trans Code	Production Line
15.1	MN	3	4	0	49	FIGPRODUCT2	Internal Account	2018-03-26	2018-03-30	2018-03-14	\$480.00	Machine #1	Build	None
15.1	MN	4	4	0	49	FIGPRODUCT2	Internal Account	2018-03-26	2018-03-30	2018-03-14	\$480.00	Machine #1	Build	None
15.1	MN	5	2	0	49	FIGPRODUCT2	Internal Account	2018-03-26	2018-03-30	2018-03-14	\$240.00	Machine #1	Build	None
16.1	MN	1	245	0	261	FIGPRODUCT	Internal Account	2018-04-11	2018-04-11	2018-04-11	\$0.00	Warehouse	Build	None

To find the job, your worker on the job floor can enter the workorder number in the global search or likely search the Production Orders list:

## Production Order List

Order #	<input type="text"/>	Part #	<input type="text" value="(comma separated)"/>	Warehouse	All
Revision	<input type="text"/>	Date	<input type="text" value="(from)"/> - <input type="text" value="(to)"/>	Date Type	Ship Date
Transcode / Status	Open Build Orders	First Article?	All	Shipped Today?	<input type="checkbox"/>
Cust. PO	<input type="text"/>	Show Production Mgmt?	<input type="checkbox"/>	Location	Assembly Station #1 At Vendor Outsourcing Big Saw Clean Room Engineering Time
Exclude Selected Locations?	<input type="checkbox"/>	Order Status	All	Production Line	All
Customer Number	<input type="text"/>	Customer Name	<input type="text"/>	Supervisor	All
No Work Instr.	<input type="checkbox"/>	Req'd Work Instr.	Hide Column (fast)	QA Inspector	All
Intercompany?	All	On Target?	All	Production Status	All
Department	<input type="text"/>	Order Type	All	Ship Via	All
Tag	<input type="text"/>	Outsourcing	All	Stage	All
Assigned To	All	Inside Sales	All	Outside Sales	All

There are a number of fields to customize a search so that only the refresh is needed for your production worker.

They can run their report and click directly into the workorder.

The screenshot displays the Cetec ERP interface for a Workorder (Build) screen. The top navigation bar includes the Cetec ERP logo and several menu items: SALES, PARTS, PURCHASING, WAREHOUSE, ACCOUNTING, PRODUCTION (highlighted with a red arrow), and ADMIN. A search icon and a 'Scan' button are also present. Below the navigation bar, the main header reads 'Workorder (Build): 144.1 Line Item: 1'. A dropdown menu on the right indicates 'Pre-Release: Cetec ERP Support Team'. The left sidebar lists various modules: WORKORDER, OVERVIEW, COMPLETE/RECEIVE, HISTORY, SPLIT LINE, PICK PARTS, DEKIT PARTS, MAINT/ETC + SERIALS, INSPECTIONS, OUTSOURCE PO, and DOCUMENTS. The main content area shows a 'Build Process' section with steps 1, 2, 3, 4, and 5, where step 3 is selected. Below this, there are fields for 'Customer' (1 - Internal Account), 'Prctpart' (FIG-FINISHEDPRODUCT), and 'Ship Date' (2019-10-04). A 'Description' field and a 'Tech Comments' section are also visible. The 'Work / Labor Tracking' section includes a 'Start Work' button, a 'Show/Hide Open Work' link, and a table with columns for 'Open Work' (No Open Work) and 'Work Location' (Scheduling, Set, Partial). A 'Work Time' section shows 'Min Used: 0.0, Est: 0.0'.

Here is the overview of the Workorder screen, or a job. Notice under the modules that we have shifted into the Production tab of Cetec.

This is what your Production people on the floor would use.

**CETEC ERP** SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

ORDERS QUALITY PART KITAUDIT MGMT TOOLS SCHEDULING **Scan**

## Workorder (Build): 144.1 Line Item: 1

Pre-Release: Cetec ERP Support Team

WORKORDER **Build Process** 1 2 3 4 5  
OVERVIEW 3. Pick Parts/Material **Line 1**

HISTORY  
SPLIT LINE  
PICK PARTS  
DEKIT PARTS  
MAINT/ETC +  
SERIALS  
INSPECTIONS  
OUTSOURCE PO  
DOCUMENTS

Customer	1 - Internal Account	Prcpart	FIG-FINISHEDPRODUCT	Ship Date	2019-10-04
Description					
Tech Comments Technical Comments					

**Work / Labor Tracking**

Open Work No Open Work

Work Location

Work Time Min Used: 0.0, Est: 0.0

The first thing we need to do on a job, is to pick the parts needed for manufacturing or kitting. So click into the pick parts screen.

## Pick Parts For Work Order: 144.1 Line Item: 1

WORKORDER  
OVERVIEW  
COMPLETE/RECEIVE  
HISTORY  
SPLIT LINE  
PICK PARTS  
DEKIT PARTS  
MAINT/ETC +  
SERIALS  
INSPECTIONS  
OUTSOURCE PO  
DOCUMENTS

Build Process 1 2 3 4 5  
3. Pick Parts/Material Line 1

BOM Part Number FIG-FINISHEDPRODUCT Customer 1 - Internal Account First Article? No  
Qty Due 5 Qty To Ship 0 Location MN  
Shortage Comments (Shortage Comments) Hide Picked?   
Prcpart  Printable Version

Item	Prc	Part	Rev	Qty Need	Qty Picked	Bin	Lot Code	Receipt	Bin Qty	Pick Qty/Serial Number
1	RAW	123		5	0	1 A-1-2	1940001	208	5	<input type="text"/> 0 ▾
Part Description: source component 123										
2	RAW	1214366		25 EA	0	6 A-73-99		7	100 EA	<input type="text"/> 0 ▾
						C-11-31		69	998 EA	<input type="text"/> 0 ▾

Now we can pick our parts by bin and lot code

Item	Prc	Part	Rev	Qty Need	Qty Picked	Bin	Lot Code	Receipt	Bin Qty	Pick Qty/Serial Number
1	RAW	123		5	<div style="width: 20px; height: 10px; background-color: green;"></div>	1 A-1-2	1940001	208	5	5 0 ▾
Part Description: source component 123										
2	RAW	1214366		25 EA	<div style="width: 20px; height: 10px; background-color: green;"></div>	6 A-73-99		7	100 EA	25 0 ▾
						C-11-31		69	998 EA	0 0 ▾
						E-33-88	23904823	72	50 EA	0 0 ▾
						K-51-21		98	90 EA	0 0 ▾
						C-11-31-1	73103	191	400 EA	0 0 ▾
Part Description: Bolt										
3	RAW	-SOURCEDCOMP		5	<div style="width: 20px; height: 10px; background-color: green;"></div>	1 NEW	1940001	209	5	5 0 ▾

Set Workorder Location To:  Update Update, Go To Order List

[Complete/Receive Order | Pick All Lines](#)

CFTEC ERP VERSION 3.1.1 ON TURKEY - COPYRIGHT © 2018 - CFTEC ERP

You can enter the number manually or click pick all lines at the bottom of the screen and select update

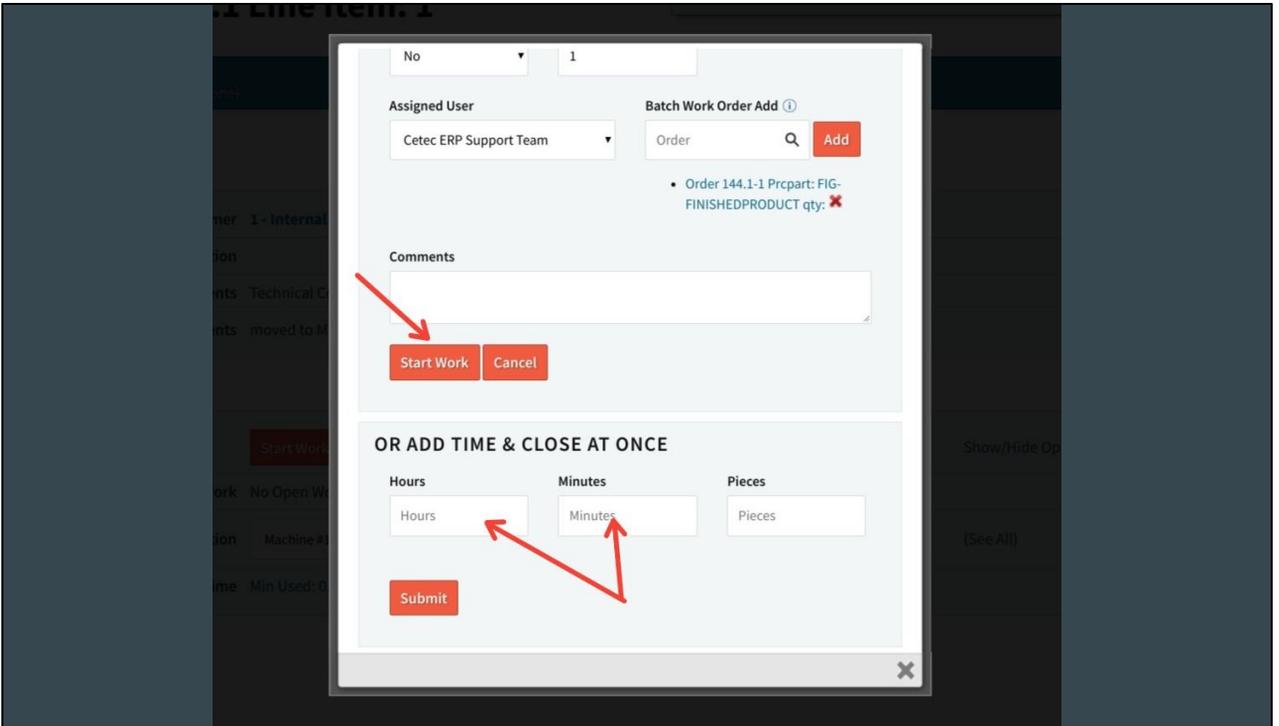
You can also set the workorder location after parts have been picked using the dropdown. Click update to save and register the change.

The screenshot shows a web-based work order management interface. On the left, a vertical menu lists various actions: REPORT, SPLIT LINE, PICK PARTS, DEKIT PARTS, MAINT/ETC +, SERIALS, INSPECTIONS, OUTSOURCE PO, and DOCUMENTS. The main content area is titled 'Order Is Short' and 'Order Has Comments'. It displays order details: Customer '1 - Internal Account', Prcpart 'FIG-FINISHEDPRODUCT', and Ship Date '2019-10-04'. A 'Tech Comments' section contains 'Technical Comments', and an 'Order Comments' section contains 'moved to Machine #1 by techx'. Below this is the 'Work / Labor Tracking' section, which includes a 'Start Work' button, 'Open Work' status (No Open Work), 'Work Location' set to 'Machine #1' with 'Set' and 'Partial' buttons, and 'Work Time' (Min Used: 0.0, Est: 0.0). A 'Show/Hide Open Work' link is also present. At the bottom, there is a 'Work Instructions (Show/Hide)' section with a table header: Location/Operation, Instruction, Response, and Status. A link 'Show/Hide Deleted Records' is located below the table. Red arrows point to the 'DOCUMENTS' menu item, the 'Start Work' button, the 'Machine #1' dropdown, and the 'Work Instructions' section header.

Back in the workorder screen, our job floor worker can proceed with production. Notice the work location has been set, and we can access workorder documents like the license plate.

Here we can also log time on a job.

There will be work instructions from the BOM revision labor plan that can require sign off, include photos, etc.



If we click Start Work, Cetec will track the time.

We can enter batch times as well.

Work / Labor Tracking

Start Work

Show/Hide Open Work

Open Work

Stop Work

User techx working since 2019-10-14 15:23:51 in Inspection # Pieces Finished:

Work Location Machine #1

(See All) | Next Up: Machine #2

Required Work Instructions! ⓘ

Override Requirement?

Work Time Min Used: 133.8, Est: 1320.0

Order Progress  
(Total Labor Min.)



Work Instructions (Show/Hide)

Location/Operation	Instruction	Response	Status
--------------------	-------------	----------	--------

## Workorder (Build): 144.1 Line Item: 1

Pre-Release: Cetec ERP Support Team

- WORKORDER
- OVERVIEW
- COMPLETE/RECEIVE
- HISTORY
- SPLIT LINE
- PICK PARTS
- DEKIT PARTS
- MAINT/ETC+
- SERIALS
- INSPECTIONS
- OUTSOURCE PO
- DOCUMENTS

Build Process 1 2 3 4 5  
3. Pick Parts/Material ~~Line 1~~(done)

Hide Warnings

[Order Is Short](#)

[Order Has Comments](#)

Customer 1 - Internal Account

Prupart FIG-FINISHEDPRODUCT

Ship Date 2019-10-04

Description

Tech Comments Technical Comments

Order Comments moved to Machine #1 by techx

### Work / Labor Tracking

Start Work

Show/Hide Open Work

Open Work No Open Work

So once we've completed production, we need to complete and receive our finished product and put it away on the shelves to be sold.

So go to Complete/Receive

# Complete/Receive Internal Order 123.1

- VIEW
- EDIT
- DETAILS/SERIALS
- COMPLETE/RECEIVE**
- DELETE LINE/ALL
- PDF (QUICK)
- PRO FORMA PDF
- COMMISSION
- RELEASE TO WH
- WORKORDER VIEW +
- PREPAY
- PACKING SLIP (QUICK)
- PACKING LABEL
- FULL ORDER PLATE
- DOCUMENTS (0)
- NOTES (0)
- QUOTE 123
- CREATE PQUOTE
- CREATE WO
- INTERNAL PO 99.1
- OUTSOURCE POS (0)
- WORK ORDER FOR MN122.1

**Build Process** 1 2 **3** 4 5  
3. Pick Parts/Material Line 1 (done)

Customer	Internal Account (1)	Location	MN	Ordered On	2019-08-23
Buyer		P.O. Number		Assembly?	Yes
Inside Sales		Outside Sales			
Ship Via	UPS Ground	Customer Email			
Tax Group	(0%)	Terms		FOB	S - Shipment
Order Type	Scheduled	Ship Type	Partial	Status	Pending Invoice (4)
Ship To	Internal Customer ,				
Tracking Numbers	<input type="text" value="(comma delimited)"/>				
Freight Charge	\$0.00	Freight Cost	\$0.00	<a href="#">Update</a>	<a href="#">Complete/Receive Product</a>

Line #	Finish Qty	Qty Due	Prcpart	Cost	Resale	Work Start Date	Ship Date	Dock Date	Status	Ext. Cost	Tax	Ext. Resale
1	<input type="text" value="46"/> <small>(Pick)</small>	46	NEU1234	\$0.00	\$0.00	2019-08-23	2019-08-23	2019-08-23	Scheduling first article	\$0.00	\$0.00	\$0.00
Est Unit Labor: 0										Actual Unit Labor: 0.0		\$0.00
Parts Picked		Description		Bin	Qty Picked	Qty To Relieve						

On the Complete/Receive screen, we can set the ship qty when parts have been picked, and print our packing label and packing slip.

QUOTE 144  
ORDER POS +  
CREATE WO  
INTERNAL PO 128.1  
OUTSOURCE POS (0)

Freight Charge \$0.00      Freight Cost \$0.00      [Update](#)      [Complete/Receive Product](#)

Line #	Finish Qty	Qty Due	Prcpart	Cost	Resale	Work Start Date	Ship Date	Dock Date	Status	Ext. Cost	Tax	Ext. Resale
1	5 <small>(Pick)</small>	5	FIG-FINISHEDPRODUCT	\$2.25	\$2.25	2019-10-02	2019-10-04	2019-10-11	Machine #1 Line Comment	\$11.25	\$0.00	\$11.25
Est Unit Labor: 0				Actual Unit Labor: 12.0				\$10.00				
Parts Picked		Description	Bin	Qty Picked	Qty To Relieve							
RAW-SOURCEDCOMP			NEW	5	5							
RAW1214366		Bolt	A-73-99	25	25							
RAW123		source component 123	A-1-2	5	5							
<a href="#">Complete All</a> <a href="#">Add To Skid</a>										Freight:		\$0.00
<input type="checkbox"/> Pick Everything? <input type="checkbox"/> Use Est. Labor?										Tax ( 0%):		\$0.00
<input type="checkbox"/> Fill Labor?										Total:	\$21.25	\$11.25

We can confirm the qty to be relieved (useful in partial shipments, where parts might be picked in full, but shipped partial).

Click update and then Complete/Receive Product.

When you do this, the raw components will be consumed in cetec and removed from the bin. Until now they've been reserved but still exist as individual inventory. NOW they will exist only as a part of the finished product.

# Purchase Order Receipt 211 2019-10-03 (Part FIG-FIN)

Success: Material Completed/Received

- VIEW
- EDIT
- LEDGER
- LABEL
- SERIAL LABELS
- DOCUMENTS (0)
- NOTES (0)
- PO MN128.1
- INVOICE 144.1
- CANCEL RECEIPT

Prcpart	FIG-FINISHEDPRODUCT	Received On	2019-10-03	Received By	Cetec ERP Support Team
P.O. Number - Line	128.1 - 1	Packing Slip #		Vendor	Internal Vendor (1)
Location	MN	Cost	\$7.39500	Qty	5
Receipt ID	91	Receipt Code	211 <a href="#">View Pieces/Serials</a>	Name	
Receipt Notes					

### CURRENT BINS

	Bin	Date Code	Lot Code	Inv Layer ID	Revision	Quantity
 Move	NEW	1940	1940001	211		5

(NO SHIPMENTS FROM THIS RECEIPT)

### CUSTOMER/FINAL SHIPMENTS FROM THIS RECEIPT

Location	Invoice	Nosi	Line	Component No.	Date Code	Lot Code	Revision	Ship Qty	Bin Location	Cost
----------	---------	------	------	---------------	-----------	----------	----------	----------	--------------	------

You'll be taken the receipt screen for the finished product where you can then put away into a bin on the shelf.

## Receipt Move: 211-100319

[Back To All Receipts](#)

Prcpart	FIG-FINISHEDPRODUCT	Receipt	211-100319	PO - Line	128.1 - 1
Move Qty	<input type="text" value="5"/>	Datecode / Lotcode	1940 / 1940001	Revision	
From Bin	NEW	To Bin	<input type="text" value="Finished Goods"/>	<input type="button" value="Submit"/>	

(No other Bins for this Part have Qty in Location MN)

# Sales Order

Quoting & Quote PDF

Commit to Order

Final Invoicing

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ▾ ORDERS ▾ INVOICES ▾ CUSTOMERS ▾ LEADS ▾ OPPORTUNITIES ▾ FORECASTS ▾ REPORTS ▾

QUOTE LIST  
NEW QUOTE  
MY QUOTES  
IMPORT QUEUE  
QUOTE STATS  
QUOTE COMMISSIONS  
PROJECTS

11-100319

Information: Receipt 211-100319 Moved Into Bin Finished Goods

Part	FIG-FINISHEDPRODUCT	Receipt	211-100319	PO - Line	128.1 - 1
Move Qty	5	Datecode / Lotcode	1940 / 1940001	Revision	
From Bin	Finished Goods	To Bin	Use A-Z, 0-9, hyphen and space only		

Submit

(No other Bins for this Part have Qty in Location MN)

Help

Go to sales > quotes > quote list OR new quote

## Quote List

Company	<input type="text" value="Search customers"/> Q	Buyer	<input type="text"/>	Prcpart	<input type="text" value="Search parts"/> Q
Cust Part	<input type="text"/>	Owned By	All ▾	Assigned To	All ▾
Quote ID	<input type="text"/>	Status	Open & Pending ▾	Stage	All ▾
View By	Quote ▾	More Options ▾		Submit	Create

CLICK 'SUBMIT' TO VIEW RESULTS



You can create a new quote from the quote list

**CETEC ERP** SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ▾ ORDERS ▾ INVOICES ▾ CUSTOMERS ▾ LEADS ▾ OPPORTUNITIES ▾ FORECASTS ▾ REPORTS ▾

## Quote/Order Worksheet 145

Sales Editing: Cetec ERP Support Team ▾

VIEW & EDIT  
 SEND +  
 COMMIT TO ORDER  
 QUOTING TOOLS +  
 COMMISSION  
 DOCUMENTS (0)  
 NOTES (0)  
 PREPAY  
 CREATE PQQUOTE

Customer Contact  
 Cust PO # Owner techx Status Open  
 Inside Sales Outside Sales

Add Line Change All Lines Show Open Lines Submit

+/- Columns

#	PRC	Part	Ship Date	Dock Date	Qty	Cost	Resale	Ext. Cost	Ext. Resale	Discount
		<input type="text" value="Q"/>	2019-10-03	2019-10-03	1	Cost	Resale			

Freight Resale Estimate:  Freight Discount:  Final Freight Resale:   
 Tax ( 0% ):   
 Ext. Cost:  Ext. Resale:   
 Total Cost:  \$0.00 Total Resale:

Click the pencil to enter the customer

## Quote/Order Worksheet 145

Sales Editing: Cetec ERP Support Team

VIEW & EDIT  
SEND +  
COMMIT TO ORDER  
QUOTING TOOLS +  
COMMISSION  
DOCUMENTS (0)  
NOTES (0)  
PREPAY  
CREATE PQQUOTE

Name	<input type="text"/>	Created On	2019-10-03	Complete By	<input type="text"/>
* Customer (Create)	Products & More <input type="text"/>	Contact	Choose a Contact <input type="text"/> (Create)	Revision Override	1 <input type="text"/>
* Cust PO #	12345 <input type="text"/>	Owner	techx <input type="text"/>	Status	Open <input type="text"/>
* Ship To	Products & More 111 Congress <input type="text"/>	* Ship Via	Fedex Ground <input type="text"/>	Carrier Account #	<input type="text"/>
Ship Type	Partial <input type="text"/>	Order Type	Scheduled <input type="text"/>		

Fields with \* req'd for order entry. More Options -

+/- Columns

There are a few required fields: Customer, Cust PO #, Ship To, Ship Via

You can use the More Options carrot to enter more quote header info that will track with the quote through to order and invoicing.

Click OK to save the changes

VIEW & EDIT  
 SEND +  
 COMMIT TO ORDER  
 QUOTING TOOLS +  
 COMMISSION DOCUMENTS (0)  
 NOTES (0)  
 PREPAY  
 CREATE PQUOTE

Sell Process 1 2 3 4 5  
 1. Create Quote / Order Worksheet

Customer Products & More (2)  
 Products & More 111 Congress Ave #400 Austin, TX 78701 UNITED STATES Contact

Cust PO # 12345 Owner techx Status Open

Inside Sales Outside Sales

Add Line Show Open Lines Submit

ADD LINE

Loc Manufacturing Solutions Prcpart (OOH:5) FIG-FINISHEDPRODUCT Cust Part 123GRAY

Work Start Date 2019-10-03 Ship Date 2019-10-03 Dock Date 2019-10-10

Qty	Unit Cost	Unit Resale	Lead Time	Transaction Code
5	7.395	7.395 12.50	0	Stock

More Options

OK OK & Add Update Cost

Change All Lines

Then we need to enter our lines for the goods we are selling.

Click add line, enter prcpart, cust part #, qty, check cost, set transcode to stock and hit ok & add

Again, use more options to enter line comments, sourcing comments, price breaks for the quote

# Quote/Order Worksheet 145

Sales Editing: Cetec ERP Support Team

- VIEW & EDIT
- SEND +
  - PDF/EMAIL (QUICK)
  - EXCEL FILE
  - PRICE BOOK
  - COMMIT TO ORDER
  - QUOTING TOOLS +
  - COMMISSION
  - DOCUMENTS (0)
  - NOTES (0)
  - PREPAY
  - CREATE PQQUOTE

Sell Process 1 2 3 4 5  
2. Commit Order

Customer Products & More (2)  
Products & More 111 Congress Ave #400 Austin, TX 78701 UNITED STATES

Contact

Cust PO # 12345 Owner techx Status Open

Inside Sales Outside Sales

Add Line Change All Lines Show Open Lines Submit

+/- Columns

#	PRC	Part	Ship Date	Dock Date	Qty	Cost	Resale	Ext. Cost	Ext. Resale	Discount		
1	FIG	-FINISHEDPRODUCT	2019-10-03	2019-10-10	5	\$7.39	\$7.39	\$36.97	\$36.97	Add		
		Q	2019-10-03	2019-10-03	1	Cost	Resale				Add	
Freight Resale Estimate:									Freight Discount:		Final Freight Resale:	
Tax (City Sales Tax 2%):												
								Ext. Cost:	\$36.97	Ext. Resale:		
								Total Cost:	\$37.71	Total Resale:	Delete	

We can send out our quote w/ the PDF.

Other options with our quote would be to send to engineering or purchasing for review. You can add commissions

# Quote/Order Worksheet 145

Sales Editing: Cetec ERP Support Team

- VIEW & EDIT
- SEND +
- PDF/EMAIL (QUICK)
- EXCEL FILE
- PRICE BOOK
- COMMIT TO ORDER
- QUOTING TOOLS +
- COMMISSION
- DOCUMENTS (0)
- NOTES (0)
- PREPAY
- CREATE PQQUOTE

Sell Process 1 2 3 4 5  
2. Commit Order

Customer Products & More (2)  
Products & More 111 Congress Ave #400 Austin, TX 78701 UNITED STATES

Contact

Cust PO # 12345 Owner techx Status Open

Inside Sales Outside Sales

Add Line Change All Lines Show Open Lines Submit

+/- Columns

#	PRC	Part	Ship Date	Dock Date	Qty	Cost	Resale	Ext. Cost	Ext. Resale	Discount		
1	FIG	-FINISHEDPRODUCT	2019-10-03	2019-10-10	5	\$7.39	\$7.39	\$36.97	\$36.97	Add	  	
		Q	2019-10-03	2019-10-03	1	Cost	Resale				Add	
Freight Resale Estimate:									Freight Discount:		Final Freight Resale:	
								Tax (City Sales Tax 2%):				
								Ext. Cost:	\$36.97	Ext. Resale:		
Total Cost:								\$37.71	Total Resale:		Delete	

When the quote has been reviewed internally, and approved by the customer it's time to commit order for order fulfilment

# Quote/Order Worksheet 145

Sales Editing: Cetec ERP Support Team

- VIEW & EDIT
- SEND +
- COMMIT TO ORDER
- QUOTING TOOLS +
- COMMISSION
- DOCUMENTS (0)
- NOTES (0)
- PREPAY
- CREATE PQUOTE

Sell Process 1 2 3 4 5  
 2. Commit Order

**Commit Order** Create Separate Order For Each Quote Line?

**Order Notices (Doesn't Prohibit Order Entry)**  
 Line 1 Ship Date should be 2019-09-30 based on Customer Ship Ahead Days (10)

	Customer <b>Products &amp; More (2)</b> Products & More 111 Congress Ave #400 Austin, TX 78701 UNITED STATES	Contact
Cust PO # 12345	Owner techx	Status Open
Inside Sales	Outside Sales	

Check/Uncheck All Lines  [Change All Lines](#)

+/- Columns

Order?	#	PRC	Part	Ship Date	Dock Date	Qty	Cost	Resale	Ext. Cost	Ext. Resale
<input checked="" type="checkbox"/>	1	FIG	-FINISHEDPRODUCT	2019-10-03	2019-10-10	5		\$7.39	\$7.39	\$36.97

## Order 145.1

VIEW  
EDIT  
DETAILS/SERIALS  
INVOICE/SHIP  
DELETE LINE/ALL  
PDF (QUICK)  
PRO FORMA PDF  
COMMISSION  
RELEASE TO WH  
WORKORDER VIEW +  
PREPAY  
PACKING SLIP (QUICK)  
PACKING LABEL  
FULL ORDER PLATE  
DOCUMENTS (0)  
NOTES (0)  
QUOTE 145  
CREATE PQQUOTE  
CREATE WO

Sell Process 1 2 3 4 5  
4. Pick Parts/Material Line 1

Customer	Products & More (2)	Location	MN	Ordered On	2019-10-03
Buyer		P.O. Number	12345	Assembly?	No
Ship Via	Fedex Ground	Customer Email	info@products.com		
Tax Group	City Sales Tax (2%)	Terms	NET30	FOB	S - Shipment
Order Type	Scheduled	Ship Type	Partial	Status	New (0)
Carrier Account #					
Inside Sales		Outside Sales			
Ship To	Products & More 111 Congress Ave #400 Austin, TX 78701 UNITED STATES				

+/- Columns

#	Qty	Code	Prcpart	Rev	Work Start Date	Ship Date	Status	Ext. Resale
1	5	Stock	FIG-FINISHEDPRODUCT	(unnamed)	2019-10-10	2019-10-03	Scheduling	\$36.97
							A Tax (City Sales Tax 2%):	\$0.74
							Freight:	\$0.00
							Total:	\$37.71

CETEC ERP VERSION 3.1.1 ON TURKEY COPYRIGHT © 2019 CETEC ERP

From our order screen, we can download and send the Pro Forma, packing slip, and packing label.

We've just completed the finished product and put it on the shelf, so we can move with invoicing. But you can do stock checks through the Order.

You can send it to warehouse for picking the parts and shipping as well.

When ready, select Invoice/Ship

# Invoice/Ship Order 145.1

- VIEW
- EDIT
- DETAILS/SERIALS
- INVOICE/SHIP
- DELETE LINE/ALL
- PDF (QUICK)
- PRO FORMA PDF
- COMMISSION
- RELEASE TO WH
- WORKORDER VIEW +
- PREPAY
- PACKING SLIP (QUICK)
- PACKING LABEL
- FULL ORDER PLATE
- DOCUMENTS (0)
- NOTES (0)
- QUOTE 145
- CREATE PQQUOTE
- CREATE WO

Sell Process 1 2 3 4 5  
4, Pick Parts/Material Line 1

Customer	Products & More (2)	Location	MN	Ordered On	2019-10-03
Buyer		P.O. Number	12345	Assembly?	No
Inside Sales		Outside Sales			
Ship Via	Fedex Ground	Customer Email	info@products.com		
Tax Group	City Sales Tax (2%)	Terms	NET30	FOB	S - Shipment
Order Type	Scheduled	Ship Type	Partial	Status	New (0)
Ship To	Products & More 111 Congress Ave #400 Austin, TX 78701 UNITED STATES				

Tracking Numbers

Freight Charge  Freight Cost  [Update](#) [Create Invoice](#)

Line #	Ship Qty	Qty Due	Prcpart	Cost	Resale	Work Start Date	Ship Date	Dock Date	Status	Ext. Cost	Tax	Ext. Resale
1	<input type="text" value="5"/>	5	FIG-FINISHEDPRODUCT	\$7.39	\$7.39	2019-10-10	2019-10-03	2019-10-10	Scheduling	\$36.97	\$0.00	\$36.97

[Fully Ship](#) [Add To Skid](#) Freight: \$0.00

Adjust the Ship Qty, pick your parts, click update

Then Print your packing docs

PRO FORMA PDF  
 COMMISSION  
 RELEASE TO WH  
 WORKORDER VIEW +  
 PREPAY  
 PACKING SLIP (QUICK)  
 PACKING LABEL  
 FULL ORDER PLATE  
 DOCUMENTS (0)  
 NOTES (0)  
 QUOTE 145  
 CREATE PQUOTE  
 CREATE WO

Inside Sales

Outside Sales

Ship Via Fedex Ground

Customer Email info@products.com

Tax Group City Sales Tax (2%)

Terms NET30

FOB S - Shipment

Order Type Scheduled

Ship Type Partial

Status New (0)

Ship To Products & More 111 Congress Ave #400 Austin, TX 78701 UNITED STATES

Tracking Numbers

Freight Charge \$0.00

Freight Cost \$0.00





Line #	Ship Qty	Qty Due	Prupart	Cost	Resale	Work Start Date	Ship Date	Dock Date	Status	Ext. Cost	Tax	Ext. Resale
1	<input type="text" value="5"/> <small>(Pick)</small>	5	FIG-FINISHEDPRODUCT	\$7.39	\$7.39	2019-10-10	2019-10-03	2019-10-10	Scheduling	\$36.97	\$0.00	\$36.97
<b>Parts Picked</b>			<b>Description</b>	<b>Bin</b>	<b>Qty Picked</b>	<b>Qty To Relieve</b>						
No Parts Picked!												
 										Freight:		\$0.00
<b>Pick Everything?</b> <input checked="" type="checkbox"/>										<b>Tax (City Sales Tax 2%):</b>		\$0.74
<b>Fill Labor?</b> <input type="checkbox"/>										<b>Total:</b>	\$36.98	\$37.71



# Pick Parts For Distribution Order: 145.1 Nosi 0

Information: Part Pick Recorded

- WORKORDER
- OVERVIEW
- INVOICE/SHIP
- HISTORY
- OTHER PART ORDERS
- SPLIT LINE
- PICK PARTS
- DEKIT PARTS
- MAINT/ETC + SERIALS
- INSPECTIONS
- OUTSOURCE PO
- DOCUMENTS

Sell Process 1 2 3 4 5  
4. Pick Parts/Material Line (done)

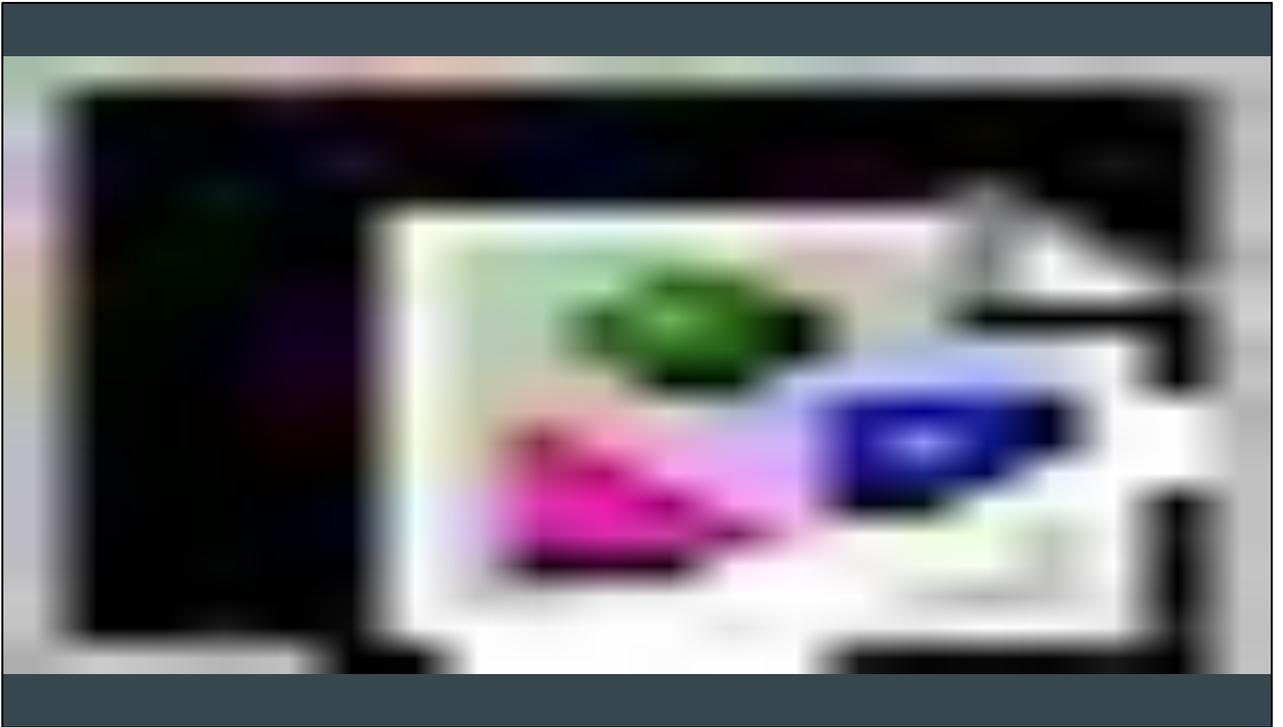
Part Number	FIG-FINISHEDPRODUCT	Customer	2 - Products & More	First Article?	No
Qty Due	5	Qty To Ship	5	Location	MN

Printable Version

Item	Prc	Part	Rev	Qty Need	Qty Picked	Bin	Lot Code	Receipt	Bin Qty	Pick Qty / Serial Number
1	FIG	-FINISHEDPRODUCT		5	<div style="width: 100%; height: 10px; background-color: green;"></div>	1 Finished Goods	1940001	211	0	5 / 0

Set Workorder Location To:  Update Update, Go To Order List

Invoice/Ship Order | Pick All Lines



Finally, click Create Invoice, which means in Cetec that you have shipped the finished good. So we will relieve the inventory and this will immediately hit the ledger

**CETEC ERP** SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS **INVOICES** CUSTOMERS LEADS OPPORTUNITIES FORECASTS REPORTS

**Invoice 145.1 NOSI: 1** Success: Invoice Created

VIEW  
 EDIT  
 LEDGER  
 DETAILS/SERIALS  
 COST ANALYSIS  
 SHIP AND DEBITS  
 SELL AGAIN  
 UNINVOICE  
 PDF (QUICK)  
 COMMISSION  
 TAKE PAYMENT  
 CREATE RMA  
 PACKING SLIP  
 TRACEABILITY DOC  
 DOCUMENTS (0)  
 NOTES (0)  
 ORDER 145.1

Sell Process 1 2 3 4 5  
 5. Invoice 145.1

<b>Customer</b>	Products & More	<b>Location</b>	MN
<b>Bill To</b>	Products & More 111 Congress Ave #400 Austin TX 78701 UNITED STATES		
<b>Ship To</b>	Products & More 111 Congress Ave #400 Austin TX 78701 UNITED STATES		
<b>Invoice Date</b>	2019-10-03	<b>Entry Date</b>	2019-10-03
<b>P.O. Number</b>	12345	<b>Terms</b>	NET30
<b>Inside Sales</b>		<b>Outside Sales</b>	
<b>Ship Via</b>	Fedex Ground	<b>FOB</b>	Shipment
<b>Terms</b>	NET30	<b>Freight Cost</b>	\$0.00
<b>Tracking Numbers</b>			
<b>Internal Comments</b>			
<b>Comments</b>			

+/- Columns

Line #	Ship Qty	Prcpart	Cust Part Number	Adjust Cost	Adjust GM	Cost	GM	Resale	Ext. Cost	Ext. Resale
--------	----------	---------	------------------	-------------	-----------	------	----	--------	-----------	-------------

Here's our final Invoice screen, where we can see the Ledger impact, the cost analysis, and download and print/send the Invoice.

We can also take payment now, or Create an RMA down the road.

# Invoice 145.1 NOSI: 1

- VIEW
- EDIT
- LEDGER
- DETAILS/SERIALS
- COST ANALYSIS
- SHIP AND DEBITS
- SELL AGAIN
- UNINVOICE
- PDF (QUICK)
- COMMISSION
- TAKE PAYMENT
- CREATE RMA
- PACKING SLIP
- TRACEABILITY DOC
- DOCUMENTS (0)
- NOTES (0)
- ORDER 145.1

Sell Process 1 2 3 4 5  
5. Invoice 145.1

<b>Customer</b>	Products & More	<b>Location</b>	MN
<b>Bill To</b>	Products & More 111 Congress Ave #400 Austin TX 78701 UNITED STATES		
<b>Ship To</b>	Products & More 111 Congress Ave #400 Austin TX 78701 UNITED STATES		
<b>Invoice Date</b>	2019-10-03	<b>Entry Date</b>	2019-10-03
<b>P.O. Number</b>	12345	<b>Terms</b>	NET30
<b>Inside Sales</b>		<b>Outside Sales</b>	
<b>Ship Via</b>	Fedex Ground	<b>FOB</b>	Shipment
<b>Terms</b>	NET30	<b>Freight Cost</b>	\$0.00
<b>Tracking Numbers</b>			
<b>Internal Comments</b>			
<b>Comments</b>			

+/- Columns

Line #	Ship Qty	Prcpart	Cust Part Number	Adjust Cost	Adjust GM	Cost	GM	Resale	Ext. Cost	Ext. Resale
1	5	FIG-FINISHEDPRODUCT		\$7.39	0%	\$7.39	0%	\$7.39	\$36.97	\$36.97

# Invoice 145.1 NOSI: 1

VIEW            Sell Process 1 2 3 4 5  
 EDIT 5. Invoice 145.1

LEDGER

DETAILS/SERIALS

COST ANALYSIS

SHIP AND DEBITS

SELL AGAIN

UNINVOICE

PDF (QUICK)

COMMISSION

TAKE PAYMENT

CREATE RMA

PACKING SLIP

TRACEABILITY DOC

DOCUMENTS (0)

NOTES (0)

ORDER 145.1

<b>Customer</b>	Products & More	<b>Location</b>	MN
<b>Bill To</b>	Products & More 111 Congress Ave #400 Austin TX 78701 UNITED STATES		
<b>Ship To</b>	Products & More 111 Congress Ave #400 Austin TX 78701 UNITED STATES		
<b>Invoice Date</b>	2019-10-03	<b>Entry Date</b>	2019-10-03
<b>P.O. Number</b>	12345	<b>Terms</b>	NET30
<b>Inside Sales</b>		<b>Outside Sales</b>	
<b>Ship Via</b>	Fedex Ground	<b>FOB</b>	Shipment
<b>Terms</b>	NET30	<b>Freight Cost</b>	\$0.00
<b>Tracking Numbers</b>			
<b>Internal Comments</b>			
<b>Comments</b>			

+/- Columns

Line #	Ship Qty	Prcpart	Cust Part Number	Adjust Cost	Adjust GM	Cost	GM	Resale	Ext. Cost	Ext. Resale
1	5	FIG-FINISHEDPRODUCT		\$7.39	0%	\$7.39	0%	\$7.39	\$36.97	\$36.97

# Q&A

## Review

- Internal workorder
- Purchasing
- Receiving and put away
- Completing and job
- Processing an external sales order

Any questions?