

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

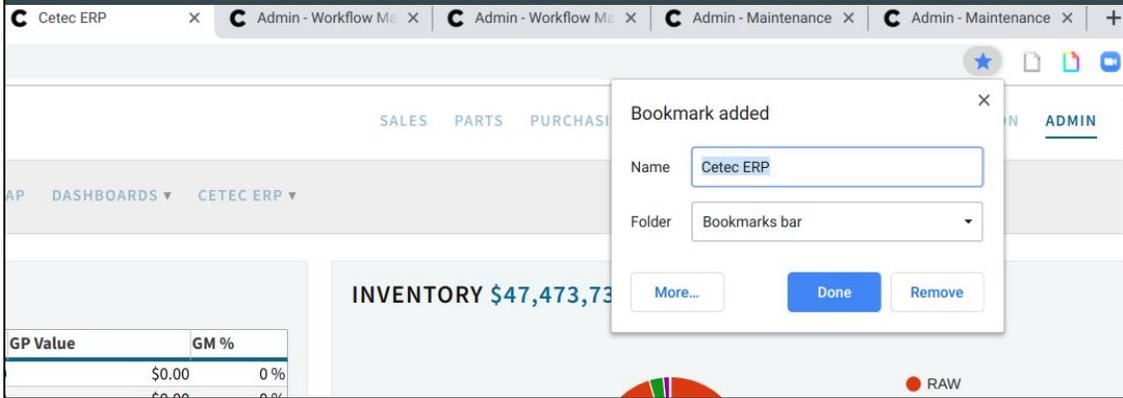
OPEN SALES ORDERS



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



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	\$686,568.95	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 navigation bar includes 'SALES', 'PARTS', 'PURCHASING', 'WAREHOUSE', and 'ACCOUNTING'. A red arrow points to a search bar and a 'sandwich menu' icon (three horizontal lines) in the top right corner. Below the navigation bar, there are several data sections: 'INVOICE VALUES' with a table, 'INVENTORY \$47,473,478.64' with a pie chart, 'OPEN ORDER BACKLOG' with summary statistics, and 'OPEN SALES ORDERS' with a legend. A right-hand sidebar contains user information and various system links.

	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 %

Category	Value
# 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

Global Search and Sandwich Menu

Global Search: Search for parts, customers, POs, invoices, etc. Use the dropdown to select an option and click the link.

Sandwich Menu: Customizes the dashboard. Options include: LITE SUPPORT PLAN, MY BOOKMARKS, MY PROFILE, MY TIME, MY TASKS, MY DOCUMENTS, MY EXPORTS, LOGOUT, WORK ORDER ENTRY (BUILD TO STOCK), WORK ORDER ENTRY (CUSTOM), PO ENTRY, CUSTOMER SEARCH, PART SEARCH, RECEIVE PRODUCT.

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	i
JOB	JOB50	Yes	0	0	0		\$0.00	\$749.99	i
JOB	JOBEXCSTAIRCASE123	Yes	0	0	0		\$0.00	\$0.00	i
NEU	NEU-BOX-MODS	Yes	198	2	16		\$357.00	\$0.00	i

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

WAREHOUSE: MN - MANUFACTURING SOLUTIONS ✎

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

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

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					Warehouse Transfer Vend
WATERFALL	Avg Cost	\$0.00000				
PO HISTORY (0)	Cost For Loc	\$0.00000	Resale For Loc			
NCRS (0)	QOH	0	QR	0	Qty Avail	
ECOS (0)	QOO	0	Total Backlog	1	MOQ	
RMAS (0)	Std Cost	0	Std Package		Lead Time (in days)	
ORDERS W/ NEED (YES)	Commodity Code		ABC Code		Country of Origin	
PART REQS (0)	Tariff (HTS)					
TOOLS	Last Updated	N/A	Last Counted	N/A	ROP	
HISTORY						
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

Shipto State Shipto Country

Credit Hold?

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 PERFORMANCE
- CONTACT LIST
- VENDOR REPS

Vendor List

Vendor Name

Status

1099?

Include Activity?

Activity Dates -

Submit

Create New

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 prctpart. 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 ← 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 #	Prctpart	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				ⓘ ✖
2	RAW1214366	(unset)	Bolt	(cho)	5 EA		0		\$0.05	0			9999	ⓘ ✖
(new)				(choose)	1									Update
Material Cost: \$2.25										0				Delete

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) +
RMAS (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 ⓘ: (Current) Credit Code:

A/R:

Terms Code: Ship Via:

Business Type: Inter-Company Account:

Ship Ahead Days: FOB:

Taxable: Non-Taxable Taxable Tax Reseller ID:

Primary Phone: Primary Fax:

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

Include Activity?

Activity Dates -

Help

CLICK 'SUBMIT' TO VIEW RESULTS

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

Prior Month

YTD

Prior YTD

Prior Year

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: <input type="text"/>								Tax (0%):		
Ext. Cost:								Ext. Resale:		
Total Cost:								Total Resale:		\$0.00 <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
Resale Estimate Type		Fixed Bid		
Revision		Skip Adding Sub-Assemblies		
Comment		Line Comment		
Line Warnings/Alerts		Ship Via		
(shows on quote pdf as line warning, does not trans)		N/A		
Ship To Address		Part Description		
Use Header-level Ship To				
Tech Description				
Tech Comments				
Technical Comments				
Sourcing Comments				
(does not display externally, transfers)				
Tags				
(Available Important Order Tags: CHECK_FOR_MISSING_PARTS_BC, DOUBLE CHECK FOR PROBLEMS, DO THIS THING) (Apply to sub orders too?)				
Less Options				
OK OK & Add Update Cost				

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.

+/- 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" value="Q"/>	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	
							Material Total:	\$2.25	\$11.25	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	Prepare	Lead time	Weight	QOH	Excess mtr	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"/>										Add	
Material Total:								\$2.25	\$11.25		Delete
Procurement Charges:								\$0.00	\$0.00		Edit
Labor Total (based on operations): labor history:								N/A	N/A		Edit
Misc Charges Total:								N/A	N/A		Edit
Tooling Total:								\$0.00	N/A		Edit
Excess Material Total: Cost Added to Quote (Ignored on BOM Wksht)											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		Edit
										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**

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								

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 PQUOTE
- 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.

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. Below the navigation bar, there are dropdown menus for ORDERS, QUALITY, PART, KITAUDIT, MGMT, TOOLS, and SCHEDULING. A 'Scan' button is visible on the right. The main heading is 'Workorder (Build): 144.1 Line Item: 1'. On the left, a 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 'Pick Parts/Material Line 1' is active. 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 present. The 'Work / Labor Tracking' section includes a 'Start Work' button, a 'Show/Hide Open Work' link, and a table showing 'Open Work' status (No Open Work) and 'Work Location' (Scheduling) with 'Set' and 'Partial' buttons. The '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
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	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?		<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 a form titled "Add Line" with several input fields:

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.



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

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

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

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**

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

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	<input type="text" value="(Shortage Comments)"/>			Hide Picked?	<input type="checkbox"/>
Prcpart	<input type="text"/>			Printable Version	

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 Refresh

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 ▾ Submit Review POs

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	i	
<input type="checkbox"/>	1714538	Terminal-B	0			75198	\$0.03	\$644.20	100000	24777 EA	Unassigned	ROP	i	
<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	i
<input checked="" type="checkbox"/>	1714538	Cable	0		2018-11-19		95	\$1.50	\$132.00	0	88 FT	Master Distributor	Supply/Demand	i
<input type="checkbox"/>	5938173	Terminal Ring	0		2019-06-28		0	\$250.00	\$10,000.00	2000	40 EA	Unassigned	Supply/Demand	i

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													
Displaying 1 - 13 of 18 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"/>	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	i
<input type="checkbox"/>	1714538	Terminal-B	0			75198	\$0.03	\$644.85	100000	24802 EA	Unassigned	ROP	i
<input type="checkbox"/>	5938173	Terminal Ring	0	2019-06-28		0	\$250.00	\$10,000.00	2000	40 EA	Unassigned	Supply/Demand	i

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 quote or create a new one.

Then select the checkboxes for each row and use the drop down to select a quote, 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	Cost Center	
PQuote Comment		
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 [+]	<input type="text"/>		2019-10-04	Unsched.	\$250.0000	\$250.0000	\$5,000.0000
2	1000	RAW452312 [+]	<input type="text"/>		2019-10-04	Unsched.	\$0.0000	\$0.0000	\$0.0000
3	24000 EA	RAW1714538 [+]	<input type="text"/>		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"/> Landed Cost	Quantity	<input type="text"/> + Pieces/Serials
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"/>	Receive	Receive & Keep PO
Inspection Instructions (N/A)					
Qty Accepted	<input type="text"/>	Qty Rejected	<input type="text"/>	Receipt Notes	<input type="text"/>
Inspection Notes	<input type="text"/>				

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"/>	Receive	Receive & Keep PO
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 & 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

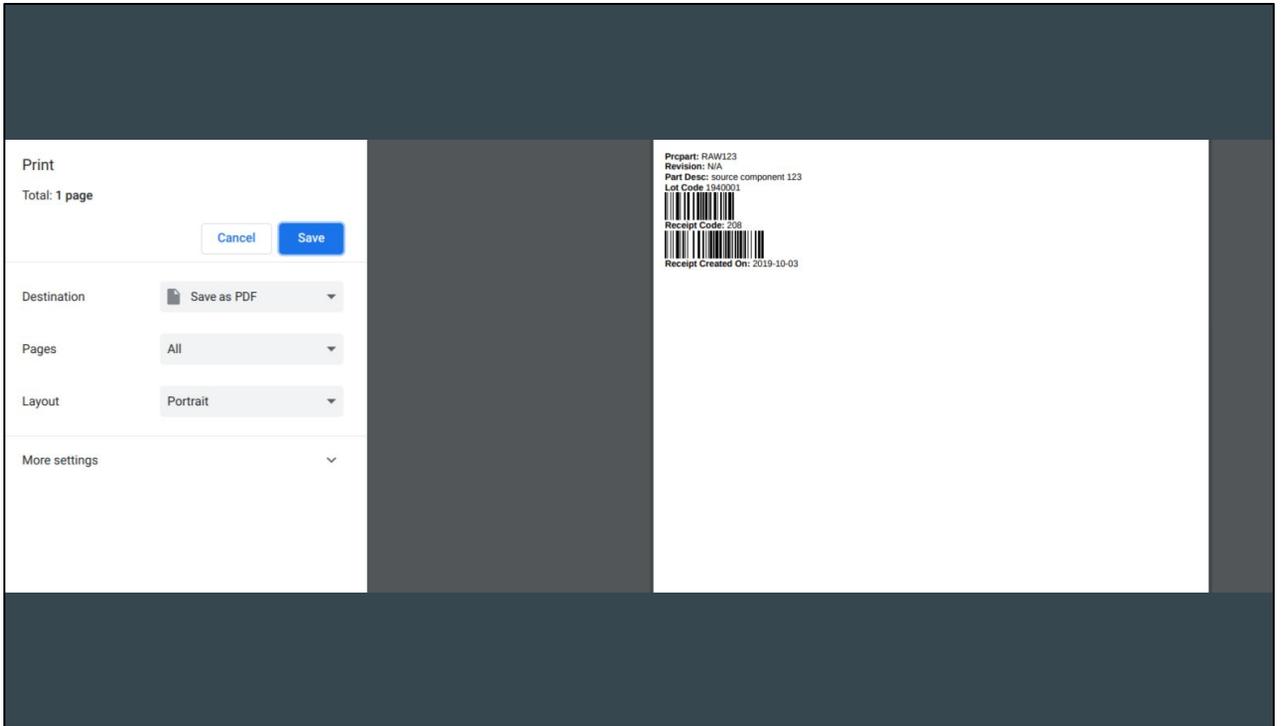
Receive Parts

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"/>	Receive	Receive & Keep PO
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 View Pieces/Serials	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 View Pieces/Serials	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	Put Away
(Non-PO)	RAW9000-B	-				2019-05-17	50	Put Away
(Non-PO)	RAW9000-A	-				2019-05-17	50	Put Away
56	SUB200	68.1 - 1	1922005	1922		2019-05-31	1	Put Away
60	PRT56781234	46.1 - 1	1926002			2019-06-26	5	Put Away
61	PRT56781234	46.1 - 1	1926004	1-2039		2019-06-26	10	Put Away
65	RAWETHANOL	75.1 - 1	ABC123			2019-07-11	98	Put Away
66	FIG-FINISHED CASE OF CBD OIL	76.1 - 1	1928002	1928		2019-07-11	2	Put Away

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)

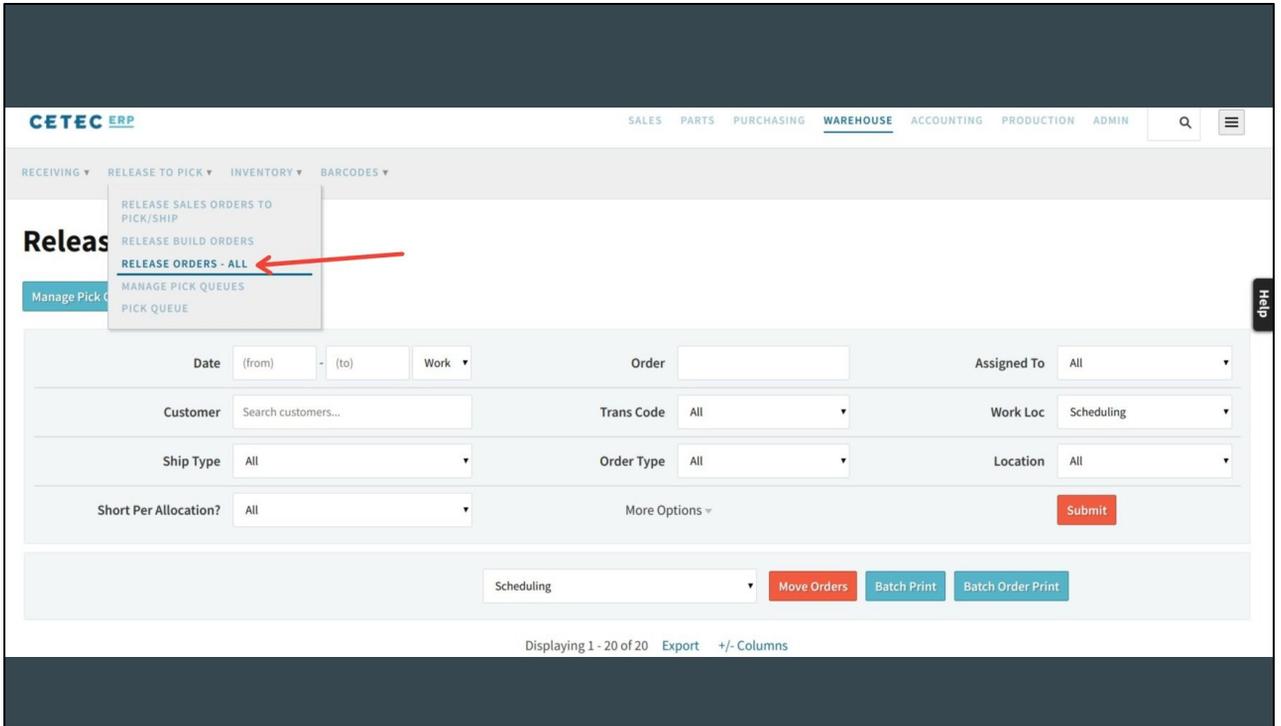
Picking Parts

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.

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
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	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

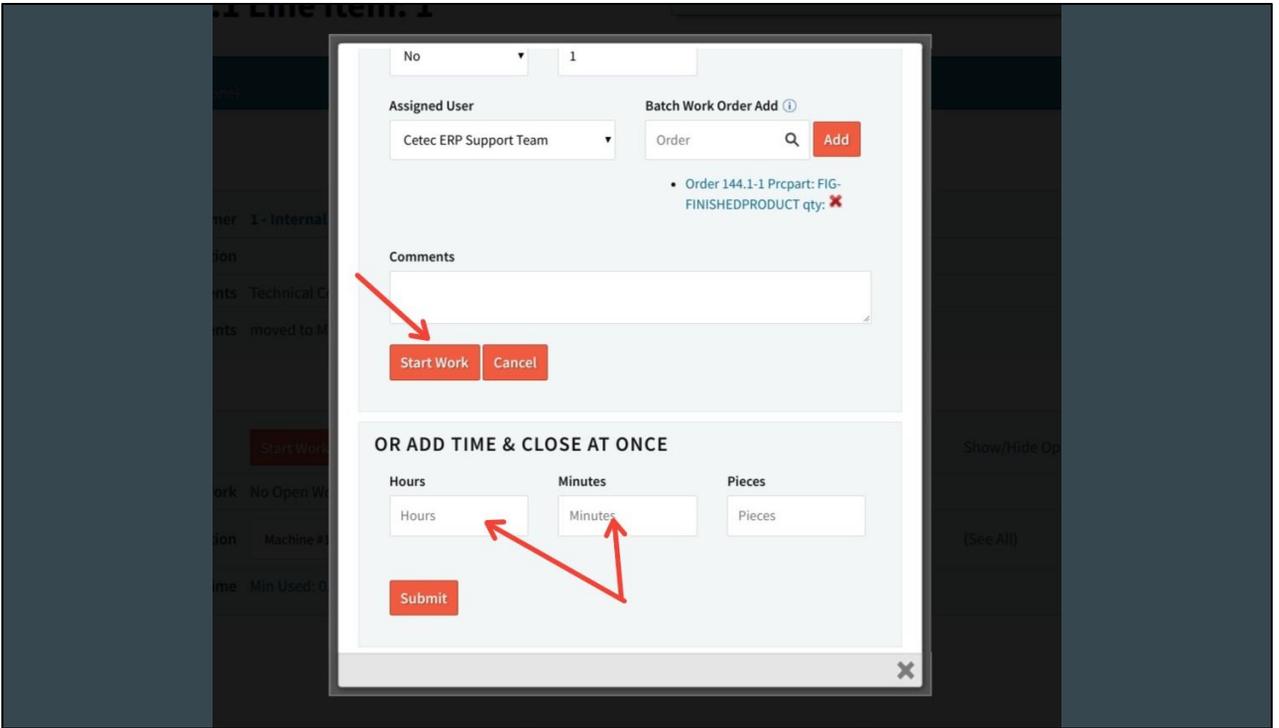
You can also set the workorder location after parts have been picked using the dropdown. Click update to save and register the change.

The screenshot shows a software interface for work order management. On the left is a vertical navigation menu with items: REPORT, SPLIT LINE, PICK PARTS, DEKIT PARTS, MAINT/ETC +, SERIALS, INSPECTIONS, OUTSOURCE PO, and DOCUMENTS. The main 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'. 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', a 'Work Location' dropdown set to 'Machine #1' with 'Set' and 'Partial' buttons, and 'Work Time' 'Min Used: 0.0, Est: 0.0'. At the bottom is the 'Work Instructions (Show/Hide)' section with a table header: Location/Operation, Instruction, Response, and Status. A link 'Show/Hide Deleted Records' is below the table. Red arrows point to 'DOCUMENTS', 'Start Work', 'Machine #1', and 'Work Instructions'.

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

Set

Partial

(See All) | Next Up: Machine #2

Required Work Instructions! ⓘ

Override Requirement?

(override comments)

Set

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	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	<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							
Complete All Add To Skid										Freight:		\$0.00
Pick Everything? <input type="checkbox"/>										Tax (0%):		\$0.00
Fill Labor? <input type="checkbox"/>										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 View Pieces/Serials	Name	
Receipt Notes					

CURRENT BINS

	Bin	Date Code	Lot Code	Inv Layer ID	Revision	Quantity
	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 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)

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 ▾	<input type="button" value="Submit"/>	<input type="button" value="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				
										<input type="button" value="Add"/>	
Freight Resale Estimate:								<input type="text"/>	Freight Discount:		<input type="text"/>
										Final Freight Resale:	<input type="text"/>
										Tax (0%):	<input type="text"/>
								Ext. Cost:	<input type="text"/>	Ext. Resale:	<input type="text"/>
								Total Cost:	\$0.00	Total Resale:	<input type="text"/>
											<input type="button" value="Delete"/>

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 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	

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

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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 (comma delimited)

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	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
Parts Picked			Description	Bin	Qty Picked	Qty To Relieve						
No Parts Picked!												
 										Freight:		\$0.00
Pick Everything? <input checked="" type="checkbox"/>										Tax (City Sales Tax 2%):		\$0.74
Fill Labor? <input type="checkbox"/>										Total:	\$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)

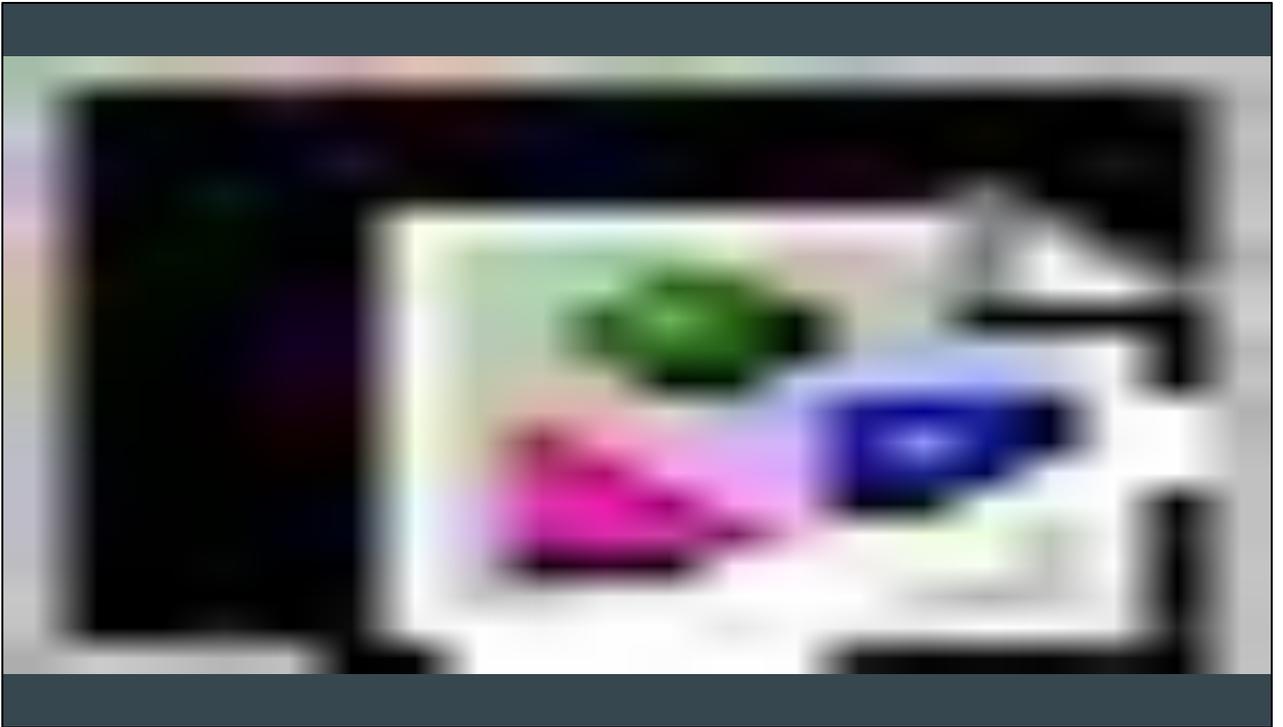
Part Number	FIG-FINISHEDPRODUCT	Customer	2 - Products & More	First Article?	No
Qty Due	5	Qty To Ship	5	Location	MN

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

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

+/- 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

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

+/- 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

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

+/- 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?