CRM / Sales Flowchart View PDF

CETEC ERP

Purchasing, Planning, Supply Chain, MRP Flowchart View PDF

Quoting & Customer Service

Manufacturing Quoting & Job Estimating

Enter Order Directly

End Customer
Stock / Parts Order
(Pick Raw / Finished Goods, Pack, & Ship)

Quote First? No / Yes

Sales

Customizable Workflow
Assignments / Responsibilities
Email Triggers / Alerts

Purchasing — Mgmt

Quote / Order Header
- Customer
- Sales Rep / Owner
- Sales $ Projections, Forecast, & Probabilities
- Sales Tax, Shipping Info, Terms, PO #, Order Type, etc.
- Temp. Ship Address, Shipping Instructions, Drop Ship
- Header Comments & Alerts (Internal & External)
- Sales Commissions / Amounts & Percentages
- Notes / Knowledge Base (Sales Team Collaboration)
- Documents / Drawings

Line Item(s)
- Part / Item / Product (Prcpart)
- Quantity Due
- Quantity Breaks & Discounts
- Product Unit Cost Estimate
- Product Unit Resale
- Transaction Code = **STOCK**
- Tags, Notes, & Line Comments (Flow Through To Shop Floor)
- Due Dates & Scheduling Impact
- Current Stock & Available Info
- Historical Info, Cost, Etc.

Possible Tasks
- Batch Import Quote Lines
- Send Quote PDF To Customer
- Create New Parts / BOMs Automatically From Quote / Order
- Check Inventory (BOM & Component) Quantity Available In Stock
- Check Historical Product Info; Copy From Existing BOM / Product Templates
- "What If" Scenarios To Check Material Forecast & Predict Production Schedule
- Process Upfront Payment (Prepay); Credit Card Integration Optional
- Upload Customer Supplied Drawings / Documents To Quote / Order
- Check Notes / History For Consistent Handoff (Quote Workflow)
- Convert Quote To Order Or Reconcile Quote With Lost Business Type

End Customer
Custom Work Order
(Track Production Driven From BOM, Control Inventory, Build & Ship)

Quote First? No / Yes

Sales — Engineering

Customizable Workflow
Assignments / Responsibilities
Email Triggers / Alerts

Purchasing — Mgmt

Quote / Order Header
- Customer
- Sales Rep / Owner
- Sales $ Projections, Forecast, & Probabilities
- Sales Tax, Shipping Info, Terms, PO #, Order Type, etc.
- Temp. Ship Address, Shipping Instructions, Drop Ship
- Header Comments & Alerts (Internal and External)
- Sales Commissions / Amounts & Percentages
- Notes / Knowledge Base (Sales Team Collaboration)
- Documents / Drawings

Line Item(s)
- Finished Product (Saleable Good)
- Quantity Due
- Quote Cost / Quantity Breaks & Breakout Across BOM Quote
- Manufacturing Unit Cost Estimate
- Manufacturing Unit Resale
- Due Dates & Scheduling Impact
- Tags, Notes, & Line Comments (Flow Through To Shop Floor)
- Transaction Code = **BUILD**
- Material Requirements & Available Info
- Historical Info, Cost, etc.

Possible Tasks
- Batch Import Quote Lines
- Send Quote PDF To Customer
- Create New Parts / BOMs Automatically From Quote / Order
- Check Inventory (BOM & Component) Quantity Available In Stock
- Check Historical Product Info; Copy From Existing BOM / Product Templates
- "What If" Scenarios To Check Material Forecast & Predict Production Schedule
- Process Upfront Payment (Prepay); Credit Card Integration Optional
- Upload Customer Supplied Drawings / Documents To Quote / Order
- Check Notes / History For Consistent Handoff (Quote Workflow)
- Convert Quote To Order Or Reconcile Quote With Lost Business Type

Production Estimate B

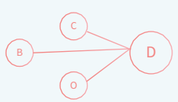
Internal
Build To Stock Work Order
(Track production driven from BOM, put finished product back on shelf)

Engineering

Customizable Workflow
Assignments / Responsibilities
Email Triggers / Alerts

Production Planning — Mgmt

Quote / Order Header
- Build-To-Stock Internal Account
- Production Manager
- Header Comments / Alerts, Internal "PO" Number (Internal Communication Regarding Production Batch)
- Notes / Knowledge Base (Collaboration)
- Engineering Documents / Drawings



Line Item(s)
- Finished Product (Saleable Good)
- Quantity Due
- Cost / Quantity Breaks (On Subcomponent / Raw Material)
- Unit Cost Estimate
- Unit Resale
- Due Dates & Scheduling
- Tags, Notes, & Line Comments (Communicate To Floor)
- Transaction Code = **BUILD**
- Current Stock & Available Info
- Historical Info, Cost, etc.

Possible Tasks
- Batch Import Work Order Lines (e.g. From MRP Report)
- Create New Parts Or BOMs Automatically From Quote / Order
- Check Inventory (BOM & Component) Quantity Available In Stock
- Check Historical Product Info; Copy From Existing BOM / Product Templates
- "What If" Scenarios To Check Material Forecast & Predict Production Schedule
- Communicate To Sales / Customer Service Dept. Re: Production Batch & Impact To End Customer (Customer Due Dates, etc)
- Upload Engineering Related Drawings / Documents To Quote / Order
- Check Notes / History For Consistent Handoff (Pre-Order Workflow)
- Convert Pre-Order To Work Order

Subassemblies
- Create Work Order?
- Pull From Existing Stock?
- Flatten BOM? (Phantom)

Subassemblies
- Create Work Order?
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B **Production Estimate**

Auto-Enter Work Order

Integrated Planning & Scheduling Flowchart View PDF

MES & Production Tracking Flowchart View PDF

Packing/Shipping/Invoicing Flowchart View PDF