

 The first step is to open **Cetec ERP** and search for your Order, PO, NCR, etc.

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

Q

Welcome John Smith! (You Are On The LITE Support Plan)

SELL EXISTING STOCK BUILD A PART BUY FROM A VENDOR

Welcome To Cloud ERP

New systems are hard; our [Getting Started Guide](#) makes it easier.
Enter your first pieces of data and start using your new Cloud-Based ERP System: [Parts](#), [Customers](#), and [Vendors](#).
If you have questions, consult the [How To Videos](#) and [Documentation](#), or browse through the [FAQ list](#).

RECENT QUOTES

No Quotes to Display

(Go To Quote)

Go

View All Quotes

CUSTOMERS

	Most Recent Quote	YTD Sales
Customer ABC	1 (Closed)	\$0.00

Search Customers

Go

View All Customers

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		\$0.00	\$0.00	\$0.00	0 %
YTD		\$0.00	\$0.00	\$0.00	0 %
Prior YTD		\$0.00	\$0.00	\$0.00	0 %
Prior Year		\$0.00	\$0.00	\$0.00	0 %

Update

 Search and select **Order 1.1 (PO 03984233)**

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

1.1

Welcome John Smith! (You Are On The LITE Support Plan)

SELLER

Order 1.1 (PO 03984233)
PO 1.1

VENDOR

Help

RECENT QUOTES

No Quotes to Display

(Go To Quote)

Go

View All Quotes

CUSTOMERS

	Most Recent Quote	YTD Sales
Customer ABC	1 (Closed)	\$0.00

Search Customers

Go

View All Customers

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		\$0.00	\$0.00	\$0.00 0 %
YTD		\$0.00	\$0.00	\$0.00 0 %
Prior YTD		\$0.00	\$0.00	\$0.00 0 %
Prior Year		\$0.00	\$0.00	\$0.00 0 %

Update

Click Pending Approval: John Smith

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES REPORTS

Order 1.1

Pending Approval: John Smith

Click to Open

VIEW

EDIT

DETAILS/SERIALS

INVOICE/SHIP

CLOSE LINE/ALL

MERGE

PDF (QUICK)

PRO FORMA PDF

COMMISSION

RELEASE TO WH

WORKORDER VIEW +

PREPAY

PROGRESS BILLING

PACKING SLIP (QUICK)

PACKING LABEL

FULL ORDER PLATE

QUOTE 1

CREATE WO

CREATE PQUOTE

DOCUMENTS (0)

NOTES (0)

Sell Process 1 2 3 4 5

4. Pick Parts/Material Line 1

Hide Warnings

Customer	Customer ABC (2)	Location	MN	Ordered On	2022-02-01
Buyer		P.O. Number	03984233	Assembly?	No
Ship Via	UPS Ground	Customer Email		Carrier Account #	
Tax Group	(0%)	Terms	NET30	FOB/Incoterms	S - Shipment
Order Type	Scheduled	Ship Type	Partial	Status	New (0)
More Options					

+/- Columns

#	Qty	Code	Prupart	Cost	Resale	Adj GM	Work Start Date	Status	Labor Days	Ext. Cost	Tax	Ext. Resale
1	10	Stock	PRT1	\$0.00	\$200.00		2022-02-25	Doc Control (Unreleased Orders)	0	\$0.00	\$0.00	\$2,000.00
										Tax (0%):		\$0.00
										Freight:	\$0.00	\$0.00
										Total:	\$0.00	\$2,000.00

Reschedule Lines

Click John Smith

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES REPORTS

Order 1.1

VIEW
EDIT
DETAILS/SERIALS
INVOICE/SHIP
CLOSE LINE/ALL
MERGE
PDF (QUICK)
PRO FORMA PDF
COMMISSION
RELEASE TO WH
WORKORDER VIEW +
PREPAY
PROGRESS BILLING
PACKING SLIP (QUICK)
PACKING LABEL
FULL ORDER PLATE
QUOTE 1
CREATE WO
CREATE PQUOTE
DOCUMENTS (0)
NOTES (0)

Sell Process 1 2 3 4 5

4. Pick Parts/Material Line 1

Hide Warnings

Customer	Customer ABC (2)	Location	MN
Buyer		P.O. Number	03984233
Ship Via	UPS Ground	Customer Email	
Tax Group	(0%)	Terms	NET30
Order Type	Scheduled	Ship Type	Partial
More Options			

+/- Columns

#	Qty	Code	Prctpart	Cost	Resale	Adj GM	Work Start Date	Status
1	10	Stock	PRT1	\$0.00	\$200.00		2022-02-25	Doc Control (Unrel

Reschedule Lines

Pending Approval: John Smith

PENDING APPROVAL

Assigned to John Smith for 1 hour, 45 minutes

Move To

John Smith

Send Back To Review

John Smith

Approve

John Smith

Delete

John Smith

(Reassign, Keep Pending Approval)

Assignment Comments (if changing)

CC List

Set CCs

Priority

3

Set

(1 is High)

Edit Workflow Assignment Options

Close Workflow



Select Sally Smith

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES REPORTS

Order 1.1

VIEW

EDIT

DETAILS/SERIALS

INVOICE/SHIP

CLOSE LINE/ALL

MERGE

PDF (QUICK)

PRO FORMA PDF

COMMISSION

RELEASE TO WH

WORKORDER VIEW +

PREPAY

PROGRESS BILLING

PACKING SLIP (QUICK)

PACKING LABEL

FULL ORDER PLATE

QUOTE 1

CREATE WO

CREATE PQUOTE

DOCUMENTS (0)

NOTES (0)

Sell Process 1 2 3 4 5

4. Pick Parts/Material Line 1

Hide Warnings

Customer	Customer ABC (2)	Location	MN
Buyer		P.O. Number	03984233
Ship Via	UPS Ground	Customer Email	
Tax Group	(0%)	Terms	NET30
Order Type	Scheduled	Ship Type	Partial
More Options			

+/- Columns

#	Qty	Code	Prupart	Cost	Resale	Adj GM	Work Start Date	Status
1	10	Stock	PRT1	\$0.00	\$200.00		2022-02-25	Doc Control (Unrel

Reschedule Lines

Pending Approval: John Smith

PENDING APPROVAL

Assigned to John Smith for 1 hour, 45 minutes

Move To

John Smith

Send Back To Review

Sally Smith

Approve

John Smith

Delete

✓ Sally Smith

Cetec ERP Support team

Pending Approval)

Assignment Comments (if changing)

CC List

Set CCs

Priority

3

Set

(1 is High)

Edit Workflow Assignment Options

Close Workflow



Type assignment comments. This will display in an email to the employee being assigned the order.

CETEC ERP SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES REPORTS

Order 1.1

VIEW
EDIT
DETAILS/SERIALS
INVOICE/SHIP
CLOSE LINE/ALL
MERGE
PDF (QUICK)
PRO FORMA PDF
COMMISSION
RELEASE TO WH
WORKORDER VIEW +
PREPAY
PROGRESS BILLING
PACKING SLIP (QUICK)
PACKING LABEL
FULL ORDER PLATE
QUOTE 1
CREATE WO
CREATE PQUOTE
DOCUMENTS (0)
NOTES (0)

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

Hide Warnings

Customer	Customer ABC (2)	Location	MN
Buyer		P.O. Number	03984233
Ship Via	UPS Ground	Customer Email	
Tax Group	(0%)	Terms	NET30
Order Type	Scheduled	Ship Type	Partial
More Options ▾			

+/- Columns

#	Qty	Code	Prtpart	Cost	Resale	Adj GM	Work Start Date	Status
1	10	Stock	PRT1	\$0.00	\$200.00		2022-02-25	Doc Control (Unrel)

Reschedule Lines

Pending Approval: John Smith ▾

PENDING APPROVAL

Assigned to John Smith for 1 hour, 45 minutes

Move To

John Smith ▾ Send Back To Review

Sally Smith ▾ Approve

John Smith ▾ Delete

John Smith ▾ (Reassign, Keep Pending Approval)

Assignment Comments (if changing)

CC List

Set CCs

Priority

3 ▾ Set (1 is High)

Edit Workflow Assignment Options

Close Workflow

Click **Approve** to change the workflow to that stage to 'Sally Smith'

CETEC ERP SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES REPORTS

Order 1.1

VIEW
EDIT
DETAILS/SERIALS
INVOICE/SHIP
CLOSE LINE/ALL
MERGE
PDF (QUICK)
PRO FORMA PDF
COMMISSION
RELEASE TO WH
WORKORDER VIEW +
PREPAY
PROGRESS BILLING
PACKING SLIP (QUICK)
PACKING LABEL
FULL ORDER PLATE
QUOTE 1
CREATE WO
CREATE PQUOTE
DOCUMENTS (0)
NOTES (0)

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

Hide Warnings

Customer	Customer ABC (2)	Location	MN
Buyer		P.O. Number	03984233
Ship Via	UPS Ground	Customer Email	
Tax Group	(0%)	Terms	NET30
Order Type	Scheduled	Ship Type	Partial
More Options ▾			

+/- Columns

#	Qty	Code	Prtpart	Cost	Resale	Adj GM	Work Start Date	Status
1	10	Stock	PRT1	\$0.00	\$200.00		2022-02-25	Doc Control (Unrel)

Reschedule Lines

Pending Approval: John Smith ▾

PENDING APPROVAL

Assigned to John Smith for 1 hour, 45 minutes

Move To

John Smith ▾	Send Back To Review
Sally Smith ▾	Approve
John Smith ▾	Delete
John Smith ▾	(Reassign, Keep Pending Approval)

Assignment Comments (if changing)

Please review and approve changes

CC List

Set CCs

Priority

3 ▾ Set (1 is High)

Edit Workflow Assignment Options

Close Workflow



That's it. You're done.

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES REPORTS

Order 1.1

Approved: Sally Smith

VIEW

EDIT

DETAILS/SERIALS

INVOICE/SHIP

CLOSE LINE/ALL

MERGE

PDF (QUICK)

PRO FORMA PDF

COMMISSION

RELEASE TO WH

WORKORDER VIEW +

PREPAY

PROGRESS BILLING

PACKING SLIP (QUICK)

PACKING LABEL

FULL ORDER PLATE

QUOTE 1

CREATE WO

CREATE PQUOTE

DOCUMENTS (0)

NOTES (0)

Sell Process 1 2 3 4 5

4. Pick Parts/Material Line 1

Hide Warnings

Customer	Customer ABC (2)	Location	MN	Ordered On	2022-02-01
Buyer		P.O. Number	03984233	Assembly?	No
Ship Via	UPS Ground	Customer Email		Carrier Account #	
Tax Group	(0%)	Terms	NET30	FOB/Incoterms	S - Shipment
Order Type	Scheduled	Ship Type	Partial	Status	New (0)
More Options					

+/- Columns

#	Qty	Code	Prcpart	Cost	Resale	Adj GM	Work Start Date	Status	Labor Days	Ext. Cost	Tax	Ext. Resale
1	10	Stock	PRT1	\$0.00	\$200.00		2022-02-25	Doc Control (Unreleased Orders)	0	\$0.00	\$0.00	\$2,000.00
										Tax (0%):		\$0.00
										Freight:	\$0.00	\$0.00
										Total:	\$0.00	\$2,000.00

Reschedule Lines



Scan to go to the interactive player