

 The first step is to open Cetec ERP and click Sales

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

SEARCH

Menu

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

No recent customers quoted

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

Add Content



 Click **Quotes**

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES REPORTS

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[View All Quotes](#)

#### CUSTOMERS

No recent customers quoted

[View All Customers](#)

#### INVOICE VALUES

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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 %



 Click **New Quote**

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SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES REPORTS

QUOTE LIST

NEW QUOTE

MY QUOTES

QUOTE STATS

QUOTE COMMISSIONS

PROJECTS

# Cloud ERP

Getting started Guide makes it easier.  
Learn how to use your new Cloud-Based ERP System: [Parts](#), [Customers](#), and [Vendors](#).  
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(Go To Quote) Go [View All Quotes](#)

CUSTOMERS

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INVOICE VALUES

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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

Add Content





Click the pencil icon to Edit the Quote Header

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES REPORTS

Quote/Order Worksheet 1

Sales Editing: John Smith

VIEW & EDIT

SEND +

COMMIT TO ORDER

QUOTING TOOLS + COMMISSION

DOCUMENTS (0)

NOTES (0)

PREPAY

CREATE PQOTE

Customer

Contact

Cust PO #

Owner john

Status Open

Notifier Options Normal

Inside Sales

Outside Sales

More Options

Add Line

Change All Lines

Show Open Lines

Submit

+/- Columns

#	PRC	Part	Ship Date	Dock Date	Loc	Qty	Cost	Adj Cost	Resale	Ext. Cost	Tax	Ext. Resale				
		<div><div></div><div>Ship</div></div>	<div><div></div><div>Dock</div></div>		<div><div>Main</div><div></div></div>	1	<div><div></div><div>Cost</div></div>		<div><div></div><div>Resale</div></div>				<div>Add</div>			
Freight Resale Estimate:										<div></div>	Freight Discount:	<div></div>	Freight Cost:	<div></div>	Final Freight Resale:	<div></div>
										Tax ( 0% ):		\$0.00				
										Ext Cost:		Ext Resale:				



Type and select the customer name

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COMMISSION

DOCUMENTS (0)

NOTES (0)

PREPAY

CREATE PQUOTE

Name

Created On

2022-02-01

Complete By

\* Customer (Create)

customer

Contact

Choose a customer first

Revision Override

1

\* Cust PO #

Owner

john

Status

Open

\* Ship To

Choose a customer first

\* Ship Via

UPS Ground

Carrier Account #

Ship Type

Partial

Order Type

Scheduled

Fields with \* req'd for order entry.

More Options

OK Cancel

Add Line

Change All Lines

Show Open Lines

Submit

+/- Columns

#	PRC	Part	Ship Date	Dock Date	Loc	Qty	Cost	Adj Cost	Resale	Ext. Cost	Tax	Ext. Resale





Type the customer PO number

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

[QUOTES](#) [ORDERS](#) [INVOICES](#) [CUSTOMERS](#) [LEADS](#) [OPPORTUNITIES](#) [REPORTS](#)

## Quote/Order Worksheet 1

Sales Editing: John Smith

VIEW & EDIT

SEND +

COMMIT TO ORDER

QUOTING TOOLS +

COMMISSION

DOCUMENTS (0)

NOTES (0)

PREPAY

CREATE PQOTE

Name	<input type="text"/>	Created On	2022-02-01	Complete By	<input type="text"/>
* Customer (Create)	Customer ABC <input type="text"/>	Contact	Choose a Cor <input type="text"/> (Create)	Revision Override	1
* Cust PO #	<input type="text"/>	Owner	john <input type="text"/>	Status	Open <input type="text"/>
* Ship To	Customer ABC 123 Main Street Austin, TX 78741 UNITED STATES				
* Ship Via	UPS 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.

+/- Columns

#	PRC	Part	Ship Date	Dock Date	Loc	Qty	Cost	Adj Cost	Resale	Ext. Cost	Tax	Ext. Resale



Click OK

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES REPORTS

Quote/Order Worksheet 1

Sales Editing: John Smith

VIEW & EDIT

SEND +

COMMIT TO ORDER

QUOTING TOOLS +

COMMISSION

DOCUMENTS (0)

NOTES (0)

PREPAY

CREATE PQQUOTE

Name

Created On 2022-02-01

Complete By

\* Customer (Create)

Customer ABC

Contact

Choose a Cor (Create)

Revision Override

1

\* Cust PO #

03984233

Owner

john

Status

Open

\* Ship To

Customer ABC 123 Main Street Austin, TX 78741 UNITED STATES

\* Ship Via

UPS Ground

Carrier Account #

Ship Type

Partial

Order Type

Scheduled

Fields with \* req'd for order entry.

More Options

OK

Cancel

Add Line

Change All Lines

Show Open Lines

Submit

+/- Columns

#	PRC	Part	Ship Date	Dock Date	Loc	Qty	Cost	Adj Cost	Resale	Ext. Cost	Tax	Ext. Resale
---	-----	------	-----------	-----------	-----	-----	------	----------	--------	-----------	-----	-------------





Type and select **prtpart** number

QUOTES

ORDERS

INVOICES

CUSTOMERS

LEADS

OPPORTUNITIES

REPORTS

Success: Quote Header Updated

Quote/Order Worksheet 1

VIEW & EDIT

SEND +

COMMIT TO ORDER

QUOTING TOOLS +

COMMISSION

DOCUMENTS (0)

NOTES (0)

PREPAY

CREATE PQOTE

Sell Process 1 2 3 4 5

1. Create Quote / Order Worksheet

Customer Customer ABC (2)

Customer ABC 123 Main Street Austin, TX 78741 UNITED STATES

Contact

Cust PO # 03984233

Owner john

Status Open

Notifier Options Normal

Inside Sales

Outside Sales

More Options

Add Line

Change All Lines

Show Open Lines

Submit

+/- Columns

#	PRC	Part	Ship Date	Dock Date	Loc	Qty	Cost	Adj Cost	Resale	Ext. Cost	Tax	Ext. Resale
	prtpart	Ship		Dock	Main	1	Cost		Resale			
PRT 1 (Desc: Part Description - 1)												
Freight Resale Estimate:										Freight Discount:	Freight Cost:	Final Freight Resale:
Tax ( 0% ):												



Type Qty

CETEC ERP

SALESPARTSFINANCIALSWAREHOUSEACCOUNTINGPRODUCTIVITYADMIN

QUOTESORDERSINVOICESCUSTOMERSLEADSOPPORTUNITIESREPORTS

Success: Quote Header Updated

Quote/Order Worksheet 1

VIEW & EDIT

SEND +

COMMIT TO ORDER

QUOTING TOOLS +

COMMISSION

DOCUMENTS (0)

NOTES (0)

PREPAY

CREATE PQOTE

Sell Process 1 2 3 4 5

1. Create Quote / Order Worksheet

Customer Customer ABC (2)

Customer ABC 123 Main Street Austin, TX 78741 UNITED STATES

Contact

Cust PO # 03984233

Owner john

Status Open

Notifier Options Normal

Inside Sales

Outside Sales

More Options

Add Line

Change All Lines

Show Open Lines

Submit

+/- Columns

#	PRC	Part	Ship Date	Dock Date	Loc	Qty	Cost	Adj Cost	Resale	Ext. Cost	Tax	Ext. Resale	
	PRT1		2022-02-01	2022-02-01	Main		0		200				Add

Freight Resale Estimate:

Freight Discount:

Freight Cost:

Final Freight Resale:

Tax ( 0% ):





## Select Ship and Dock dates

VIEW & EDIT

SEND +

COMMIT TO ORDER

QUOTING TOOLS +

COMMISSION

DOCUMENTS (0)

NOTES (0)

PREPAY

CREATE PQQUOTE

**Quote/Order Worksheet 1**

Success: Quote Header Updated

Sell Process 1 2 3 4 5

1. Create Quote / Order Worksheet

Customer Customer ABC (2)

Customer ABC 123 Main Street Austin, TX 78741 UNITED STATES

Contact

Cust PO # 03984233

Owner john

Status Open

Notifier Options Normal

Inside Sales

Outside Sales

More Options

Show Open Lines

Submit

**February 2022**

Su	Mo	Tu	We	Th	Fr	Sa
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	1	2	3	4	5
6	7	8	9	10	11	12

+/- Columns

#	PRC	Part	Ship Date	Cost	Adj Cost	Resale	Ext. Cost	Tax	Ext. Resale
PRT1			2022-02-24	2022-02-01	Main	10	0	0	

Freight Resale Estimate:

Freight Discount:

Final Freight Resale:



Enter Resale value

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SALES PARTS ESTIMATING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES REPORTS

Success: Quote Header Updated

Quote/Order Worksheet 1

VIEW & EDIT

SEND +

COMMIT TO ORDER

QUOTING TOOLS +

COMMISSION

DOCUMENTS (0)

NOTES (0)

PREPAY

CREATE PQOTE

Sell Process 1 2 3 4 5

1. Create Quote / Order Worksheet

Customer Customer ABC (2)

Customer ABC 123 Main Street Austin, TX 78741 UNITED STATES

Contact

Cust PO # 03984233

Owner john

Status Open

Notifier Options Normal

Inside Sales

Outside Sales

More Options

Add Line

Change All Lines

Show Open Lines

Submit

+/- Columns

#	PRC	Part	Ship Date	Dock Date	Loc	Qty	Cost	Adj Cost	Resale	Ext. Cost	Tax	Ext. Resale	
	PRT1	Q	2022-02-24	2022-02-25	Main	10	0		200				Add

Freight Resale Estimate:

Freight Discount:

Freight Cost:

Final Freight Resale:

Tax ( 0% ):



Click Add

CETEC ERP

SALESPARTSFINANCIALSWAREHOUSEACCOUNTINGPRODUCTIVITYADMIN

QUOTESORDERSINVOICESCUSTOMERSLEADSOPPORTUNITIESREPORTS

Success: Quote Header Updated

Quote/Order Worksheet 1

VIEW & EDIT

SEND +

COMMIT TO ORDER

QUOTING TOOLS +

COMMISSION

DOCUMENTS (0)

NOTES (0)

PREPAY

CREATE PQOTE

Sell Process 1 2 3 4 5

1. Create Quote / Order Worksheet

Customer Customer ABC (2)

Customer ABC 123 Main Street Austin, TX 78741 UNITED STATES

Contact

Cust PO # 03984233

Owner john

Status Open

Notifier Options Normal

Inside Sales

Outside Sales

More Options

Add Line

Change All Lines

Show Open Lines

Submit

+/- Columns

#	PRC	Part	Ship Date	Dock Date	Loc	Qty	Cost	Adj Cost	Resale	Ext. Cost	Tax	Ext. Resale	
	PRT1	Q	2022-02-24	2022-02-25	Main	10	0		200				Add
Freight Resale Estimate:										Freight Discount:		Freight Cost:	Final Freight Resale:
Tax ( 0% ):													



 Click **Commit To Order**

CETEC ERP

SALES PARTS ESTIMATING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES REPORTS

Quote/Order Worksheet 1

Success: Quote Header Updated

VIEW & EDIT

SEND +

COMMIT TO ORDER

QUOTING TOOLS +

COMMISSION

DOCUMENTS (0)

NOTES (0)

PREPAY

CREATE PQUTE

Sell Process 1 2 3 4 5

1. Create Quote / Order Worksheet

Customer Customer ABC (2)

Customer ABC 123 Main Street Austin, TX 78741 UNITED STATES

Contact

Cust PO # 03984233

Owner john

Status Open

Notifier Options Normal

Inside Sales

Outside Sales

More Options

Add Line

Change All Lines

Show Open Lines

Submit

+/- Columns

#	PRC	Part	Ship Date	Dock Date	Loc	Qty	Cost	Adj Cost	Resale	Ext. Cost	Tax	Ext. Resale	
1	PRT	<div>1 NEW!</div>	2022-02-24	2022-02-25	MN	10	\$0.00		\$200.00	\$0.00	\$0.00	\$2,000.00	<div></div>
<div><div>Q</div><div>Ship</div><div>Dock</div><div>Main</div><div></div><div>Cost</div><div>Resale</div><div>Add</div></div>													

Freight Resale Estimate:

Freight Discount:

Freight Cost:

Final Freight Resale:



Click Commit Order

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES REPORTS

Quote/Order Worksheet 1

Sales Editing: John Smith

VIEW & EDIT

SEND +

COMMIT TO ORDER

QUOTING TOOLS +

COMMISSION

DOCUMENTS (0)

NOTES (0)

PREPAY

CREATE PQOTE

Sell Process 1 2 3 4 5

2. Commit Order

Commit Order

Create Separate Order For Each Quote Line? ☐

1 Order Notices (Doesn't Prohibit Order Entry) »

Customer Customer ABC (2)

Customer ABC 123 Main Street Austin, TX 78741 UNITED STATES

Contact

Cust PO # 03984233

Owner john

Status Open

Notifier Options Normal

Inside Sales

Outside Sales

More Options

Check/Uncheck All Lines ☒ Change All Lines

+/- Columns

Order?	#	PRC	Part	Ship Date	Dock Date	Loc	Qty	Cost	Adj Cost	Resale	Ext. Cost	Tax	Ext. Resale
<input checked="" type="checkbox"/>	1	PRT	<div>1NEW!</div>	2022-01-01	2022-01-01	MN	10	\$0.00		\$200.00	\$0.00	\$0.00	\$2,000.00





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

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)

Success: Created Order MN1.1

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