



To clone a quote we'll find a quote by clicking **Sales**

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

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

SELL EXISTING STOCK BUILD A PART BUY FROM A VENDOR

Welcome To Cloud ERP

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](#).

INVOICE VALUES

	Ext Resale ⓘ	Cost	GP Value	GM %
Yesterday	\$0.00	\$0.00	\$0.00	0 %
Today	\$1,000.00	\$0.00	\$1,000.00	100 %
MTD	\$1,000.00	\$0.00	\$1,000.00	100 %
Prior MTD	\$0.00	\$290.00	\$-290.00	0 %
Prior Year MTD	\$0.00	\$0.00	\$0.00	0 %
Prior Month	\$0.00	\$290.00	\$-290.00	0 %
YTD	\$3,149.90	\$5,249.73	\$-2,099.83	-66 %
Prior YTD	\$120,000.00	\$276.25	\$119,723.75	99 %
Prior Year	\$120,000.00	\$276.25	\$119,723.75	99 %

Update

INVENTORY \$689,653.12

- 754
- RAW
- PRT
- SUB
- NEU
- Other

SALES FUNNEL

First Touch: 2
Qualification: 1
Development: 2
Quoting: 1

OPEN SALES ORDERS ⓘ

■ This Month: ■ Next Month: ■ Third Month: ■ Remaining:

 Click Quotes

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES REPORTS

QUOTES

NEW QUOTE

MY QUOTES

QUOTE STATS

QUOTE COMMISSIONS

PROJECTS

Cloud ERP

Get the most out of your new Cloud-Based ERP System: [Parts](#), [Customers](#), and [Vendors](#).
[View To Videos](#) and [Documentation](#), or browse through the [FAQ list](#).

INVOICE VALUES

	Ext Resale	Cost	GP Value	GM %
Yesterday	\$0.00	\$0.00	\$0.00	0 %
Today	\$1,000.00	\$0.00	\$1,000.00	100 %
MTD	\$1,000.00	\$0.00	\$1,000.00	100 %
Prior MTD	\$0.00	\$290.00	\$-290.00	0 %
Prior Year MTD	\$0.00	\$0.00	\$0.00	0 %
Prior Month	\$0.00	\$290.00	\$-290.00	0 %
YTD	\$3,149.90	\$5,249.73	\$-2,099.83	-66 %
Prior YTD	\$120,000.00	\$276.25	\$119,723.75	99 %
Prior Year	\$120,000.00	\$276.25	\$119,723.75	99 %

Update

INVENTORY \$689,653.12

92.7%

754

RAW

PRT

SUB

NEU

Other

SALES FUNNEL

First Touch: 2

Qualification: 1

Development: 2

Quoting: 1

OPEN SALES ORDERS

This Month: Next Month: Third Month: Remaining:

Resale

 Click Quote List

CETEC ERP

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

Get up and running using your new Cloud-Based ERP System: [Parts](#), [Customers](#), and [Vendors](#).
[View To Videos](#) and [Documentation](#), or browse through the [FAQ list](#).

INVOICE VALUES

	Ext Resale	Cost	GP Value	GM %
Yesterday	\$0.00	\$0.00	\$0.00	0 %
Today	\$1,000.00	\$0.00	\$1,000.00	100 %
MTD	\$1,000.00	\$0.00	\$1,000.00	100 %
Prior MTD	\$0.00	\$290.00	\$-290.00	0 %
Prior Year MTD	\$0.00	\$0.00	\$0.00	0 %
Prior Month	\$0.00	\$290.00	\$-290.00	0 %
YTD	\$3,149.90	\$5,249.73	\$-2,099.83	-66 %
Prior YTD	\$120,000.00	\$276.25	\$119,723.75	99 %
Prior Year	\$120,000.00	\$276.25	\$119,723.75	99 %

Update

INVENTORY \$689,653.12

92.7%

754

RAW

PRT

SUB

NEU

Other

SALES FUNNEL

First Touch: 2

Qualification: 1

Development: 2

Quoting: 1

OPEN SALES ORDERS

This Month: Next Month: Third Month: Remaining:

Resale

Click **Submit**

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES REPORTS

Quote List

Customer

Search customers

Buyer

Prupart

Search parts

Cust Part

Owned By

All

Assigned To

All

Quote ID

Status

Open & Pending

Stage

All
Engineering Review
Purchasing Review

View By

Quote

Location

Trans Code

All

More Options

Submit

Create

CLICK 'SUBMIT' TO VIEW RESULTS

CETEC ERP VERSION 4.061 ON APP3 COPYRIGHT © 2022 CETEC ERP

Select Quote number

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES REPORTS

Quote List

Customer

Search customers

Buyer

Prctpart

Search parts

Cust Part

Owned By

All

Assigned To

All

Quote ID

Status

Open & Pending

Stage

All
Purchasing Review
Engineering Review

View By

Quote

Location

Trans Code

All

More Options

Submit

Create

Displaying 1 - 11 of 11

Export

+/- Columns

ID	Quote	Owner	Customer	Cust PO	Buyer	Ext Cost	Ext Resale	Quote Total	Terms	Probability	Ship Via	GP \$
8	8	johnsmith	Products & More	0239485		\$1,128.99	\$1,500.00	1530	NET30(\$50 Upfront)	50	Fedex Ground	\$371.01
9	9	johnsmith	Products & More	0239485		\$1,128.99	\$1,500.00	1530	NET30(\$50 Upfront)	50	Fedex Ground	\$371.01
11	11	johnsmith	Products & More	0239485		\$1,128.99	\$1,500.00	1530	NET30(\$50 Upfront)	50	Fedex Ground	\$371.01
12	12	johnsmith	Products & More	0239485		\$1,128.99	\$1,500.00	1530	NET30(\$50 Upfront)	50	Fedex Ground	\$371.01
48	48	techx	More-Tronics			\$0.00	\$0.00	0	NET30		UPS Ground	\$0.00

 Click **Quoting Tools +**

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES REPORTS

Quote/Order Worksheet 8

Sales Editing: John Smith

VIEW & EDIT

SEND +

COMMIT TO ORDER

QUOTING TOOLS +

COMMISSION

DOCUMENTS (0)

NOTES (0)

CLONED FROM 6

PREPAY

CLONED QUOTES +

CREATE PQUOTE

Build Process 1 2 3 4 5

2. Commit Order

Order Requires Prepayment Of \$750.00

Customer Products & More (2)

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

Contact

Cust PO # 0239485

Owner johnsmith

Status Open

Notifier Options Normal

Inside Sales

Outside Sales

More Options





Add Line

Change All Lines

Show Open Lines

Submit

+/- Columns

#	PRC	Part	Rev	Ship Date	Work Start Date	Lead Time	Qty	
1	754	-96-1	3.0	2018-02-16		0	10	   
Search parts				Ship	Work Start		1	<div>Add</div>

Final Freight Resale:

Freight Resale Estimate:

Freight Discount:

 Click **Clone This Quote**

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES REPORTS

Quote/Order Worksheet 8

Sales Editing: John Smith

VIEW & EDIT

SEND +

COMMIT TO ORDER

QUOTING TOOLS +

COSTING SHEET

IMPORT

REPRICE

ADJUST DATES

QUOTE HISTORY

MERGE

CLONE THIS QUOTE

CLOSE QUOTE

COMMISSION

DOCUMENTS (0)

NOTES (0)

CLONED FROM 6

PREPAY

CLONED QUOTES +

CREATE PQQUOTE

Build Process 1 2 3 4 5

2. Commit Order

Order Requires Prepayment Of \$750.00

Customer Products & More (2)

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

Contact

Cust PO # 0239485

Owner johnsmith

Status Open

Notifier Options Normal

Inside Sales

Outside Sales

More Options





Add Line

Change All Lines

Show Open Lines

Submit

+/- Columns

#	PRC	Part	Rev	Ship Date	Work Start Date	Lead Time	Qty	
1	754	-96-1	3.0	2018-02-16		0	10	   
Search parts				Ship	Work Start		1	<div>Add</div>

Final Freight Resale:

Freight People Estimate:

Freight Discount:

T

The new quote is an exact copy of the original quote.

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES REPORTS

Quote/Order Worksheet 111

Information: Quote 111 Created From 8

VIEW & EDIT

SEND +

COMMIT TO ORDER

QUOTING TOOLS +

COMMISSION

DOCUMENTS (0)

NOTES (0)

CLONED FROM 8

PREPAY

CREATE PQOTE

Build Process 1 2 3 4 5

2. Commit Order

Order Requires Prepayment Of \$750.00

Customer Products & More (2)

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

Contact

Cust PO # 0239485

Owner johnsmith

Status Open

Notifier Options Normal

Inside Sales

Outside Sales

More Options

Add Line

Change All Lines

Show Open Lines

Submit

+/- Columns

#	PRC	Part	Rev	Ship Date	Work Start Date	Lead Time	Qty	
1	754	-96-1	3.0	2022-09-20		0	10	
Search parts				Ship	Work Start		1	Add

Final Freight Resale:

Freight Base Estimate:

Freight Discount:

Now, if we want to close this quote, we'll click **Quoting Tools+**

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES REPORTS

Quote/Order Worksheet 111

Information: Quote 111 Created From 8

VIEW & EDIT

SEND +

COMMIT TO ORDER

QUOTING TOOLS +

COSTING SHEET

IMPORT

REPRICE

ADJUST DATES

QUOTE HISTORY

MERGE

CLONE THIS QUOTE

CLOSE QUOTE

COMMISSION

DOCUMENTS (0)

NOTES (0)

CLONED FROM 8

PREPAY

CREATE PQUOTE

Build Process 1 2 3 4 5

2. Commit Order

Order Requires Prepayment Of \$750.00

Customer Products & More (2)

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

Contact

Cust PO # 0239485

Owner johnsmith

Status Open

Notifier Options Normal

Inside Sales

Outside Sales

More Options

Add Line

Change All Lines

Show Open Lines

Submit

+/- Columns

#	PRC	Part	Rev	Ship Date	Work Start Date	Lead Time	Qty	
1	754	-96-1	3.0	2022-09-20		0	10	
Search parts				Ship	Work Start		1	Add

Final Freight Resale:

 Click **Close Quote**

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES REPORTS

Quote/Order Worksheet 111

Information: Quote 111 Created From 8

VIEW & EDIT

SEND +

COMMIT TO ORDER

QUOTING TOOLS +

COSTING SHEET

IMPORT

REPRICE

ADJUST DATES

QUOTE HISTORY

MERGE

CLONE THIS QUOTE

CLOSE QUOTE

COMMISSION

DOCUMENTS (0)

NOTES (0)

CLONED FROM 8

PREPAY

CREATE PQUOTE

Build Process 1 2 3 4 5

2. Commit Order

Order Requires Prepayment Of \$750.00

Customer Products & More (2)

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

Contact

Cust PO # 0239485

Owner johnsmith

Status Open

Notifier Options Normal

Inside Sales

Outside Sales

More Options





Add Line

Change All Lines

Show Open Lines

Submit

+/- Columns

#	PRC	Part	Rev	Ship Date	Work Start Date	Lead Time	Qty	
1	754	-96-1	3.0	2022-09-20		0	10	   
Search parts				Ship	Work Start		1	Add

Final Freight Resale:

Freight Base Estimate:

Freight Discount:



Select your resolution type. These can be edited under Admin>Maintenance>Data Maintenance>*Quote Resolution*

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES REPORTS

Quote/Order Worksheet 111

Sales Editing: John Smith

VIEW & EDIT

SEND +

COMMIT TO ORDER

QUOTING TOOLS +

COMMISSION

DOCUMENTS (0)

NOTES (0)

CLONED FROM 8

PREPAY

CREATE PQOTE

Default Line Resolution

No Response

(set)

Too Expensive

Bad Avail

☒ No Response

Add or Edit Quote Resolution Types

Customer Products & More (2)

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

Contact

Cust PO # 0239485

Owner johnsmith

Status Open

Notifier Options Normal

Inside Sales

Outside Sales

More Options

Change All Lines

+/- Columns

#	PRC	Part	Rev	Ship Date	Work Start Date	Lead Time	Qty
1	754	-96-1	3.0	2022-09-20		0	10
Search parts				Ship	Work Start		1

 Click **Reconcile Lines And Close Quote**

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES REPORTS

Quote/Order Worksheet 111

Sales Editing: John Smith

VIEW & EDIT

SEND +

COMMIT TO ORDER

QUOTING TOOLS +

COMMISSION

DOCUMENTS (0)

NOTES (0)

CLONED FROM 8

PREPAY

CREATE PQUOTE

Default Line Resolution

No Response

Add or Edit Quote Resolution Types

Reconcile Lines And Close Quote

Reconcile Lines

Customer

Products & More (2)

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

Contact

Cust PO #

0239485

Owner

johnsmith

Status

Open

Notifier Options

Normal

Inside Sales

Outside Sales

More Options

Change All Lines

+/- Columns

#	PRC	Part	Rev	Ship Date	Work Start Date	Lead Time	Qty
1	754	-96-1	3.0	2022-09-20		0	10
Search parts				Ship	Work Start		1

To view quote data corresponding to closed quote, click **Quotes**

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES REPORTS

Quote/Order Worksheet 111

Success: Quote reconciled.

VIEW & EDIT

SEND +

COMMIT TO ORDER

QUOTING TOOLS +

COMMISSION

DOCUMENTS (0)

NOTES (0)

CLONED FROM 8

PREPAY

CREATE PQUOTE

Build Process 1 2 3 4 5

1. Create Quote / Order Worksheet

Order Requires Prepayment Of \$750.00

Customer Products & More (2)

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

Contact

Cust PO # 0239485

Owner johnsmith

Status Closed Reopen

Notifier Options Normal

Inside Sales

Outside Sales

More Options

Change All Lines

Show Open Lines

Submit

+/- Columns

#	PRC	Part	Rev	Ship Date	Work Start Date	Lead Time	Qty	
Freight Resale Estimate:								Final Freight Resale:
Freight Discount:								
Tax (City Sales Tax 2%):								
\$30.00								



Click Quote Stats

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

Q

≡

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES REPORTS

QUOTE LIST

NEW QUOTE

MY QUOTES

QUOTE STATS

QUOTE COMMISSIONS

PROJECTS

QUOTING TOOLS +

COMMISSION

DOCUMENTS (0)

NOTES (0)

CLONED FROM 8

PREPAY

CREATE PQUOTE

Worksheet 111

Success: Quote reconciled.

1 2 3 4 5

Quote / Order Worksheet

Order requires Prepayment Of \$750.00

Customer Products & More (2)

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

Contact

Cust PO # 0239485

Owner johnsmith

Status Closed Reopen

Notifier Options Normal

Inside Sales

Outside Sales

More Options

Change All Lines

Show Open Lines

Submit

+/- Columns

#	PRC	Part	Rev	Ship Date	Work Start Date	Lead Time	Qty	
Freight Resale Estimate: Freight Discount:								Final Freight Resale:
Tax (City Sales Tax 2%): \$30.00								



See the Quote Line breakdown section which highlights details of all quotes (closed, open, and converted to orders).

Specify Restrictions

Creation Date

2022-08-20 - 2022-09-21

User

All

User Type

Quote Creator

New Business Only?

☐

Exclude Intercompany?

☐

[i](#)

Submit

OVERVIEW

# Quotes	# Quotes Ordered	# First Customer Orders	# Customers Quoted	# Customers Who Ordered
10	7 (70.00 %)	0	4	2

QUOTE LINE BREAKDOWN

Displaying 1 - 8 of 8 [Export](#) [+/- Columns](#)

Type	Number	Cost	Resale	GM
Ordered	12	\$407.20	\$527.50	22.81 %
First Customer Orders	0	\$0.00	\$0.00	0.00 %
Bad Avail	0	\$0.00	\$0.00	0.00 %
No Response	1	\$1,128.99	\$1,500.00	24.73 %
Too Expensive	0	\$0.00	\$0.00	0.00 %
Closed, But Not Reconciled	0	\$0.00	\$0.00	0.00 %
Still Open	0	\$0.00	\$0.00	0.00 %
Total	13	\$1,536.19	\$2,027.50	24.23 %

Displaying 1 - 8 of 8 [Export](#) [+/- Columns](#)



Scan to go to the interactive player