How do I fulfill an order in Cetec ERP?
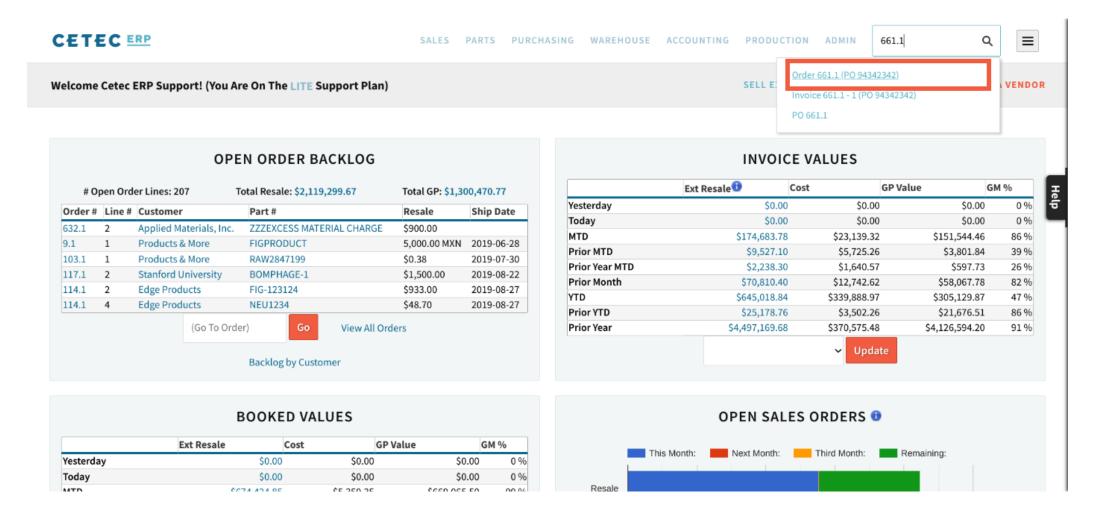
First, navigate to the order screen.   Here, we'll use the global search to find our order. This is the quickest way to go if you already know the order number.
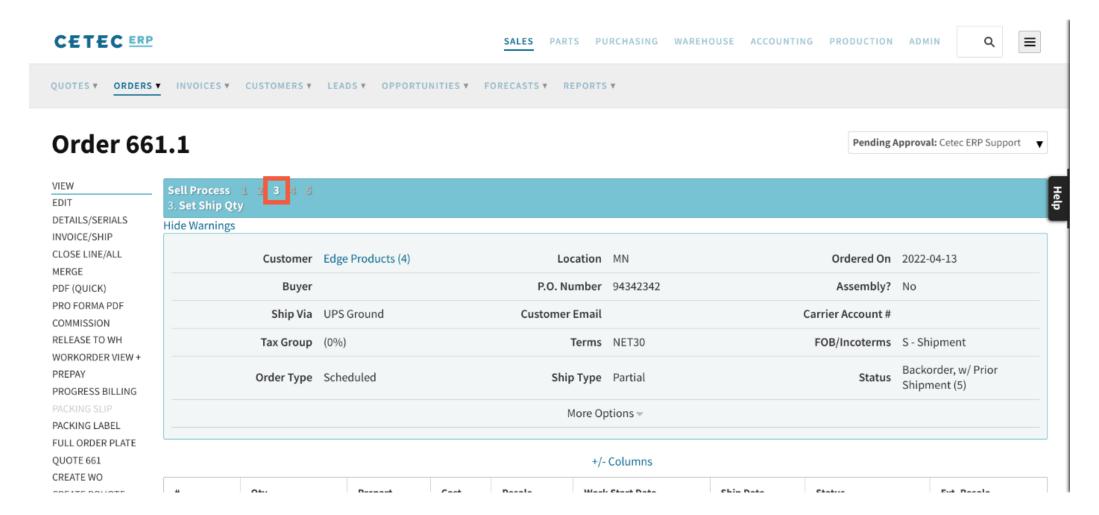
Let's set the ship quantity. This needs to be done before parts can be picked. Click the 3 in the header and

click Set Ship Qty.

If you want to set all lines of the order to ship at their full quantities, you can click the Fully Ship button.

Line #	Ship Qty	Qty Due	Prcpart	Revision	Cost	Resale	Work Start Date	Ship Date	Dock Date	Status	Ext. Cost	Tax	Ext. Resale
16	0 (Pick)	10 EA	FW-54057	1	$0.00	$2,000.00	2022-04-13	2023-10-18	2022-04-13	Release Material	$0.00	$0.00	$20,000.00
17	0 (Pick)	10 EA	FW-54057	1	$0.00	$2,000.00	2022-04-13	2023-10-25	2022-04-13	Release Material	$0.00	$0.00	$20,000.00
18	0 (Pick)	10 EA	FW-54057	1	$0.00	$2,000.00	2022-04-13	2023-11-01	2022-04-13	Release Material	$0.00	$0.00	$20,000.00
19	0 (Pick)	50 EA	FW-54057	1	$0.00	$2,000.00	2022-04-13	2023-11-08	2022-04-13	Release Material	$0.00	$0.00	$100,000.00
20	0 (Pick)	10 EA	FW-54057	1	$0.00	$2,000.00	2022-04-13	2023-11-15	2022-04-13	Release Material	$0.00	$0.00	$20,000.00

Fully Ship **Add To Skid**

Create New ▾ **Add w/ Ship Qty to Skid**

Freight: $0.00

Pick Everything? ☐   Use Est. Labor? ☐

Tax (0%): $0.00

Fill Labor? ☐

Total: $0.00 $500,000.00

However in this case, let's say we only want to ship Line 9. We enter the ship quantity.

Line #	Ship Qty	Qty Due	Prcpart	Revision	Cost	Resale	Work Start Date	Ship Date	Dock Date	Status	Ext. Cost	Tax	Ext. Resale
8	0 (Pick)	50 EA	FW-54057	1	$0.00	$2,000.00	2022-04-13	2023-08-23	2022-04-13	Release Material	$0.00	$0.00	$100,000.00
9	(Pick)	10 EA	FW-54057	1	$0.00	$2,000.00	2022-04-13	2023-08-30	2022-04-13	Release Material	$0.00	$0.00	$20,000.00
10	0 (Pick)	10 EA	FW-54057	1	$0.00	$2,000.00	2022-04-13	2023-09-06	2022-04-13	Release Material	$0.00	$0.00	$20,000.00
11	0 (Pick)	10 EA	FW-54057	1	$0.00	$2,000.00	2022-04-13	2023-09-13	2022-04-13	Release Material	$0.00	$0.00	$20,000.00
12	0 (Pick)	10 EA	FW-54057	1	$0.00	$2,000.00	2022-04-13	2023-09-20	2022-04-13	Release Material	$0.00	$0.00	$20,000.00
13	0 (Pick)	50 EA	FW-54057	1	$0.00	$2,000.00	2022-04-13	2023-09-27	2022-04-13	Release Material	$0.00	$0.00	$100,000.00
14	0 (Pick)	10 EA	FW-54057	1	$0.00	$2,000.00	2022-04-13	2023-10-04	2022-04-13	Release Material	$0.00	$0.00	$20,000.00
15	0 (Pick)	10 EA	FW-54057	1	$0.00	$2,000.00	2022-04-13	2023-10-11	2022-04-13	Release Material	$0.00	$0.00	$20,000.00

Help

To set that ship quantity, we click Update.

QUOTE 661
CREATE WO
CREATE PQUOTE
INVOICES (1) +
DOCUMENTS (0)
NOTES (0)

Austin, TX 78704
UNITED STATES

Tracking Numbers	(comma delimited)		
Tracking #		Delete?	
Freight Charge	$0.00	Freight Cost	$0.00	Update	Create Invoice

More Options ▾

Help

Line #	Ship Qty	Qty Due	Prcpart	Revision	Cost	Resale	Work Start Date	Ship Date	Dock Date	Status	Ext. Cost	Tax	Ext. Resale
8	0 (Pick)	50 EA	FW-54057	1	$0.00	$2,000.00	2022-04-13	2023-08-23	2022-04-13	Release Material	$0.00	$0.00	$100,000.00
9	10 (Pick)	10 EA	FW-54057	1	$0.00	$2,000.00	2022-04-13	2023-08-30	2022-04-13	Release Material	$0.00	$0.00	$20,000.00
10	0 (Pick)	10 EA	FW-54057	1	$0.00	$2,000.00	2022-04-13	2023-09-06	2022-04-13	Release Material	$0.00	$0.00	$20,000.00
11	0 (Pick)	10 EA	FW-54057	1	$0.00	$2,000.00	2022-04-13	2023-09-13	2022-04-13	Release Material	$0.00	$0.00	$20,000.00

Next we'll pick the parts for Line 9.   We click the 4 in the header (for step 4 in the order process).

Then we click Line 9.

QUOTES ▾   **ORDERS** ▾   INVOICES ▾   CUSTOMERS ▾   LEADS ▾   OPPORTUNITIES ▾   FORECASTS ▾   REPORTS ▾

Invoice/Ship Order 661.1

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 661
CREATE WO
CREATE PQUOTE
INVOICES (1) +
DOCUMENTS (0)

Sell Process   1   2   3   **4**   5
4. Pick Parts/Material Line 8(done)   **Line 9,** Line 10, Line 11, Line 12, Line 13, Line 14, (See Rest On Workorder)

Customer	Edge Products (4)	Location	MN	Ordered On	2022-04-13
Buyer		P.O. Number	94342342	Assembly?	No
Notifier Options	Normal	Inside Sales	George Smith	Outside Sales	
Ship Via	UPS Ground	Carrier Account #		Customer Email	
Tax Group	(0%)	Terms	NET30	FOB	S - Shipment
Order Type	Scheduled	Ship Type	Partial	Status	Pending Invoice (4)
Ship To	Edge Products 222 Main St Austin, TX 78704 UNITED STATES			Residential	No
Tracking Numbers	(comma delimited)				
Tracking #		Delete?			

🖱 We could click on Pick All Lines at the bottom of the screen to fully pick every line that shows up on this screen.

Pick Parts For Distribution Order: 661.1 Nosi 0

WORKORDER
OVERVIEW
INVOICE/SHIP
HISTORY
PICK PARTS
DEKIT PARTS
MAINT/ETC +
SERIALS
INSPECTIONS
OUTSOURCE PO
DOCUMENTS

Sell Process 1 2 3 **4** 5
4. Pick Parts/Material ~~Line 8(done)~~ **Line 9,** Line 10, Line 11, Line 12, Line 13, Line 14, (See Rest On ~~Workorder~~)

| Part Number | FW-54057 | Customer | 4 - Edge Products | First Article? | No |
| Qty Due | 10 EA | Qty To Ship | 10 EA | Location | MN |

Printable Version

Item	Prc	Part	Revision	Qty Need	Qty Picked	Bin	Lot Code	Bin Rev	Receipt	Bin Qty	Pick Qty/Serial Number	Printer
9	FW-	54057	1	10 EA	0	1 NEW			1009	10 EA	[ ] 0 ▾	Get Label

Part Description: CARRIER SEAL ASSY

Set Workorder Location To: Release Material ▾ Update Update, Go To Order List

Invoice/Ship Order | Pick All Lines

Here we'll choose to manually enter the pick quantity.

Pick Parts For Distribution Order: 661.1 Nosi 0

WORKORDER
OVERVIEW
INVOICE/SHIP
HISTORY
PICK PARTS
DEKIT PARTS
MAINT/ETC +
SERIALS
INSPECTIONS
OUTSOURCE PO
DOCUMENTS

Sell Process 1 2 3 **4** 5
4. Pick Parts/Material ~~Line 8(done)~~ **Line 9**, Line 10, Line 11, Line 12, Line 13, Line 14, (See Rest On ~~Workorder~~)

| Part Number | FW-54057 | Customer | 4 - Edge Products | First Article? | No |
| Qty Due | 10 EA | Qty To Ship | 10 EA | Location | MN |

Printable Version

Item	Prc	Part	Revision	Qty Need	Qty Picked	Bin	Lot Code	Bin Rev	Receipt	Bin Qty	Pick Qty/Serial Number		Printer
9	FW-	54057	1	10 EA	0	1 NEW			1009	10 EA	1	0	Get Label

Part Description: CARRIER SEAL ASSY

Set Workorder Location To: [Release Material ▼] [Update] [Update, Go To Order List]

Invoice/Ship Order | Pick All Lines

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To confirm this action, we click Update.

Pick Parts For Distribution Order: 661.1 Nosi 0

WORKORDER
OVERVIEW
INVOICE/SHIP
HISTORY
PICK PARTS
DEKIT PARTS
MAINT/ETC +
SERIALS
INSPECTIONS
OUTSOURCE PO
DOCUMENTS

Sell Process 1 2 3 4 5
4. Pick Parts/Material ~~Line 8(done)~~ **Line 9**, Line 10, Line 11, Line 12, Line 13, Line 14, (See Rest On ~~Workorder~~)

| Part Number | FW-54057 | Customer | 4 - Edge Products | First Article? | No |
| Qty Due | 10 EA | Qty To Ship | 10 EA | Location | MN |

Printable Version

Item	Prc	Part	Revision	Qty Need	Qty Picked	Bin	Lot Code	Bin Rev	Receipt	Bin Qty	Pick Qty/Serial Number		Printer
9	FW-	54057	1	10 EA	0	1 NEW			1009	10 EA	10	0	Get Label

Part Description: CARRIER SEAL ASSY

Set Workorder Location To: Release Material   Update   Update, Go To Order List

Invoice/Ship Order | Pick All Lines

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🖱 Now it's time to ship Line 9. We go to to the bottom of the screen and click Invoice/Ship Order.

Pick Parts For Distribution Order: 661.1 Nosi 0

WORKORDER
OVERVIEW
INVOICE/SHIP
HISTORY
PICK PARTS
DEKIT PARTS
MAINT/ETC +
SERIALS
INSPECTIONS
OUTSOURCE PO
DOCUMENTS

Sell Process 1 2 3 4 5
4. Pick Parts/Material ~~Line 8(done) Line 9(done)~~, Line 10, Line 11, Line 12, Line 13, Line 14, (See Rest On ~~Workorder~~)

Part Number	FW-54057	Customer	4 - Edge Products	First Article?	No
Qty Due	10 EA	Qty To Ship	0 EA	Location	MN

Printable Version

Item	Prc	Part	Revision	Qty Need	Qty Picked	Bin	Lot Code	Bin Rev	Receipt	Bin Qty	Pick Qty/Serial Number		Printer
9	FW-	54057	1	10 EA	10	1 NEW			1009	0 EA	10	0	Get Label

Part Description: CARRIER SEAL ASSY

Set Workorder Location To: [Release Material ▾] [Update] [Update, Go To Order List]
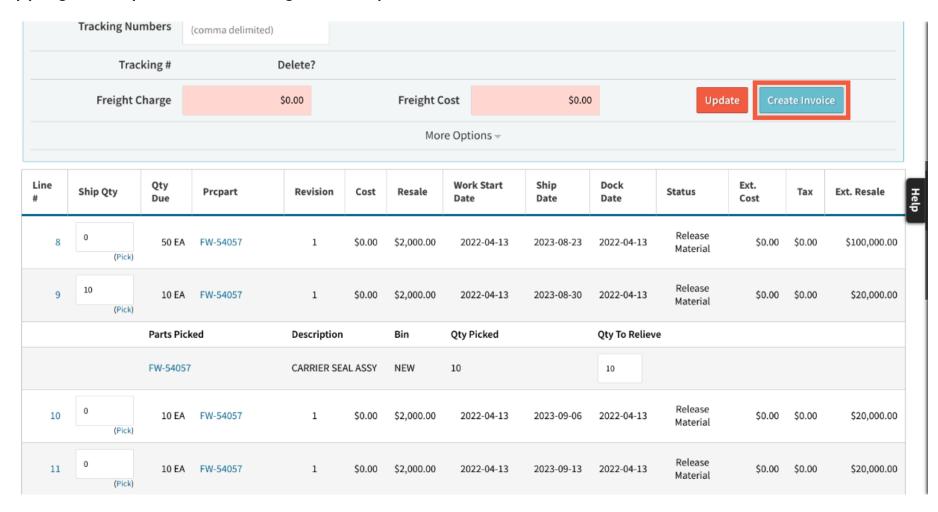
Invoice/Ship Order | Pick All Lines

Back to Order Invoice/Ship Screen

We can see that Line 9 has been fully picked, so we click Create Invoice. This signals to Cetec that we are shipping these parts and closing out this part of the order.
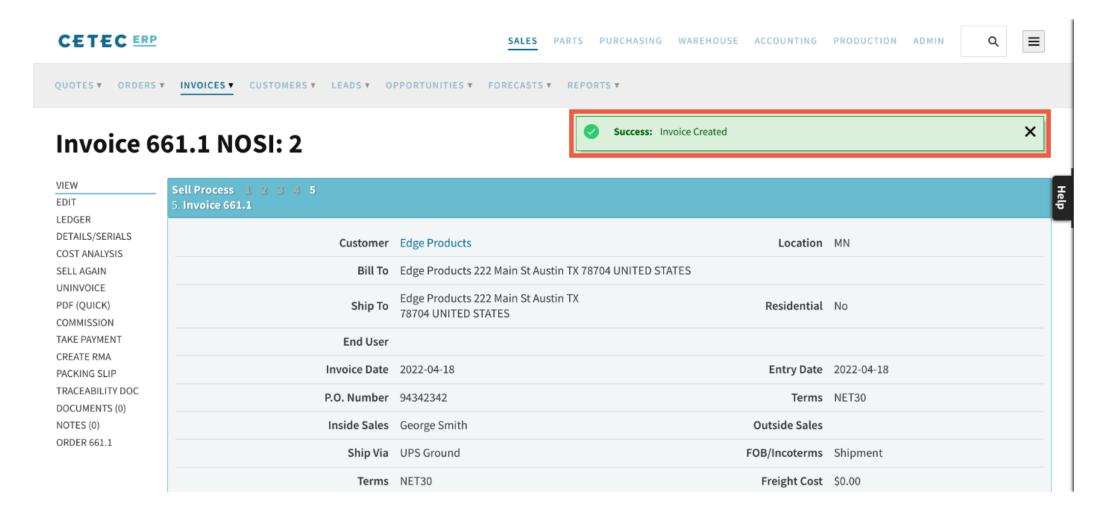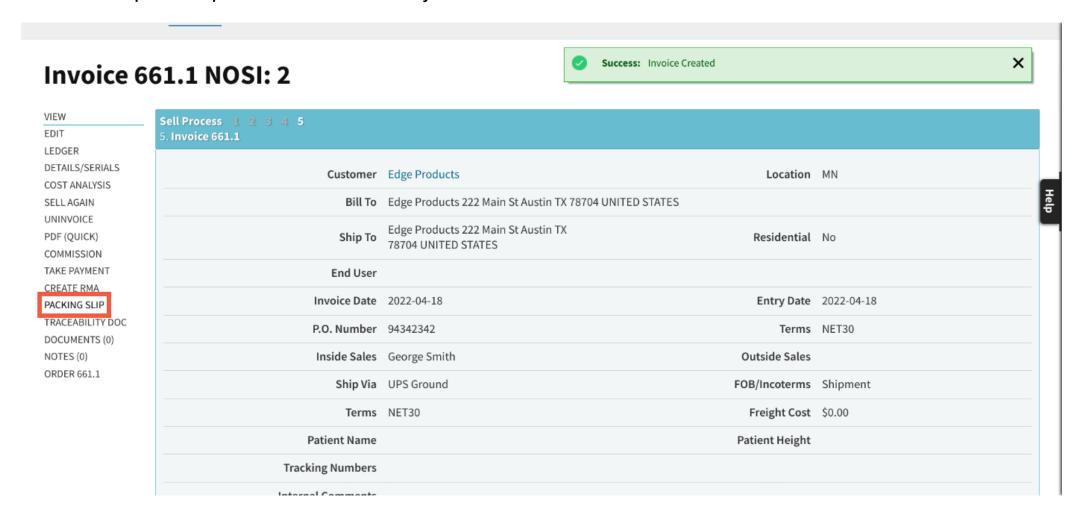
CREATE PQUOTE
INVOICES (1) +
DOCUMENTS (0)
NOTES (0)

Tracking Numbers   (comma delimited)

Tracking #   Delete?

Freight Charge $0.00   Freight Cost $0.00   Update   Create Invoice

More Options ▾

Line #	Ship Qty	Qty Due	Prcpart	Revision	Cost	Resale	Work Start Date	Ship Date	Dock Date	Status	Ext. Cost	Tax	Ext. Resale
8	0 (Pick)	50 EA	FW-54057	1	$0.00	$2,000.00	2022-04-13	2023-08-23	2022-04-13	Release Material	$0.00	$0.00	$100,000.00
9	10 (Pick)	10 EA	FW-54057	1	$0.00	$2,000.00	2022-04-13	2023-08-30	2022-04-13	Release Material	$0.00	$0.00	$20,000.00

Parts Picked	Description	Bin	Qty Picked	Qty To Relieve
FW-54057	CARRIER SEAL ASSY	NEW	10	10

Line #	Ship Qty	Qty Due	Prcpart	Revision	Cost	Resale	Work Start Date	Ship Date	Dock Date	Status	Ext. Cost	Tax	Ext. Resale
10	0 (Pick)	10 EA	FW-54057	1	$0.00	$2,000.00	2022-04-13	2023-09-06	2022-04-13	Release Material	$0.00	$0.00	$20,000.00
11	0 (Pick)	10 EA	FW-54057	1	$0.00	$2,000.00	2022-04-13	2023-09-13	2022-04-13	Release Material	$0.00	$0.00	$20,000.00

Help

🖱 If there were no errors, you will see the Success:Invoice Created message at the top of the screen.

To print your packing slip, click Packing Slip in the left side menu. The PDF will open up and you'll have the option to print it. That's it. Now you know how to fulfill an order in Cetec ERP!

Scan to go to the interactive player