Cetec ERP
Cetec ERP 101 - The Basics

● ● ●

Web browser usage

Cetec Overview - Records, Reports

Follow Processes
      Workorder
      Purchasing
      Complete Workorder
      Sales Order

Where We're Going

Cetec ERP Intro & Overview

Creating & Editing Records

Cetec ERP Process

Cetec ERP Overview

Web Browser Intro

Homepage

Modules

Basic Navigation

Web Browser Intro

Shortcuts

New Tab	ctrl+t
Scrolling Between Tabs	right: ctrl+tab left: ctrl+shift+tab
Closing Tabs	ctrl+w
Reopening Tabs	ctrl+shift+t
Page Search	ctrl+f

Use shortcuts to more efficiently navigate through Cetec and open tasks. Using separate tabs in Cetec can prevent you from clicking into a link and then having to "go back" as the page is still loaded.

Here are a few to help get started. You can google other shortcuts, like separate windows, bold, underline, italize, etc.

C Cetec ERP × | C Cetec ERP × | C Cetec ERP × | C Cetec ERP × | ERP Cloud ERP - Product × | ERP Manufacturing Clou × | ERP Proof of success in × | C Customer demo × | +

← → C 🔒 demo.cetecerp.com/#

CETEC ERP

SALES PARTS PURCHASING **WAREHOUSE** ACCOUNTING PRODUCTION ADMIN

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

Active Work in 143.1

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	$1,736.97	$1,213.17	$523.81	30 %
Prior MTD	$33,499.00	$306.00	$33,193.00	99 %
Prior Year MTD	$-160.00	$-19.68	$-140.32	0 %
Prior Month	$33,499.00	$306.00	$33,193.00	99 %
YTD	$922,788.33	$235,695.56	$687,092.76	74 %
Prior YTD	$83,090.00	$3,897.56	$79,192.44	95 %
Prior Year	$87,074.99	$7,281.41	$79,793.58	91 %

Information:
No Billing Credit Card On File! There are 3 days remain before your trial ends!! Please provide credit card information **in your profile**. **Dismiss** ✕

- SUB
- NEU
- PRT
- RAW
- Other

95.3%

OPEN ORDER BACKLOG

Open Order Lines: 20   Total Resale: $238,583.19   Total GP: $-80,992.48

Order #	Line #	Customer	Part #	Resale	Ship Date
37.1	1	Products & More	JOB-37	$0.00	2018-12-04
36.1	1	Products & More	JOB-36	$150.00	2019-02-01
44.1	1	Products & More	NEUGRAVEL-BOX-HIMB	$74,775.80	2019-04-04
50.1	1	Products & More	JOB50	$749.99	2019-06-06
90.1	1	Custom House	JOB-NEWSTAIRCASE2	$153,493.50	2019-06-28
103.1	1	Products & More	RAW2847199	$0.38	2019-07-30

OPEN SALES ORDERS ⓘ

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

Resale

GP

-100,000   0   100,000   200,000   300,000

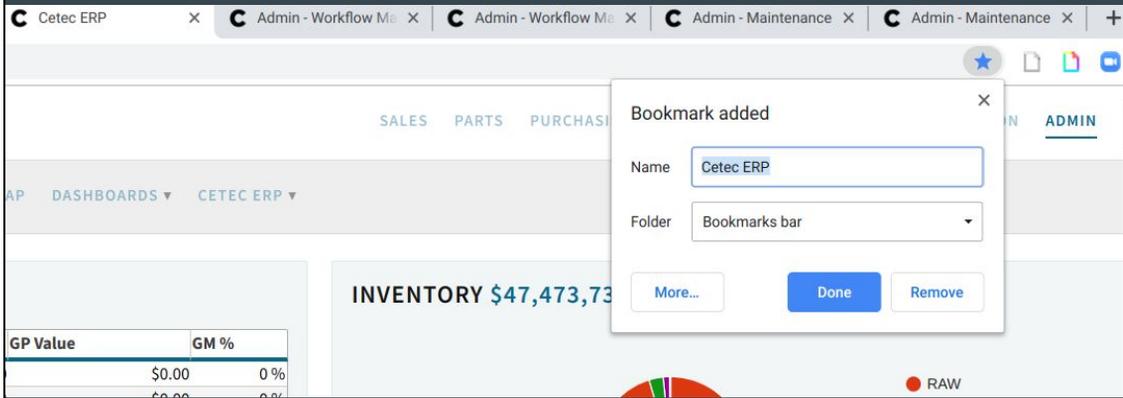Help

Web Browser Intro

Bookmarks

Navigate to web pages quickly

CETEC ERP

Welcome Cetec ERP Support Team! (You Are On The LITE Support Plan)

SELL EXISTING STOCK   BUILD A PART   BUY FROM A VENDOR

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	$33,499.00	$306.00	$33,193.00	99 %
YTD	$921,051.35	$234,482.39	$686,568.96	74 %
Prior YTD	$83,250.00	$3,917.24	$79,332.76	95 %
Prior Year	$87,074.99	$7,281.41	$79,793.58	91 %

INVENTORY $47,473,478.64

- PRT
- SUB
- NEU
- RAW
- Other

95.3%

OPEN ORDER BACKLOG

Open Order Lines: 20   Total Resale: $241,183.19   Total GP: $-80,502.56

Order #	Line #	Customer	Part #	Resale	Ship Date
14.1	1	Products & More	FIGPRODUCT	$3,000.00	2018-03-16
37.1	1	Products & More	JOB-37	$0.00	2018-12-04
36.1	1	Products & More	JOB-36	$150.00	2019-02-01
44.1	1	Products & More	NEUGRAVEL-BOX-HIMB	$74,775.80	2019-04-04
50.1	1	Products & More	JOB50	$749.99	2019-06-06
90.1	1	Custom House	JOB-NEWSTAIRCASE2	$153,493.50	2019-06-28

(Go To Order) [Go]   View All Orders

OPEN SALES ORDERS ℹ

This Month: Next Month: Third Month: Remaining:

Total Resale: $241,183.19   Total GP: $-80,502.56

Modules

Each module at the top represents a different department. Each has a dropdown for the processes, functions, reports, etc., related to each.

For example, under SALES, you've got quoting and orders (order entry), Invoices (sales history), CRM: customers, leads, opportunities, and then forecasting and reports.

Global search/sandwich menu

Two helpful tools for navigating and using Cetec are the Global search and the Sandwich menu in the top right of the screen.

The Global Search: you can search the entirety of your Cetec instance w/ the global search - parts, customers, POs, Invoices, etc. There will be a dropdown with possible options, these will be a link. Be sure to clink the link rather than hitting "enter".

Sandwich dropdown: you can use these options to customize and better use Cetec according to you day-to-day job. Bookmark specific pages or reports you look at daily, set up and change your profile, see your time - both logged and passive, see your documents. There's also a few shortcuts at the bottom.

Searching & Viewing Records

Global Search

Lists - Parts, Customers, Vendors

We'll look at a couple records for parts, customers, vendors. And then reports/lists related to each.

What you'll notice is that the general format and layout is the same, but with data and fields specific to that record.

First parts, click parts, Views/Lists and then List

Parts

Prcpart/Description	Search parts... 🔍 ☐		Preferred Vendor			Creation Date	(from)	- (to)
Status	Active ▾		UOM	All ▾		Non-Inventory	All	▾

Note: Exports with more than 1000 rows will not include all columns.

More Options ▾

Submit   Create New

<< Previous | 1 **2** 3 4 | Next >>

Displaying 26 - 50 of 83   Export   +/- Columns

PRC	Prcpart		BOM?	QOH	QR	QOO	UOM	Default Cost	Default Resale	Info
JOB	JOB5		Yes	0	0	0		$816.90	$100.00	ⓘ
JOB	JOB50		Yes	0	0	0		$0.00	$749.99	ⓘ
JOB	JOBEXCSTAIRCASE123		Yes	0	0	0		$0.00	$0.00	ⓘ
NEU	NEU-BOX-MODS		Yes	198	2	16		$357.00	$0.00	ⓘ

We can run a report on all parts in Cetec by hitting submit. There are a number of search fields you can use to filter these down. Each column shows the data in the part record.

Click into a part to see the part record

Part JOB50

VIEW	
EDIT	
BOM OVERVIEW (1)	
EDIT BOM	
EXPORT BOM	
BUILD ESTIMATE	
BUILD W/ SUBS	
PRICING	
QUOTES (0)	
ORDERS (1)	
SALES HIST (0)	
SHIP AND DEBITS	
PQUOTES (0)	
OPEN POS (0)	
WATERFALL	
PO HISTORY (0)	
NCRS (0)	
ECOS (0)	
RMAS (0)	
ORDERS W/ NEED (YES)	
PART REQS (0)	
TOOLS	
HISTORY	
CROSSES (0)	
MAINT + CHARGES	
REVISIONS	

PART INFO

Description				Revision	
Default Cost	$0.00000	Default Resale	$749.99000	Pricing Rules	
Last Buy Cost	$0.00000	Created On	2019-04-04	Shelf Life	0
Revenue G/L Account		COS G/L Account		RoHS	Yes
Preferred Vendor		Preferred Manufacturer		OEM Part #	
UOM	(none)	Purchase UOM	(none)	Export (ECCN)	
CHECK FOR MISSING PARTS	No				

▾ WAREHOUSE: MN - MANUFACTURING SOLUTIONS ✎   [Warehouse Transfer] [Vendor Return]

Avg Cost	$0.00000				
Cost For Loc	$0.00000	Resale For Loc			
QOH	0	QR	0	Qty Avail	0
QOO	0	Total Backlog	1	MOQ	(1)
Std Cost	0	Std Package		Lead Time (in days)	
Commodity Code		ABC Code		Country of Origin	

On the left, you'll see the lefthand navigation, which shows data related to the part: Revisions, BOM overview for BOMs, quotes, orders, sales history, pquotes, etc.

We have basic Part Info up top and then warehouse info below. To edit Part info, click Edit in the lefthand navigation. To edit the Warehouse info, select the pencil icon next to the Warehouse.

Documents; Notes

CHECK FOR MISSING PARTS	No				

▾ WAREHOUSE: MN - MANUFACTURING SOLUTIONS ✏️

Avg Cost	$0.00000				
Cost For Loc	$0.00000	Resale For Loc			
QOH	0	QR	0	Qty Avail	
QOO	0	Total Backlog	1	MOQ	
Std Cost	0	Std Package		Lead Time (in days)	
Commodity Code		ABC Code		Country of Origin	
Tariff (HTS)					
Last Updated	N/A	Last Counted	N/A	ROP	

Sidebar navigation:
OPEN POS (0)
WATERFALL
PO HISTORY (0)
NCRS (0)
ECOS (0)
RMAS (0)
ORDERS W/ NEED (YES)
PART REQS (0)
TOOLS
HISTORY
CROSSES (0)
MAINT +
CHARGES
REVISIONS
QUALITY ALERTS (0)
PRINT LABELS
DOCUMENTS (0)
NOTES (0)

Buttons: Warehouse Transfer | Vend

Each record - parts, customers, vendors have the documents and notes links.

You can upload documents to a specific part record, like a drawing, instructions, etc.
Notes can be used for internal communication

Part JOB50

VIEW
EDIT
BOM OVERVIEW (1)
EDIT BOM
EXPORT BOM
BUILD ESTIMATE
BUILD W/ SUBS
PRICING
QUOTES (0)
ORDERS (1)
SALES HIST (0)
SHIP AND DEBITS
PQUOTES (0)
OPEN POS (0)
WATERFALL
PO HISTORY (0)
NCRS (0)
ECOS (0)
RMAS (0)
ORDERS W/ NEED
(YES)
PART REQS (0)
TOOLS
HISTORY
CROSSES (0)
MAINT +

Field	Value	Field	Value
Description		Created On	2019-04-04
UOM	(none)	Default Transcode	(use default)
Last Resort Cost	$0.00000	Revenue G/L Account	(use defaul)
COS G/L Account	(use defaul)	Default Voucher GL Account	(use defaul)
		Preferred Vendor	Search vendors...
Preferred Manufacturer		OEM Part #	
UPC		Block Autopick?	
Non-Inventory?		Shelf Life	0
Serial Format	(More)	Default Warranty	(none)
		Default Selling Location	(choose location)

Help

This is the Part edit screen. You edit the fields, or not.

Then to save your changes, click update.

Custsomer List

To see a customer record, we will go to Sales > Customers > Customer List. Set your filter fields and click submit to search customers.

And similar for Vendors. Purchasing > Vendors > Vendor List

Creating Records - Parts/BOMs & Customers

Creating a new part record

Specifics for creating a new BOM

Specifics for creating a new Customer

Under any list in Cetec, you will see the "Create New" button, or some version of it.

Click this to

Designate a PRC, or product code, which is a key piece of how Cetec identifies part records - a prcpart. PRC is a group or category of your inventory, and part would be the SKU or part number. Neither one of these alone are unique, but the PRCpart is the unique id of the part record in Cetec.

Then designate if BOM or not and click create

For a component, you'll be taken immediately to the part edit screen where you can enter part info

FIG (BOM)

Revision (Unnamed), Part FIG-FINISHEDPRODUCT

✅ **Success:** Components Added: 1   ✕

TO PART RECORD   Back To Revisions
WORK INST
LABOR PLAN   Note: Cost defaults to Inventory cost unless provided.
INSPECTION INST.   Note: Selecting (unset) for revision defaults to the current revision
EDIT REVISION BOM   **Edit Revision BOM**
IMPORT BOM
WORK REPORT   +/- Columns
WORK INST. HISTORY

Comp #	Prcpart	Revision	Description	Work Loc	Qty Per Top	Scrap Factor	Scrap Adder	Reference Designator	Cost	Total Weight	Preferred MFG	Preferred Vendor	Vendor Part	
1	RAW123	(unse ▼	source component 123	(cho ▼	1		0		$2.00	0				❶ ✖
2	RAW1214366	(unse ▼	Bolt	(cho ▼	5 EA		0		$0.05	0			9999	❶ ✖
(new				(choose) ▼	1									Update
								Material Cost: $2.25	0					Delete

Show Batch Component Add

If you are creating a new finished good, or sub assembly, in Cetec (a BOM), then you'll be taken to the Edit BOM Revision page.

Add each component and qty per top and click update.

Customer

Then we will create a customer to sell our product to.

Under the Customer list, we have the create new button. Click that

A few important notes on the customer: The credit code will default to restricted. You can leave that until verified or you can change to 'good'.

You'll also need to add a bill-to address. Scroll down to "Addresses" and select add address.

Edit Address

Edit Address

Type:	Bill To ▾
Copy Address:	(populate from existing address) ▾
Name:	New Customer
Street:	123 Main

City - State/Province - Postal	Austin	-	TX -
	78741		
Country	(set country) ▾		
Attn Line:			
Timezone	America/Chicago ▾		
Tax Group:		(Customer is Non-Taxable, Tax Group will be ignored!)	
Permanent Shipping Instructions			
	Update		

Set your address type to Bill To (ship to will be created automatically as the same bill to).

Then enter the address info, and click update at the bottom of the screen.

Vendor

Vendor Supplier

VIEW   Back To List
EDIT
POS
CREATE VOUCHER
CREATE CHECK
A/P STATEMENT
PERFORMANCE
DOCUMENTS (0)
NOTES (0)

Vendor #	7	Credit Limit	$0.00	A/P Balance	$0.00
Buyer		Terms Code	-	Inter-Company	No
Remit Address	,			Corporate Address	,
Website		Default FOB		Created By	techx on 2019-10-10
Default G/L	None	Tax ID		1099?	N
Ext. Vendor ID		Min Order Amount	0	YTD Spent	$0.00
Avg. PPV	$0.00				
Email		Phone		Fax	

CONTACTS

Add Contact

ADDITIONAL ADDRESSES

Add Address

Name	Street	City	State/Province	Zip/Postal	Country	

Click edit to enter Vendor info, like remit address, etc.

Cetec ERP Process

Build to Stock - Internal Work Order

Purchasing - MRP; Receiving; Put Away

Release Order; Pick Parts & Production

Complete/Receive Finished Good & Put Away

Sales Order - Quoting & Order Entry

Invoicing

So now that we have a finished good, with the components need to kit it, and a customer to buy it and a vendor to source our material from.

We'll follow a high-level process through Cetec ERP to get and understand the flow and how to navigate through Cetec.
A sales order pulls from stock, so we will start by building our finished good to put it on the shelves.
> Cetec can, and does, do ETO, build to order; but will follow this specific process as an intro to the general process

An internal, build to stock order, drives demand for raw components and materials to be purchased. So we'll look at MRP, how to use and understand that tool, and then create a PQuote, convert to PO, and then receive the products and put them away. Because we follow good warehouse practices (HAHAH IF ONLY)
Once we've received the raw material, we can release our workorder to the warehouse for parts to be picked and then production. Once we've logged time and performed inspections, we'll complete/receive the product and put it on the shelf, ready for a sales order.
Then we'll enter a quote, commit it to order, pull it off the shelf, and Invoice and Ship.

WORKORDER

Internal Order

Build to Stock

Build our finished good and put it on the shelf

SALES   PARTS   PURCHASING   WAREHOUSE   ACCOUNTING   **PRODUCTION**   ADMIN

ORDERS ▾   QUALITY ▾   PART ▾   KITAUDIT ▾   MGMT ▾   TOOLS ▾   SCHEDULING ▾

LIST
NEW BUILD FOR STOCK ←
ECO/ECR
WIP AGING REPORT
WIP MATERIAL REPORT
ORDER VALUE BY LOCATION
PRODUCTION CALENDAR
ORDER MATERIAL REPORT

	sale 🛈	Cost	GP Value	GM %
	$0.00	$0.00	$0.00	0 %
	$0.00	$0.00	$0.00	0 %
	$0.00	$0.00	$0.00	0 %
	$0.00	$0.00	$0.00	0 %
	$0.00	$0.00	$0.00	0 %
Prior Month	$33,499.00	$306.00	$33,193.00	99 %
YTD	$921,051.35	$234,482.39	$686,568.96	74 %
Prior YTD	$83,250.00	$3,917.24	$79,332.76	95 %
Prior Year	$87,074.99	$7,281.41	$79,793.58	91 %

INVENTORY $47,473,478.64

- PRT
- SUB
- RAW
- NEU
- Other

95.3%

OPEN ORDER BACKLOG

Open Order Lines: 20   Total Resale: $241,183.19   Total GP: $-80,502.56

Order #   Line #   Customer   Part #   Resale   Ship Date

OPEN SALES ORDERS 🛈

This Month: Next Month: Third Month: Remaining:

This is a quote/order worksheet. This is part of the order entry process in cetec, whether it's an external sales order or internal workorder.

On this internal workorder, we have an Internal Customer automatically assigned.

So all we need to do is add our lines for the finished good. We can do this either by clicking add line, or a quick add by inputting the PRCpart on the line and selecting Add on the right.

If we click Add Line, we'll see different fields show up, including location, place for our pcrpart, and dates.

We can enter our qty, adjust cost/resale. Then click OK & Add.

Dates, Transcode

Build And Add To Stock
Enter a Workorder to build product into stock.

Add Line   Show Open Lines ▾   Submit

ADD LINE

Loc	Manufacturing Solutions ▾	Prcpart (QOH:0)	FIG-FINISHEDPRODUCT 🔍	Cust Part	FinProd 🔍
Work Start Date	2019-10-02 ⓘ 📅	Ship Date	2019-10-04	Dock Date	2019-10-11

Qty	Unit Cost ⓘ	Unit Resale ⓘ	Lead Time	Transaction Code
5	0	0	0	Build ▾

More Options ▾

OK   OK & Add   Update Cost

Change All Lines

Two important definitions are the dates and the transcodes.

Dates:
Work Start Date: the date intended to begin production; for a build order this will drive our purchasing demand
Ship date: is the desired ship date, meaning the product is complete and ready to ship, or receive and put away.
Dock Date: this is the date the customer would expect to have the product on their receiving dock.

Transcodes

Dates

Work Start: the date intended to begin work on a job

    This date will drive demand for Purchasing

Ship Date: the date planned for completion and to be shipped

Dock Date: the date the customer is expecting to receive the product

Transcodes

Build

Stock

Charge

Qty	Unit Cost ⓘ	Unit Resale ⓘ	Lead Time	Transaction Code
5	0	0	0	Build ▼

Resale Estimate Type	Fixed Bid ▼		
Revision	▼		Skip Adding Sub-Assemblies ☐
Comment	Line Comment	Ship Via	N/A ▼
Line Warnings/Alerts	(shows on quote pdf as line warning, does not trans	Part Description	
Ship To Address	Use Header-level Ship To ▼		

Tech Description

Tech Comments	Technical Comments
Sourcing Comments	(does not display externally, transfers)
Tags ⓘ	(Available Important Order Tags: CHECK_FOR_MISSING_PARTS_BC, DOUBLE CHECK FOR PROBLEMS, DO THIS THING) (Apply to sub orders too? ☐)

Less Options ▲

OK   OK & Add   Update Cost

We can click more options to add line or technical comments, attach tags, choose a revision, etc.

Quote/Order Worksheet 144

Sales Editing: Cetec ERP Support Team ▼

VIEW & EDIT
SEND +
COMMIT TO ORDER
QUOTING TOOLS +
COMMISSION
DOCUMENTS (0)
NOTES (0)
PREPAY
CREATE PQUOTE

Build Process 1 2 3 4 5
2. Commit Order

Build And Add To Stock
Enter a Workorder to build product into stock.

Add Line | Change All Lines

Show Open Lines | Submit

+/- Columns

#	PRC	Part	Ship Date	Dock Date	Qty	Cost	Resale	Ext. Cost	Ext. Resale	Discount	
1	FIG	-FINISHEDPRODUCT NEW!	2019-10-04	2019-10-11	5	$0.00	$0.00	$0.00	$0.00	Add	✎ 📄 ❶ ⓩ ✖
		FIG-FINISHEDPRODUCT 🔍	2019-10-02	2019-10-09	1	0	0				Add

Freight Resale Estimate: [ ] Freight Discount: [ ] [ ] Final Freight Resale:

Now we have our quote line. For all lines w/ transcode build, we can use the BOM worksheet to view, edit, build, our order specific BOM

BOM Worksheet

Quote/Order Worksheet 144

VIEW & EDIT
SEND +
COMMIT TO ORDER
QUOTING TOOLS +
COMMISSION
DOCUMENTS (0)
NOTES (0)
PREPAY
CREATE PQUOTE

Build Process 1 **2** 3 4 5
2. Commit Order
Back to Quote 144

BOM FIG-FINISHEDPRODUCT		**BOM Type** Preexisting		**Production Line** (unset)
Customer Internal Account		**Qty** 5		**Revision** (unnamed)
Updated By Cetec ERP Support Team 2019-10-02		Refresh BOM	Commit BOM	Update

+ Component | + Placeholder | +/- Tooling | +/- Ext. Unit Cost | Copy BOM | Copy BOM Wksht | Import BOM | Export BOM

Item	Qty	Prcpart	Lead Time	Weight	QOH	Excess Min	Comp Unit Cost	Ext. Unit Cost	Ext. Cost	
1	1	RAW123 [+]		0	0	0	0	$2.00	$2.00	$10.00
2	5	RAW1214366 [+]		0	0	1738 EA	0	$0.05	$0.25	$1.25
	1									Add
							Material Total:	$2.25	$11.25	Delete

Set our Revision, edit the components, add components, edit the component cost, etc.

Quote/Order Worksheet 144

VIEW & EDIT
SEND +
COMMIT TO ORDER
QUOTING TOOLS +
COMMISSION
DOCUMENTS (0)
NOTES (0)
PREPAY
CREATE PQUOTE

Build Process 1 **2** 3 4 5
2. **Commit Order**
Back to Quote 144

BOM FIG-FINISHEDPRODUCT	**BOM Type** Preexisting		**Production Line** (unset) ▾
Customer Internal Account	**Qty** 5		**Revision** (unnamed) ▾
Updated By Cetec ERP Support Team 2019-10-02		Refresh BOM	Commit BOM Update

[+ Component] [+ Placeholder] [+/- Tooling] [+/- Ext. Unit Cost] [Copy BOM] [Copy BOM Wksht] [Import BOM] [Export BOM]

Item	Qty	Prcpart	Lead Time	Weight	QOH	Excess Min	Comp Unit Cost	Ext. Unit Cost	Ext. Cost	
1	1	RAW123 [+]		0	0	0	0	$2.00	$2.00	$10.00 ✎ ⓘ ✖
2	5	RAW1214366 [+]		0	0	1738 EA	0	$0.05	$0.25	$1.25 ✎ ⓘ ✖
			1							Add
							Material Total:	$2.25	$11.25	Delete

You can load the fixed BOM record by clicking Refresh BOM, or overwrite the permanent BOM record by clicking Commit BOM. Select Update to save changes on the BOM worksheet

Item	Qty	Prepart		Lead Time	Weight	QOH	Excess Mtrl	Comp Unit Cost	Ext. Unit Cost	Ext. Cost	
1	1	RAW123	[+]		0	0	0	0	$2.00	$2.00	$10.00 🖊 ⓘ ✖
2	5	RAW1214366	[+]		0	0	1738 EA	0	$0.05	$0.25	$1.25 🖊 ⓘ ✖
			1								Add

Material Total:	$2.25	$11.25	Delete
Procurement Charges:	$0.00	$0.00	Edit
Labor Total (based on operations): labor history	N/A	N/A	Edit
Misc Charges Total:	N/A	N/A	Edit
Tooling Total:	$0.00	N/A	Edit
Excess Material Total: Cost Added to Quote (Ignored on BOM Wksht)			Edit
(max lead time = 0 days) Cost Total:	$2.25	$11.25	
Total Weight:	0		
Markup Total:	$0.00	$0.00	Edit

What are the values above? ⓘ

Transfer to Quote

If you're quoting a BOM, you can add costing like labor, excess material, or Mark it up. Click transfer to quote to transfer costing changes to the quote

Commit to Order

Quote/Order Worksheet 144

VIEW & EDIT
SEND +
COMMIT TO ORDER
QUOTING TOOLS +
COMMISSION
DOCUMENTS (0)
NOTES (0)
PREPAY
CREATE PQUOTE

Build Process 1 **2** 3 4 5
2. **Commit Order**

Build And Add To Stock
Enter a Workorder to build product into stock.

[Add Line] [Change All Lines]   Show Open Lines

+/- Columns

#	PRC	Part	Ship Date	Dock Date	Qty	Cost	Resale	Ext. Cost	Ext. Resale	Discount
1	FIG	-FINISHEDPRODUCT NEW!	2019-10-04	2019-10-11	5	$2.25	$0.00	$11.25	$0.00	Add
		🔍	2019-10-02	2019-10-02	1	Cost	Resale			

Now that we have the quote built out, lines added, we will commit to order. This will drive production scheduling, demand for purchasing.

This is the commit to order screen. Review details and click Commit to Order. If there are issues with the quote, Cetec will flag them and require quote updates before proceeding.

Order 144.1

> **Success:** Created Order MN144.1
> Created PO 128.1 ✕

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

VIEW
EDIT
DETAILS/SERIALS
COMPLETE/RECEIVE
DELETE LINE/ALL
PDF (QUICK)
PRO FORMA PDF
COMMISSION
RELEASE TO WH
WORKORDER VIEW +
PREPAY
PACKING SLIP
PACKING LABEL
FULL ORDER PLATE
DOCUMENTS (0)
NOTES (0)
QUOTE 144
CREATE PQUOTE
CREATE WO
INTERNAL PO 128.1
OUTSOURCE POS (0)

Customer Internal Account (1)	Location MN	Ordered On 2019-10-02
Buyer	P.O. Number	Assembly? Yes
Ship Via UPS Ground	Customer Email	
Tax Group (0%)	Terms	FOB S - Shipment
Order Type Scheduled	Ship Type Partial	Status New (0)
Carrier Account #		
Inside Sales	Outside Sales	
Ship To Internal Customer ,		

+/- Columns

#	Qty	Code	Prcpart	Rev	Work Start Date	Ship Date	Status	Ext. Resale
1	5	Build	FIG-FINISHEDPRODUCT	(unnamed)	2019-10-02	2019-10-04	Scheduling	$11.25
	Custpart: FinProd							

Now that we've committed to order, we have our Order View Screen.

To pick parts, log time, perform inspections, etc., anything related to a specific job, we will click into the Workorder screen, which is home base for production on an order.

Here is the overview of the Workorder screen, or a job. Notice under the modules that we have shifted into the Production tab of Cetec.

This is what your Production people on the floor would use.

The first thing we need to do on a job, is to pick the parts needed for manufacturing or kitting. So click into the pick parts screen.

Pick Parts For Work Order: 144.1 Line Item: 1

WORKORDER
OVERVIEW
COMPLETE/RECEIVE
HISTORY
SPLIT LINE
PICK PARTS
DEKIT PARTS
MAINT/ETC +
SERIALS
INSPECTIONS
OUTSOURCE PO
DOCUMENTS

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

BOM Part Number	FIG-FINISHEDPRODUCT	Customer	1 - Internal Account	First Article?	No
Qty Due	5	Qty To Ship	0	Location	MN
Shortage Comments	(Shortage Comments)			Hide Picked?	☐
Prcpart					

Printable Version

Item	Prc	Part	Rev	Qty Need	Qty Picked	Bin	Lot Code	Receipt	Bin Qty	Pick Qty/Serial Number
1	RAW	123		5	0	→ Part not available! Add Stock To Inventory				
Part Description: source component 123										
2	RAW	1214366		25 EA	0	6 → A-73-99		7	100 EA	[ ] 0 ▼
						C-11-31		69	998 EA	[ ] 0 ▼
						E-33-88	23904823	72	50 EA	[ ] 0 ▼

You'll see data pertinent to the part records for picking - qty need, qty picked. The Bin and bin qty. Bins are organized on the pick parts screen by Receipt/Lot Code.

But we do not have any stock for RAW123, so we have to go out and purchase this material.

Purchasing

Creating PQuote (New PQuote, from sales/work order)

Converting to a PO

MRP Overview

We will shift hats to our Purchasing department to source the raw materials needed to complete our job.

We'll look at a couple of options for creating a PQuote; walk through the process of converting to a PO; and do an overivew of MRP, which will be purchasing's home screen.

We have a couple one-off options for creating a new PQuote.

First is Purchasing > PQuotes > New PQuote

Here is our PQuote Worksheet, where we will enter Vendor info, add pquote lines

PQuote/PQuote Worksheet 129

Working: Cetec ERP Support Tea

VIEW
IMPORT
SPREADSHEET
CONVERT TO PO
CLOSE
PDF/EMAIL (QUICK)
CLONE
DOCUMENTS (0)
NOTES (0)
HISTORY

Buy Process 1 2 3
1. Create PQuote / PO Worksheet

* Vendor	Master Distributor	

Contact Choo ▾   Create Cont

Status Open   FOB   D - Delivery ▾

Ship Via   UPS Ground
Acct #

* Location   Manufacturing Solutior ▾   Owner   techx

Scheduled ○Yes ◉ No

More Options ▾

OK   Cancel

Fields marked with * are required for purchase order entry.

Add Line   Change All Lines

Input your Vendor, use more options to enter specific PQuote header data (PQuote comments, addreses, etc.)

Click OK to save. Then click "Add Line" to add parts to our PQuote

Enter Qty, Prcpart, cost, etc. and click OK to save and add line

PQuote/PQuote Worksheet 129

Working: Cetec ERP Support Team ▼

VIEW
IMPORT
SPREADSHEET
CONVERT TO PO
CLOSE
PDF/EMAIL (QUICK)
CLONE
DOCUMENTS (2)
NOTES (0)
HISTORY

Show Sticky Notes

Buy Process 1 **2** 3
2. Convert To PO

Vendor	Master Distributor (2)		Contact	
Status	Open	FOB	D - Delivery	Ship Via	UPS Ground
Location	MN	Owner	techx	Taxable	No
Created At	10/03/19 11:55 AM	Terms	1 - NET30	Scheduled	N
PO Comment			Cost Center	
PQuote Comment				
Vendor Phone Number	800-781-4820	Vendor Min Order Amount	$0.0000	

Add Line **Change All Lines**

+/- Columns

#	Qty	Prcpart	Vendor Part	Revision	Dock Date	Sched?	Cost ⓘ	PPV	Ext. Cost	
1	5	RAW123 [+]			2019-10-03	Unsched.	$2.0000	$0.0000	$10.0000	🖊ⓘ⮐✖
2	5	RAW-SOURCEDCOMP [+]			2019-10-03	Unsched.	$2.0000	$2.0000	$10.0000	🖊ⓘ⮐✖

Once the PQuote is approved, we need to convert to PO

PQuote 129

VIEW
IMPORT
SPREADSHEET
CONVERT TO PO
CLOSE
PDF/EMAIL (QUICK)
CLONE
DOCUMENTS (2)
NOTES (0)
HISTORY

Buy Process 1 2 3
2. Convert To PO

Place Purchase Order Verify the PQuote then click the Place Purchase Order button; or go to the View screen to make changes.

Vendor	Master Distributor (2)				Contact	
Status	Open	FOB	D - Delivery	Ship Via	UPS Ground
Location	MN	Owner	techx	Taxable	No
Created At	10/03/19 11:55 AM	Terms	1 - NET30	Scheduled	
PO Comment				Cost Center	
PQuote Comment					
Vendor Phone Number	800-781-4820	Vendor Min Order Amount	$0.0000		

Now we can send our Purchase Order to our Vendor directly from Cetec-generated PDF

We can download the PDF, or email directly to our Vendor.

This is a good sample of documents in Cetec. You can edit what data from your PO (or any other object - quote, invoice, etc), using the checkboxes in here. Select what you'd like to appear on the document and click "Set Columns". This will save your settings for the next time you open the Purchase Order PDF

Purchase Order

CETEC ERP

PO Number: 129.1
Entry Date: 2019-10-03
Date Sent: 2019-10-03
Please Confirm Receipt

Ship To	Vendor	Bill To
PO Box 463 Greenland, NH 03840	Master Distributor 701 Brooks Ave Thief River Falls, MN 56701 United States Vendor #: 2 Phone: 800-781-4820	408 Tradesmens Park Drive, Suite CHutto, Texas 78634

FOB	Delivery	**Terms**	NET30
Ship Via	UPS Ground	**Buyer**	Cetec ERP Support Team
Email	sales@cetecerp.com		
Comments			

#	Qty	Vendor Part	special field	Dock Date	Cost	Ext. Cost
1	5			2019-10-03 or sooner	$2.0000	$10.0000
	Part Description: source component 123					
2	5			2019-10-03 or sooner	$2.0000	$10.0000
					Total:	$20.00

Here's what our PDF will look like.

Now back on our original order screen..

We can actually create a PQuote directly from the Order, by clicking create PQuote

Make PQuote from Order 144.1

VIEW
EDIT
DETAILS/SERIALS
COMPLETE/RECEIVE
DELETE LINE/ALL
PDF (QUICK)
PRO FORMA PDF
COMMISSION
RELEASE TO WH
WORKORDER VIEW +
PREPAY
PACKING SLIP
PACKING LABEL
FULL ORDER PLATE
DOCUMENTS (0)
NOTES (0)
QUOTE 144
CREATE PQUOTE
CREATE WO
INTERNAL PO 128.1
OUTSOURCE POS (0)

Show 25 entries

Displaying 1 - 3 of 3   Export   +/- Columns

Add To PQuote?	Prcpart	Qty Need	QOH	Avail	QOO	Pref Vendor	Most Recent Vendor	Info
Qty to Add	RAW-SOURCEDCOMP	5	0	-5	5		Master Distributor	ℹ
Qty to Add	RAW1214366	25	1738	-3447	3500		Master Distributor	ℹ
Qty to Add	RAW123	5	0	-5	5		Master Distributor	ℹ

Displaying 1 - 3 of 3   Export   +/- Columns

☐ Use Order Cost?

Set Qty Need for All Parts

Add Lines To PQuote / PO Worksheet

(Leave Blank to Create New) ▾   (vendor)   **Submit**

You'll see the qty need, qoh, qty available and qoo of each component.

Either manually enter the qty to add to the PQuote or click the "Set Qty Need for All Parts" to auto set all lines.

Make PQuote from Order 144.1

Show 25 ▼ entries

Displaying 1 - 3 of 3   Export   +/- Columns

Add To PQuote?	Prcpart	Qty Need	QOH	Avail	QOO	Pref Vendor	Most Recent Vendor
5	RAW-SOURCEDCOMP	5	0	-5	5		Master Distributor
25	RAW1214366	25	1738	-3447	3500		Master Distributor
5	RAW123	5	0	-5	5		Master Distributor

Displaying 1 - 3 of 3   Export   +/- Columns

☐ Use Order Cost?

[Set Qty Need for All Parts]

Add Lines To PQuote / PO Worksheet

| (Leave Blank to Create New) ▼ | Master Distributor (2) (# Outsource POs: 0) | [Submit] |

Then either select a PQuote to add these to, or leave blank and enter a vendor to create a new PQuote.

MRP

Overview

Waterfall (Supply/Demand)

SALES   PARTS   **PURCHASING**   WAREHOUSE   ACCOUNTING   PRODUCTION   ADMIN

PQUOTES ▾   PURCHASE ORDERS   RECEIPTS ▾   VENDORS ▾   MRP ▾

MRP - BUY
MRP - BUILD
MRP - ALL

Pick Parts For Work Order: 1

WORKORDER
OVERVIEW
COMPLETE/RECEIVE
HISTORY
SPLIT LINE
PICK PARTS
DEKIT PARTS
MAINT/ETC +
SERIALS
INSPECTIONS
OUTSOURCE PO
DOCUMENTS

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

BOM Part Number FIG-FINISHEDPRODUCT	**Customer** 1 - Internal Account	**First Article?** No
Qty Due 5	**Qty To Ship** 0	**Location** MN
Shortage Comments (Shortage Comments)		**Hide Picked?** ☐
Prcpart		**Printable Version**

MRP runs (or is generated) when you click Refresh. Typically we suggest Refreshing MRP once in the morning and then again after lunch, and work through the updated list twice a day.

You'll see two timestamps on the MRP screen:
MRP Generation
Allocation data

Allocation is a program that runs in the background every 2 hours. It gathers data from all of Cetec that is pertinent to stay up to date and accurate on the supply and demand - so having allocation run will speed up refreshing MRP and other areas of Cetec using this breadth of data.

Clicking Submit will open MRP as it was last generated. So not the most current/up-to-date, but will track progress.

All?	Part	Description	Leadtime ⓘ	Need Date ⓘ	Buy Date ⓘ	QOH	Cost	Ext Cost	ROP	Sum Req'd Qty ⓘ	Vendor ⓘ	Source	
☐	-3385	Type 3385	0			5	$10.84	$54.20	10	5	Internal Vendor	ROP	ⓘ
☐	1714538	Terminal-B	0			75198	$0.03	$644.20	100000	24777 EA	Unassigned	ROP	ⓘ
☑	1711111	Terminal-A	3 2019-10-06	2018-04-11	2018-04-08	1841	$1.00	$1,204.00	0	1204 EA	Master Warehouse	Supply/Demand	ⓘ
☑	6462151	Cable	0		2018-11-19	95	$1.50	$132.00	0	88 FT	Master Warehouse	Supply/Demand	ⓘ
☐	5938173	Terminal Ring	0	2019-06-28		0	$250.00	$10,000.00	2000	40 EA	Unassigned	Supply/Demand	ⓘ

After we've run MRP, we will see our report.

A couple of different dates
Need Date - when the earliest order will need this part;
Buy Date - need date minus leadtime; when you should buy the part (need leadtimes set)

And then Source
ROP: re-order point set in the part record; to keep minimum qty on hand
Supply/Demand: from the Part waterfall, open orders versus placed POs

All?	Part	Description	Leadtime ⓘ	Need Date ⓘ	Buy Date ⓘ	QOH	Cost	Ext Cost	ROP	Sum Req'd Qty ⓘ	Vendor ⓘ	Source	
☐	-3385	Type 3385	0			5	$10.84	$54.20	10	5	Internal Vendor	ROP	ⓘ
☐	1714538	Terminal-B	0			75198	$0.03	$644.20	100000	24777 EA	Unassigned	ROP	ⓘ
■	~~1714531~~	~~Terminal-A~~	~~3 2019-10-06~~	~~2018-04-11~~	~~2018-04-08~~	~~1841~~	~~$1.00~~	~~$1,204.00~~	~~0~~	~~1204 EA~~	~~Master Warehouse~~	~~Supply/Demand~~	ⓘ
■	~~0452111~~	~~Cable~~	~~0~~	~~2018-11-19~~		~~95~~	~~$1.50~~	~~$132.00~~	~~0~~	~~88 FT~~	~~Master Warehouse~~	~~Supply/Demand~~	ⓘ
☐	5938173	Terminal Ring	0	2019-06-28		0	$250.00	$10,000.00	2000	40 EA	Unassigned	Supply/Demand	ⓘ

Internal Vendors: All   BOMs: All   Preferred Vendor: ____

Do you want to buy ○ ? Or build ○ ?   Less Options ▲   Submit   Review POs

Displaying 1 - 13 of 1? Export   +/- Columns

Then we can see the current QOH and the required quantity for all open orders and ROP.

Part Waterfall

On each row, you can click the blue "I" to open up part record information for this part.

You'll see BOM use, quotes, orders, pos, sales history, etc.

Particularly, we want to see the Waterfall, which captures our supply/demand for this specific part that drives the MRP flag and can be a very useful report to help make decisions on purchasing.
On the left of the table, you have demand: All Orders requiring this part. These could be external sales orders, OR internal build orders needing the part for kitting.
On the right you have supply, all POs placed that will source this part. Those could be external POs from a vendor, OR for an assembly, these could be internal POs against internal build orders.

The Orders show the dates driving MRP requirements, primarily work start date.

Between the two is the Projected QOH, that "waterfalls" the QOH by line, either subtracting the value for orders using components or adding for POs. So you can see what your projected QOH is for a certain date.

Purchase Materials

Once we've refreshed MRP, we can move quickly through our report to purchase needed parts.

Select the 'buy" radio button, and you'll see the option to either add parts to a pquote or create a new one.

Then select the checkboxes for each row and use the drop down to select a pquote, if you'd like. Then click the orange button.

As you work through MRP without refreshing, lines will actually be crossed off so you know what you've ordered. The next time you refresh will be with a new allocation timestamp, meaning you will be working through a data set of supply and demand.

When we create a new PQuote, here's what it will look like from MRP.

Note: If you have the preferred vendor set, vendor info will bve prepopulated. But if not, you'll have to enter a vendor.

Receiving

Receiving parts

Receipts

Put Away

Now we will shift hats from our purchasing department to our Warehouse where we will receive our parts and put them away for future picking and kitting.

On the Warehouse floor, you can navigate to Warehouse > Receiving > Receive Parts

Receive Parts

Back to Pending Put Away

PO	PO or RMA ID	PO Line	(find PO to ass ▾)	Packing Slip #	
Prcpart	Search parts...	Unit Cost	[Landed Cost]	Quantity	[+ Pieces/Serials]
Location	Manufacturing Solutions ▾	Date	2019-10-14		
Date Code		Lot Code		Revision	
Expires On		Lock Bin	☐	[Receive] [Receive & Keep PO]
Inspection Instructions (N/A)					
Qty Accepted		Qty Rejected		Receipt Notes	
Inspection Notes					

From our Receive Parts screen, we can receive against a PO, or perform a non-PO receipt (inventory adjustment).

You'll need the PO # to receive against.

For non-PO receipt, add the Prcpart and Qty, then simply click receive.

Once the PO # is entered, you can select which PO line to receive against, and the part, qty, cost will all be auto-filled.

You can log your receiving inspection, date code, lot code, exp date, etc. and then click Receive. If you are receiving multiple lines off the same PO click Receive and Keep PO

You can also navigate to the receiving screen through the PO lines, where our data will be auto-populated.

Click receive per PO line

You see our PO # is filled in. We can follow the same receiving process outlined before

PO	129.1		PO Line	1 Part RAW123 ▾	Packing Slip #	
Prcpart	RAW123		Unit Cost	2.00000000 Landed Cost	Quantity	5 + Pieces/Serials
Location	Manufacturing Solutions ▾		Date	2019-10-03		
Date Code			Lot Code	1940001	Revision	
Expires On			Lock Bin	☐		Receive Receive & Keep PO

Part Description	source component 123	
Part Image		
PO Due Date	2019-10-03	PO Buyer Cetec ERP Support Team

Inspection Instructions

| Qty Accepted | 5 | Qty Rejected | 0 | Receipt Notes | |

| Inspection Notes | |

Enter your qty accepted/rejected

Click receive

After receipt, you can see your receipt, receipt label, and the orders possibly needing this part

If we keep the PO on receipt, we can use the dropdown to select the next PO line and keep moving through our PO
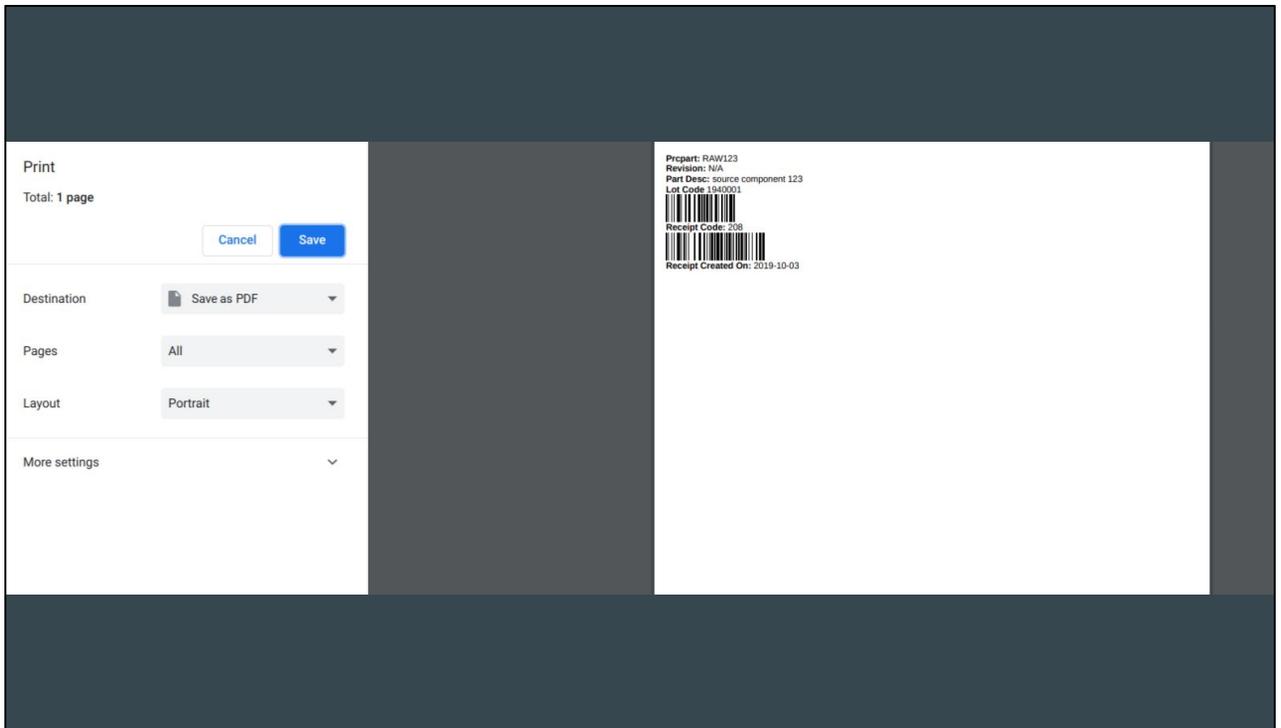
This is an example of the receipt label, with Prcpart, revision, description, Lot Code, Receipt Code and correlating barcodes

Here is our receipt.

We can perform a put away in the warehouse by clicking "Move".

If you have a warehouse worker performing put aways, they would navigate to warehouse > receiving > put away

They'll see the list of all Receipts Pending Put Away

Then click Put Away for each receipt/part

They can then enter the bin and the put away quantity

Back to workorder

Releasing Orders

Printing travelers (license plates)

Picking Parts

Logging Time

Completing and Receiving a Job

Now that we've completed our PO, received the parts, and put them away, we can actually pick parts and complete our job.

So we will switch hats back to Production, first the production manager, and then our job floor worker.
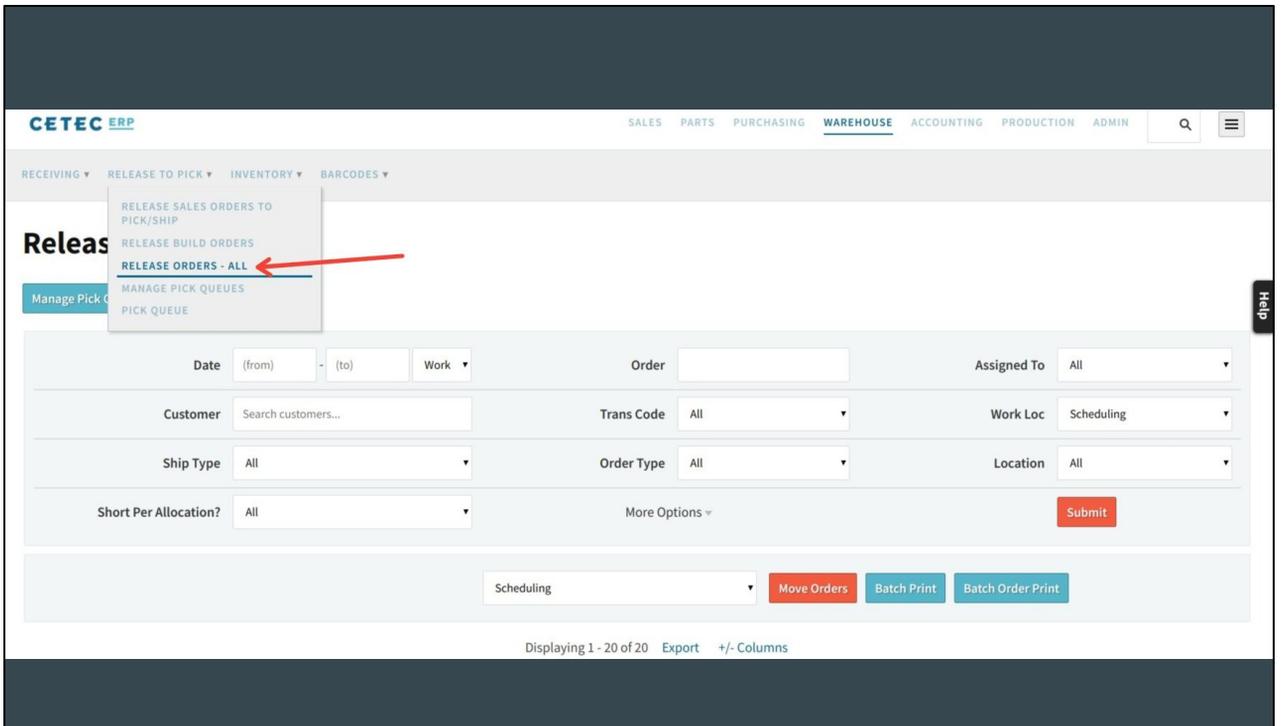
The Release to Pick screen is where your Production/Warehouse managers can release orders for picking, assign them to work locations, batch print license plates, etc.

Under Warehouse > Release to Pick > Release Orders

These three options take you to the same screen, just with different search field settings set differently.

Order	Line	Tags	Prcpart	Customer	Work Start Date	Ship Date	Dock Date	Short Per Allocation	# Comp	Assign To John Sm ▾	Qty Due	Release Qty	Docs	Order Plate	Plate	Move ☐
14.1	2		PRT12345	Products & More	2019-09-12	2020-01-01	2020-01-03	Short! (0)	0	John Smit ▾ set	5	5	Docs	Order Plate	Plate	☐
40.2	1		SUB100	Internal Account	2018-11-19	2018-11-28	2018-11-28	No	3	John Smit ▾ set	30		Docs	Order Plate	Plate	☐
72.1	1		SUB200	Internal Account	2019-05-21	2019-05-28	2019-05-28	No	1	John Smit ▾ set	1		Docs	Order Plate	Plate	☐
73.1	1		SUB100	Internal Account	2019-05-31	2019-06-05	2019-06-05	No	3	John Smit ▾ set	1		Docs	Order Plate	Plate	☐
90.1	1		JOB-NEWSTAIRCASE2	Custom House	2019-06-28	2019-06-28	2019-06-28	Short!	29	John Smit ▾ set	1		Docs	Order Plate	Plate	☐

Scheduling ▾   Move Orders   Batch Print   Batch Order Print

Displaying 1 - 20 of 20   Export   +/- Columns

Help

Scheduling ▼ **Move Orders** Batch Print Batch Order Print

Displaying 1 - 20 of 20   Export   +/- Columns

Order	Line	Tags	Prcpart	Customer	Work Start Date	Ship Date	Dock Date	Short Per Allocation	# Comp	Assign To John Sm ▼	Qty Due	Release Qty	Docs	Order Plate	Plate	Move ☐
14.1	2		PRT12345	Products & More	2019-09-12	2020-01-01	2020-01-03	Short! (0)	0	John Smit ▼ set	5	5	Docs	Order Plate	Plate	☐
40.2	1		SUB100	Internal Account	2018-11-19	2018-11-28	2018-11-28	No	3	John Smit ▼ set	30		Docs	Order Plate	Plate	☐
72.1	1		SUB200	Internal Account	2019-05-21	2019-05-28	2019-05-28	No	1	John Smit ▼ set	1		Docs	Order Plate	Plate	☐
73.1	1		SUB100	Internal Account	2019-05-31	2019-06-05	2019-06-05	No	3	John Smit ▼ set	1		Docs	Order Plate	Plate	☐
90.1	1		JOB-NEWSTAIRCASE2	Custom House	2019-06-28	2019-06-28	2019-06-28	Short!	29	John Smit ▼ set	1		Docs	Order Plate	Plate	☐

Scheduling

Move Orders   Batch Print   Batch Order Print

Order	Line	Tags	Prcpart	Customer	Work Start Date	Ship Date	Dock Date	Short Per Allocation	# Comp	Assign To	Qty Due	Release Qty	Docs	Order Plate	Plate	Move
										John Sm ▾						☐
14.1	2		PRT12345	Products & More	2019-09-12	2020-01-01	2020-01-03	Short! (0)	0	John Smit ▾ set	5	5	Docs	Order Plate	Plate	☐
40.2	1		SUB100	Internal Account	2018-11-19	2018-11-28	2018-11-28	No	3	John Smit ▾ set	30		Docs	Order Plate	Plate	☐
72.1	1		SUB200	Internal Account	2019-05-21	2019-05-28	2019-05-28	No	1	John Smit ▾ set	1		Docs	Order Plate	Plate	☐
73.1	1		SUB100	Internal Account	2019-05-31	2019-06-05	2019-06-05	No	3	John Smit ▾ set	1		Docs	Order Plate	Plate	☐
90.1	1		JOB-NEWSTAIRCASE2	Custom House	2019-06-28	2019-06-28	2019-06-28	Short!	29	John Smit ▾ set	1		Docs	Order Plate	Plate	☐

Help

Full Order Plate

Customer: Products & More

Order: 14.1

Cust PO #: 02394812

Ship Date: 2018-03-16

Work Start Date: 2018-03-16

Revision: 1.0

Labor Estimate: 2540.00 = 2540.00 min or 42.33 hrs

Part Desc:

Comment:

Part Number: PRODUCT

Order Line 14.1 Line Item: 1

Qty: 20

Item	Prcpart	Description	Qty Per Top	Net Qty Required	Qty Picked
1	FIGPRODUCT Part Requires Tools:		10	10	0

Ship Date: 2020-01-01

Work Start Date: 2019-09-12

Revision:

Part Number: 12345

Order Line 14.1 Line Item: 2

License Plate (Traveler)

Customer Internal Account (for Products & More)

Ship Date: 2018-11-28

Part Number: 100

Purchase Order: 74298342

Work Start Date: 2018-11-19

Revision:

Order 40.2 Line Item: 1
(Part Of 40.1 FIGPRODUCT)

Labor Estimate: 3600.00 = 3600.00 min or 60.00 hrs

Part Desc: Subassembly 100

Comment:

Qty: 30

Pick List

Item	Prcpart	Description	Cust Part	Rev	Qty Per Top	Net Qty Req'd	Qty Picked
1	RAW9462711	Cable			1 FT	30 FT	0
2	RAW8392785	Material-B			1 EA	30 EA	0
3	SUB200	Subassembly 200			1	30	0

Estimated Labor Plan per Part

1. Scheduling	No Operations Specified
2. Warehouse	No Operations Specified
3. Kit Short Shelf	No Operations Specified
4. Big Saw	No Operations Specified
5. At Vendor Outsourcing	No Operations Specified

The License Plate will print off the pick list for picking, and the labor plan set in the BOM revision.

This is your traveler that would follow the job along the job floor from picking through production

This is what will help your job floor workers quickly navigate into the workorder, either using the order number or the barcode scanner

Production Order List

	Order #			Part #	(comma separated)		Warehouse	All
Revision			Date	(from)	- (to)		Date Type	Ship Date
Transcode / Status	Open Build Orders		First Article?	All			Shipped Today?	☐

More Options ▾

Submit

Displaying 1 - 27 of 27   Export   +/- Columns

Order	Loc	Line	Qty	Ship Qty	QOH	Prcpart	Customer	Work Start Date	Ship Date	Dock Date	Ext. Resale	Work Loc	Trans Code	Production Line
15.1	MN	3	4	0	49	FIGPRODUCT2	Internal Account	2018-03-26	2018-03-30	2018-03-14	$480.00	Machine #1	Build	None
15.1	MN	4	4	0	49	FIGPRODUCT2	Internal Account	2018-03-26	2018-03-30	2018-03-14	$480.00	Machine #1	Build	None
15.1	MN	5	2	0	49	FIGPRODUCT2	Internal Account	2018-03-26	2018-03-30	2018-03-14	$240.00	Machine #1	Build	None
16.1	MN	1	245	0	261	FIGPRODUCT	Internal Account	2018-04-11	2018-04-11	2018-04-11	$0.00	Warehouse	Build	None

To find the job, your worker on the job floor can enter the workorder number in the global search or likely search the Production Orders list:

Production Order List

Order #		Part #	(comma separated)	Warehouse	All ▾
Revision		Date	(from) - (to)	Date Type	Ship Date ▾
Transcode / Status	Open Build Orders ▾	First Article?	All ▾	Shipped Today?	☐
Cust. PO		Show Production Mgmt?	☐	→ Location	Assembly Station #1 / At Vendor Outsourcing / Big Saw / Clean Room / Engineering Time
Exclude Selected Locations?	☐	Order Status	All ▾	→ Production Line	All ▾
Customer Number		Customer Name		Supervisor	All ▾
No Work Instr.	☐	Req'd Work Instr.	Hide Column (fast) ▾	QA Inspector	All ▾
Intercompany?	All ▾	On Target?	All ▾	Production Status	All ▾
Department		Order Type	All ▾	Ship Via	All ▾
Tag		Outsourcing	All ▾	Stage	All ▾
→ Assigned To	All ▾	Inside Sales	All ▾	Outside Sales	All ▾

Help

There are a number of fields to customize a search so that only the refresh is needed for your production worker.

They can run their report and click directly into the workorder.

Here is the overview of the Workorder screen, or a job. Notice under the modules that we have shifted into the Production tab of Cetec.

This is what your Production people on the floor would use.

The first thing we need to do on a job, is to pick the parts needed for manufacturing or kitting. So click into the pick parts screen.

Pick Parts For Work Order: 144.1 Line Item: 1

WORKORDER
OVERVIEW
COMPLETE/RECEIVE
HISTORY
SPLIT LINE
PICK PARTS
DEKIT PARTS
MAINT/ETC +
SERIALS
INSPECTIONS
OUTSOURCE PO
DOCUMENTS

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

BOM Part Number	FIG-FINISHEDPRODUCT				Customer	1 - Internal Account			First Article?	No
Qty Due	5				Qty To Ship	0			Location	MN
Shortage Comments	(Shortage Comments)								Hide Picked?	☐
Prcpart									Printable Version	

Item	Prc	Part	Rev	Qty Need	Qty Picked	Bin		Lot Code	Receipt	Bin Qty	Pick Qty/Serial Number
1	RAW	123		5	0	1	A-1-2	1940001	208	5	⬚ 0 ▾
Part Description: source component 123											
2	RAW	1214366		25 EA	0	6	A-73-99		7	100 EA	⬚ 0 ▾
							C-11-31		69	998 EA	⬚ 0 ▾

Now we can pick our parts by bin and lot code

You can enter the number manually or click pick all lines at the bottom of the screen and select update

You can also set the workorder location after parts have been picked using the dropdown. Click update to save and register the change.

Back in the workorder screen, our job floor worker can proceed with production. Notice the work location has been set, and we can access workorder documents like the license plate.

Here we can also log time on a job.

There will be work instructions from the BOM revision labor plan that can require sign off, include photos, etc.
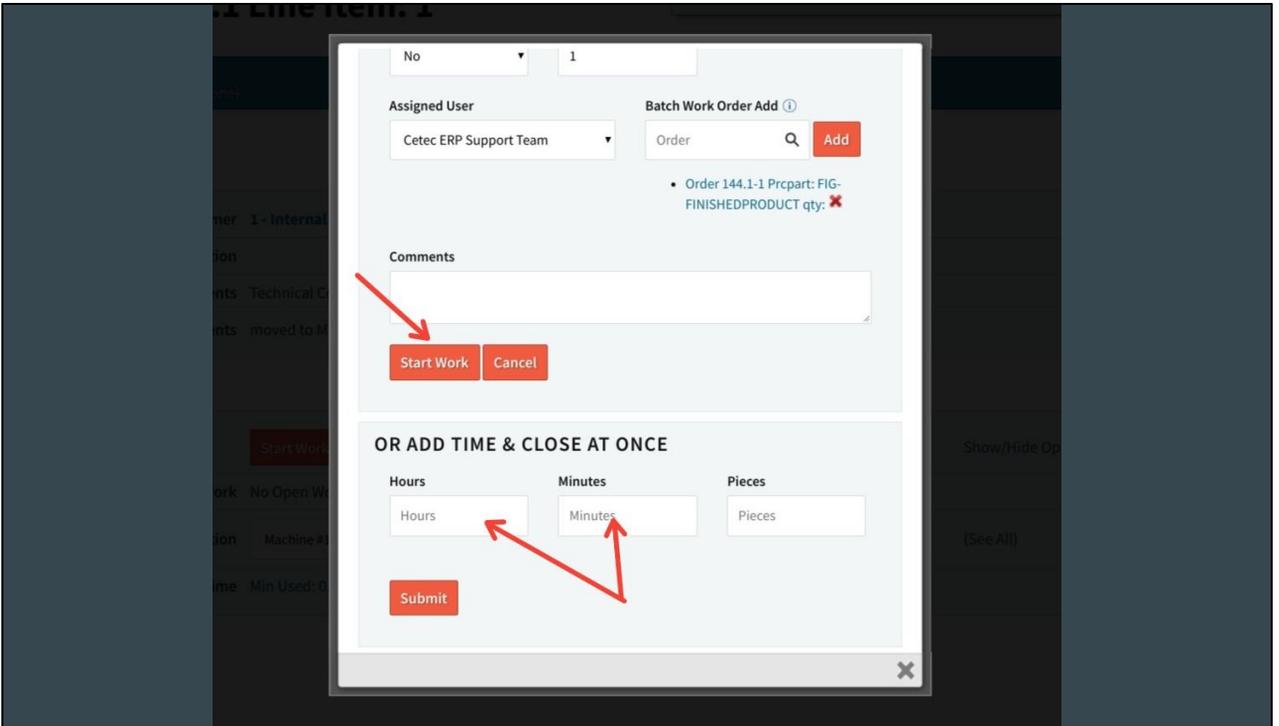
If we click Start Work, Cetec will track the time.

We can enter batch times as well.

Work / Labor Tracking

Start Work   Show/Hide Open Work

→ Open Work   Stop Work   User techx working since 2019-10-14 15:23:51 in Inspection **# Pieces Finished:** [   ]

Work Location   Machine #1 ▾   Set   Partial   (See All) | **Next Up:** Machine #2
                                                   Required Work Instructions! ⓘ
                                                   Override Requirement? ☐
                                                   (override comments)   Set

Work Time   Min Used: 133.8, Est: 1320.0

Order Progress
(Total Labor Min.)   ▬▬▬▬
                0   50 100 150 200 250 300 350 400 450 500 550 600 650 700 750 800 850 900 950 1,000 1,050 1,100 1,150 1,200 1,250 1,300

Work Instructions (Show/Hide)

Location/Operation	Instruction	Response	Status

So once we've completed production, we need to complete and receive our finished product and put it away on the shelves to be sold.

So go to Complete/Receive

Complete/Receive Internal Order 123.1

On the Complete/Receive screen, we can set the ship qty when parts have been picked, and print our packing label and packing slip.

We can confirm the qty to be relieved (useful in partial shipments, where parts might be picked in full, but shipped partial).

Click update and then Complete/Receive Product.

When you do this, the raw components will be consumed in cetec and removed from the bin. Until now they've been reserved but still exist as individual inventory. NOW they will exist only as a part of the finished product.

Purchase Order Receipt 211 2019-10-03 (Part FIG-FIN..........

Success: Material Completed/Received ✕

VIEW
EDIT
LEDGER
LABEL
SERIAL LABELS
DOCUMENTS (0)
NOTES (0)
PO MN128.1
INVOICE 144.1
CANCEL RECEIPT

	Prcpart	FIG-FINISHEDPRODUCT		Received On	2019-10-03	Received By	Cetec ERP Support Team
	P.O. Number - Line	128.1 - 1		Packing Slip #		Vendor	Internal Vendor (1)
	Location	MN		Cost	$7.39500	Qty	5
	Receipt ID	91		Receipt Code	211 View Pieces/Serials	Name	
	Receipt Notes						

CURRENT BINS

	Bin	Date Code	Lot Code	Inv Layer ID	Revision	Quantity
Move	NEW	1940	1940001	211		5

(NO SHIPMENTS FROM THIS RECEIPT)

CUSTOMER/FINAL SHIPMENTS FROM THIS RECEIPT

Location	Invoice	Nosi	Line	Component No.	Date Code	Lot Code	Revision	Ship Qty	Bin Location	Cost

You'll be taken the receipt screen for the finished product where you can then put away into a bin on the shelf.

Receipt Move: 211-100319

Back To All Receipts

Prcpart	FIG-FINISHEDPRODUCT	**Receipt**	211-100319	**PO - Line**	128.1 - 1
Move Qty	5	**Datecode / Lotcode**	1940 / 1940001	**Revision**	
From Bin	NEW			**To Bin**	❶ Finished Goods
					Submit

(No other Bins for this Part have Qty in Location MN)

Sales Order

Quoting & Quote PDF

Commit to Order

Final Invoicing

Go to sales > quotes > quote list OR new quote

You can create a new quote from the quote list

Quote/Order Worksheet 145

Sales Editing: Cetec ERP Support Team ▾

VIEW & EDIT
SEND +
COMMIT TO ORDER
QUOTING TOOLS +
COMMISSION
DOCUMENTS (0)
NOTES (0)
PREPAY
CREATE PQUOTE

	Customer		Contact
Cust PO #		Owner techx	Status Open
Inside Sales		Outside Sales	

Add Line   **Change All Lines**

Show Open Lines ▾   **Submit**

+/- Columns

#	PRC	Part	Ship Date	Dock Date	Qty	Cost	Resale	Ext. Cost	Ext. Resale	Discount	
		🔍	2019-10-03	2019-10-03	1	Cost	Resale				**Add**
						Freight Resale Estimate:	Freight Discount:			Final Freight Resale:	
										Tax (0%):	
								Ext. Cost:		Ext. Resale:	
								Total Cost:	$0.00	Total Resale:	**Delete**

CLick the pencil to enter the customer

There are a few required fields: Customer, Cust PO #, Ship To, Ship Via

You can use the More Options carrot to enter more quote header info that will track with the quote through to order and invoicing.

Click OK to save the changes

Then we need to enter our lines for the goods we are selling.

Click add line, enter prcpart, cust part #, qty, check cost, set transcode to stock and hit ok & add

Again, use more options to enter line comments, sourcing comments, price breaks for the quote

We can send out our quote w/ the PDF.

Other options with our quote would be to send to engineering or purchasing for review. You can add commissions

Quote/Order Worksheet 145

Sell Process 1 **2** 3 4 5
2. Commit Order

VIEW & EDIT
SEND +
PDF/EMAIL (QUICK)
EXCEL FILE
PRICE BOOK
COMMIT TO ORDER
QUOTING TOOLS +
COMMISSION
DOCUMENTS (0)
NOTES (0)
PREPAY
CREATE PQUOTE

✎ 🔎

Customer	Products & More (2) Products & More 111 Congress Ave #400 Austin, TX 78701 UNITED STATES		Contact
Cust PO # 12345		**Owner** techx	**Status** Open
Inside Sales		**Outside Sales**	

Add Line | **Change All Lines**   Show Open Lines ▾ **Submit**

+/- Columns

#	PRC	Part	Ship Date	Dock Date	Qty	Cost	Resale	Ext. Cost	Ext. Resale	Discount	
1	FIG	-FINISHEDPRODUCT	2019-10-03	2019-10-10	5	$7.39	$7.39	$36.97	$36.97	Add	✎ ⓘ ⊡ ✖
		🔍	2019-10-03	2019-10-03	1	Cost	Resale				Add

	Freight Resale Estimate:	Freight Discount:		Final Freight Resale:	
				Tax (City Sales Tax 2%):	
			Ext. Cost:	$36.97	Ext. Resale:
			Total Cost:	$37.71	Total Resale:	Delete

When the quote has been reviewed internally, and approved by the customer it's time to commit order for order fulfilment

Quote/Order Worksheet 145

VIEW & EDIT
SEND +
COMMIT TO ORDER
QUOTING TOOLS +
COMMISSION
DOCUMENTS (0)
NOTES (0)
PREPAY
CREATE PQUOTE

Sell Process 1 **2** 3 4 5
2. **Commit Order**

ⓘ **Commit Order** ⟵ Create Separate Order For Each Quote Line? ☐

Order Notices (Doesn't Prohibit Order Entry)
Line 1 Ship Date should be 2019-09-30 based on Customer Ship Ahead Days (10)

🔍

Customer	Products & More (2)	Contact
	Products & More 111 Congress Ave #400 Austin, TX 78701 UNITED STATES	
Cust PO # 12345	Owner techx	Status Open
Inside Sales	Outside Sales	

Check/Uncheck All Lines ☑ **Change All Lines**

+/- Columns

Order?	#	PRC	Part	Ship Date	Dock Date	Qty	Cost	Resale	Ext. Cost	Ext. Resale
☑	1	FIG	-FINISHEDPRODUCT	2019-10-03	2019-10-10	5	$7.39	$7.39	$36.97	$36.97

From our order screen, we can download and send the Pro Forma, packing slip, and packing label.

We've just completed the finished product and put it on the shelf, so we can move with invoicing. But you can do stock checks through the Order.

You can send it to warehosue for picking the parts and shipping as well.

When ready, select Invoice/Ship

Adjust the Ship Qty, pick your parts, click update

Then Print your packing docs

Inside Sales					**Outside Sales**						
Ship Via Fedex Ground					**Customer Email** info@products.com						
Tax Group City Sales Tax (2%)					**Terms** NET30				**FOB** S - Shipment		
Order Type Scheduled					**Ship Type** Partial				**Status** New (0)		
Ship To Products & More 111 Congress Ave #400 Austin, TX 78701 UNITED STATES											

Tracking Numbers (comma delimited)

Freight Charge $0.00   **Freight Cost** $0.00   Update   Create Invoice

Line #	Ship Qty	Qty Due	Prcpart	Cost	Resale	Work Start Date	Ship Date	Dock Date	Status	Ext. Cost	Tax	Ext. Resale
1	5 (Pick)	5	FIG-FINISHEDPRODUCT	$7.39	$7.39	2019-10-10	2019-10-03	2019-10-10	Scheduling	$36.97	$0.00	$36.97

Parts Picked	Description	Bin	Qty Picked	Qty To Relieve
No Parts Picked!				

Fully Ship   Add To Skid   Freight: $0.00

Pick Everything? ☑   Use Est. Labor? ☐   Tax (City Sales Tax 2%): $0.74

Fill Labor? ☐   Total: $36.98 $37.71

Pick Parts For Distribution Order: 145.1 Nosi 0

Information: Part Pick Recorded ✕

WORKORDER
OVERVIEW
INVOICE/SHIP
HISTORY
OTHER PART ORDERS
SPLIT LINE
PICK PARTS
DEKIT PARTS
MAINT/ETC +
SERIALS
INSPECTIONS
OUTSOURCE PO
DOCUMENTS

**Sell Process** 1 2 3 **4** 5
4. Pick Parts/Material Line 1(done)

	Part Number	FIG-FINISHEDPRODUCT		Customer	2 - Products & More		First Article?	No
	Qty Due	5		Qty To Ship	5		Location	MN

Printable Version

Item	Prc	Part	Rev	Qty Need	Qty Picked	Bin		Lot Code	Receipt	Bin Qty	Pick Qty/Serial Number
1	FIG	-FINISHEDPRODUCT		5	▌	1	Finished Goods	1940001	211	0	5	0 ▾

Set Workorder Location To: Shipping ▾ Update Update, Go To Order List

Invoice/Ship Order | Pick All Lines
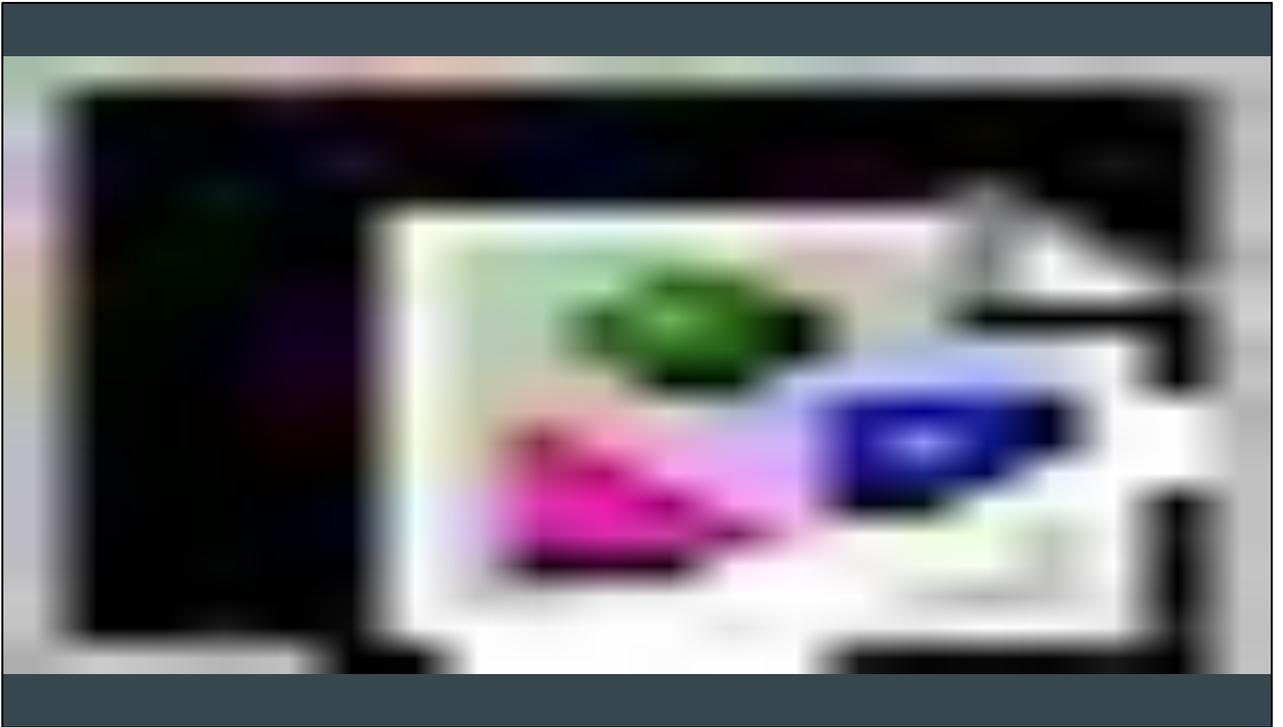
Finally, click Create Invoice, which means in Cetec that you have shipped the finished good. So we will relieve the inventory and this will immediately hit the ledger

Here's our final Invoice screen, where we can see the Ledger impact, the cost analysis, and download and print/send the Invoice.

We can also take payment now, or Create an RMA down the road.

Invoice 145.1 NOSI: 1

VIEW
EDIT
LEDGER
DETAILS/SERIALS
COST ANALYSIS
SHIP AND DEBITS
SELL AGAIN
UNINVOICE
PDF (QUICK)
COMMISSION
TAKE PAYMENT
CREATE RMA
PACKING SLIP
TRACEABILITY DOC
DOCUMENTS (0)
NOTES (0)
ORDER 145.1

Sell Process 1 2 3 4 **5**
5. Invoice 145.1

Customer	Products & More
Bill To	Products & More 111 Congress Ave #400 Austin TX 78701 UNITED STATES
Ship To	Products & More 111 Congress Ave #400 Austin TX 78701 UNITED STATES
Invoice Date	2019-10-03
P.O. Number	12345
Inside Sales	
Ship Via	Fedex Ground
Terms	NET30
Tracking Numbers	
Internal Comments	
Comments	

Location	MN
Entry Date	2019-10-03
Terms	NET30
Outside Sales	
FOB	Shipment
Freight Cost	$0.00

+/- Columns

Line #	Ship Qty	Prcpart	Cust Part Number	Adjust Cost	Adjust GM	Cost	GM	Resale	Ext. Cost	Ext. Resale
1	5	FIG-FINISHEDPRODUCT		$7.39	0%	$7.39	0%	$7.39	$36.97	$36.97

Invoice 145.1 NOSI: 1

Sell Process 1 2 3 4 **5**
5. Invoice 145.1

Customer	Products & More	**Location**	MN
Bill To	Products & More 111 Congress Ave #400 Austin TX 78701 UNITED STATES		
Ship To	Products & More 111 Congress Ave #400 Austin TX 78701 UNITED STATES		
Invoice Date	2019-10-03	**Entry Date**	2019-10-03
P.O. Number	12345	**Terms**	NET30
Inside Sales		**Outside Sales**	
Ship Via	Fedex Ground	**FOB**	Shipment
Terms	NET30	**Freight Cost**	$0.00
Tracking Numbers			
Internal Comments			
Comments			

+/- Columns

Line #	Ship Qty	Prcpart	Cust Part Number	Adjust Cost	Adjust GM	Cost	GM	Resale	Ext. Cost	Ext. Resale
1	5	FIG-FINISHEDPRODUCT		$7.39	0%	$7.39	0%	$7.39	$36.97	$36.97

Q&A

Review
-Internal workorder
-Purchasing
-Receiving and put away
-Completing and job
-Processing an external sales order

Any questions?