

Cetec ERP

Digital Transformation

...

Outline

What & Why of Digital Transformation

How in Cetec

Workflow, Document Management, Barcoding

Cetec ERP Process

Setting Up Workflow and Barcodes

What is Digital Transformation

Digital transformation is the integration of technology into all areas of a business

Moving towards paperless driven processes and task-management

Represents a significant culture change for companies, and risk

Digital transformation is the integration of **digital** technology into all areas of a business, fundamentally changing how you operate and deliver value to customers

Why make the effort?

Increased efficiency

Improved accountability internally

Ability to scale and grow

Staying relevant and competitive

Accountability - digital actions are tracked and auditable to see who has touched what (digital signature)

Workflow & Document Management

The unsung heroes of Cetec ERP software

Attached to every business object in Cetec (hard to demo)

Most transformational for business process and company culture for our customers

Barcoding & digitally statusing orders

The two features we'll focus on primarily today will be workflow and document management, as they are the secret (hidden) sauce of Cetec ERP.

Like a Tim Duncan, or Greg Popovich - fundamental, not flashy, but reliable and consistent, and improves everything else.

They're apart of every business object in Cetec, making them hard to demo and not always the most flashy. But they have shown to be the most transformational and impactful for our customers who use them regularly.

Also will look at barcoding and digitally statusing orders.

Intro Workflow

Task assignment internally

Track where processes are at, set reminders

My Tasks

Tasks & processes could apply to quotes,

Workflow List

Workflow		
NCR	Edit	Avg Queue Time
Lead	Edit	Avg Queue Time
Opportunity	Edit	Avg Queue Time
ECO	Edit	Avg Queue Time
Document	Edit	Avg Queue Time
PQuote	Edit	Avg Queue Time
Quote	Edit	Avg Queue Time
Project	Edit	Avg Queue Time
Voucher	Edit	Avg Queue Time
CAR	Edit	Avg Queue Time
Ordline	Edit	Avg Queue Time

You can build an internal workflow customized for you business process. Around any of these business objects

Tasks & Reminders

Tasks (Items Assigned Via Workflow)

User: Object Type: Date Entered:

<< Previous | 1 2 3 | Next >>
Displaying 1 - 50 of 126 +/- Columns

Object	Object Type	Object Name	Comments	User	Assigned At	Assigned By	Workflow State
Quote 9	Quote	9		Cetec ERP Support Team	2018-02-16 21:43:44	Cetec ERP Support Team	Sales Editing
Quote 12	Quote	12		Cetec ERP Support Team	2018-02-16 21:49:10	Cetec ERP Support Team	Sales Editing
PQuote 7	PQuote	7		Cetec ERP Support Team	2018-02-16 22:46:52	Cetec ERP Support Team	Working
PQuote 8	PQuote	8		Cetec ERP Support Team	2018-02-16 22:47:25	Cetec ERP Support Team	Working
Lead 4	Lead	4		Cetec ERP Support Team	2018-02-18 21:27:49	Cetec ERP Support Team	Qualification

When a workflow assignment happens, it both emails the user and shows up in the My Tasks screen. Located under the sandwich menu, and My Tasks.

You can search by object type and date.

You'll also see all of your own uploaded documents and your own notes posted anywhere.

Voucher 6 (From Chris Stearns)  Inbox x



Chris Stearns <outbound@cetecerp.com>
to scott ▾

Tue, Oct 15, 9:40 AM (1 day ago) ☆ ↶ ⋮

Voucher 6 State: Closed

Priority: 3


Currently Assigned To: scott

Assigned By: Chris Stearns

URL: <https://3-2.cetecerpdevel.com/voucher/6/edit>

(This is an automated email and will not process replies)

 Reply

 Reply all

 Forward

Intro Doc Mgmt

Cetec-generated documents

Globalize/Localize documents

Process documents

Document Attachment & revisions

Cetec-generated docs:

Process docs: categorizing documents, like a file system: HR docs, training docs, etc.
Less google drive and more a repository for ISO-compliance because they are rev-controlled

Document attachment: upload (or scan) and attach docs anywhere, and have the most recent revision accessible along with previous document revisions; require approval

Our file-system is native. Most ERP's assume you have a separate file system you link to and reference, requiring maintenance. Cetec is the file system.

How - Cetec ERP Process

Order Entry: Quote > Order

Purchasing: MRP > PQuote > PO

Warehouse > Receiving/Put Away > Order Release

Order Release > Picking > Production > Invoice

Invoice > Accounting: A/R & A/P

How do these work in Cetec?

I'll be following a standard Cetec process, though you could adapt how workflow & doc mgmt match your process.

You might even consider how to change/improve internal processes.

We'll start at order entry: a quote entered by sales rep George that needs review and approval before being committed to order.

That will drive demand for materials, so before we release an order, we will purchase the material and see pquote approval.

Once we've placed the PO and received the material, we put the material away and can release the order to the job floor for picking and production.

After Inspections, the finished product is ready for shipping and invoicing.

Finally, we have money to collect and money to pay.

We can use workflow tools and doc mgmt at pretty much any point in the manufacturing process to improve communication, efficiency, visibility, and control.

Quote

Workflow

Assign new Quote to accounting, engineering, or purchasing for review and editing

Doc Mgmt

Attach Customer PO, refer to Part or Customer record documents

Under the Quote object you can assign a quote for review or approval

Anecdote!!! Workflow are digital tools (native to Cetec ERP) that are leveraged in vastly different ways to help you Build A Process!! (Neurovision using for quote approvals)

Under documents, you can attach the customer PO, load a CAD drawing, or refer to part/customer record documents. The native nature means that documents will flow through, and are able to be emailed to the customer.

CETEC ERP SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES FORECASTS REPORTS

Quote/Order Worksheet 11

Sales Editing: George Smith

VIEW & EDIT
 SEND +
 COMMIT TO ORDER
 QUOTING TOOLS +
 COMMISSION
 DOCUMENTS (0)
 NOTES (0)
 CLONED FROM 8
 PREPAY
 CREATE PQQUOTE

Sell Process 1 2 3 4 5
 2. Commit Order

Customer Products & More (2)
 Products & More 111 Congress Ave #400 Austin, TX 78701 UNITED STATES

Contact

Cust PO # 0239485 Owner johnsmith 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	PRODUCT	2018-02-16	2018-02-16	10	EA	\$112.90	\$150.00	\$1,128.99	\$1,500.00	Add
		Q	2019-10-04	2019-10-04	1	Cost	Resale				Add

Freight Resale Estimate: Freight Discount: Final Freight Resale:

Workflow and documents attached to every business object in Cetec. They are here, and here

Quote/Order Worksheet 11 Sales Editing: George Smith

VIEW & EDIT
SEND +
COMMIT TO ORDER
QUOTING TOOLS +
COMMISSION
DOCUMENTS (0)
NOTES (0)
CLONED FROM 8
PREPAY
CREATE PQQUOTE

Drop Files Here Browse Upload All

CustPO_0239485.pdf Tags (Attach to Self) Upload ✕

23.10 KB

Browse files, find customer PO, and upload to the Quote
This will follow from quote, through to order, and all the way to invoice. So we can access the customer PO at any point in the process.

You can attach

Quote/Order Worksheet 11

Sales Review & Approval: George Smith

- VIEW & EDIT
- SEND +
- PDF/EMAIL (QUICK)
- EXCEL FILE
- PRICE BOOK
- COMMIT TO ORDER
- QUOTING TOOLS +
- COMMISSION
- DOCUMENTS (1)
- NOTES (0)
- CLONED FROM 8
- PREPAY
- CLONED QUOTES +
- ORDERS +
- CREATE PQQUOTE
- INVOICES +

Drop Files Here [Browse](#)

QUOTE 11

Filter by Name

Name	Tags	Alive	Revision	Uploader	Created On	Move	Global	
CustPO_0239485.pdf	(Edit)	Yes	1	Cetec ERP Support Team	2019-10-04 11:18:41 AM	(Target) Move	Globalize	✕
GlobalizeQuote.pdf	(Edit)	Yes	1	Cetec ERP Support Team	2019-10-09 11:31:39 AM	(Target) Move	Localize	✕

PART FIG-FINISHEDPRODUCT

Filter by Name

Name	Tags	Alive	Revision	Uploader	Created On	Move	Global	
Drawing.png	(Edit)	Yes	1	Cetec ERP Support Team	2019-10-04 12:04:33 PM	(Target) Move	Globalize	✕

We have the newly uploaded Cust PO, along with the documents from our part record. Customer documents would also be accessible through the quote.

Interrelated business object

Quote/Order Worksheet 11

Sales Editing: George Smith

VIEW & EDIT

SEND +

PDF/EMAIL (CLICK)

EXCEL FILE

PRICE BOOK

COMMIT TO ORDER

QUOTING TOOLS +

COMMISSION

DOCUMENTS (0)

NOTES (0)

CLONED FROM 8

PREPAY

CREATE PQOTE

Customize PDF

Bold Row

<input checked="" type="checkbox"/> Header Comment	<input type="checkbox"/> Quote Internal Name	<input checked="" type="checkbox"/> Bill To	<input checked="" type="checkbox"/> Ship To	<input checked="" type="checkbox"/> Show Tech Comments	<input checked="" type="checkbox"/> Sales Contacts
<input checked="" type="checkbox"/> Ship Type	<input checked="" type="checkbox"/> Totals	<input type="checkbox"/> Ship Via	<input checked="" type="checkbox"/> Shipping Instructions	<input checked="" type="checkbox"/> Show Quote Rev	<input checked="" type="checkbox"/> Show Carrier Account
<input type="checkbox"/> Prcpart	<input type="checkbox"/> PRC	<input checked="" type="checkbox"/> Weight	<input checked="" type="checkbox"/> Part #	<input checked="" type="checkbox"/> Customer Part	<input type="checkbox"/> Revision
<input checked="" type="checkbox"/> Ship Date	<input type="checkbox"/> Dock Date	<input type="checkbox"/> Lead Time	<input checked="" type="checkbox"/> Qty	<input checked="" type="checkbox"/> Resale	<input checked="" type="checkbox"/> Tax
<input checked="" type="checkbox"/> Ext. Price	<input type="checkbox"/> Discount	<input checked="" type="checkbox"/> Part Description	<input checked="" type="checkbox"/> Tech Description	<input checked="" type="checkbox"/> Line Comment	<input type="checkbox"/> Line Taxes
<input checked="" type="checkbox"/> Line Warnings	<input checked="" type="checkbox"/> Line Images	<input type="checkbox"/> ECCN	<input type="checkbox"/> COO	<input type="checkbox"/> Commissions Info	

Set Columns

Download PDF

Email PDF

PREVIEW

Quotation

Quote Number: 11

Revision: 1

Date: 2019-10-04

Buyer: ||

CETEC ERP

From

Manufacturing Solutions
1700 Montpelier Dr, Suite F

Bill To

Products & More
111 Congress Ave #400

Ship To

Products & More
111 Congress Ave #400

Interrelated business object

Quote 12

- VIEW & EDIT
- SEND +
- COMMIT TO ORDER
- QUOTING TOOLS +
- COMMISSION
- DOCUMENTS (2)
- NOTES (0)
- CLONED FROM 8
- PREPAY
- CREATE PQUOTE

Email PDF

From

"Cetec ERP Support Team" <sales@cetecerp.com>

To (comma delimited)

recipient@example.com

(Contacts)

CC (comma delimited)

cc@example.com

(Contacts)

BCC (comma delimited)

bcc@example.com

(Contacts)

Attach Extra Documents

- GlobalizeQuote.pdf
- CAD.xlsx

Subject

Manufacturing Solutions - Quote #12 (PO #0239485)

Body

Please see attachment.

Interrelated business object

CETEC ERP SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ORDERS INVOICES CUSTOMERS LEADS OPPORTUNITIES FORECASTS REPORTS

Quote/Order Worksheet 11

Sales Editing: George Sm

VIEW & EDIT
 SEND +
 PDF/EMAIL (QUICK)
 EXCEL FILE
 PRICE BOOK
 COMMIT TO ORDER
 QUOTING TOOLS +
 COMMISSION
 DOCUMENTS (0)
 NOTES (0)
 CLONED FROM 8
 PREPAY
 CREATE PQQUOTE

Sell Process 1 2 3 4 5
 2. Commit Order

Customer Products & More (2)
 Products & More 111 Congress Ave #400 Austin, TX 78701 UNITED STATES

Contact

Cust PO # 0239485 Owner johnsmith Status Open

Inside Sales Outside Sales

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	PRODUCT	2018-02-16	2018-02-16	10	EA	\$112.90	\$150.00	\$1,128.99	\$1,500.00	Add
			2019-10-04	2019-10-04	1	Cost	Resale				

Freight Resale Estimate: Freight Discount: Final Freight Resale:

Attach the Customer PO as a document

Quote/Order Worksheet 11

Sales Review & Approval: George Smith

VIEW & EDIT
SEND +
PDF/EMAIL (QUICK)
EXCEL FILE
PRICE BOOK
COMMIT TO ORDER
QUOTING TOOLS +
COMMISSION
DOCUMENTS (1)
NOTES (0)
CLONED FROM 8
PREPAY
CLONED QUOTES +
ORDERS +
CREATE PQOTE
INVOICES +

Drop Files Here [Browse](#)

QUOTE 11

Filter by Name

Name	Tags	Alive	Revision	Uploader	Created On	Move	Global
CustPO_0239485.pdf	(Edit)	Yes	1	Cetec ERP Support Team	2019-10-04 11:18:41 AM	(Target) Move Globalize X	<input type="checkbox"/>
GlobalizeQuote.pdf	(Edit)	Yes	1	Cetec ERP Support Team	2019-10-09 11:31:39 AM	(Target) Move Localize X	<input type="checkbox"/>

PART FIG-FINISHEDPRODUCT

Filter by Name

Name	Tags	Alive	Revision	Uploader	Created On	Move	Global
Drawing.png	(Edit)	Yes	1	Cetec ERP Support Team	2019-10-04 12:04:33 PM	(Target) Move Globalize X	<input type="checkbox"/>

Globalize vs Localize

You can attach some documents to a business object w/ "Globalize", meaning that document would be attached to every Quote, not just specific quotes.

So for example, you may have a generic document that needs to be filled out for request. Or just a process-related document to be easily accessible for your sales people.

This will apply everywhere we can attach documents as well - parts, order lines, etc.

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

Quote/Order Worksheet 11

VIEW & EDIT
 SEND +
 COMMIT TO ORDER
 QUOTING TOOLS +
 COMMISSION
 DOCUMENTS (0)
 NOTES (0)
 CLONED FROM 8
 PREPAY
 CREATE PQOTE

Sell Process 1 2 3 4 5
 2. Commit Order

Customer Products & More (2)
 Products & More 111 Congress Ave #400 Austin, TX 78701 UNITED STATES

Cust PO # 0239485 Owner johnsmith

Inside Sales Outside Sales

Add Line Change All Lines

+/- Columns

#	PRC	Part	Ship Date	Dock Date	Qty	Cost	Resale	Ex
1	FIG	PRODUCT	2018-02-16	2018-02-16	10	EA	\$112.90	\$150.00
		Q	2019-10-04	2019-10-04	1		Cost	Resale

Freight Resale Estimate: Freight Discount:

Sales Editing: George Smith

SALES EDITING

Assigned to George Smith for < 1 minute

Move To

- SusanD To Accounting Review
- John Smith To Engineering Review
- SusanD To Purchasing Review
- George Smith To Sales Review & Approval
- George Smith (Reassign, Keep Sales Editing)

Assignment Comments (if changing)

CC List Set CCs

Priority 3 Set (1 is High)

Edit Workflow Assignment Options

Close Workflow

Here's a sample quote workflow, where we can assign the quote for review by accounting or engineering or purchasing. Or even up the chain for quote approval. When you assign to a user, like Susan, she would get an email and a task assignment from Cetec for either accounting review or purchasing review.

You can create visibility and improve internal communication.

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

Quote/Order Worksheet 11

VIEW & EDIT
SEND +
COMMIT TO ORDER
QUOTING TOOLS +
COMMISSION
DOCUMENTS (1)
NOTES (0)
CLONED FROM 8
PREPAY
CREATE PQQUOTE

Sell Process 1 2 3 4 5
2. Commit Order

Customer Products & More (2)
Products & More 111 Congress Ave #400 Austin, TX 78701 UNITED STATES

Cust PO # 0239485 Owner johsmith

Inside Sales Outside Sales

Add Line Change All Lines

+/- Columns

#	PRC	Part	Ship Date	Dock Date	Qty	Cost	Resale	Ex
1	FIG	PRODUCT	2018-02-16	2018-02-16	10	EA	\$112.90	\$150.00
		Q	2019-10-04	2019-10-04	1		Cost	Resale

Freight Resale Estimate: Freight Discount:

Purchasing Review: SusanD ▾

PURCHASING REVIEW

Assigned to SusanD for < 1 minute

Move To

George Smith ▾ To Sales Editing

SusanD ▾ To Accounting Review

George Smith ▾ To Engineering Review

George Smith ▾ To Sales Review & Approval

SusanD ▾ (Reassign, Keep Purchasing Review)

Assignment Comments (if changing)

CC List

Set CCs

Priority

3 ▾ Set (1 is High)

So we've assigned this quote to Susan for purchasing review. And she's seen it, made suggestions, and is sending back to George for final sales approval and to commit to order.

Order 11.1

- VIEW
- EDIT
- DETAILS/SERIALS
- INVOICE/SHIP
- DELETE LINE/ALL
- PDF (QUICK)
- PRO FORMA PDF
- COMMISSION
- RELEASE TO WH
- WORKORDER VIEW +
- PREPAY
- PACKING SLIP (QUICK)
- PACKING LABEL
- FULL ORDER PLATE
- DOCUMENTS (0)
- NOTES (0)
- QUOTE 11
- CREATE PQUOTE
- CREATE WO
- OUTSOURCE POS (0)

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

Customer	Products & More (2)	Location	MN	Ordered On	2019-10-04
Buyer		P.O. Number	023948	Assembly?	Yes
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)
Carrier Account #					
Inside Sales			Outside Sales		
Ship To	Products & More 111 Congress Ave #400 Austin, TX 78701 UNITED STATES				

+/- Columns

#	Qty	Code	Prcpart	Rev	Work Start Date	Ship Date	Status	Ext. Resale
1	10 EA	Stock	FIGPRODUCT	1.0	2019-10-16	2019-10-07	Scheduling	\$1,500.00
2	10	Build	FIG-FINISHEDPRODUCT	(unnamed)	2019-10-04	2019-10-07	Scheduling	\$200.00
A Tax (City Sales Tax 2%):								\$34.00
Freight:								\$0.00
Total:								\$1,734.00

Now we have a newly committed order, ideally ready for production.

First, this order will drive demand for purchasing before we can release it to the warehouse for picking and production.

Purchasing - PQuote

Workflow

Enable purchasing \$ threshold and require manager approval

Documents

PQuote from MRP > Attaches part waterfall report at time of pquote

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

PQUOTES PURCHASE ORDERS RECEIPTS VENDORS **MRP**

MRP Requirements

Standard Mode Refresh

MRP generated as of 10/04/19 12:12 PM in 'Standard' Mode using Allocation data from 2019-10-04 12:12:27.
Last refresh took 00 minutes, 10 seconds.

Vendor: All Location: Manufacturing Solutions Product Manager: []

Source Type: All Prcpart: Search parts... Hide Ignore: []

Expand All Part Info?: No Order #: [] Leadtime Qualifier: Cushion days

Internal Vendors: All BOMs: Exclude Preferred Vendor: []

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

Displaying 1 - 9 of 9 Export +/- Columns

All?	Part	Description	Leadtime	Need Date	Buy Date	QOH	Cost	Ext Cost	ROP	Sum Req'd Qty	Vendor	Source
<input type="checkbox"/>	1714538	Terminal-B	0			75198	\$0.03	\$644.85	100000	24802 EA	Unassigned	ROP

Now we put on Susan's hat, as purchasing. And navigate to MRP.

Do you want to buy ? Or build ? Less Options

Buy

Displaying 1 - 9 of 9 Export +/- Columns

<input type="checkbox"/> All?	Part	Description	Leadtime ①	Need Date ①	Buy Date ①	QOH	Cost	Ext Cost	ROP	Sum Req'd Qty ①	Vendor ①	Source
<input type="checkbox"/>	11112	Terminal-B	0			75196	\$0.03	\$644.85	100000	24802 EA	Unassigned	ROP
<input type="checkbox"/>	11113	Terminal-Ring	0	2019-06-28		0	\$250.00	\$10,000.00	2000	40 EA	Unassigned	Supply/Demand
<input type="checkbox"/>	11114		0	2019-07-23		156	\$1.00	\$1,544.00	0	1544	Raw (Unassigned)	Supply/Demand
<input type="checkbox"/>	11115		0	2019-07-23		7338	\$20.00	\$755,240.00	0	37762	Raw (Unassigned)	Supply/Demand
<input type="checkbox"/>	-123124		0	2019-09-03		0	\$0.00	\$0.00	0	300	Unassigned	Supply/Demand
<input type="checkbox"/>	CAN-I-CREATE-A-PART-NUMBER		0	2019-09-12		0	\$0.00	\$0.00	0	2	Unassigned	Supply/Demand
<input checked="" type="checkbox"/>	123	source component 123	0	2019-10-04		0	\$2.00	\$20.00	0	10	Master Distributor	Supply/Demand
<input checked="" type="checkbox"/>	-SOURCEDCOMP		0	2019-10-04		0	\$2.00	\$20.00	0	10	Master Distributor	Supply/Demand
<input checked="" type="checkbox"/>	11112	Bottle	10 2019-10-14	2019-10-30	2019-10-20	100000	\$1.00	\$99,050.00	0	99050	Master Distributor	Supply/Demand

Displaying 1 - 9 of 9 Export +/- Columns

Susan works through the MRP report and creates a new PQuote for the raw materials needed on our order.

CETEC ERP PARTS PURCHASING WAREHOUSE ADMIN

PQUOTES PURCHASE ORDERS RECEIPTS VENDORS MRP

PQuote/PQuote Worksheet 132

Working: SusanD

VIEW
 IMPORT
 SPREADSHEET
 CONVERT TO PO
 CLOSE
 PDF/EMAIL (QUICK)
 CLONE
 DOCUMENTS (3)
 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
Location	MN	Owner	SusanD
Created At	10/04/19 12:19 PM	Terms	1 - NET30
PO Comment		Scheduled	N
PQuote Comment		Cost Center	
Vendor Phone Number	800-781-4820	Vendor Min Order Amount	\$0.0000

Add Line Change All Lines

+/- Columns

#	Qty	Prcpart	Revision	Dock Date	Sched?	PPV	Ext. Cost
---	-----	---------	----------	-----------	--------	-----	-----------

In a PQuote, just as in the quote, we have the documents and workflow tools.

However, you may want to require an approval on purchases over a certain dollar amount. We can use workflow to manage and approve this PQuote.

PQuote 135

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

Drop Files Here [Browse](#)

PQUOTE 135

Filter by Name

Name	Tags	Alive	Revision	Uploader	Created On	Move	Global
RAW5938173_184_Waterfall.html	waterfall	Yes	1	Cetec ERP Support Team	2019-10-15 01:24:31 PM	(Target) Move Globalize X	
SKU-3385_185_Waterfall.html	waterfall	Yes	1	Cetec ERP Support Team	2019-10-15 01:24:32 PM	(Target) Move Globalize X	

PART SKU-3385

Filter by Name

Name	Tags	Alive	Revision	Uploader	Created On	Move	Global
Screen Shot 2019-06-19 at 8.29.38 AM.png	(Edit)	Yes	1	Cetec ERP Support Team	2019-06-19 08:30:03 AM	(Target) Move Globalize X	

PQuote/PQuote Worksheet 132

Working: SusanD

- VIEW
- IMPORT
- SPREADSHEET
- CONVERT TO PO
- CLOSE
- PDF/EMAIL (QUICK)
- CLONE
- DOCUMENTS (3)
- NOTES (0)
- HISTORY

Show Sticky Notes

Buy Process 1 2 3
2. Convert To PO

Vendor	Master Distributor (2)		
Status	Open	FOB	D - Delivery
Location	MN	Owner	SusanD
Created At	10/04/19 12:19 PM	Terms	1 - NET30
PO Comment			
PQuote Comment			
Vendor Phone Number	800-781-4820	Vendor Min Order Amount	\$0.0000

Add Line Change All Lines

+/- Columns

#	Qty	Prcpart	Revision	Dock Date	Sched
---	-----	---------	----------	-----------	-------

WORKING

Assigned to SusanD for 21 minutes

Move To

SusanD

Request Quote From Vendor

John Smith

Submit For Approval

SusanD

(Reassign, Keep Working)

Assignment Comments (if changing)

CC List

Set CCs

Priority

Priority 3 (1 is High)

Close Workflow

This stage is for building the PQuote.

We assign the PQuote up the chain for manager approval

PQuote 132

- VIEW
- IMPORT
- SPREADSHEET
- CONVERT TO PO
- CLOSE
- PDF/EMAIL (QUICK)
- CLONE
- DOCUMENTS (3)
- NOTES (0)
- HISTORY

Buy Process 1 2 3
2. Convert To PO

PO CONVERSION PROHIBITED UNTIL ALL CONDITIONS ARE MET



Not Approved

Vendor	Master Distributor (2)			Contact	
Status	Open	FOB	D - Delivery	Ship Via	UPS Ground
Location	MN	Owner	SusanD	Taxable	No
Created At	10/04/19 12:19 PM	Terms	1 - NET30	Scheduled	
PO Comment			Cost Center		
PQuote Comment					
Vendor Phone Number	800-781-4820	Vendor Min Order Amount	\$0.0000		

+/- Columns

#	Qty	Prcpart	Revision	Dock Date	Sched?	PPV	Ext. Cost
1	100	RAW123 [+]		2019-10-04	Unsched.	\$0.0000	\$200.0000
2	100	RAW-SOURCEDCOMP [+]		2019-10-04	Unsched.	\$0.0000	\$200.0000

This particular pquote is above Susan's threshold so as she goes to convert to PO, she isn't able to proceed w/ out manager approval.

PQuote/PQuote Worksheet 132

VIEW

IMPORT

SPREADSHEET

CONVERT TO PO

CLOSE

PDF/EMAIL (QUICK)

CLONE

DOCUMENTS (3)

NOTES (0)

HISTORY

Pending Approval: John Smith

PENDING APPROVAL

Assigned to John Smith for < 1 minute

Move To

John Smith Denied

John Smith Approve

John Smith (Reassign, Keep Pending Approval)

Assignment Comments (if changing)

CC List Set CCs

Priority 3 Set (1 is High)

Edit Workflow Assignment Options

Close Workflow

High

Buy Process 1 2 3

2. Convert To PO

Vendor Master Distributor (2)

Status Open **FOB** D - Delivery

Location MN **Owner** SusanD

Created At 10/04/19 12:19 PM **Terms** 1 - NET30

PO Comment

PQuote Comment

Vendor Phone Number 800-781-4820 **Vendor Min Order Amount** \$0.0000

Add Line Change All Lines

+/- Columns

#	Qty	Prupart	Revision	Dock Date	Sched

So Susan will use the PQuote workflow to assign to John for approval.

Once the manager reviews, John just has to click approve and assign back to Susan. There is actually even a config to auto-convert to PO upon approval.

PQuote/PQuote Worksheet 133

Approved: SusanD

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

Show Sticky Notes

Buy Process 1 2 3
 2. Convert To PO

Vendor Master Distributor (2)
 Status Open
 Location MN
 Created At 10/04/19 12:00 AM
 Vendor Phone Number 800-781-4820

FOB D - Delivery
 Owner SusanD
 Terms 1 - NET30
 Vendor Min Order Amount \$0.0000

Add Line Change All Lines

+/- Columns

#	Qty	Prcpart	Revision	Dock Date	Sched			
1	100	RAW123	[+]	2019-10-04	Unsched.	\$0.0000	\$200.0000	

APPROVED

Assigned to SusanD for < 1 minute

Move To
 SusanD Revoke Approval
 SusanD (Reassign, Keep Approved)

Assignment Comments (if changing)

CC List Set CCs

Priority Priority 3 (1 is High)

Close Workflow

Remove Approval

John receives the email with the task assignment, takes a look, and reassigns back to Susan with approval so she can convert to PO and make the necessary purchase.

You can also enable it to auto-convert upon approval.

Purchase Order 133.1 (Location: MN)

Success: PO MN133.1 Created

- VIEW
- EDIT
- DELETE LINE/ALL
- ACKNOWLEDGE
- PDF/EXPORT (QUICK)
- DOCUMENTS (0)
- NOTES (0)
- CLOSE PO
- PQUOTE 133

Show Sticky Notes

Buy Process 1 2 3
3. Receive

Vendor	Master Distributor (2)	Location	MN	Contact	
Buyer	SusanD	P.O. Number	133.1	Shipvia	UPS Ground
FOB	Delivery	Taxable	No	Terms	NET30
Entry Date	2019-10-04	Scheduled	No	Tax Rate	0
PO Comment		Location	MN	Cost Center	

+/- Columns

#	Prupart	Revision	Dock Date	Requested Arrival	Qty	Net Order Qty	Qty Recvd	Ext. Cost	Status
1	RAW123		2019-10-04		100	100	0	\$200.0000	Open Receive
2	RAW-SOURCEDCOMP		2019-10-04		100	100	0	\$200.0000	Open Receive
3	PRT1112		2019-10-04		1000	1000	0	\$1,000.0000	Open Receive

Now that we have the components on order, we'll have to switch hats to our Warehouse for receiving and put away.

Warehouse - Receiving & Put Away

Barcode the warehouse

Speed up put away process

Improve inventory mgmt during the picking process

You can actually barcode your entire warehouse, and go completely paperless with barcode scanners and barcodes for each bin.

Receive Parts

[Back to Pending Put-Away](#)

Help

PO	133.1	PO Line	1 Part RAW123	Packing Slip #	
Prupart	RAW123	Unit Cost	2.00000000 Landed Cost	Quantity	100 + Pieces/Serials
Location	Manufacturing Solutions	Date	2019-10-04		
Date Code		Lot Code	1940002	Revision	
Expires On		Lock Bin	<input type="checkbox"/>	Receive	Receive & Keep PO
Part Description source component 123					
Part Image					
PO Due Date 2019-10-04 PO Buyer SusanD					
Inspection Instructions					
Qty Accepted	100	Qty Rejected	0	Receipt Notes	

Prupart: RAW452312

Revision: N/A

Part Desc: N/A

Lot Code: 1942002



Receipt Code: 222



Receipt Created On: 2019-10-16

Bin: 001-001-001



Bin: 001-001-002



Bin: 001-001-003



Bin: 001-001-004



Bin: 001-001-005



Bin: A-2-3



Receipts Pending Put Away

View Pending Receipts For Warehouse:

+/- Columns

Receipt	Prcpart	PO - Line	Lotcode	Date code	Revision	Received On	Put Away Qty	
49	FIGPRODUCT2	3.1 - 2	1919001	1919		2019-05-08	24	Put Away
(Non-PO)	RAW9000-B	-				2019-05-17	50	Put Away
(Non-PO)	RAW9000-A	-				2019-05-17	50	Put Away
56	SUB200	68.1 - 1	1922005	1922		2019-05-31	1	Put Away
60	PRT56781234	46.1 - 1	1926002			2019-06-26	5	Put Away
61	PRT56781234	46.1 - 1	1926004	1-2039		2019-06-26	10	Put Away
65	RAWETHANOL	75.1 - 1	ABC123			2019-07-11	98	Put Away
66	FIG-FINISHED CASE OF CBD OIL	76.1 - 1	1928002	1928		2019-07-11	2	Put Away
67	FIGPRODUCT321	77.1 - 1	1929003			2019-07-16	1	Put Away
68	PRT56781234	46.1 - 1	1929001			2019-07-18	70	Put Away
(Non-PO)	SKU1013	-	192874	7/22/2019		2019-07-22	1500	Put Away

Scan receipt
Goes to put away page for receipt

Receipt Put Away: 213-100419

[Back To All Receipts](#)

Prcpart	RAW123	Receipt	213-100419	PO - Line	133.1 - 1
Put Away Qty	<input type="text" value="100"/>	Datecode / Lotcode	/ 1940002	Revision	
From Bin	NEW	To Bin	<input type="text" value=""/>	Use A-Z, 0-9, hyphen and space only	
				<input type="button" value="Submit"/>	

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

Help

Put Away: 213-100419

Prcpart	RAW123	Receipt	213-100419	PO - Line	133.1 - 1
Put Away Qty	<input type="text" value="100"/>	Datecode / Lotcode	/ 1940002	Revision	
From Bin	NEW	To Bin	<input type="text" value="A-1-2"/>	<input type="button" value="Submit"/>	

this Part have Qty in Location MN)

Can code barcode scanner to scan and submit, and it will take you back to the put away screen.

Screen next receipt

Assign/Release Orders

Batch assign orders to users and/or work locations

Use barcode scanners to scan into the order

Can either be fully digital using workflow task management or run parallel w/ paper license plates to scan into a job

Once parts have been ordered and put away, jobs can be released to the shop floor for picking and production.

Our production manager can batch assign orders to workers and/or work locations, who can then give status on their own jobs.

Here you can go fully digital, using 'My Tasks' to assign and then navigate into a work order, the labor plan natively integrated into the workorder screen, and the ability to change work locations and reassign a job using workflow.

Managers can real time see the status of a job, and report on bottlenecks in efficiency.

You can also run parallel, printing off travelers (or license plates) for the floor and utilizing scanners.

Release To Pick

Manage Pick Queues

Date (from) - (to) Work Order Assigned To All
Customer Search customers... Trans Code All Work Loc Scheduling
Ship Type All Order Type All Location All
Short Per Allocation? All More Options **Submit**

Scheduling **Move Orders** Full Order Plate **Batch 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	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	6	5	Docs	Order Plate	Plate	<input checked="" type="checkbox"/>
40.2	1		SUB100	Internal Account	2018-11-19	2018-11-28	2018-11-28	No	3	John Smit set	0		Docs	Order Plate	Plate	<input checked="" type="checkbox"/>

We can batch move orders to any work location in the warehouse. And then print our license plates for your job floor workers to scan into.

You also have the Assign To option. Where I can actually assign specific jobs to Joe Worker. So rather than him scanning into a job, or typing into a job. Joe can look at his task list and see what workorders have been assigned to him, and then click into them without needing the scanner or anything else. He'd have access to all necessary documents - the license plate w/ picklist, work instructions, etc.

License Plate

Customer Products & More

Ship Date: 2019-10-07

Purchase Order: 023948

Work Start Date: 2019-10-04

Revision:

Labor Estimate: 180.00 = 180.00 min or 3.00 hrs

Part Desc:

Comment:

Qty: 10

Part Number: -FINISHEDPRODUCT



Order 11.1 Line Item: 2
(Part Of 11.1 FIG-FINISHEDPRODUCT)



Pick List

Item	Prctpart	Description	Cust Part	Rev	Qty Per Top	Net Qty Req'd	Qty Picked
1	RAW123	source component 123			1	10	0
2	RAW1214366	Botl			5 EA	50 EA	0
3	RAW-SOURCEDCOMP				1	10	0

Estimated Labor Plan per Part

1. Machine #1

1. Generic 1 Min Operation

Operations: 1

Repetitions: 10 (10 minutes)

2. Inspection

1. Generic 1 Min Operation

Operations: 1

Repetitions: 5 (5 minutes)





3. Shipping

1. Generic 1 Min Operation

Operations: 1

Repetitions: 3 (3 minutes)

Order Plate

<p>Work Start Date: 2019-10-16</p> <p>Revision: 1.0</p> <p>Labor Estimate: 1280.00 = 1280.00 min or 21.33 hrs</p> <p>Part Desc:</p> <p>Comment:</p> <p>Qty: 10</p>	 Order Line 11.1 Line Item: 1 																		
<table border="0" style="width: 100%;"> <thead> <tr> <th style="text-align: left;">Item</th> <th style="text-align: left;">Prupart</th> <th style="text-align: left;">Description</th> <th style="text-align: right;">Qty Per Top</th> <th style="text-align: right;">Net Qty Required</th> <th style="text-align: right;">Qty Picked</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>FIGPRODUCT</td> <td></td> <td style="text-align: right;">10</td> <td style="text-align: right;">10</td> <td style="text-align: right;">0</td> </tr> <tr> <td colspan="6">Part Requires Tools:</td> </tr> </tbody> </table>		Item	Prupart	Description	Qty Per Top	Net Qty Required	Qty Picked	1	FIGPRODUCT		10	10	0	Part Requires Tools:					
Item	Prupart	Description	Qty Per Top	Net Qty Required	Qty Picked														
1	FIGPRODUCT		10	10	0														
Part Requires Tools:																			
<p>Ship Date: 2019-10-07</p> <p>Work Start Date: 2019-10-04</p> <p>Revision:</p> <p>Labor Estimate: 180.00 = 180.00 min or 3.00 hrs</p> <p>Part Desc:</p> <p>Comment:</p> <p>Qty: 10</p>	<p>Part Number: -FINISHEDPRODUCT</p>  Order Line 11.1 Line Item: 2 																		
<table border="0" style="width: 100%;"> <thead> <tr> <th style="text-align: left;">Item</th> <th style="text-align: left;">Prupart</th> <th style="text-align: left;">Description</th> <th style="text-align: right;">Qty Per Top</th> <th style="text-align: right;">Net Qty Required</th> <th style="text-align: right;">Qty Picked</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>RAW123</td> <td>source component 123</td> <td style="text-align: right;">1</td> <td style="text-align: right;">10</td> <td style="text-align: right;">0</td> </tr> </tbody> </table>		Item	Prupart	Description	Qty Per Top	Net Qty Required	Qty Picked	1	RAW123	source component 123	1	10	0						
Item	Prupart	Description	Qty Per Top	Net Qty Required	Qty Picked														
1	RAW123	source component 123	1	10	0														

Workorder - Picking Parts

Pick Queue screen to see which jobs are released for picking

Use the barcode scanner to scan which bin parts are picked from on the floor

Workflow

Immediately assign to the next work location or worker for production

So now that we've assigned our job to the warehouse for picking, we can scan into the

These are all digital workflows

Pick Q

- RELEASE SALES ORDERS TO PICK/SHIP
- RELEASE BUILD ORDERS
- RELEASE ORDERS - ALL
- MANAGE PICK QUEUES
- PICK QUEUE**

Part Request:

Your orders:

Location

Orders

Warehouse

4

Displaying 1 - 4 of 4 +/- Columns

Order	Line	Code	Prctpart	Customer	Work Start Date	Ship Date	Pick
16.1	1	SA	FIGPRODUCT	Internal Account	2018-04-11	2018-04-11	Pick
34.1	1	SA	FIGPRODUCT	Internal Account	2018-11-09	2018-11-20	Pick
38.1	1	SA	JOB-ABE1	Internal Account	2018-12-04	2018-12-04	Pick
11.1	2	SA	FIG-FINISHEDPRODUCT	Products & More	2019-10-04	2019-10-07	Pick

Displaying 1 - 4 of 4 +/- Columns

Help

Pick Parts For Work Order: 123.1 Line Item: 1

- WORKORDER
- OVERVIEW
- COMPLETE/RECEIVE
- HISTORY
- OTHER PART ORDERS
- 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 (done)

BOM Part Number NEU1234 Customer 1 - Internal Account First Article? No
Qty Due 46 Qty To Ship 46 Location MN
Shortage Comments (Shortage Comments) Hide Picked?
Prctpart [Printable Version](#)

Item	Prc	Part	Rev	Qty Need	Qty Picked	Bin	Lot Code	Receipt	Bin Qty	Pick Qty	Serial Number
1	PRT	56781234		46	<input checked="" type="checkbox"/>	4 NEW-1	1926002	156	0	<input type="text" value="5"/>	<input type="text" value="0"/>
						NEW-2	1926004	157	0	<input type="text" value="10"/>	<input type="text" value="0"/>
						NEW	1929001	167	39	<input type="text" value="31"/>	<input type="text" value="0"/>
						NEW-3	9384092	192	10	<input type="text"/>	<input type="text" value="0"/>

Part Description: 2 in. wire

Set Workorder Location To:

Use scanners and scan receipt barcode

Click in the text box and scan

Prctpart: RAW452312

Revision: N/A

Part Desc: N/A

Lot Code: 1942002



Receipt Code: 222



Receipt Created On: 2019-10-16

Item	Prc	Part	Rev	Qty Need	Qty Picked	Bin	Lot Code	Receipt	Bin Qty	Pick Qty/Serial Number
1	RAW	123		10	<input checked="" type="checkbox"/>	1 A-1-2	1940002	213	100	<input type="text" value="10"/> <input type="text" value="0"/>
Part Description: source component 123										
2	RAW	1214366		50 EA	<input checked="" type="checkbox"/>	6 A-73-99		7	75 EA	<input type="text" value="50"/> <input type="text" value="0"/>
						C-11-31		69	998 EA	<input type="text"/> <input type="text" value="0"/>
						E-33-88	23904823	72	50 EA	<input type="text"/> <input type="text" value="0"/>
						K-51-21		98	90 EA	<input type="text"/> <input type="text" value="0"/>
						C-11-31-1	73103	191	400 EA	<input type="text"/> <input type="text" value="0"/>
Part Description: Bolt										
3	RAW	-SOURCEDCOMP		10	<input checked="" type="checkbox"/>	1 B-1-2	1940004	215	100	<input type="text" value="10"/> <input type="text" value="0"/>

Set Workorder Location To:

Can assign to Machine #1 and update to log the parts picked, and move it through the shop floor

ORDERS ▾ QUALITY ▾ PART ▾ KITAUDIT ▾ MGMT ▾ TOOLS ▾ SCHEDULING ▾ Tap Here To Scan

Workorder (Build): 11.1 Line Item: 2

Pre-Release: Cetec ERP Support Team ▾

PRE-RELEASE
Assigned to Cetec ERP Support Team for 3 hours, 3 minutes

Move To
Joe Worker ▾ To In Process
Cetec ERP Support Team ▾ To Completed
Cetec ERP Support Team ▾ (Reassign, Keep Pre-Release)

Assignment Comments (if changing)

CC List
 Set CCs

Priority
3 ▾ Set (1 is High)

Edit Workflow Assignment Options
Close Workflow

WORKORDER
OVERVIEW
INVOICE/SHIP
HISTORY
OTHER PART ORDERS
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, Line 2(done)
Hide Warnings
Order Has Comments

Customer	2 - Products & More	Prcpart	FIG-FINISHEDPRODUC
Ship Date	2019-10-07	Description	
Order Comments	moved to Warehouse by techx Placed In Pick Queue For User: johnsmith (Release Qty: 10.00000000) moved to Machine #1 by johnsmith (see more)		

Work / Labor Tracking

Start Work Show/Hide Open Work

Open Work No Open Work

Work Location Machine #1 ▾ Set Partial

(See All) | Next Up: Inspection
Required Work Instructions! ⓘ
Override Requirement?
(override comments)

We can also assign to the next user w/ the workflow tool in the workorder screen. This would bring the job up in their "My Tasks"

Use this, along with labor plan to replace paper travelers

Workorder - Machine #1

Joe Worker can quickly navigate into a job

- By scanning into the job w/ the license plate

- By utilizing “My Tasks”

- Using the “Bookmark” and having a pre-set filtered report to show his jobs or jobs by work location

Joe can log time w/ the barcode scanner

Access ordline docs or part, quote, customer record documents flowing through

Use the workflow or location tools to send to the next user or work location

CETEC ERP PRODUCTION 11.1-2

ORDERS

Production Order List

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

Hello, Joe Worker
 Lite Support Plan
 MY BOOKMARKS
 MY PROFILE
 MY TIME
 MY TASKS
 MY DOCUMENTS
 MY EXPORTS
 LOGOUT

Displaying 1 - 5 of 5 Export +/- Columns

Order	Line	Qty	Ship Qty	QOH	Prupart	Work Start Date	Ship Date	Work Loc
15.1	3	4	0	49	FIGPRODUCT2	2018-03-26	2018-03-30	Machine #1
15.1	4	4	0	49	FIGPRODUCT2	2018-03-26	2018-03-30	Machine #1
15.1	5	2	0	49	FIGPRODUCT2	2018-03-26	2018-03-30	Machine #1
50.1	1	1	0	0	JOB50	2019-06-03	2019-06-06	Machine #1
11.1	2	10	0	0	FIG-FINISHEDPRODUCT	2019-10-04	2019-10-07	Machine #1

There are a number of ways to navigate into the workorder screen

- Bookmark the report for location, assigned to, or even order status to see the list
- Use My Tasks
- To use the barcode scanner, click in the global search and scan the workorder

Production Order List

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

Set search fields and bookmark the report to build out a working task list on the Production Order List

Tasks & Reminders

- PROFILE
- TWO FACTOR
- TIME LOGGED
- TASKS
- TRIVIA
- DOCUMENTS (0)
- EXPORTS
- ALL NOTES BY ME
- NOTES (0)

Tasks (Items Assigned Via Workflow)

Object Type: All | Date Entered: (from) - (to) | **Submit**

Displaying 1 - 2 of 2 +/- Columns

Object	Object Type	Object Name	User	Assigned At	Assigned By	Workflow State
Ordlne 112	Ordlne	11.1-2	Joe Worker	2019-10-04 15:00:42	John Smith	In Process
Ordlne 111	Ordlne	11.1-1	Joe Worker	2019-10-04 15:02:29	Joe Worker	Pre-Release



Displaying 1 - 2 of 2 +/- Columns


Reminders

Reminder Date: 2019-10-04 - (to) | **Submit**

Displaying 0 - 0 of 0 Export +/- Columns

Object	Object Type	Object ID	Note	Note Type	Created By	Created On	Reminder Date
--------	-------------	-----------	------	-----------	------------	------------	---------------

CETEC ERP PRODUCTION  

ORDERS 

Workorder (Build): 11.1 Line Item: 2 In Process: Joe Worker

WORKORDER HISTORY PICK PARTS DEKIT PARTS DOCUMENTS

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

Hide Warnings

Order Has Comments

Customer	2 - Products & More	Prcpart	FIG-FINISHEDPRODUCT
Ship Date	2019-10-07	Description	
Order Comments	moved to Warehouse by techx Placed In Pick Queue For User: johnsmith (Release Qty: 10.00000000) moved to Machine #1 by johnsmith (see more)		

Work / Labor Tracking

Show/Hide Open Work

Open Work No Open Work

Work Location | **Next Up: Inspection**
Required Work Instructions!

Work Time Min Used: 0.0, Est: 180.0

Help

Joe is into the workorder, sees his work instructions, the part drawing, etc. is ready to begin work.

He can scan to start work, and cetec will log time

Workorder (Build): 14.1 Line Item: 1

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

GENERATED / RELATED DOCUMENTS

Document						
RoHS	Qty: 20	Substance Exception: N/A				
RoHS China	Qty: 20	Substance Exception: N/A				
C. O. C.:	Qty: 20	Override Date Code: 1942	<input type="button" value="Set"/>	<input type="text" value="Search using"/>	<input type="text" value="Date"/>	<input type="button" value="Set Comments"/> <input type="button" value="Physically Sign"/>
Reach						
Plate						
Full Order Plate						
Work List						
Part Pick List						
PreControl Charts (Edit)						
Serial List, Top & Component						

Drop Files Here

ORDLINE 14.1-1

Filter by Name

Name	Tags	Alive	Revision	Uploader	Created On	Move	Global	
SKM_C45819100914200.pdf	(Edit)	Yes	1	Cetec ERP Support Team	2019-10-15 04:04:40 PM	(Target) Move	Globalize	✖

PART FIG-FINISHEDPRODUCT

Filter by Name

Name	Tags	Alive	Revision	Uploader	Created On	Move	Global	
Drawing.png	(Edit)	Yes	1	Cetec ERP Support Team	2019-10-04 12:04:33 PM	(Target) Move	Globalize	✖

QUOTE 14

Filter by Name

Name	Tags	Alive	Revision	Uploader	Created On	Move	Global	
GlobalizeQuote.pdf	(Edit)	Yes	1	Cetec ERP Support Team	2019-10-09 11:31:39 AM	(Target) Move	Localize	✖

Help

Workorder (Build): 11.1 Line Item: 2

In Process: Joe Worker

- WORKORDER
- HISTORY
- PICK PARTS
- DEKIT PARTS
- DOCUMENTS

Build Process 1 2 3 4 5
3. Pick Parts/Material Line 1, Line 2(done)
Hide Warnings
Order Has Comments

Customer	2 - Products & More	Prcpart	FIG-FINISHEDPRODUCT
Ship Date	2019-10-07	Description	
Order Comments	moved to Warehouse by techx Placed In Pick Queue For User: johnsmith (Release Qty: 10.00000000) moved to Machine #1 by johnsmith (see more)		

Work / Labor Tracking

Start Work Show/Hide Open Work

Open Work **Stop Work** User joe working since 2019-10-04 16:43:50 in Machine #1 # Pieces Finished:

Work Location **Set** | **Next Up: Inspection**
Required Work Instructions!

Work Time **Min Used: 0.0, Est: 180.0**



Work Instructions (Show/Hide)

When Joe is completed with work, he scans again to stop work. Then send to the next work location, or assign with the workflow

Workorder (Build): 11.1 Line Item: 2

- WORKORDER
- HISTORY
- PICK PARTS
- DEKIT PARTS
- DOCUMENTS

Build Process 1 2 3 4 5
3. Pick Parts/Material Line 1, Line 2(done)

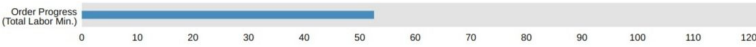
Hide Warnings

Order Has Comments

Customer	2 - Products & More	Prctpart	FIG-FINISHEDPRODUCT
Ship Date	2019-10-07	Description	
Order Comments	moved to Warehouse by techx Placed In Pick Queue For User: johnsmith (Release Qty: 10.00000000) moved to Machine #1 by johnsmith (see more)		

Work / Labor Tracking

Start Work	Show/Hide Open Work	
Open Work	No Open Work	
Work Location	Inspection Set	Next Up: Inspection Required Work Instructions
Work Time	Min Used: 52.6, Est: 180.0	



Work Instructions (Show/Hide)

Location/Operation	Instruction	Response	Status
--------------------	-------------	----------	--------

IN PROCESS

Assigned to Joe Worker for 1 hour, 56 minutes

Move To

- Joe Worker **To Pre-Release**
- John Smith **To Completed**
- John Smith **To Quality Review**
- Joe Worker **(Reassign, Keep In Process)**

Assignment Comments (if changing)

CC List

Priority

Priority 3 (1 is High)

Close Workflow

Being Fulfilled

The next stage in this job is inspections

Workorder - Inspections

Log data digitally

Create NCR, follow a workflow for ISO-compliant quality process

Create a CAR

Require digital Inspection sign off

Cetec has a built-out, ISO compliant workflow for NCRs and CARs.

So you can log data digitally, and track and report on quality issues

Workorder (Build): 11.1 Line Item: 2

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

Qty Inspected	<input type="text" value="10"/>	Qty Inspected field is required	Inspection Type	<input type="text" value="Final"/>	Inspection type field is required
Qty Accepted	<input type="text" value="8"/>	Qty Accepted field is required	Pass	<input type="text" value="1st"/>	Pass field is required
Qty Rejected	<input type="text" value="2"/>	Qty Rejected field is required	Inspector	<input type="text" value="johnsmith"/>	
Production Line	<input type="text" value="Choose"/>		Work Location	<input type="text" value="Machine #1"/>	
Date Code	<input type="text" value="100719"/>	Date Code field is required	Inspector Text	<input type="text"/>	
Assembler	<input type="text" value="Joe Worker"/>	Assembler field is required	Comments	<input type="text"/>	
New Serial	<input type="text"/>				<input type="button" value="Submit"/>

Displaying 0 - 0 of 0 +/- Columns

Location	TLA	FA?	Date	Qty Inspected	Qty Accepted	Qty Rejected	Inspection Type	Pass	Date Code	Inspector	Inspector Text	Production Line	Assembler	Comments	Serials	NCR
----------	-----	-----	------	---------------	--------------	--------------	-----------------	------	-----------	-----------	----------------	-----------------	-----------	----------	---------	-----

Displaying 0 - 0 of 0 +/- Columns

Here we log inspections - required data and click submit

Workorder (Build): 11.1 Line Item: 2

- WORKORDER
- OVERVIEW
- INVOICE/SHIP
- HISTORY
- OTHER PART ORDERS
- SPLIT LINE
- PICK PARTS
- DEKIT PARTS
- MAINT/ETC +
- OTHER PART ORDERS
- SPLIT LINE
- SCHEDULE
- NOTIFICATIONS
- WIP AGING REPORT
- WORK REPORT
- BUILD W/ SUBS
- ORDER MATERIAL
- KIT AUDIT
- BOM MANAGEMENT
- CHANGE REV
- LABOR PLAN
- MANAGEMENT

QC - Work Order Inspection Work Order: 11.1-2

Set Failure Details

Failure	Component #	Component Prcpart	Serial	Reference Designator
1 F05 - Pin Alignment	1	RAW123		
2 F00 - FINAL INSP				

You can enter specifics according to the parts that fail inspections, or just default them

Workorder (Build): 11.1 Line Item: 2

Information: Inspection Added

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

Qty Inspected	<input type="text"/>	Qty Inspected field is required	Inspection Type	Choose	Inspection type field is required
Qty Accepted	<input type="text"/>	Qty Accepted field is required	Pass	Choose	Pass field is required
Qty Rejected	<input type="text"/>	Qty Rejected field is required	Inspector	Choose	
Production Line	Choose		Work Location	Choose	
Date Code	<input type="text"/>	Date Code field is required	Inspector Text	<input type="text"/>	
Assembler	<input type="text"/>	Assembler field is required	Comments	<input type="text"/>	
New Serial	<input type="text"/>				<input type="button" value="Submit"/>

Displaying 1 - 1 of 1 +/- Columns

	Location	TLA	FA?	Date	Qty Inspected	Qty Accepted	Qty Rejected	Inspection Type	Pass	Date Code	Inspector	Assembler	Serial	NCR	
View / Edit	Machine #1	FIG-FINISHEDPRODUCT		2019-10-07	10	8	2	Final	1	100719	johnsmith	Joe Worker		Create NCR	delete

Displaying 1 - 1 of 1 +/- Columns

After the inspection has been logged we can create an NCR

ORDERS ▾ QUALITY ▾ PART ▾ RTADDIT ▾ MGMT ▾ TOOLS ▾ SCHEDULING ▾

NCR 14

VIEW NCR
DOCUMENTS (0)
NOTES (0)
HISTORY

Back To All

For Customer Products & More (# 2)

NCR Type	Accounting (Internal) ▾ Edit
Order/Line	11.1 Line Item: 2
Assigned To	johnsmith Edit Assignments
Source	Inspection 20
Vendor	<input type="text"/>
Source Desc	Qty Inspected: 10 Qty Failed:2 Rejected Because of FINAL INSP: 1 Rejected Because of Pin Alignment: 1
Due Date:	<input type="text"/>

Creation: John Smith ▾

CREATION

Assigned to John Smith for < 1 minute

Move To

George Smith ▾ [Send To Review](#)

John Smith ▾ [\(Reassign, Keep Creation\)](#)

Assignment Comments (if changing)

CC List

[Set CCs](#)


Priority

3 ▾ [Set](#) (1 is High)

Edit Workflow Assignment Options

[Close Workflow](#)

Create the NCR.



The NCR workflow starts at creation. Then moves to Review

NCR 14

VIEW NCR
DOCUMENTS (0)
NOTES (0)
HISTORY

Back To All

For Customer Products & More (# 2)

NCR Type Accounting (Internal) Types Edit

Order/Line 11.1 Line Item: 2

Assigned To georgesmith Edit Assignments

Source Inspection 20

Vendor

Source Desc Qty Inspected: 10 Qty Failed:2
Rejected Because of FINAL INSP: 1
Rejected Because of Pin Alignment: 1

Due Date:

REVIEW
Review: George Smith

Assigned to George Smith for < 1 minute

Move To

- George Smith Back To Creation
- George Smith Send To Escalation
- John Smith Send To MRB
- George Smith (Reassign, Keep Review)

Assignment Comments (if changing)

CC List Set CCs

Priority 3 Set (1 is High)

Edit Workflow Assignment Options

Close Workflow

Once we've moved it to Review, you'll notice the NCR screen changes, with more/different data to input. The workflow also changes accordingly. We send back to creation, to escalation, or to our MRB.

We can follow the process all the through to the creation of a CAR if so desired

Work / Labor Tracking

Start Work Show/Hide Open Work

Open Work Stop Work User johnsmith working since 2019-10-07 16:31:51 in Inspection # Pieces Finished:

Work Location Inspection Location Locked Pending Work Instr

(See All) | Next Up: Shipping
Required Work Instructions! ⓘ
 Override Requirement? ⓘ
 Set

Work Time Min Used: 82.6, Est: 180.0

Order Progress (Total Labor Min.) 0 10 20 30 40 50 60 70 80 90 100 110 120 130 140 150 160 170 180

Work Instructions (Show/Hide)

Location/Operation	Instruction	Response	Status
1. Machine #1	Show/Hide # Operations: 1		(not scheduled)
2. Inspection	(Current Location)		(not scheduled)
1. Generic 1 Min Operation	Repetitions: 5 (5 minutes est)		
	Sign Off Required	<input type="text" value="JS"/>	(Response Req'd) Done
3. Shipping	Show/Hide # Operations: 1		(not scheduled)

Show/Hide Deleted Records

Once the inspection is complete, we can log our required instructions labor plan initials

Process control made possible by founding the process in a digital format

Workorder (Build): 11.1 Line Item: 2

WORKORDER
OVERVIEW
INVOICE/SHIP
HISTORY
OTHER PART ORDERS
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**, Line 2(done)

Hide Warnings

Order Has Comments

Customer	2 - Products & More	Prupart	FIG-FINISHED PRODUC
Ship Date	2019-10-07	Description	
Order Comments	moved to Warehouse by techx Placed in Pick Queue For User: johnsmith (Release Qty: 10.00000000) moved to Machine #1 by johnsmith (see more)		

Work / Labor Tracking

[Start Work](#) [Show/Hide Open Work](#)

Open Work No Open Work

Work Location Shipping [Set](#) [Partial](#)

(See All) | **Next Up: Machine #1**
Required Work Instructions! ⓘ
Override Requirement? ⓘ
(override comments)

Work Time Min Used: 83.5, Est: 180.0

Quality Review: John Smith

QUALITY REVIEW

Assigned to John Smith for 12 minutes

Move To

John Smith	To Pre-Release
John Smith	To In Process
George Smith	To Completed
John Smith	(Reassign, Keep Quality Review)

Assignment Comments (if changing)

CC List [Set CCs](#)

Priority 3 [Set](#) (1 is High)

Edit Workflow Assignment Options

[Close Workflow](#)

Inspections have been completed, and we are ready to ship, so we assign over to shipping for packaging and printing packing label and final invoicing

Accounting - A/P

Utilitize the Voucher workflow

On the accounting side of things, you can utilize workflow

Edit Voucher 6

Entered: Scott Ryan

- EDIT
- LEDGER
- CLONE
- HISTORY
- DOCUMENTS (0)
- NOTES (0)

Back To Voucher List

Payment To Vendor USD Add Voucher

Currency

Vendor Invoice # Vendor

Received On ? Pay By

Internal Notes

External Notes

Auto-Approve Notes Global Voucher Auto-Approve PO Value: 0 Receipt Value: 0 Amount Invoiced: 0

BREAK DOWN / LEDGER SPLITS

ENTERED

Assigned to Scott Ryan for < 1 minute

Move To

- Scott Ryan Needs Review
- Tanner Rogers Put On Hold
- Jordan Jolly To Closed
- Scott Ryan (Reassign, Keep Entered)

Assignment Comments (if changing)

CC List Set CCs

Priority Set (1 is High)



help

ATTACHED PO LINE/RECEIPTS

Search POs

133.1

PO Lines

PO Receipts

PO	Line	Line Qty	Receipt	Receipt Qty	Date	Prcpart	Value	Drop?
PO 133.1	1	N/A	213	100	2019-10-04	RAW123	\$200.0000	<input checked="" type="checkbox"/>
PO 133.1	2	N/A	215	100	2019-10-04	RAW-SOURCEDCOMP	\$200.0000	<input checked="" type="checkbox"/>
PO 133.1	3	N/A	217	1000	2019-10-07	PRT1112	\$1,000.0000	<input checked="" type="checkbox"/>
Total Value:							\$1,400.00	

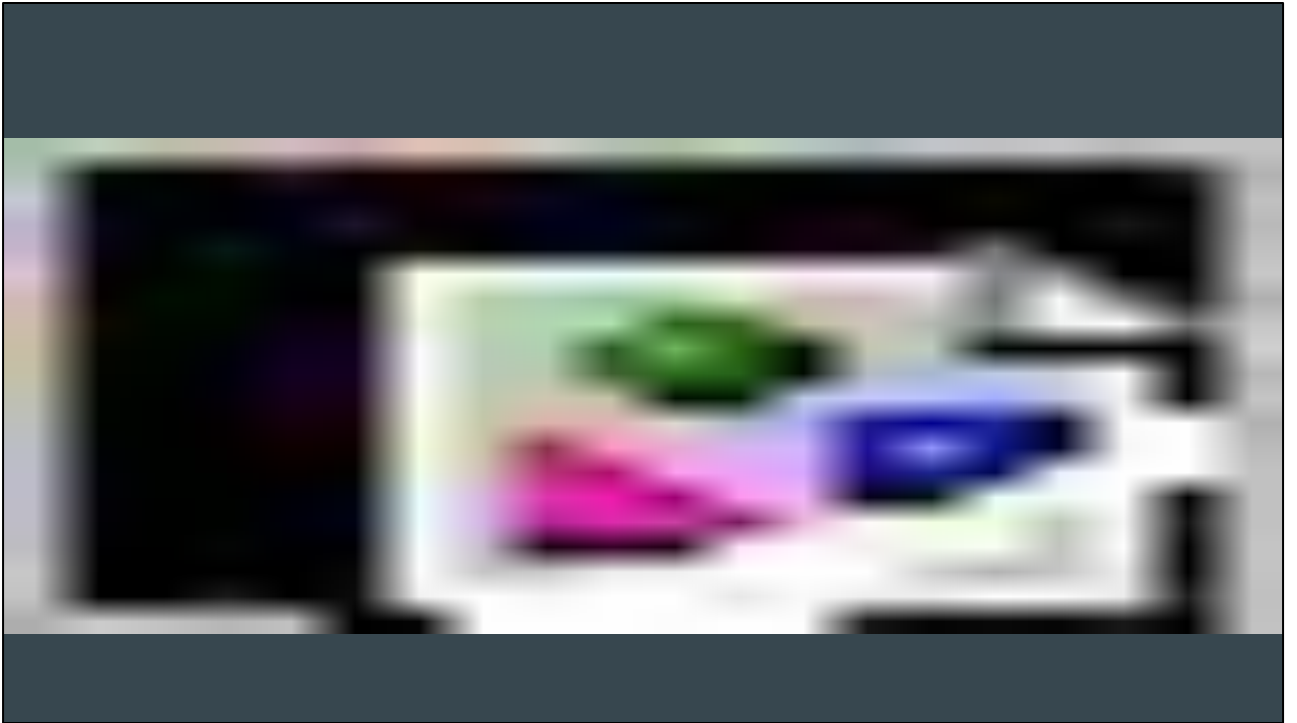
VOUCHER PAYMENTS

Make Payment

State CPA Review

johnsmith

Setting Up Workflow



RMAStatusCode	The Current Status of the return, e.g. Repair, Pending customer information
RMAType	Actions taken in response to non-conformance e.g. Preventive, Corrective, etc.
RentalChargeReason	
RentalFailureType	
Role	Activate/Deactivate user roles.
SHPCDE	Methods of order shipment e.g. UPS, FedEx, etc.
SalesImportSource	Sources for sales quote import.
SystemControlType	
UOM	Units of Measure - feet, inches, pounds, etc.
Workcenter	Use workcenters (i.e. production lines) to manage a shop floor with multiple production lines. You can assign certain BOMs to a particular work center, so that work orders for those goods are routed to and may be managed to the appropriate work center.
WorkflowStage	

Displaying 1 - 67 of 67 +/- Columns

Data Maintenance For WorkflowStage

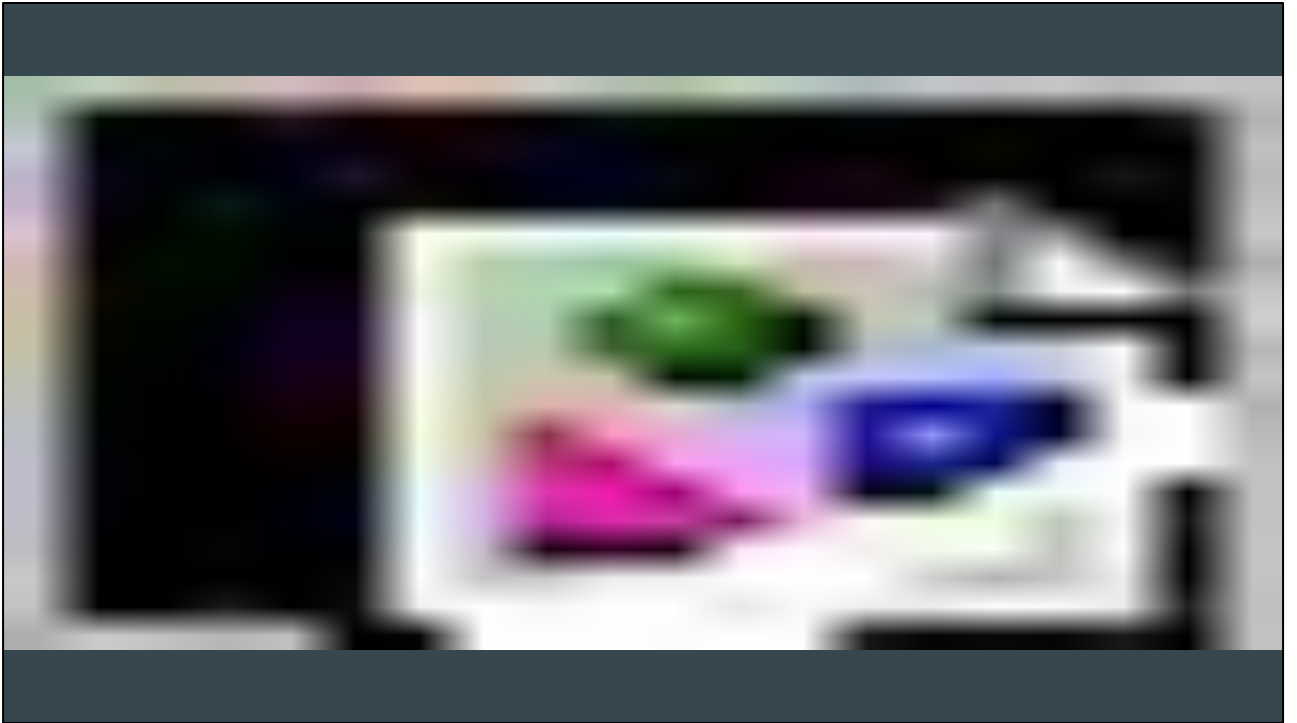
[Back To All](#)

Warning: Removing/Changing data may have repercussions on other related data sets.

If you want to modify a row that has been added already, we strongly recommend that you rename the row rather than delete the row - deleting the row could orphan off any related data.

Displaying 1 - 19 of 19 rows. [Export](#) +/- Columns

Id	Name	Description	Object Type	Order Num	Initial State	Close State	Role Restrictions	Help
19	Quality Review	Quality and Inspections	Orline	3	<input type="checkbox"/>	<input type="checkbox"/>		
18	CFA Review	Upper Management Review	Voucher	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
17	Sales Review & Approval	Sales Approval	Quote	6	<input type="checkbox"/>	<input type="checkbox"/>		
16	Accounting Review	Accounting Approval	Quote	2	<input type="checkbox"/>	<input type="checkbox"/>		
15	Completed	Shipped/Completed	Orline	3	<input type="checkbox"/>	<input type="checkbox"/>		
14	In Process	Being Fulfilled	Orline	2	<input type="checkbox"/>	<input type="checkbox"/>		
13	Pre-Release	Pending Release To Fulfillment	Orline	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
12	Customer	Customer	Lead	5	<input type="checkbox"/>	<input checked="" type="checkbox"/>		



INVOICE VALUES

	GP Value	GM %
Yesterday	\$0.00	\$0.00 0%
Today	\$0.00	\$0.00 0%
MTD	\$1,213.17	\$523.81 30%
Prior MTD	\$306.00	\$33,193.00 99%
Prior Year MTD	\$0.00	\$0.00 0%
Prior Month	\$306.00	\$33,193.00 99%
YTD	\$922,788.33	\$235,695.56 \$687,092.76 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%

- DATA MAINTENANCE
- BONUS COLUMNS
- TAX AUTHORITIES
- TAX GROUPS
- DOWNLOAD BACKUP
- WORKFLOW MAINTENANCE
- UNIT CONVERSIONS
- NOTIFICATION RULES



INVENTORY \$47,473,732.22



- RAW
- SUB
- NEU
- PRT
- Other

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

OPEN SALES ORDERS



Workflow List

Workflow		
NCR	Edit	Avg Queue Time
Lead	Edit	Avg Queue Time
Opportunity	Edit	Avg Queue Time
ECO	Edit	Avg Queue Time
Document	Edit	Avg Queue Time
PQuote	Edit	Avg Queue Time
Quote	Edit	Avg Queue Time
Project	Edit	Avg Queue Time
Voucher	Edit	Avg Queue Time
CAR	Edit	Avg Queue Time
Ordline	Edit	Avg Queue Time

Help

Edit Workflow States And Possible Assignments Quote

[Back To All](#)

STATE: ACCOUNTING REVIEW

Users ¹	Roles ¹	
<ul style="list-style-type: none">devaGeorge SmithJoe WorkerJohn SmithSusanDCetec ERP Support Team	<ul style="list-style-type: none">AccountingAccounting AdminAdminAllInvoicesAllPQuotesAllQuotesBlock Edit Part	<input type="checkbox"/> Include User Who Initiated / Created Quote Workflow? <input type="checkbox"/> Enable Priority/Nag Alerts? <input type="submit" value="Submit"/>

STATE: ENGINEERING REVIEW

Users ¹	Roles ¹	
<ul style="list-style-type: none">devaGeorge SmithJoe WorkerJohn SmithSusanDCetec ERP Support Team	<ul style="list-style-type: none">AccountingAccounting AdminAdminAllInvoicesAllPQuotesAllQuotesBlock Edit Part	<input checked="" type="checkbox"/> Include User Who Initiated / Created Quote Workflow? <input type="checkbox"/> Enable Priority/Nag Alerts? <input type="submit" value="Submit"/>

STATE: PURCHASING REVIEW

Users ¹	Roles ¹	
<ul style="list-style-type: none">devaGeorge Smith	<ul style="list-style-type: none">AccountingAccounting Admin	<input checked="" type="checkbox"/> Include User Who Initiated / Created Quote Workflow?

You can either assign by specific users or by roles. Go through and designate the roles (or users) and click submit to save your inputs. They'll then show in the Workflow dropdown for Accounting Review.

BACK TO ALL

STATE: ACCOUNTING REVIEW

Users	Roles	
<ul style="list-style-type: none"> deva George Smith Joe Worker John Smith SusanD Cetec ERP Support Team 	<ul style="list-style-type: none"> Accounting Accounting Admin Admin AllInvoices AllQuotes AllQuotes Block Edit Part 	<input type="checkbox"/> Include User Who Initiated / Created Quote Workflow? <input checked="" type="checkbox"/> Enable Priority/Nag Alerts? <input type="submit" value="Submit"/>
Nags/Escalations		
<p>Priority 1:</p> <p>Escalate After: 1440 Min</p> <p><input type="checkbox"/> Include User Who Initiated / Created Quote Workflow? <small>(Note: Assigned User is Always Included)</small></p>	<p>Escalate To:</p> <ul style="list-style-type: none"> deva George Smith Joe Worker John Smith SusanD Cetec ERP Support Team 	
<p>Priority 2:</p> <p>Escalate After: (min) Min</p> <p><input type="checkbox"/> Include User Who Initiated / Created Quote Workflow? <small>(Note: Assigned User is Always Included)</small></p>	<p>Escalate To:</p> <ul style="list-style-type: none"> deva George Smith Joe Worker John Smith SusanD Cetec ERP Support Team 	
<p>Priority 3:</p> <p>Escalate After: (min) Min</p>	<p>Escalate To:</p> <ul style="list-style-type: none"> deva George Smith Joe Worker John Smith 	

Help

You can set Nag alerts, which could serve as a reminder on a task, or an escalation point so that a task doesn't unopened too long. Check the box, click submit, then determine the number of minutes to escalate after (use minutes, even if in days), and designate who would receive the escalation email. After the set amount of minutes, those users would receive an email concerning the task.

Document Uploads and Approval

Workflow for document control and doc revision control

Privileged vs nonprivileged

Part FIG-FINISHEDPRODUCT

- VIEW
- EDIT
- BOM OVERVIEW (3)
- EDIT BOM
- EXPORT BOM
- BUILD ESTIMATE
- BUILD W/ SUBS
- PRICING
- QUOTES (3)
- ORDERS (1)
- SALES HIST (3)
- SHIP AND DEBITS
- PQUOTES (0)
- OPEN POS (0)
- WATERFALL
- PO HISTORY (1)
- NCRS (0)
- ECOS (0)
- RMAS (0)
- ORDERS W/ NEED (YES)
- PART REQS (0)
- TOOLS
- HISTORY
- CROSSES (1)
- MAINT +

Drop Files Here [Browse](#)

PART FIG-FINISHEDPRODUCT

Filter by Name

Name	Tags	Alive	Revision	Uploader	Created On	Move	Global
Drawing.png	(Edit)	Yes	2	Cetec ERP Support Team	2019-10-17 08:59:28 AM	(Target) Move	Globalize X

REVISIONS FOR DOCUMENT: DRAWING.PNG

[Upload Revision](#) [Delete All](#)

Filename	Alive	Revision	Uploader	Created On	Delete
Screenshot 2019-10-16 at 8.45.43 AM.png	Yes	2	Cetec ERP Support Team	2019-10-17 08:59:28 AM	X
Drawing.png	Yes	1	Cetec ERP Support Team	2019-10-04 12:04:33 PM	X

Help

Part FIG-FINISHEDPRODUCT

- VIEW
- EDIT
- BOM OVERVIEW (3)
- EDIT BOM
- EXPORT BOM
- BUILD ESTIMATE
- BUILD W/ SUBS
- PRICING
- QUOTES (3)
- ORDERS (1)
- SALES HIST (3)
- SHIP AND DEBITS
- PQUOTES (0)
- OPEN POS (0)
- WATERFALL
- PO HISTORY (1)
- NCRS (0)
- ECOS (0)
- RMAS (0)
- ORDERS W/ NEED (YES)
- PART REQS (0)
- TOOLS
- HISTORY
- CROSSES (1)
- MAINT +

Drop Files Here [Browse](#)

PART FIG-FINISHEDPRODUCT

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Drawing.png	Yes	1	Cetec ERP Support Team	2019-10-04 12:04:33 PM	X

Help

Document Drawing.png

Approved: Cetec ERP Support Team ▼

VIEW
HISTORY
NOTES

To Docs Pending Approval

Belongs To Part FIG-FINISHEDPRODUCT (FIG-FINISHEDPRODUCT)

Name	Drawing.png	Status	Active ▼ (Delete)	Uploaded By	Cetec ERP Support Team
Uploaded On	2019-10-17T08:59:28	Revision	2	Tags	
Valid	From - To	Public	No ▼	Protected	No ▼
Update					
Private URL: https://demo.cetecerp.com/api/document/1284?download=1					

Help

Document Drawing.png

Approved: Cetec ERP Support Team

VIEW
HISTORY
NOTES

To Docs Pending Approval
Belongs To Part **FIG-FINISHEDPRODUCT (FIG-FINISHEDPRODUCT)**

Name	Drawing.png	Status	Active
Uploaded On	2019-10-17T08:59:28	Revision	2
Valid	From <input type="text"/> - To <input type="text"/>	Public	No

Private URL: <https://demo.cetecerp.com/api/document/1284?download=1>

APPROVED

Assigned to Cetec ERP Support Team for < 1 minute

Move To

- Cetec ERP Support Team
- Cetec ERP Support Team

Assignment Comments (if changing)

CC List

Priority

3 (1 is High)

Edit Workflow Assignment Options

Build a workflow for document upload approval

Barcode Scanners

Hardware requirements

User set up

Hardware - bluetooth or usb (hardware agnostic)

User profile - "has scanner"

-Autodetect, YES, NO

Employee ID (if used for external tracking)

Has Barcode Scanner (force tablet mode)

Default Warehouse Location

User Specific Labor Rate (Resale)

Roles

Default Production Location

User Specific Labor Rate (Cost)

Customer Association Type



Q&A