CETEC ERP★ALOOZA

Tips & Tricks

Increasing Efficiency in Cetec ERP!

Tips & Tricks - An Overview

Time Saving Tricks

Frequently Asked Questions

New Features

Ship Engine!
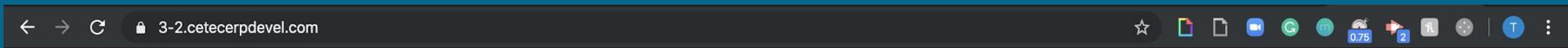
Time Saving Tricks

Chrome Extensions/Keyboard Shortcuts

Configuration Settings

Bookmarks

New Lists!

Chrome Extensions

Cetec's platform resides on Google Chrome. Being in a web browser has its perks, mainly Chrome Extensions and Keyboard Shortcuts.

3-2.cetecerpdevel.com

^^^^^^^^^^

Chrome Extensions

https://chrome.google.com/webstore/category/extensions

Auto Refresher

- For shop floor 'Production Screen'

Screencastify

- Sending in tickets, sharing 'how-to' in Cetec

Keyboard Shortcuts - Windows and Linux

Copy and Paste Text

- [Highlight Text] Ctrl + C
- Ctrl + V

Refresh Your Page

- Ctrl + Shift + R

Keyboard Shortcuts - Windows and Linux

Undo an Action (type or keystroke)

- Ctrl + Z

Search Within a Window

- Ctrl + F

Invoice List

Create Bill Only Invoice

Customer	Products & More	Invoice #		Cust PO
Invoice Date	2019-09-14 - (to)	Date Type	Invoice Date	Intercompany	All
Prcpart	Search parts	Cust Part		Location	All
View By	Header	More Options		Submit	Print

Note: Some columns are excluded on exports of > 1000 rows. Consolidated invoices can be accessed by clicking on a Customer, then selecting "Consolidated Invoices" from the side bar.

Displaying 1 - 14 of 14   Export   +/- Columns

Invoice	Customer	Cust PO	Invoice Date	# Lines	Ext Resale	Total	Unpaid	GM	GP	Adjust GM	Print?
46-0	Products & More		2019-10-07	1	2000.00000000	$2,120.00	$2,120.00	100 %	2000	100 %	☐
47-0	Products & More		2019-10-07	1	10.00000000	$10.60	$10.60	100 %	10	100 %	☐
134.1-1	Products & More	e33	2019-10-02	1	20.00000000	$20.00	$0.00	100 %	20	80 %	☐
95.1-1	Products & More	0293842	2019-09-20	1	50.00000000	$50.00	$0.00		0	-300 %	☐
87.1-1	Products & More	2342355	2019-09-19	1	20000.00000000	$20,000.00	$0.00	-446 %	-89379	-446 %	☐
91.1-1	Products & More		2019-09-19	1	0.00000000	$0.00	$0.00		-40		☐
3.1-2	Products & More	13513	2019-09-18	1	120.00000000	$120.00	$10.00	8 %	10	8 %	☐
15.1-1	Products & More	1928473	2019-09-18	2	35.00000000	$35.00	$0.00		0		☐
20.1-1	Products & More	983277	2019-09-18	1	100.00000000	$100.00	$0.00	100 %	100	100 %	☐

Keyboard Shortcuts - Windows and Linux

Click a Link Into a New Tab

- Ctrl + Click

Invoice List

Customer	Search customers	**Invoice #**	**Cust PO**
Invoice Date	2019-09-14 — (to)	**Date Type** Invoice Date	**Intercompany** All
Prcpart	Search parts	**Cust Part**	**Location** All
View By	Header	More Options	Submit Print

Note: Some columns are excluded on exports of > 1000 rows. Consolidated invoices can be accessed by clicking on a Customer, then selecting "Consolidated Invoices" from the side bar.

Displaying 1 - 14 of 14   Export   +/- Columns

Invoice	Customer	Cust PO	Invoice Date ℹ	# Lines	Ext Resale	Total	Unpaid	GM	GP	Adjust GM	Print?
46-0	Products & More		2019-10-07	1	2000.00000000	$2,120.00	$2,120.00	100 %	2000	100 %	☐
47-0	Products & More		2019-10-07	1	10.00000000	$10.60	$10.60	100 %	10	100 %	☐
134.1-1	Products & More	e33	2019-10-02	1	20.00000000	$20.00	$0.00	100 %	20	80 %	☐
95.1-1	Products & More	0293842	2019-09-20	1	50.00000000	$50.00	$0.00		0	-300 %	☐
87.1-1	Products & More	2342355	2019-09-19	1	20000.00000000	$20,000.00	$0.00	-446 %	-89379	-446 %	☐
91.1-1	Products & More		2019-09-19	1	0.00000000	$0.00	$0.00		-40		☐
3.1-2	Products & More	13513	2019-09-18	1	120.00000000	$120.00	$10.00	8 %	10	8 %	☐
15.1-1	Products & More	1928473	2019-09-18	2	35.00000000	$35.00	$0.00		0		☐
20.1-1	Products & More	983277	2019-09-18	1	100.00000000	$100.00	$0.00	100 %	100	100 %	☐

Keyboard Shortcuts - Windows and Linux

New Tab and Close Tab

- Ctrl + T
- Ctrl + W

Re-Open Most Recently Closed Tab

- Ctrl + Shift + T

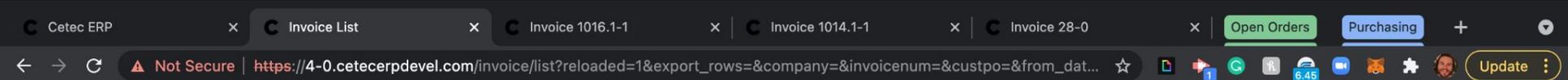# Keyboard Shortcuts - Windows and Linux

Print Preview/Quick Print

- Ctrl + P

Jump to URL

- Ctrl + L

Keyboard Shortcuts - Grouped Tabs

Keyboard Shortcuts - Windows and Linux

Google outlines all other advanced shortcuts for Windows and Linux users.

https://support.google.com/chrome/answer/157179?hl=en

Keyboard Shortcuts - MacBook

Same strokes as PC, but you replace the 'Ctrl' with the '⌘' logo.

As with Windows and Linux users, Google lists all shortcuts in their Help Center

https://support.google.com/chrome/answer/157179?hl=en

Keyboard Shortcuts - Questions?

Bookmarks!

Bookmarks in Cetec allow you to 'save' a certain report within a URL to return to at a later date.

- Typically used if you are running the 'same' report on a recurring basis.

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

Production Order List

Help

Order #		Part #	(comma separated)	Warehouse
Revision		Date	(from) - (to)	Date Type
Transcode / Status	Open Build Orders	First Article?	All	Shipped Today
Cust. PO		Show Production Mgmt?	☐	Location
Exclude Selected Locations?	☐	Order Status	All	Production Line
Customer Number		Customer Name		Supervisor
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

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

Production Order List

Order #	[ ]	Part #	[(comma separated)]	Warehouse
Revision	[ ]	Date	[(from)] - [(to)]	Date Type
Transcode / Status	Open Build Orders	First Article?	All	Shipped Today
Cust. PO	[ ]	Show Production Mgmt?	☐	Location
Exclude Selected Locations?	☐	Order Status	All	Production Line
Customer Number	[ ]	Customer Name	[ ]	Supervisor
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

Help

Welcome Tanner Rogers! (You Are On The LITE Support Plan)

SELL EXISTING STOCK

Hello, Tanner Rogers

LITE SUPPORT PLAN

MY BOOKMARKS

INSPECTION ✖

| Name | Add |

MY EXPORTS

LOGOUT

QUOTE ENTRY

CHARGE ONLY ORDER ENTRY

WORK ORDER ENTRY (BUILD TO STOCK)

WORK ORDER ENTRY (CUSTOM)

STOCK ORDER ENTRY

PO ENTRY

CUSTOMER SEARCH

PART SEARCH

RECEIVE PRODUCT

Home Dashboard

SALES FUNNEL

New Product Line Sale

Lead List   Sales Analysis

Follow Up: 1

OPEN A/R $2,165.60   (CASH: $17,980.25)

■ 0 - 30 days   ■ 31 - 60 days   ■ 61 - 90 days
■ 121 + days

A/R
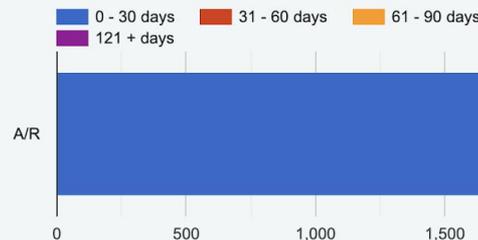
0   500   1,000   1,500

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	$2,030.00	$4.00	$2,026.00	99 %
Prior MTD	$0.00	$0.00	$0.00	0 %
Prior Year MTD	$0.00	$0.00	$0.00	0 %
Prior Month	$15,918.00	$86,744.20	$-70,826.20	-444 %
	$17,948.00	$86,748.20	$-68,800.20	-383 %

OPEN A/P - $227,630.00

■ 0 - 30 days   ■ 31 - 60 days   ■ 61 - 90 days   ■ 91 - 120 days
■ 121 + days

A/P

Help

https://3-2.cetecerpdevel.com/#

Force Home Page URL

On the heels of bookmarks. The 'force home page URL' feature allows an admin user to force other users to a specific screen upon login.

Admin>Users>Users>*Edit*

- Typically seen for shop floor employees

Edit User 3

Back To Users

Username

scott

Email

scott@cetecerp.com

First Name

Scott

Last Name

Ryan

Title

Office Phone

Mobile Phone

Homepage (user forced here after login)

https://3-2.cetecerpdevel.com/production/list

Employee ID (if used for external tracking)

Roles

Accounting
Accounting Admin
Admin
AllInvoices

Has Barcode Scanner (force tablet mode)

Autodetect

Default Production Location

None

Help

Bookmarks/Home Page URL - Questions?

Frequently Asked Questions

How do I send documents in emails out of Cetec?

- Any document attached to an object that can be emailed, may be attached to that email.

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

Quote/Order Worksheet 70

Sales Editing: Cetec ERP Support Team ▾

VIEW & EDIT
SEND +
COMMIT TO ORDER
QUOTING TOOLS +
COMMISSION
DOCUMENTS (1)
NOTES (0)
PREPAY
CREATE PQUOTE

Drop Files Here   **Browse**

QUOTE 70

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

Quote 70

VIEW & EDIT

SEND +

COMMIT TO ORDER

QUOTING TOOLS +

COMMISSION

DOCUMENTS (1)

NOTES (0)

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

Subject

Manufacturing Solutions - Quote #70 (PO #Cust. Stock Order 431)

Body

Please see attachment.

Send

Help

Globalize/Localize

The 'Globalize' feature in Cetec allows you to attach a document to any 'object' and have that document act as a template to populate on all other objects. Let's take a look.

CETEC ERP

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

Quote/Order Worksheet 70

Sales Editing: Cetec ERP Support Team ▾

VIEW & EDIT

SEND +

COMMIT TO ORDER

QUOTING TOOLS +

COMMISSION

DOCUMENTS (1)

NOTES (0)

PREPAY

CREATE PQUOTE

Drop Files Here   Browse

QUOTE 70

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	Globalize	✕

Help

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

Quote/Order Worksheet 70

Sales Editing: Cetec ERP Support Team ▾

VIEW & EDIT
SEND +
COMMIT TO ORDER
QUOTING TOOLS +
COMMISSION
DOCUMENTS (1)
NOTES (0)
PREPAY
CREATE PQUOTE

Drop Files Here   Browse

QUOTE 70

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

CETEC ERP

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

Quote/Order Worksheet 150

Sales Editing: Cetec ERP Support Team ▾

VIEW & EDIT
SEND +
COMMIT TO ORDER
QUOTING TOOLS +
COMMISSION
DOCUMENTS (1)
NOTES (0)
PREPAY
CREATE PQUOTE

Drop Files Here   **Browse**

QUOTE 150

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

Frequently Asked Questions

How do I purchase in 'feet' and consume in 'inches'?

- UOM Conversion!

Frequently Asked Questions

Unit of Measure Conversion

- The unit of measure conversion tool, you may set up proper units of measure in Cetec (1 foot = 12 inches), so that you may purchase 10 feet of material from your vendor AND it's automatically converted into 120 inches of material upon receipt.

Frequently Asked Questions

Unit of Measure Conversion: Setup

- Create UOM
- Create Conversion
- Set UOM at Part Record
    - UOM represents the unit of measure you consume the material
    - Purchase UOM represents the unit of measure you purchase the material

Data Maintenance For UOM

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 - 2 of 2   Export   +/- Columns

Id	Name ⓘ	Description ⓘ	Delete
2	Feet		☐
1	Inches		☐

Displaying 1 - 2 of 2   Export   +/- Columns

Submit   Add Record

Help

SALES   PARTS   PURCHASING   WAREHOUSE   ACCOUNTING   PRODUCTION   ADMIN

USERS ▾   CONFIG SETTINGS ▾   MAINTENANCE ▾   LOGS ▾   DOCS ▾   SITE MAP   DASHBOARDS ▾

Set UOM Conversions

| From UOM | Inches | To | Feet | | Create | Hide Create |

| Prcpart Specific? | (all) | Prcpart | (search for prcpart) | (Create UOM) |

| Prcpart | (search for prcpart) | Only Part Specific | (all) | | Search | Show Create |

Prcpart	Units	Conversions		
	Inches, Feet	1 Inches is 0.083333333: Feet	12 Inches is 1 Feet	Set Delete	OK

Help

Part PRT25

VIEW

EDIT

REVISIONS

BOM USE (2)

PRICE/COST +

SALES +

PURCHASING +

ACTIVITY +

QUALITY +

MAINT +

DOCUMENTS (0)

NOTES (0)

Description	Black Wire
UOM	Inches
Last Resort Cost	$0.00
COS G/L Account	(use default)
RoHS?	No
Preferred Manufacturer	
UPC	
Non-Inventory?	(Part has QOH)
Serial Format	
(More)	
Default Receiving Location	(choose location)

Created On	2019-09-18
Default Transcode	(use default)
Revenue G/L Account	(use default)
Default Voucher GL Account	(use default)
Preferred Vendor	Search vendors...
OEM Part #	
Block Autopick?	
Shelf Life	0
Default Warranty	(none)
Default Selling Location	(choose location)
Purchase UOM	Feet

Help

Frequently Asked Questions

Unit of Measure Conversion: Application

- Create PO
    - Part with Purchase UOM of Feet
    - Part with UOM of Inches
- Receive part into inventory
- Auto convert Feet to Inches
    - Converts qty and cost

PQUOTES ▾   PURCHASE ORDERS   RECEIPTS ▾   VENDORS ▾   MRP ▾

Purchase Order 218.1 (Location: MN)

VIEW
EDIT
DELETE LINE/ALL
ACKNOWLEDGE
PDF/EXPORT (QUICK)
DOCUMENTS (0)
NOTES (0)
CLOSE PO
PQUOTE 218

Show Sticky Notes

Help

Buy Process 1 2 3
3. Receive

Vendor	Master Distributor (2)	**Location**	MN	**Contact**	
Buyer	Tanner Rogers	**P.O. Number**	218.1	**Shipvia**	
FOB	Delivery	**Taxable**	No	**Terms**	
Entry Date	2019-10-15	**Scheduled**	No	**Tax Rate**	0
PO Comment		**Location**	MN	**Cost Center**	

+/- Columns

#	Prcpart	Dock Date	Qty	Net Order Qty	Qty Recvd	Ext. Cost	Status
1	PRT25	2019-10-15	10 Feet (120Inches)	10 Feet (120Inches)	0 Feet (0Inches)	$100.00	Open Receive
					Line Subtotal:	$100.00	
					Freight:	$0.00	
					Orig Total:	$100.00	
					Vouchered (open):	$0.00	

CETEC ERP

RECEIVING ▾   RELEASE TO PICK ▾   INVENTORY ▾   BARCODES ▾

Receive Parts

Buy Process   1   2   3
3. Receive

Back to Pending Put Away

PO	218.1		Packing Slip #	

QUANTITY RECEIVED

10	Feet or
120	Inches **Set**

Prcpart	PRT25		Quantity	10 + Pieces/Serials
Location	Main			
Date Code		Lot Code	1942001	Revision
Expires On		Lock Bin		Receive Receive & Keep PO
Color				

Part Description	Black Wire
Part Image	
PO Due Date	2019-10-15
Inspection Instructions	

PO Buyer   Tanner Rogers

Help

Help

Receive Parts

Buy Process 1 2 3
3. Receive

Back to Pending Put Away

PO	218.1 🔍	**PO Line**	1 Part PRT25 (Qt ⬍	**Packing Slip #**	
Prcpart	PRT25 🔍	**Unit Cost**	0.833333333 USD Landed Cost	**Quantity**	120 + Pieces/Serials Inches
Location	Main ⬍	**Date**	2019-10-15		Unit Cost and Quantity converted from Feet to Inches
Date Code		**Lot Code**	1942001	**Revision**	
Expires On		**Lock Bin**	☐		Receive Receive & Keep PO
Color					

Part Description	Black Wire
Part Image	
PO Due Date	2019-10-15
Inspection Instructions	

PO Buyer Tanner Rogers

Purchase Order Receipt 108 2019-10-15 (Part PRT25, Qty 120.00000000)

VIEW
EDIT
LEDGER
LABEL
SERIAL LABELS
DOCUMENTS (0)
NOTES (0)
PO MN218.1
INCOMING INSPECTION
CANCEL RECEIPT

Prcpart PRT25	Received On 2019-10-15	Received By Tanner Rogers
P.O. Number - Line 218.1 - 1	Packing Slip #	Vendor Master Distributor (2)
Location MN	Cost $0.83	Qty 120 Inches
Receipt ID 52	Receipt Code 108 View Pieces/Serials	Name
Receipt Notes		
Incoming Inspection 69		

CURRENT BINS

	Bin	Date Code	Lot Code	Inv Layer ID	Revision	Quantity
Move	A-12-5	N/A	1942001	109		120

(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

Help

FAQs - Questions?

New Features

Purchasing Dashboard

Pieces Per Hour

Vendor Portal Enhancements

Change Open Orders to 'Build to Stock'

Toggle Sticky Notes

Work Order Notifications

Config Setting Search Tag

Sort Pick List Alphabetically

New Features - Purchasing Dashboard

LIVE REVIEW - https://4-0.cetecerpdevel.com/landingpage/purchasing#

New Features - Pieces Per Hour

Pieces Per Hour is a feature on the 'BuildOperation' Data Maintenance table. It allows you to calculate run times based on your machine output rather than a person's repetition time of work.

New Features - Pieces Per Hour

Data Maintenance For BuildOperation

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 - 5 of 5   Export   +/- Columns

Id	Name ⓘ	Avg Seconds ⓘ	Active	Pieces Per Hour	Delete
5	Machine Run Time	3600.00	Active	☑	☐
4	Generic 1 Day Operation	86400.00	Active	☐	☐
3	Generic 1 Hour Operation	3600.00	Active	☐	☐
2	Generic 1 Min Operation	60.00	Active	☐	☐
1	Generic 1 Sec Operation	1.00	Active	☐	☐

Help

New Features - Pieces Per Hour

Revision Rev 2.0, Part BOM1001

VIEWS/LISTS ▾   PRICING MAINTENANCE ▾   VENDOR RETURNS   PART SPEC GROUPS   PRC LIST   REPORTS ▾

TO PART RECORD
WORK INST
LABOR PLAN
INSPECTION INST.
EDIT REVISION BOM
IMPORT BOM
EXPORT BOM
RELATED PARTS
REVS LINKED
WORK REPORT
WORK INST. HISTORY

Help

Labor multiplier set to 1

Use Fancy Work Instructions

Order	Location	Group	Operations	Time Est	Setup	Recurring	Labor Rate	Labor Est	Overhead Rate	Overhead Est	Total	Remove
1	Doc Control (Unreleased Orders)		0 ✎	0s	0s	0s	$10.00	$0.00	$5.00	$0.00	$0.00	Remove
2	Machine #1		1 ▾	36s	0s	36s	$10.00	$0.10	$5.00	$0.05	$0.15	Remove

| | Operation: 1 | Machine Run Time | | Pieces Per Hour: | 100 | Total Seconds: 36 | Setup ⓘ | No ▾ | | Set Drop? ☐ | move ▾ |

#	Instructions
(new)		Pick Req'd ☐ Sign Req'd ☐ Update

New Features - Vendor Portal Additions

Note Taking

Acknowledgement Tools

Document Attachment

Suggested Changes

PQuotes

PQuote ▲	Vendor Name	Lines	Total Amt	Notes	Documents
1	Master Distributor	1	$100.00	2 ⊖	1

Taylor Wagen - 2021-09-29 09:28:51

Sent RFQ PDF to taylor@cetecerp.com
Email Body:
Please see attachment.

Taylor Wagen - 2021-09-29 09:32:59

Sent RFQ PDF to
Email Body:
3rd time's a charm. Mike fixed things, seems OK. Please see attachment.

ADD NOTE

Hey Taylor,

Looks good on my end! Could you just add another comment line highlighting your strict deadline? I don't want the folks on my end to let this one slip.

Thanks!

Submit

POS   PO DETAILS

POs

PO #

[   ]

Propose Changes

PO # ▲	Freight ⇅	Total ⇅	Buyer ⇅	Email ⇅	Documents	Acknowledged
47.1	$20.00	$76.00	Tanner	tanner@cetecerp.com	1	No ⊖

ACKNOWLEDGE PURCHASE ORDER

Comments

| Not Acknowledged |
| ✓ Acknowledged |

Good to go. Just attached the Order Acknowledgment form. Let me know if anything changes!

Thanks Tanner!

Ⓖ

OK   Cancel

CETEC ERP

Documents: PO 47.1

Name

Search Docs...

Choose File Cetec_20210916.pdf   Upload

Name	Tags	Revision	Uploaded By	Created On
No data available in table				

Show 10 Rows Showing 0 to 0 of 0 entries

First   Previous   Next   Last   Copy   CSV   Excel

POs

PO #

[   ]

Propose Changes

PO # ▲	Freight	Total	Buyer	Email	Documents	Acknowledged
47.1	$20.00 $0.00	$76.00	Tanner	tanner@cetecerp.com	1	No⊕
65.1	$0.00 $0.00	$60.00	Tanner	tanner@cetecerp.com	2	No⊕

Show [10 ▾] Rows (2 Total)   First   Previous   1   Next   Last   Copy   CSV   Excel

New Features - Change Open Orders to 'Build to Stock'

Many times, in a make to order scenario, you need to alter the order to 'build to stock'.

Order 21.1

VIEW

EDIT

DETAILS/SERIALS

INVOICE/SHIP

CLOSE LINE/ALL

MERGE

PDF (QUICK)

PRO FORMA PDF

COMMISSION

RELEASE TO WH

WORKORDER VIEW +

PREPAY

PROGRESS BILLING

PACKING SLIP

PACKING LABEL

FULL ORDER PLATE

QUOTE 21

CREATE WO

CREATE PQUOTE

OUTSOURCE POS (0) +

DOCUMENTS (0)

NOTES (0)

Show Sticky Notes

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

Customer	Vance Refrigeration (3)	**Location** MN	**Ordered On** 2021-09-29
Buyer		**P.O. Number** 636272	**Assembly?** Yes
Ship Via	UPS Ground	**Customer Email**	**Carrier Account #**
Tax Group	(0%)	**Terms** NET30	**FOB/Incoterms** S - Shipment
Order Type	Scheduled	**Ship Type** Partial	**Status** New (0)

More Options ▾

+/- Columns

#	Qty	Code	Prcpart	Cost	Resale	Adj GM	Work Start Date	Status	BDate	Labor Days	Tax	Ext. Resale
1	10	Build	BOM1000	$767.00	$1,073.80		2021-09-24	Doc Control (Unreleased Orders)		0	$0.00	$10,738.00
	Custpart: ASY1000											
	Tax (0%):		$0.00									

Help

	Permanent Shipping Instructions				Shipping Account		

Permanent Shipping Instructions

Shipping Account

Ignore Credit Hold? ☐ Notes [   ]

Project [(project) ▼]

Carrier Account # [   ]

Ignore Carrier Account ☐

Resale Currency [USD ▼]

Reference 1 [   ] Reference 2 [   ] Reference 3 [   ]

Convert to Internal Order [Internal Ac ▼] [Internal Ve ▼] [Convert]

Cost Center [(Select Cost Center) ▼]

Resale Cost Center [(Select Cost Center) ▼]

Order Name [   ] [Place Hold]

[Submit]

Note: Customer has Ship Ahead Days set to 7. Unless there is an exception, please validate that the Ship Date is 7 day(s) before the Dock Date.

[Add Line] [Change All Lines] [Show/Hide All Advanced] [Disable Auto Fill]

#	Trans Type	Qty Due	Prcpart	Revision	Prod Line	Cost	Resale	Work Start Date	Ship Date	Original Ship Date	Dock Date
1	Bu ▼	10	BOM1000 🔍	2 ▼	N/A ▼	767.0041 USD ▼	1073.80	2021-09-24 [+]	2021-09-29 ⓘ	2021-09-29	2021-09-29

Order 21.1

VIEW

EDIT

DETAILS/SERIALS

COMPLETE/RECEIVE

CLOSE LINE/ALL

MERGE

PDF (QUICK)

PRO FORMA PDF

COMMISSION

RELEASE TO WH

WORKORDER VIEW +

PREPAY

PACKING SLIP

PACKING LABEL

FULL ORDER PLATE

QUOTE 21

CREATE WO

INTERNAL PO 66.1

CREATE PQUOTE

OUTSOURCE POS (0) +

DOCUMENTS (0)

NOTES (0)

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

Customer	Internal Account (1)	**Location** MN	**Ordered On** 2021-09-29
Buyer		**P.O. Number** 636272	**Assembly?** Yes
Ship Via UPS Ground		**Customer Email**	**Carrier Account #**
Tax Group (0%)		**Terms** NET30	**FOB/Incoterms** S - Shipment
Order Type Scheduled		**Ship Type** Partial	**Status** New (0)

More Options ▼

+/- Columns

#	Qty	Code	Prcpart	Cost	Resale	Adj GM	Work Start Date	Status	BDate	Labor Days	Tax	Ext. Resale
1	10	Build	BOM1000	$767.00	$767.00		2021-09-24	Doc Control (Unreleased Orders)		0	$0.00	$7,670.04
	Custpart: ASY1000											

Help

New Features - Toggle Sticky Notes

Customer Vance Refrigeration 3

VIEW
EDIT
CREATE QUOTE
QUOTES
ORDERS
INVOICES
AR PAYMENTS
CASES
CONSOLIDATED
LOST BUSINESS
VENDOR REPS
A/R STATEMENT
TAKE PAYMENT
CREDIT MEMOS (1) +
RMAS (3)
NOTIFICATIONS
PRODUCTION SETUP
CARRIER ACCOUNTS
CUSTOM DOCUMENTS
DOCUMENTS (0)
NOTES (0)

Add Note

Add Note:

GET A P.O. BEFORE COMMITTING TO ORDER

Note Type:

None ▼ **Edit Note Types**

Sticky:
☑

Note Date:

Mon Oct 11 2021 08::

OK **Cancel** **Set Reminder**

Note Type:

None ▼

Help

New Features - Auto Document Tags

Config Settings

Name	default_document_tags	**Description**	**Category** All ⌄

Name	Category Name	Description	Value		Updated By Username	Updated On ▼	
default_document_tags_for_PQuote	Document			Set	elizabeth	2021-10-05 10:19:15 AM	✕
default_document_tags_for_Ordhead	Document			Set	david	2021-09-29 12:08:32 PM	✕
default_document_tags_for_NCR	Document			Set	logan	2021-09-29 11:02:04 AM	✕
default_document_tags_for_Quote	Document			Set	tyler	2021-09-29 10:54:32 AM	✕
default_document_tags_for_PO	Document			Set	elizabeth	2021-09-29 09:23:44 AM	✕

Help

New Features - Auto Document Tags

NCR 7

VIEW NCR
DOCUMENTS (1)
NOTES (0)
HISTORY

Help

Drop Files Here [Browse] [Add Link]

NCR 7

Filter by Name

Name ▲	Tags	Alive	Revision	Uploader	Created On	Move	Global	
NCR10293-doc.pdf	Compliance Report	Yes	1	Tanner Rogers	2021-10-11 10:42:02 PM		Globalize	✕

New Features - Auto Document Tags

New Features - Sort Pick List!

Config Setting - "Pick Parts - Order By First Bin"

This config will alpha-numerically sort your parts to pick based on the FIFO bin.

FIFO bin is the first in first out of that part record.

Pick Parts For Work Order: 7.1 Line: 1

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

BOM Part Number	BOM2000	Customer	3 - Vance Refrigeration	First Article?	No
Qty Due	10	Qty To Ship	10	Location	MN

Shortage Comments | (Shortage Comments) | Hide Picked? ☐

Prcpart | | Printable Version

Item	Prc	Part	Revision	Qty Need	Qty Picked		Bin	Lot Code	Bin Rev	Receipt	Bin Qty	Pick Qty/Serial Number	
1	PRT	1	1	10 Meters	0	5	A-12-1			1	9965 Meters		0 ▼
							A-1-1	665731	1	58	15 Meters		0 ▼
2	PRT	2	1	20	0	1	A-12-2	889023423		2	9930		0 ▼
4	SUB	500		10	0	2	B-09-12			48	10		0 ▼
							E-33-88			48	90		0 ▼
3	PRT	111		20	0	2	B-10-34	983742		47	20		0 ▼
							F-9-11	983742		47	80		0 ▼

New Features - Questions?

ShipEngine

ShipEngine is a third-party shipping and logistics platform. With their open and friendly API, Cetec offers their services directly into the Cetec ERP interface.

Using ShipEngine in Cetec looks like this:

ShipEngine in Cetec

- API designed to make shipping easy
- Connect to major shipping carriers
- Easily integrated into Cetec
- Create shipping labels with the click of a button

Your ShipEngine Account

Your ShipEngine Account

Packages and Labels

Packages and Labels

Customer	NXP (33)	Location	MN	Ordered On	2019-10-14
Buyer		P.O. Number		Assembly?	No
Inside Sales	tech-x	Outside Sales	tech-x		
Ship Via	Fedex Ground	Customer Email			
Tax Group	(0%)	Terms	Net 30, 15% Penalty at 40	FOB	FOBDefault - FOBDefault
Order Type	Scheduled	Ship Type	Partial	Status	Pending Invoice (4)

Ship To   NXP 6501 W William Cannon Dr Austin, TX 78735 UNITED STATES

Package: #78   Length: 5 in.   Width: 6 in.   Height: 7 in.   Weight: 8 lbs. ☑   (delete package)

New Package Information: Enter dimensions for packages here. Press '+ Package' to add more, or 'Create Labels' to get shipping labels.

Length	(In Inches)	Width	(In Inches)	Select All Packages	☑

Height	(In Inches)	* Weight	(Weight in lbs.)	**+ Package** **Create Labels**

Tracking Numbers   (comma delimited)

Tracking #   Delete?

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

Packages and Labels

Packages and Labels

Order 1712.1

VIEW
EDIT
DETAILS/SERIALS
INVOICE/SHIP
DELETE LINE/ALL
PDF (QUICK)
PRO FORMA PDF
COMMISSION
RELEASE TO WH
WORKORDER VIEW +
PREPAY
PROGRESS BILLING
PACKING SLIP (QUICK)
PACKING LABEL
FULL ORDER PLATE
SHIP AND DEBITS
DOCUMENTS (1)

ORDER 1712.1

Filter by Name

Name ▲	Tags
Label for Package 78	shipengine

FROM:
tech-x
Cetec
1700 Montopolis Dr
Austin TX 78741
US

(800) 726-6626

SHIP DATE: 15OCT19
ACTWGT: 8.00 LB
CAD: 119097072/WSXI3200
DIMMED: 5 X 6 X 7 IN

BILL SENDER

TO Chris
NXP

6501 W William Cannon Dr

TEST LABEL - DO NOT SHIP

Austin TX 78735
(999) 999-9999
INV:
PO:

REF:

DEPT:

(US)

FedEx Ground

G

TRK# 7946 5318 0058

78735

9622 0019 0 (000 800 0288) 0 00 7946 5318 0058

Shipped Orders

Sell Process 1 2 3 4 **5**
5. **Invoice 1712.1**

Customer	NXP	**Location**	MN
Bill To	NXP 6501 W William Cannon Dr Austin TX 78735 UNITED STATES		
Ship To	NXP 6501 W William Cannon Dr Austin TX 78735 UNITED STATES		
Invoice Date	2019-10-15	**Entry Date**	2019-10-15
P.O. Number		**Terms**	Net 30, 15% Penalty at 40
Inside Sales	tech-x	**Outside Sales**	tech-x
Ship Via	Fedex Ground	**FOB**	FOBDefault
Terms	Net 30, 15% Penalty at 40	**Freight Cost**	$10.63
QBonus2		**Test Bonus Column**	
Test Vendor ID		**testing**	
Internal Comments			
Comments			
Packages Shipped:			
Package #: 78	Dimensions: 5 in. x 6 in. x 7 in.	Weight 8.00 lbs.	Tracking #: 794653166363

ShipEngine - Questions?