

Multi-Level BOMs





We like big BOMs and we cannot lie

Where We're Going

What's the Cost? - do we understand the actual costing of a BOM and can we get better estimates?

Order Entry & Mgmt - how are we planning to manage our subassemblies? Can we manage these across multiple layers of assemblies and understand impact on the top level?

BOM Entry - how fast can you create a multi-level BOM? And what are your options?
- Copy rev; copy labor plan; BOM component add; BOM import (the hidden tool)

BOM Tree

Part BOM1000

VIEW ▾ Show/Hide Tree View of BOM (View In Full Screen)

EDIT

REVISIONS

BOM DATA +

PRICE/COST +

SALES +

PURCHASING +

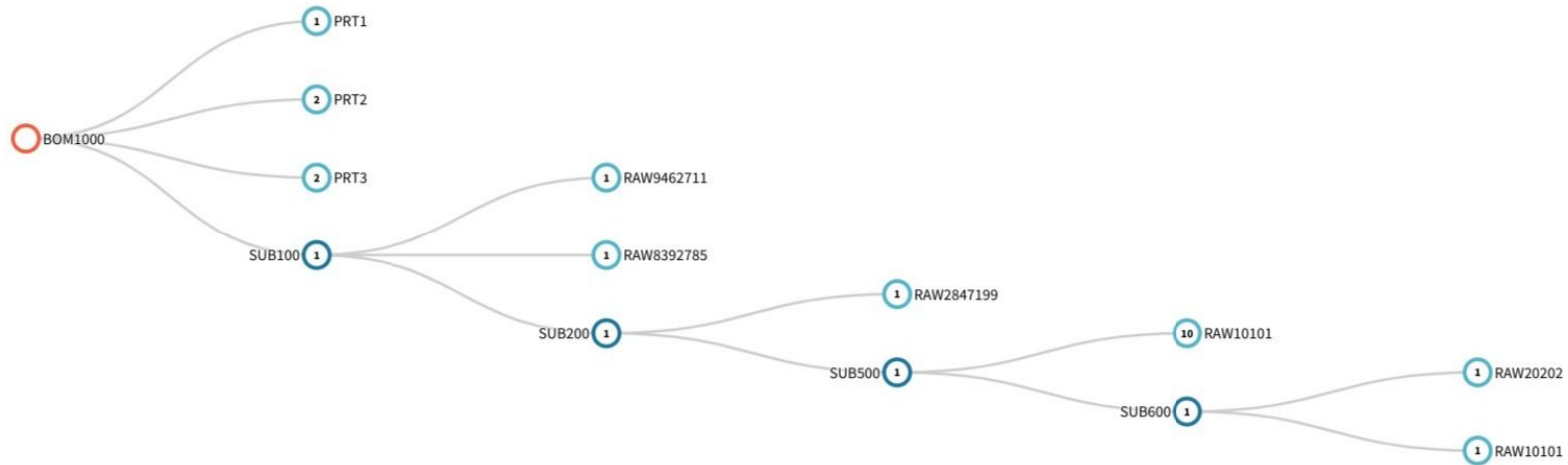
ACTIVITY +

QUALITY +

MAINT +

DOCUMENTS (1)

NOTES (1)



BOM Costing - Estimates

Part BOM1000

- VIEW
- EDIT
- REVISIONS
- BOM DATA +
- PRICE/COST +
- SALES +
- PURCHASING +
- ACTIVITY +
- QUALITY +
- MAINT +
- DOCUMENTS (1)
- NOTES (1)

► **Show/Hide Tree View of BOM** (View In Full Screen)
BOM Overview For Current Revision, 2

Build Qty Set

[Printable, With Sub Components](#) | [Printable, Top Level Only](#) | [Export](#)

+/- Columns

#	Prcpart	QOH	Avail	Qty/Top	Ext. Qty/Top	Cost Record	Ext Cost	Rollup	Info
1	PRT1	188 EA	188 EA	1 EA	1 EA	\$1.00000	\$1.00000	(\$1.00000)	i
2	PRT2	852 EA	492 EA	2 EA	2 EA	\$2.00000	\$4.00000	(\$4.00000)	i
3	PRT3	699 EA	339 EA	2 EA	2 EA	\$3.00000	\$6.00000	(\$6.00000)	i
▼ 4	SUB100	24	-105	1	1	\$1,037.73418	\$1,037.73418	\$1,482.66224	i
1	RAW9462711	21 EA	-255 EA	1 EA	1 EA	\$1.50000	\$1.50000	(\$1.50000)	i
2	RAW8392785	2099 EA	1844 EA	1 EA	1 EA	\$0.22539	\$0.22539	(\$0.22539)	i
▼ 3	SUB200	35870	35679	1	1	\$39.99408	\$39.99408	\$280.93685	i
1	RAW2847199	11415 EA	11240 EA	1 EA	1 EA	\$0.43685	\$0.43685	(\$0.43685)	i
► 2	SUB500	8	-18	1	1	\$100.00000	\$100.00000	\$280.50000	i
Setup \$0.00000		Setup O/H \$0.00000		Labor \$0.00000 (0 Mins)		Overhead \$0.00000		Material \$280.93685	
Rollup for Qty 1 of SUB200							\$280.93685	Unit \$280.93685	
Setup \$0.00000		Setup O/H \$0.00000		Labor \$1,000.00000 (120 Mins)		Overhead \$200.00000		Material \$282.66224	

Costing Estimates - Top-Level Material Estimates

Component/material costing - uses Default Cost pricing engine (typically Last Buy)

Part BOM1000

VIEW

EDIT

REVISIONS

BOM DATA +

PRICE/COST +

SALES +

PURCHASING +

ACTIVITY +

QUALITY +

MAINT +

DOCUMENTS (1)

NOTES (1)

► **Show/Hide Tree View of BOM** (View In Full Screen)

BOM Overview For Current Revision, 2

Build Qty

1

Set

Printable, With Sub Components | Printable, Top Level Only | Export

+/- Columns

#	Prcpart	QOH	Avail	Qty/Top	Ext. Qty/Top	Cost Record	Ext Cost	Rollup	Info
1	PRT1	188 EA	188 EA	1 EA	1 EA	\$1.00000	\$1.00000	(\$1.00000)	i
2	PRT2	852 EA	492 EA	2 EA	2 EA	\$2.00000	\$4.00000	(\$4.00000)	i
3	PRT3	699 EA	339 EA	2 EA	2 EA	\$3.00000	\$6.00000	(\$6.00000)	i
► 4	SUB100	24	-105	1	1	\$1,037.73418	\$1,037.73418	\$1,482.66224	i
Setup \$15.00000		Setup O/H \$5.00000		Labor \$24.58333 (0 Mins)		Overhead \$6.25000		Material \$1,493.66224	
Rollup for Qty 1 of BOM1000							\$1,544.49557	Unit \$1,544.49557	

Explain and Send Screenshots

<https://demo.catercorp.com/part/1000/allBOMList>

BOM Costing - Subassembly Rollup

Subassembly material rollup cost is captured as 'material cost' of the sub PLUS labor

Part BOM1000

VIEW
EDIT
REVISIONS
BOM DATA +
PRICE/COST +
SALES +
PURCHASING +
ACTIVITY +
QUALITY +
MAINT +
DOCUMENTS (1)
NOTES (1)

► **Show/Hide Tree View of BOM** (View In Full Screen)
BOM Overview For Current Revision, 2

Build Qty

Printable, With Sub Components | Printable, Top Level Only | Export

+/- Columns

#	Prcpart	QOH	Avail	Qty/Top	Ext. Qty/Top	Cost Record	Ext Cost	Rollup	Info
1	PRT1	188 EA	188 EA	1 EA	1 EA	\$1.00000	\$1.00000	(\$1.00000)	
2	PRT2	852 EA	492 EA	2 EA	2 EA	\$2.00000	\$4.00000	(\$4.00000)	
3	PRT3	699 EA	339 EA	2 EA	2 EA	\$3.00000	\$6.00000	(\$6.00000)	
▼ 4	SUB100	24	-105	1	1	\$1,037.73418	\$1,037.73418	\$1,482.66224	
1	RAW9462711	21 EA	-255 EA	1 EA	1 EA	\$1.50000	\$1.50000	(\$1.50000)	
2	RAW8392785	2099 EA	1844 EA	1 EA	1 EA	\$0.22539	\$0.22539	(\$0.22539)	
► 3	SUB200	35870	35679	1	1	\$39.99408	\$39.99408	\$280.93685	
Setup \$0.00000		Setup O/H \$0.00000		Labor \$1,000.00000 (120 Mins)		Overhead \$200.00000		Material \$282.66224	
Rollup for Qty 1 of SUB100						\$1,482.66224		Unit \$1,482.66224	
Setup \$15.00000		Setup O/H \$5.00000		Labor \$24.58333 (0 Mins)		Overhead \$6.25000		Material \$1,493.66224	
Rollup for Qty 1 of BOM1000						\$1,544.49557		Unit \$1,544.49557	

Costing Estimates - Subassembly Rollup

Subassembly BOM costing - traverses through every layer of the BOM to lowest level

3	PRT3	699 EA	339 EA	2 EA	2 EA	\$3.00000	\$6.00000	(\$6.00000)	
▼ 4	SUB100	24	-105	1	1	\$1,037.73418	\$1,037.73418	\$1,482.66224	
1	RAW9462711	21 EA	-255 EA	1 EA	1 EA	\$1.50000	\$1.50000	(\$1.50000)	
2	RAW8392785	2099 EA	1844 EA	1 EA	1 EA	\$0.22539	\$0.22539	(\$0.22539)	
▼ 3	SUB200	35870	35679	1	1	\$39.99408	\$39.99408	\$280.93685	
1	RAW2847199	11415 EA	11240 EA	1 EA	1 EA	\$0.43685	\$0.43685	(\$0.43685)	
▶ 2	SUB500	8	-18	1	1	\$100.00000	\$100.00000	\$280.50000	
Setup \$0.00000		Setup O/H \$0.00000		Labor \$0.00000 (0 Mins)		Overhead \$0.00000		Material \$280.93685	
Rollup for Qty 1 of SUB200						\$280.93685	Unit \$280.93685		
Setup \$0.00000		Setup O/H \$0.00000		Labor \$1,000.00000 (120 Mins)		Overhead \$200.00000		Material \$282.66224	
Rollup for Qty 1 of SUB100						\$1,482.66224	Unit \$1,482.66224		

BOM Costing - Labor Estimates

Derived from the labor plan - time estimates for a location/operations
- Rates are system-wide config, work location-specific, or user-defined

2, Part BOM1000

[Back To Revisions](#)

Labor multiplier set to 1

[Stop Using 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)	0		0s	0s	0s	\$25.00	\$0.00	\$5.00	\$0.00	\$0.00	Remove
2	Warehouse	0		0s	0s	0s	\$25.00	\$0.00	\$5.00	\$0.00	\$0.00	Remove
3	Production	2		2h 0s	1h 0s	1h 0s	\$0.00000	\$0.00000	\$5.00	\$10.00	\$10.00	Remove
4	Quality	1		5m 0s	0s	5m 0s	\$25.00	\$2.08	\$5.00	\$0.42	\$2.50	Remove
5	Shipping	0		0s	0s	0s	\$20.00	\$0.00	\$5.00	\$0.00	\$0.00	Remove
Unit Total Time (no lead time):				2 hours, 5 min	1 hour, 0 min	1 hour, 5 min		\$2.08		\$20.42	\$22.50	

(add location)



Add

Add All Default Locations

Remove All Locations

Preview Work List

Explain and Send Screenshots

https://demo.cetecerp.com/otd/revision/512/build_process

BOM Costing - Labor Estimates

Total labor estimate - estimate in minutes leveraging config setting for rates

5	Shipping	0	0s	0s	0s	\$20.00	\$0.00	\$5.00
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(labor plan ignored)

TOTAL LABOR ESTIMATE

NOTE: Value is in minutes. Setting this value will apply to all revisions

120 Use Total Labor Estimate Update

Allow Labor To Be Set From Components? [i](#)

[Repopulate From Components](#) [i](#)

Explain and Send Screenshots
https://demo.cetecorp.com/otd/revision/512/build_process

BOM Costing - Labor Estimates

Labor estimate on BOM Overview

► Show/Hide Tree View of BOM (View In Full Screen)

BOM Overview For Current Revision, 2

Build Qty

Printable, With Sub Components | Printable, Top Level Only | Export

+/- Columns

#	Prcpart	QOH	Avail	Qty/Top	Ext. Qty/Top	Cost Record	Ext Cost	Rollup	Info
1	PRT1	197 EA	197 EA	1 EA	1 EA	\$1.00000	\$1.00000	(\$1.00000)	i
2	PRT2	874 EA	514 EA	2 EA	2 EA	\$2.00000	\$4.00000	(\$4.00000)	i
3	PRT3	706 EA	346 EA	2 EA	2 EA	\$3.00000	\$6.00000	(\$6.00000)	i
► 4	SUB100	39	-139	1	1	\$1,022.76712	\$1,022.76712	\$1,482.66224	i
		Setup \$22.50000	Setup O/H \$10.83333	Labor \$22.08333 (0 Mins)		Overhead \$10.41667		Material \$1,493.66224	
Rollup for Qty 1 of BOM1000							\$1,559.49557	Unit \$1,559.49557	

+/- All BOMs

Complete Units Available to Build at MN: 0
Use Cached Pricing To Speed Page?

Explains Complete Units Available to Build at MN: 0
https://demo.batecprodlayt.com/part/135/component_list

Costing Estimates - BOM Quoting

BOM worksheet - the estimates that will be compared to the actuals

Quote/Order Worksheet 524

Sales Editing: Scott Ryan

BACK TO QUOTE

QUOTE DOCUMENTS (0)

QUOTE NOTES (0)

COPY BOM

COPY BOM WKSHT

IMPORT BOM

EXPORT BOM WKSHT

Build Process 1 2 3 4 5

2. Commit Order

[Back to Quote 524](#)

BOM BOM1000

Customer Vance Refrigeration

Update Order/Temp BOM Only?

BOM Type Preexisting

Qty 1

Refresh BOM

Production Line Production Line 1

Revision 2

Commit BOM Update


















+/- Columns + Component + Placeholder +/- Tooling +/- Ext. Unit Cost

Item	Qty	Prcpart	Description	Rev	Rev Req/d	Custpart	Lead Time	Weight	QOH	Excess Min	Cost, 1	Ext. Unit, 1	Ext. Net, 1	
1	1	PRT1	[+]	0	0	PRT2	7	0	188 EA	0	\$1.00	\$1.00	\$1.00	
2	2	PRT2	[+] Component	0	0		2	0	866 EA	0	\$2.00	\$4.00	\$4.00	

Explain and Send Screenshots <https://demo.cetecerp.com/bomquote/730/View>

Costing Estimates - BOM Quoting

Pulls costing record for materials and labor - through every level of assembly

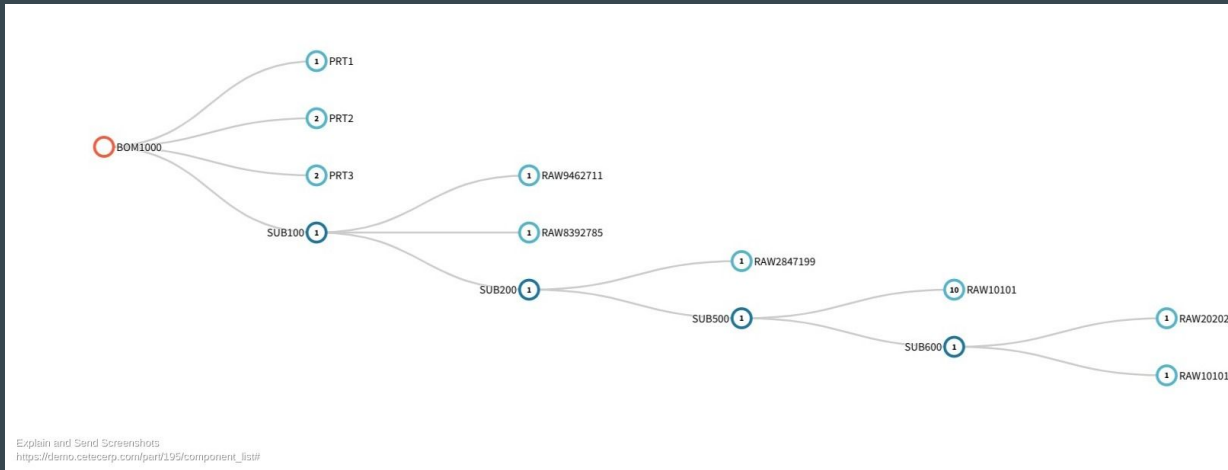
Item	Qty	Prcpart	Description	Rev	Rev Req/d	Custpart	Lead Time	Weight	QOH	Excess Min	Cost, 1	Ext. Unit, 1	Ext. Net, 1		
1	1	PRT1	[+]	0	0	PRT2	7	0	188 EA	0	\$1.00	\$1.00	\$1.00	  	
2	2	PRT2	[+] Component	0	0		2	0	866 EA	0	\$2.00	\$4.00	\$4.00	  	
Description: Component Sourcing: sourcing comments															
3	2	PRT3	[+] Component Description	0	0		5	0	699 EA	0	\$3.00	\$6.00	\$6.00	  	
4	1	SUB100	[+] Sub Assembly	0	0	SUB100	5	0	19	0	\$1,037.73	\$1,037.73	\$1,037.73	  	
	1	<input type="text"/>	<input type="text"/>												
												Material Total:	\$1,048.73	\$1,048.73	
												Procurement Charges:	\$0.00	\$0.00	
												Labor Total (based on operations): labor history	(135.00 Min) \$65.83	(135.00 Min) \$65.83	
												Misc Charges Total:	N/A	N/A	

BOM Costing - Analysis (what's the damage?)

Per invoice

- Details / Serials
- Costing Analysis

Invoice Cost Comparison



BOM Costing Analysis - Per Invoice

Details/Serials & Cost Analysis

Invoice 524.1 NOSI: 2

- VIEW
- EDIT
- LEDGER
- DETAILS/SERIALS**
- COST ANALYSIS
- SELL AGAIN
- UNINVOICE
- PDF (QUICK)
- COMMISSION
- TAKE PAYMENT
- CREATE RMA
- PACKING SLIP
- TRACEABILITY DOC
- DOCUMENTS (0)
- NOTES (0)
- ORDER 524.1

Build Process 1 2 3 4 5

5. Invoice 524.1

Customer	Vance Refrigeration	Location	MN
Bill To	Vance Refrigeration 1700 Business Park Scranton PA 18503 UNITED STATES		
Ship To	Vance Refrigeration 1700 Business Park Scranton PA 18503		
Invoice Date	2021-10-08	Entry Date	2021-10-08
P.O. Number	12345	Terms	NET30
Inside Sales		Outside Sales	
Ship Via	UPS Ground	FOB/Incoterms	Shipment
Terms	NET30	Freight Cost	\$0.00
Tracking Numbers			
Internal Comments			
Comments			

BOM Costing Analysis - Details / Serials

Material and Labor Estimates based on BOM Overview

Invoice 524.1

VIEW
EDIT
LEDGER
DETAILS/SERIALS
COST ANALYSIS
SELL AGAIN
UNINVOICE
PDF (QUICK)
COMMISSION
TAKE PAYMENT
CREATE RMA
PACKING SLIP
TRACEABILITY DOC
DOCUMENTS (0)
NOTES (0)
ORDER 524.1

Line 1 Prcpart BOM1000					
Ship Qty	1	Transaction Code	Build	Production Line	1
Cost Breakdown					
		Unit Resale	\$1,459.67	Extended	\$1,459.67
		Unit Cost	\$1,321.04	Extended	\$1,321.04
Material Est	\$1,493.66	Material Unit	\$1,246.04	Extended	\$1,246.04
Labor/Outsource Est	\$44.58	Labor / Outsource Cost	\$62.50	Extended	\$62.50
Overhead Est	\$21.25	Overhead Unit	\$12.50	Extended	\$12.50
Scrap / Std Cost					
		Total Scrap	\$0.00		(View Part Requests)
Std Cost	\$1,055.73	Unit Deviation	\$190.32	Extended	\$190.32
Date Code	2140			Lot Code	BOM1000-1413

BOM Costing Analysis - Details / Serials

Compared to the Material and Labor according to actual consumption

Invoice 524.1

- VIEW
- EDIT
- LEDGER
- DETAILS/SERIALS
- COST ANALYSIS
- SELL AGAIN
- UNINVOICE
- PDF (QUICK)
- COMMISSION
- TAKE PAYMENT
- CREATE RMA
- PACKING SLIP
- TRACEABILITY DOC
- DOCUMENTS (0)
- NOTES (0)
- ORDER 524.1

Line 1 Prcpart BOM1000					
Ship Qty	1	Transaction Code	Build	Production Line	1
Cost Breakdown					
		Unit Resale	\$1,459.67	Extended	\$1,459.67
		Unit Cost	\$1,321.04	Extended	\$1,321.04
Material Est	\$1,493.66	Material Unit	\$1,246.04	Extended	\$1,246.04
Labor/Outsource Est	\$44.58	Labor / Outsource Cost	\$62.50	Extended	\$62.50
Overhead Est	\$21.25	Overhead Unit	\$12.50	Extended	\$12.50
Scrap / Std Cost					
		Total Scrap	\$0.00		(View Part Requests)
Std Cost	\$1,055.73	Unit Deviation	\$190.32	Extended	\$190.32
Date Code	2140			Lot Code	BOM1000-1413

BOM Costing Analysis - Details / Serials

Component-level material costs compared to STD Costs for deviation
- Subassembly includes link to Details/Serial for its internal invoice

Component Details															
Prcpart	Description	PO	Receipt	Cost Center	Bin	Part Weight	Rev	Lot Code	Serial	Date Code	Qty	Unit Cost	Std Cost	Ext Delta	Ext Cost
PRT1		412.1-1	353		B-1-1	0		PRT1-1177			1	\$0.90	\$1.00	\$-0.10	\$0.90
PRT2	Component	412.1-2	354		B-1-2	0		PRT2-1180			2	\$2.00	\$2.00	\$0.00	\$4.00
PRT3	Component Description	473.1-3	438		NEW	0		111			3	\$3.00	\$3.00	\$0.00	\$9.00
SUB100	Sub Assembly	MN525.1 (build)	446		NEW-1	0		SUB100-1410		2140	1	\$1,232.14	\$1,041.73	\$190.42	\$1,232.14
					Weight	0								Total	\$1,246.04

[View 'As Used' Report](#)

Explain and Send Screenshots
https://demo.cetecerp.com/invoice/300/part_details

BOM Costing Analysis - Cost Analysis

High level view of each layer of subassemblies, with links to drill down into the details
- Includes Labor and Material actual costs

Invoice 524.1

VIEW
EDIT
LEDGER
DETAILS/SERIALS
COST ANALYSIS
SELL AGAIN
UNINVOICE
PDF (QUICK)
COMMISSION
TAKE PAYMENT
CREATE RMA
PACKING SLIP
TRACEABILITY DOC
DOCUMENTS (0)
NOTES (0)
ORDER 524.1

Expand All / Collapse All

Invoice	Line	Part	Qty	Setup	Setup OH	Labor	Overhead	Outsource	Pure Material	Components Cost	Rollup Cost
▼ 524.1-2	1	BOM1000	1	\$0.00	\$0.00	\$1,087.50	\$217.50	\$0.00	\$16.04		\$1,321.04
524.1-2	1	BOM1000	1	\$0.00	\$0.00	\$62.50	\$12.50	\$0.00	\$0.00	\$1,246.04	
		PRT1	1						\$0.90		
		PRT2	2						\$4.00		
		PRT3	3						\$9.00		
▼ 525.1-2	1	SUB100	1	\$0.00	\$0.00	\$1,025.00	\$205.00	\$0.00	\$2.14		\$1,232.14
525.1-2	1	SUB100	1	\$0.00	\$0.00	\$900.00	\$180.00	\$0.00	\$0.00	\$152.14	
		RAW9462711	1						\$1.50		
		RAW8392785	1						\$0.23		
▼ 72.1-1	1	SUB200	1	\$0.00	\$0.00	\$125.00	\$25.00	\$0.00	\$0.42		\$150.42
72.1-1	1	SUB200	1	\$0.00	\$0.00	\$125.00	\$25.00	\$0.00	\$0.00	\$0.42	
		RAW2847199	1						\$0.42		

BOM Costing Analysis - Cost Analysis

High level view of each layer of subassemblies, with links to drill down into the details
- Includes Labor and Material actual costs

Invoice 524.1

VIEW

EDIT

LEDGER

DETAILS/SERIALS

COST ANALYSIS

SELL AGAIN

UNINVOICE

PDF (QUICK)

COMMISSION

TAKE PAYMENT

CREATE RMA

PACKING SLIP

TRACEABILITY DOC

DOCUMENTS (0)

NOTES (0)

ORDER 524.1

Expand All / Collapse All

Invoice	Line	Prcpart	Qty	Setup	Setup OH	Labor	Overhead	Outsource	Pure Material	Components Cost	Rollup Cost
▼ 524.1-2	1	BOM1000	1	\$0.00	\$0.00	\$1,087.50	\$217.50	\$0.00	\$16.04		\$1,321.04
524.1-2	1	BOM1000	1	\$0.00	\$0.00	\$62.50	\$12.50	\$0.00	\$0.00	\$1,246.04	
		PRT1	1						\$0.90		
		PRT2	2						\$4.00		
		PRT3	3						\$9.00		
▼ 525.1-2	1	SUB100	1	\$0.00	\$0.00	\$1,025.00	\$205.00	\$0.00	\$2.14		\$1,232.14
525.1-2	1	SUB100	1	\$0.00	\$0.00	\$900.00	\$180.00	\$0.00	\$0.00	\$152.14	
		RAW9462711	1						\$1.50		
		RAW8392785	1						\$0.23		
▼ 72.1-1	1	SUB200	1	\$0.00	\$0.00	\$125.00	\$25.00	\$0.00	\$0.42		\$150.42
72.1-1	1	SUB200	1	\$0.00	\$0.00	\$125.00	\$25.00	\$0.00	\$0.00	\$0.42	
		RAW2847199	1						\$0.42		

Explain and Send Screenshots

https://demo.cetecerp.com/invoice/300/invoice_cost_breakdown/342#

BOM Costing - Invoice Cost Comparison

Report comparing the estimate of the BOM Overview to the actuals in the Invoice

The screenshot displays the CETEC ERP interface. At the top, there is a navigation bar with tabs for SALES, PARTS, PURCHASING, WAREHOUSE, ACCOUNTING, PRODUCTION, and ADMIN. Below this is a secondary navigation bar with dropdown menus for QUOTES, ORDERS, INVOICES, CUSTOMERS, LEADS, OPPORTUNITIES, FORECASTS, and REPORTS. The 'INVOICES' dropdown menu is open, showing various options, with 'COST COMPARISON' highlighted and a red arrow pointing to it. The main content area shows a form for generating an invoice report, including fields for Invoice number, Customer, Trans Code (set to All), and Prcpart. A 'Submit' button is visible. Below the form, a table displays the 'COST COMPARISON' report, showing columns for Ship Date, Qty, Est Labor/Outsource, Invoice Labor/Outsource, Est Overhead, Invoice Overhead, Est Material, Invoice Material, GM %, Invoice Line Ext. Cost, and Invoice Line Ext. Resale. The table contains three rows of data for the date 2021-10-08.

Quote	Order Line	In #	Ship Date	Qty	Est Labor/Outsource	Invoice Labor/Outsource	Est Overhead	Invoice Overhead	Est Material	Invoice Material	GM %	Invoice Line Ext. Cost	Invoice Line Ext. Resale
524	524.1-1	52	2021-10-08	1	\$44.58	\$62.50	\$21.25	\$12.50	\$1,493.66	\$1,246.04	9.50%	\$1,321.04	\$1,459.67
527	527.1-1	52	2021-10-08	1	\$0.00	\$25.00	\$0.00	\$5.00	\$280.94	\$275.30	0.00%	\$305.30	\$305.30
525	525.1-1	52	2021-10-08	1	\$1,000.00	\$900.00	\$200.00	\$180.00	\$282.66	\$152.14	0.00%	\$1,232.14	\$1,232.14

BOM Costing - Invoice Cost Comparison

Report comparing the estimate of the BOM Overview to the actuals in the Invoice

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

Invoice Cost Comparison

Invoice Date: 2021-10-04 - 2021-10-15 Invoice: Customer:

Intercompany: All Trans Code: All Prcpart:

Displaying 1 - 4 of 4 Export Columns

Quote	Order Line	Invoice #	Customer	Prcpart	Ship Date	Qty	Est Labor/Outsource	Invoice Labor/Outsource	Est Overhead	Invoice Overhead	Est Material	Invoice Material	GM %	Invoice Line Ext. Cost	Invoice Line Ext. Resale
524	524.1-1	524.1-2	Vance Refrigeration (62)	BOM1000	2021-10-08	1	\$44.58	\$62.50	\$21.25	\$12.50	\$1,493.66	\$1,246.04	9.50%	\$1,321.04	\$1,459.67
527	527.1-1	527.1-2	Internal Account (1)	SUB200	2021-10-08	1	\$0.00	\$25.00	\$0.00	\$5.00	\$280.94	\$275.30	0.00%	\$305.30	\$305.30
525	525.1-1	525.1-2	Internal Account (1)	SUB100	2021-10-08	1	\$1,000.00	\$900.00	\$200.00	\$180.00	\$282.66	\$152.14	0.00%	\$1,232.14	\$1,232.14
528	528.1-1	528.1-2	Internal Account (1)	SUB500	2021-10-08	1	\$120.00	\$120.00	\$100.00	\$100.00	\$60.50	\$53.30	0.00%	\$273.30	\$273.30

Explain and Send Screenshots
https://demo.cetecorp.com/invoice/cost_comparison?reload=1&from_date=2021-10-04&to_date=2021-10-15&invoicenum=&customer=&intercompany=&transcode=&prcpart=

BOM Costing - Invoice Cost Comparison

Report comparing the estimate of the BOM Overview to the actuals in the Invoice

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

Invoice Cost Comparison

Invoice Date: 2021-10-04 - 2021-10-15 Invoice: Customer:

Intercompany: All ▾ Trans Code: All ▾ Prcpart:

Displaying 1 - 4 of [Export](#) [+/- Columns](#)

Quote	Order Line	Invoice #	Customer	Prcpart	Ship Date	Qty	Est Labor/Outsource	Invoice Labor/Outsource	Est Overhead	Invoice Overhead	Est Material	Invoice Material	GM %	Invoice Line Ext. Cost	Invoice Line Ext. Resale
524	524.1-1	524.1-2	Vance Refrigeration (62)	BOM1000	2021-10-08	1	\$44.58	\$62.50	\$21.25	\$12.50	\$1,493.66	\$1,246.04	9.50%	\$1,321.04	\$1,459.67
527	527.1-1	527.1-2	Internal Account (1)	SUB200	2021-10-08	1	\$0.00	\$25.00	\$0.00	\$5.00	\$280.94	\$275.30	0.00%	\$305.30	\$305.30
525	525.1-1	525.1-2	Internal Account (1)	SUB100	2021-10-08	1	\$1,000.00	\$900.00	\$200.00	\$180.00	\$282.66	\$152.14	0.00%	\$1,232.14	\$1,232.14
528	528.1-1	528.1-2	Internal Account (1)	SUB500	2021-10-08	1	\$120.00	\$120.00	\$100.00	\$100.00	\$60.50	\$53.30	0.00%	\$273.30	\$273.30

Explain and Send Screenshots
https://demo.cetercorp.com/invoice/cost_comparison?reload=1&from_date=2021-10-04&to_date=2021-10-15&invoicenum=&customer=&intercompany=&transcode=&prcpart=

BOM Costing - Invoice Cost Comparison

Click into the invoices to drill down into the details

Filter the Intercompany flag to see customer shipments or internal builds

Filter by prcpart and see the trends over time for a specific BOM

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

Invoice Cost Comparison

Invoice Date: 2021-10-04 - 2021-10-15 Invoice: Customer:

Intercompany: All ▾ Trans Code: All ▾ Prcpart:

Displaying 1 - 4 of 4 Export +/- Columns

Quote	Order Line	Invoice #	Customer	Prcpart	Ship Date	Qty	Est Labor/Outsource	Invoice Labor/Outsource	Est Overhead	Invoice Overhead	Est Material	Invoice Material	GM %	Invoice Line Ext. Cost	Invoice Line Ext. Resale
524	524.1-1	524.1-2	Vance Refrigeration (62)	BOM1000	2021-10-08	1	\$44.58	\$62.50	\$21.25	\$12.50	\$1,493.66	\$1,246.04	9.50%	\$1,321.04	\$1,459.67
527	527.1-1	527.1-2	Internal Account (1)	SUB200	2021-10-08	1	\$0.00	\$25.00	\$0.00	\$5.00	\$280.94	\$275.30	0.00%	\$305.30	\$305.30
525	525.1-1	525.1-2	Internal Account (1)	SUB100	2021-10-08	1	\$1,000.00	\$900.00	\$200.00	\$180.00	\$282.66	\$152.14	0.00%	\$1,232.14	\$1,232.14
528	528.1-1	528.1-2	Internal Account (1)	SUB500	2021-10-08	1	\$120.00	\$120.00	\$100.00	\$100.00	\$60.50	\$53.30	0.00%	\$273.30	\$273.30

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https://demo.cscsarp.com/invoice-cost-comparison?reload=1&from_date=2021-10-04&to_date=2021-10-15&invoice=2&customer=3&intercompany=3&transcode=3&prcpart=

Order Entry & Mgmt

How do we manage the building and material planning for subassemblies?

- Work Orders - Suborders; Batch Build
- With Top - phantom assemblies

Order Mgmt tips / tricks - related orders; order material

- Will correlate with the Prod Mgmt and Scheduling classes

Work Orders - Commit to Order Screen

Subassembly Build Options - Yes, No, With Top

Quote/Order Worksheet 1023 Sales Editing: Scott Ryan ▾

VIEW & EDIT
SEND +
COMMIT TO ORDER
QUOTING TOOLS +
COMMISSION
DOCUMENTS (0)
NOTES (0)
CLONED FROM 25
PREPAY
CREATE PQQUOTE

Build Process 1 2 3 4 5
2. Commit Order

Commit Order Create Separate Order For Each Quote Line?

3 Order Notices (Doesn't Prohibit Order Entry)

Sub-Assembly Orders and Internal POs to be Created (4):

Build? ?	Quote Line	Prcpart	Quantity	Rev	Prod Line	Location	Customer	Work Start Date	Ship Date	Dock Date	Vendor	PO Location
No ▾	1	SUB400	10	: ▾	(unset)	MN - ▾	Internal Acc ▾	(schedule)			Internal Ve ▾	MN - Main ▾
No ▾	1	SUB300	10	: ▾	(unset)	MN - ▾	Internal Acc ▾	(schedule)			Internal Ve ▾	MN - Main ▾
No ▾	1	SUB200	10	: ▾	(unset)	MN - ▾	Internal Acc ▾	(schedule)			Internal Ve ▾	MN - Main ▾
No ▾	1	SUB100	10	: ▾	(unset)	MN - ▾	Internal Acc ▾	(schedule)			Internal Ve ▾	MN - Main ▾
No ▾		(set based on available qty) ▾		(set all) ▾	(set all) ▾	(set all) ▾	Internal Acc ▾	(set all)	(set all)	(set all)	Internal Ve ▾	(set all) ▾

Combine SubOrders with Same Rev

Explain and Send Screenshots
http://4-0.castecsrpdevel.com/quote/1023/order

Build YES

Creating Suborders

Quote/Order Worksheet 1026

VIEW & EDIT

SEND +

PDF/EMAIL (QUICK)

EXCEL FILE

PRICE BOOK

COMMIT TO ORDER

QUOTING TOOLS +

COSTING SHEET

IMPORT

REPRICE

ADJUST DATES

QUOTE HISTORY

MERGE

CLONE THIS QUOTE

CLOSE QUOTE

COMMISSION

DOCUMENTS (0)

NOTES (0)

PREPAY

CREATE PQQUOTE

Build Process 1 2 3 4 5

2. Commit Order

Commit Order

Create Separate Order For Each Quote Line?

3 Order Notices (Doesn't Prohibit Order Entry) +

Sub-Assembly Orders and Internal POs to be Created (4):

Build?	Quote Line	Prcpart	Quantity	Rev	Prod Line	Location	Customer	Work Start Date	Ship Date	Dock Date
Yes	1	SUB400	10	:	(unset)	MN -	Internal Accc	(schedule)		
Yes	1	SUB300	10	:	(unset)	MN -	Internal Accc	(schedule)		
No	1	SUB200	10	:	(unset)	MN -	Internal Accc	(schedule)		
Yes	1	SUB100	10	:	(unset)	MN -	Internal Accc	(schedule)		
(set default build/buy)		(set based on available qty)		(set all)		(set all)	Internal Accc	(set all)	(set all)	(set all)

Build YES

Setting Qty to build on suborders leveraging Qty Avail for subassembly
- Qty Need minus Qty Avail (set_orders_based_on_avail)

Sub-Assembly Orders and Internal POs to be Created (4):							
Build? 	Quote Line	Prcpart	Quantity	Rev	Prod Line	Location	Customer
Yes <input type="checkbox"/>	1	SUB400	5	: <input type="checkbox"/>	(unset)	MN - <input type="checkbox"/>	Internal Accc <input type="checkbox"/>
Yes <input type="checkbox"/>	1	SUB300	10	: <input type="checkbox"/>	(unset)	MN - <input type="checkbox"/>	Internal Accc <input type="checkbox"/>
No <input type="checkbox"/>	1	SUB200	10	: <input type="checkbox"/>	(unset)	MN - <input type="checkbox"/>	Internal Accc <input type="checkbox"/>
Yes <input type="checkbox"/>	1	SUB100	5	: <input type="checkbox"/>	(unset)	MN - <input type="checkbox"/>	Internal Accc <input type="checkbox"/>
(set default build/buy) <input type="checkbox"/>		Yes <input type="checkbox"/>		(set all) <input type="checkbox"/>	(set all) <input type="checkbox"/>	(set all) <input type="checkbox"/>	Internal Accc <input type="checkbox"/>

Available Stock: 5
Part Description:

Build YES - Order Mgmt

Order Numbering

+/- Columns

Order	Line	Build Loc	Receive Loc	Part	Desc	Qty	Prod Line	Work Loc	Labor Days	Lead Time	Work Start Date
Order 538.1	1	MN		BOM1000		1	Production Line 1	Doc Control (Unreleased)	1		2021-10-14
Order 538.2	1	MN	MN	SUB100	Sub Assembly	1	None	Doc Control (Unreleased)	6		2021-10-08
Order 538.3	1	MN	MN	SUB200	Sub Assembly	1	None	Doc Control (Unreleased)	0		2021-10-08
Order 538.4	1	MN	MN	SUB500		1	None	Doc Control (Unreleased)	12		2021-10-08

Explain and Send Screenshots
<https://demo.cetecerpdevel.com/order/MN538.1/related>

Build YES - Order Mgmt

Related Orders - manage build quantities & check status

Order 1026.1

- 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 1026
- CREATE WO
- RELATED ORDERS**
- SUB ORDER MIN1026.z
- CREATE PQUOTE
- OUTSOURCE POS (0) +
- DOCUMENTS (0)

Related Orders And POS

Work Start Date Cells will be outlined in orange if the delta between Work Start and Ship Date is less than the required Labor Days.

Ship Date Cells will be outlined in red if the date is on or after the Parent Order's Work Start Date.

Auto Date/Qty?

[Set All Listed Dates/Qty](#)

[Reschedule All Orders](#)

+/- Column

Order	Line	Build Loc	Receive Loc	Part	Desc	Qty	Prod Line	Work Loc	Labor Days	Lead Time	Work Start Date	Ship Date	Doc Control	Dock Date	
Order 1026.1	1	MN		BOM1000		10	None	Doc Control (Unreleased Orders)	0		2021-10-11	+	2021-10-11	Set	2021-10-11
Order 1026.2	1	MN	MN	SUB100		5	None	Doc Control (Unreleased Orders)	0		2021-10-11	+	2021-10-11	Set	2021-10-11
Order 1026.3	1	MN	MN	SUB300		10	None	Doc Control (Unreleased Orders)	0		2021-10-08	+		Set	
Order 1026.4	1	MN	MN	SUB400		5	None	Doc Control (Unreleased Orders)	0		2021-10-08	+	2021-10-08	Set	2021-10-08

Build YES - Order Mgmt

Related Orders - adjust Work Start Date, Ship Date, and Dock Date
- Leverage Labor Days (based on labor path) and/or Lead Time to refactor

Order 1026.1

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 1026
CREATE WO
RELATED ORDERS
SUB ORDER MN1026.2
CREATE PQOTE
OUTSOURCE POS (0) +
DOCUMENTS (0)

Related Orders And POS

Work Start Date Cells will be outlined in orange if the delta between Work Start and Ship Date is less than the required Labor Days.

Ship Date Cells will be outlined in red if the date is on or after the Parent Order's Work Start Date.

Auto Date/Qty?

[Set All Listed Dates/Qty](#)

[Reschedule All Orders](#)

+/- Columns

Order	Line	Build Loc	Receive Loc	Part	Desc	Qty	Prod Line	Work Loc	Labor Days	Lead Time	Work Start Date	Ship Date	Dock Date
Order 1026.1	1	MN		BOM1000		10	None	Doc Control (Unreleased Orders)	0		2021-10-11	2021-10-11	2021-10-11
Order 1026.2	1	MN	MN	SUB100		5	None	Doc Control (Unreleased Orders)	0		2021-10-11	2021-10-11	2021-10-11
Order 1026.3	1	MN	MN	SUB300		10	None	Doc Control (Unreleased Orders)	0		2021-10-08		
Order 1026.4	1	MN	MN	SUB400		5	None	Doc Control (Unreleased Orders)	0		2021-10-08	2021-10-08	2021-10-08

Click Set



Build NO - Overbuilding

Batch building - leveraging MRP to plan out the production of the subassemblies and streamline the order entry process

Quote/Order Worksheet 539

Sales Editing: Scott Ryan

VIEW & EDIT
SEND +
COMMIT TO ORDER
QUOTING TOOLS +
COMMISSION
DOCUMENTS (0)
NOTES (0)
CLONED FROM 538
PREPAY
CREATE PQQUOTE

Build Process 1 2 3 4 5
2. Commit Order

Commit Order Create Separate Order For Each Quote Line?

4 Order Notices (Doesn't Prohibit Order Entry) >

Sub-Assembly Orders and Internal POs to be Created (4):

Build?	Quote Line	Prcpart	Quantity	Rev	Prod Line	Location	Customer	Work Start Date	Ship Date	Dock Date	Vendor	PO Location
No	1	SUB600	1	1	2	MN - I	Internal Accol	(schedule)			Internal Vendi	MN - Main V
No	1	SUB500	1	1	(unset)	MN - I	Internal Accol	(schedule)			Internal Vendi	MN - Main V
No	1	SUB200	1	1	100	MN - I	Internal Accol	(schedule)			Internal Vendi	MN - Main V
No	1	SUB100	1	(unr)	(unset)	MN - I	Internal Accol	(schedule)			Internal Vendi	MN - Main V
(set default build/buy)					(set all)	(set all)	Internal Accol	(set all)	(set all)	(set all)	Internal Vendi	(set all)
(set based on available qty)												

Combine SubOrders with Same Rev

Explain and Send Screenshots
<https://demo.cctecerpdevelop.com/quote/539/order>

Build NO - Overbuilding

Batch building - leveraging MRP to plan out the production of the subassemblies and streamline the order entry process

MRP Requirements

Standard Mode

Include Forecasts In Next Allocation Run?

MRP generated as of **10/11/21 1:39 PM** in 'Standard' Mode using Allocation data from 2021-10-11 13:40:15. Most recent allocation refresh is 2021-10-11 13:40:15, and Forecasts are included.
Last refresh took **00 minutes, 59 seconds**.

Vendor	All	Location	All Main Warehouse Malaysia Plant Quarantine	Product Manager	
Source Type	All	Prupart	Search parts... <input type="text"/>	Hide Ignore	<input type="checkbox"/>
Expand All Part Info?	No	Order #	<input type="text"/>	Leadtime Qualifier	Cushion days
Internal Vendors	All	BOMs	Only	Preferred Vendor	<input type="text"/>
Drawing Number	<input type="text"/>				

Do you want to buy ? Or build ? [Less Options](#)

Build

Internal Account

Build NO - Overbuilding

MRP - see Qty need according to earliest Need Date compiled across all work orders
- Option: manage demand through ROP (re-order point) w/ EOQ or Forecasts

Displaying 1 - 5 of 5 [Export](#) [+/- Columns](#)

<input type="checkbox"/> All?	PRC	Part	BOM	Leadtime ⓘ	Need Date ⓘ	QOO	QOH	Avail	ROP	EOQ	Sum Req'd Qty ⓘ	Source	
<input checked="" type="checkbox"/>	SUB	100	Yes	5 2021-10-16	2020-12-17	113	24	-137	0	0	<input type="text" value="981"/>	Supply/Demand	i
<input type="checkbox"/>	SUB	19284	Yes	0	2020-07-10	10	0	-1	0	0	<input type="text" value="2"/>	Supply/Demand	i
<input type="checkbox"/>	SUB	1131A-001 (ECO!)	Yes	0	2020-07-09	10	0	-1	0	0	<input type="text" value="1"/>	Supply/Demand	i
<input checked="" type="checkbox"/>	SUB	500	Yes	5 2021-10-16	2020-04-16	28	8	-24	15	10	<input type="text" value="12"/>	Supply/Demand	i
<input type="checkbox"/>	SUB	200	Yes	3 2021-10-14		109	194	-3	10	10	<input type="text" value="10"/>	ROP	i

[Explain and Send Screenshots](#)
https://demo.cetecerp.com/prQuote/assisted_purchasing?reloaded=1&debug=&vendor_search=&prod_mgr=&source_type=&part_order=&order_id=&item_leadtime=&internal_only=all&bom_only=only&preferred_vendor=&drawing_number_bc_restriction=&build_or_buy=

Displaying 1 - 5 of 5 [Export](#) [+/- Columns](#)

Build NO - Overbuilding

MRP - see Qty need according to earliest Need Date compiled across all work orders
- Option: manage demand through ROP (re-order point) w/ EOQ or Forecasts

Buy (Leave Blank to Create New PQuote) Search vendors... Add/Create PQuote Ignore Checked Lines

Displaying 1 - 5 of 5 Export +/- Columns

<input type="checkbox"/> All?	PRC	Part	BOM	Leadtime ⓘ	Need Date ⓘ	QOO	QOH	Avail	ROP	EOQ	Sum Req'd Qty ⓘ	Source
<input checked="" type="checkbox"/>	SUB	100	Yes	5 2021-10-16	2020-12-17	113	24	-137	0	0	981	Supply/Demand ⓘ
<input type="checkbox"/>	SUB	19284	Yes	0	2020-07-10	10	0	-1	0	0	2	Supply/Demand ⓘ
<input type="checkbox"/>	SUB	1131A-001 (ECO!)	Yes	0	2020-07-09	10	0	-1	0	0	1	Supply/Demand ⓘ
<input checked="" type="checkbox"/>	SUB	500	Yes	5 2021-10-16	2020-04-16	28	8	-24	15	10	12	Supply/Demand ⓘ
<input type="checkbox"/>	SUB	200	Yes	3 2021-10-14		109	194	-3	10	10	10	ROP ⓘ

Explain and Send Screenshots
https://demo.catercorp.com/pquote/assisted_purchasing?reloaded=1&debug=2&vendor_search=3&prod_mgr=2&source_type=2&part_search=SUB&show_all_part_info=0&order_restriction=2&leadtime=2&internal_only=all&bom_only=only&preferred_vendor=2&drawing_numbers_restriction=0&bill_of_materials_restriction=0

Displaying 1 - 5 of 5 Export +/- Columns

Build NO - Order Mgmt

Prod Mgmt - managing subassemblies based on qty avail and short flags
- Tools include: Show Prod Mgmt flag

Production Order List

Order #	<input type="text"/>	Part #	<input type="text" value="(comma separated)"/>	Revision	<input type="text"/>
Customer Number	<input type="text"/>	Customer Name	<input type="text"/>	Cust. PO	<input type="text"/>
Date	<input type="text" value="2021-10-11"/> - (to) <input type="text"/>	Order	<input type="text"/>	Transcode / Status	<input type="text" value="Open Build Orders"/>
Intercompany?	<input type="text" value="All"/>	Production Line	<input type="text" value="All
None
1 - Production Line 1
2 - Production Line 2
3 - Production Line 3"/>	Warehouse	<input type="text" value="All
Main Warehouse (MN)
Malaysia Plant (CA)
Mexico Plant (OM)
Quarantine (CP)"/>
Location	<input type="text" value="Appliances
At Vendor Outsourci
Beck assembly
Cable Assembly
Cable Prep/Cut"/>	Shipped Today?	<input type="checkbox"/>	Show Prod Mgmt?	<input checked="" type="checkbox"/>
No Work Instr.	<input type="checkbox"/>	First Article?	<input type="text" value="All"/>	Order Status	<input type="text" value="All"/>
Req'd Work Instr.	<input type="text" value="Hide Column (fast)"/>	QA Inspector	<input type="text" value="All"/>	On Target?	<input type="text" value="All"/>
Production Status	<input type="text" value="All"/>	<small>Explain and Send Screenshots https://demo.cetscorp.com/otd/order/list?reloaded=1&debug=2&ordernum=2&prcpart=2&revision=2&custnum=2&custname=2&cust_po=2&from_date=2021-10-11&to_date=2&date_type=entry&trans_type=wo_open&intercompany=2&prod_mgmt_view=1&first_article=2&orderstatus=2&show_req_</small>			

Build NO - Order Mgmt

Prod Mgmt - managing subassemblies based on qty avail and short flags
 - Tools include: Show Prod Mgmt flag

Less Options Submit

Displaying 1 - 5 of 5 [Export](#) [+/- Columns](#)

Loc	Warehouse	Order	On Target?	Prod Stats	Prod Notes	Short Per Allocation	Comp	Short Parts	Qty	QOH	Prcpart	Customer	Work Start Date	Ship Date	Est. Labor	Act. Labor	Incomplete Labor	Ext. Resale	Work Loc
MN	MN	530.1	Yes	N/A		Short!	4	PRT2, PRT3, SUB100	5	3	BOM1000	Vance Refrigeration	2021-10-20	2021-10-20	395.00	0.00	395.00	\$8,144.95	Doc Control (Unreleased)
MN	MN	530.1	Yes	Critical Shortage		Short!	4	PRT2, PRT3, SUB100	7	3	BOM1000	Vance Refrigeration	2021-10-15	2021-10-18	525.00	0.00	525.00	\$11,402.93	Doc Control (Unreleased)
MN	MN	530.1	Yes	Critical Shortage		Short!	4	PRT2, PRT3, SUB100	7	3	BOM1000	Vance Refrigeration	2021-10-12	2021-10-13	525.00	0.00	525.00	\$11,402.93	Doc Control (Unreleased)
MN	MN	531.1	Yes	N/A		Short!	2	SUB500	10	194	SUB200	Internal Account	2021-10-11	2021-10-11	0.00	0.00	0.00	\$397.03	Doc Control (Unreleased)
MN	MN	532.1	No	Quality Hold		No	3		10	19	SUB100	Internal Account	2021-10-07	2021-10-08	24000.00	0.00	24000.00	\$10,377.34	Doc Control (Unreleased)

25445.00 25445.00

Explain and Send Screenshots
https://demo.catercorp.com/total/order/list?reloaded=1&debug=2&ordernum=3&prcpart=2&revision=3&custnum=2&custname=2&cust_po=2&from_date=2021-10-11&to_date=2&date_type=entry&trans_type=wo_open&intercompany=3&prod_mgmt_view=1&first_article=2&orderstatus=2&show_req_work_instructions=2&qin

Build NO - Order Mgmt

Prod Mgmt - managing subassemblies based on qty avail and short flags
 - Tools include: Show Prod Mgmt flag; Order Material (looking for short materials)

Order Material Report

Work Start Date: 2021-10-06 - 2021-10-19 Ship Date: (from) - (to) Dock Date: ()

Customer: () Order: () Line: ()

More Options ▾

Displaying 1 - 9 of 9 [Export](#) +/- Columns

	Order	Line	Qty	Work Start Date	Ship Date	Top Level Prcpart	Shortage Prcpart	Need Qty	QOH	QOO	Avail	Supplier Name	PO	PO Ack?	PO Da
View	530.1	1	7	2021-10-15	2021-10-18	BOM1000	PRT2	14	874.00000000	14	874	N/A		No	N/A
View	530.1	1	7	2021-10-15	2021-10-18	BOM1000	PRT3	14	706.00000000	3	706	N/A		No	N/A

Build NO - Order Mgmt

Prod Mgmt - managing subassemblies based on qty avail and short flags
 - Tools include: Show Prod Mgmt flag; Order Material (looking for short materials)

Displaying 1 - 9 of 9 Export +/- Columns

	Order	Line	Qty	Work Start Date	Ship Date	Top Level Prcpart	Shortage Prcpart	Need Qty	QOH	QOC	Avail	Supplier Name	PO	PO Ack?	PO Dock Date	PO Qty Due in
View	530.1	1	7	2021-10-15	2021-10-18	BOM1000	PRT2	14	874.00000000	14	874	N/A		No	N/A	0
View	530.1	1	7	2021-10-15	2021-10-18	BOM1000	PRT3	14	706.00000000	3	706	N/A		No	N/A	0
View	530.1	1	7	2021-10-15	2021-10-18	BOM1000	SUB100	7	34.00000000	132	34	Internal Vendor	533.1-1	Yes	2021-10-14	25
View	530.1	3	7	2021-10-12	2021-10-13	BOM1000	PRT2	14	874.00000000	14	874	Master Distributor	373.1	Yes	2021-05-26	4
View	530.1	3	7	2021-10-12	2021-10-13	BOM1000	PRT3	14	706.00000000	3	706	N/A		No	N/A	0
View	530.1	3	7	2021-10-12	2021-10-13	BOM1000	SUB100	7	34.00000000	132	34	Internal Vendor	533.1-1	Yes	2021-10-14	25
View	531.1	1	10	2021-10-11	2021-10-11	SUB200	SUB500	10	8.00000000	23	8	Internal Vendor	510.4-1	Yes	2021-09-24	1
View	532.1	1	35	2021-10-07	2021-10-13	SUB100	RAW9462711	35	115.00000000	89	115	N/A		No	N/A	0

Explain and Send Screenshots
https://demo.celcerp.com/oto/allocator/late?reloaded=1&from_vip=2021-10-13&to_vip=2021-10-19&from_promise=&to_promise=&from_duedate=&to_duedate=&customer=&ordernum=&linenum=&propart=&comp_prcpart=&prc=&mode=short&ordertype=&transcode=&location=&association

WITH TOP

Quote/Order Worksheet 534

Sales Edit

VIEW & EDIT

SEND +

COMMIT TO ORDER

QUOTING TOOLS +

COMMISSION

DOCUMENTS (0)

NOTES (0)

PREPAY

CREATE PQUOTE

Build Process 1 2 3 4 5

2. Commit Order

Commit Order

Create Separate Order For Each Quote Line?

Order Notices (Doesn't Prohibit Order Entry)

Line 1 has a date set before today or is blank! Please Check Ship Date, Work Start Date, and Dock Date!

Line 1 Ship Date should be 2021-10-08 based on Customer Ship Ahead Days (7)

Lines where Ship Date and Dock Date are the same: 1

Sub-Assembly Orders and Internal POs to be Created (4):

Build?	Quote Line	Prcpart	Quantity	Rev	Prod Line	Location	Customer	Work Start Date	Ship Date	Dock Date	Vendor
Wit	1	SUB600	5	1	2	MN - I	Internal Accou	(schedule)			Internal Vendi
Wit	1	SUB500	5	1	(unset)	MN - I	Internal Accou	(schedule)			Internal Vendi
Wit	1	SUB200	5	1	100	MN - I	Internal Accou	(schedule)			Internal Vendi
Wit	1	SUB100	5	(unr	(unset)	MN - I	Internal Accou	(schedule)			Internal Vendi
With Top					(set all)	(set all)	Internal Accou	(set all)	(set all)	(set all)	Internal Vendi

Combine SubOrder

WITH TOP

Rolls up the material and labor plan for a subassembly into the parent

- Traverses every layer of a BOM to include all components and labor steps for subassemblies in flat single work order

Why would you use WITH TOP?

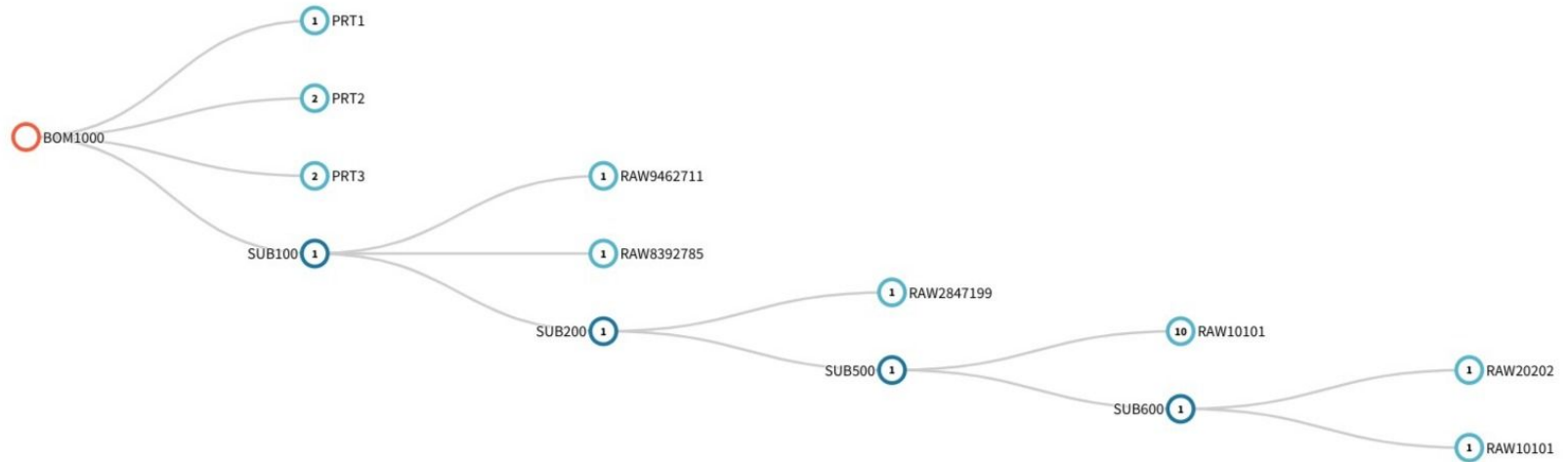
- The compromise between Engineering and Production to support highly complex BOMs with a simple production process

- For cost accounting, captures cost of material and labor to one work order

WITH TOP - Order Mgmt

Material Impact - replaces a subassembly with its components

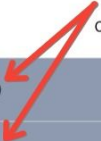
▼ Show/Hide Tree View of BOM (View In Full Screen)



WITH TOP - Order Mgmt

Material Impact - BOM Management shows the components by subassembly

Order Specific BOM								+/- Columns	
#	Prcpart	Description	Revision	Qty	Qty Picked	Net Qty Need	Drop <input type="checkbox"/>		
1	PRT1 (QOH: 197 Avail: -87) (Part Synonyms)			1 EA	0 EA	5	<input type="checkbox"/>		
2	PRT2 (QOH: 874 Avail: -20) (Part Synonyms)	Component		2 EA	0 EA	10	<input type="checkbox"/>		
3	PRT3	Component Description		2 EA	0 EA	10	<input type="checkbox"/>		
4	RAW9462711 (From SUB100)			1 EA	0 EA	5	<input type="checkbox"/>		
5	RAW8392785 (From SUB100)			1 EA	0 EA	5	<input type="checkbox"/>		
6	RAW2847199 (From SUB200)	Clamp		1 EA	0 EA	5	<input type="checkbox"/>		
7	RAW10101 (From SUB500)			10 Oz	0 Oz	50	<input type="checkbox"/>		
8	RAW20202 (From SUB600)			1 Oz	0 Oz	5	<input type="checkbox"/>		
9	RAW10101 (From SUB600)			1 Oz	0 Oz	5	<input type="checkbox"/>		



Explain and Send Screenshots
<https://demo.cetecerp.com/otd/order/604/tempbom>

WITH TOP

Labor impact - Work instructions and estimates included (these print to your work order docs)

Work Instructions (Show/Hide)			
Location/Operation	Instruction	Response	Status
1. Mill (for SUB500)	Lead Time: 10 days		(not scheduled)
2. Quality (for SUB500)	Show/Hide # Operations: 1		(not scheduled)
3. Doc Control (Unreleased) (for SUB100)	No Operations Specified		(not scheduled)
4. Warehouse (for SUB100)	No Operations Specified		(not scheduled)
5. Subassembly Production (for SUB100)	Lead Time: 0 days		(not scheduled)
6. Cable Prep/Cut (for SUB100)	No Operations Specified		(not scheduled)
7. Production (for SUB100)	No Operations Specified		(not scheduled)
8. Lathe (for SUB100)	No Operations Specified		(not scheduled)
9. Doc Control (Unreleased)	No Operations Specified		(not scheduled)
10. Warehouse	Show/Hide # Operations: 1		(not scheduled)
11. Production	Show/Hide # Operations: 2		Schedule: 2021-10-15 Start
12. Quality	Show/Hide # Operations: 1		Schedule: 2021-10-15 Start
13. Shipping	No Operations Specified		(not scheduled)

[Show/Hide Deleted Records](#)

Explain this screenshot
https://demo.celeris.com/oid/oid/work_view

WITH TOP - Order Mgmt

Create multi-level BOM on Order edit

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

ADD LINE

Trans Type

Build

Qty

1

Prcpart

BOM1000

Revision

2

Prod Line

N/A

Cost

\$0.00

USD

Resale

\$0.00

USD

Work Start Date

Ship Date

2021-10-11

Dock Date

2021-10-11

Submit

Add Multi-Level BOM

Change All Lines

Show/Hide All Advanced

Enable Auto Fill

#	Trans Type	Qty Due	Prcpart	Revision	Prod Line	Cost	Resale	Work Start Date	Ship Date	Original Ship Date	Dock Date
---	------------	---------	---------	----------	-----------	------	--------	-----------------	-----------	--------------------	-----------

WITH TOP - Order Mgmt

Create multi-level BOM on Order edit

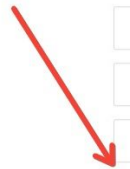
Build Process 1 2 3 4 5
2. Commit Order

Commit Order Create Separate Order For Each Quote Line?

Order Notices (Doesn't Prohibit Order Entry)
Line 1 Ship Date should be 2021-10-04 based on Customer Ship Ahead Days (7)
Lines where Ship Date and Dock Date are the same: 1

Sub-Assembly Orders and Internal POs to be Created (4):

Build?	Quote Line	Prcpart	Quantity	Rev	Prod Line	Location	Customer	Work Start Date	Ship Date	Dock Date	Vendor	Pe Lo
<input type="checkbox"/>	1	SUB600	5	<input type="checkbox"/>	2	MN - I	Intr	(schedule)			I	
<input type="checkbox"/>	1	SUB500	5	<input type="checkbox"/>	(i	MN - I	Intr	(schedule)			I	
<input type="checkbox"/>	1	SUB200	5	<input type="checkbox"/>	1	MN - I	Intr	(schedule)			I	
<input type="checkbox"/>	1	SUB100	5	<input type="checkbox"/>	(i	MN - I	Intr	(schedule)			I	
With Top						(set a	Intr	(set all)	(set all)	(set all)	I	



BOM Creation

Part BOM1000

VIEW

EDIT

REVISIONS

BOM DATA +

PRICE/COST +

SALES +

PURCHASING +

ACTIVITY +

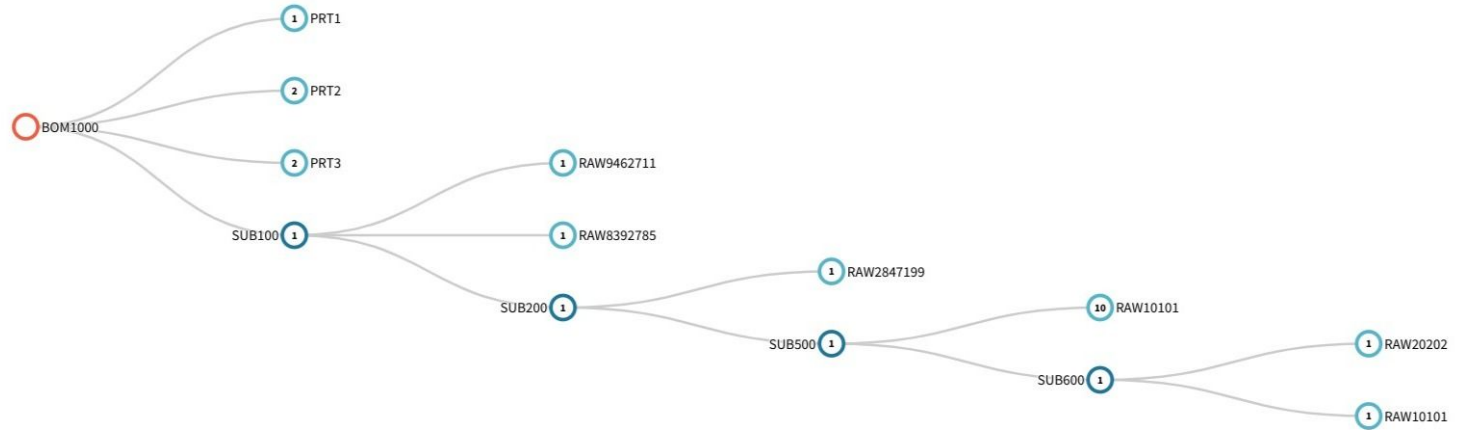
QUALITY +

MAINT +

DOCUMENTS (1)

NOTES (1)

▼ Show/Hide Tree View of BOM (View In Full Screen)



Explain and Send Screenshots

https://demo.cetecerpdevelop.com/part/195/component_list

BOM Creation

BOM Quote / BOM Revision Import - Import one by one

Quote/Order Worksheet 537

[BACK TO QUOTE](#) [Back to Quote 537](#)

QUOTE DOCUMENTS (1)

QUOTE NOTES (0)

COPY BOM

COPY BOM WKSHT

IMPORT BOM

EXPORT BOM WKSHT

BOM BOM1000

Customer

Update Order/Temp BOM Only?

Explain and Send Screenshots
<https://demo.cetecerp.com/bomquote/767/view>

Revision 2, Part BOM1000

[TO PART RECORD](#) [Back To Revisions](#)

WORK INST

LABOR PLAN

INSPECTION INST.

EDIT REVISION BOM

IMPORT BOM

RELATED PARTS

REVS LINKED

WORK REPORT

WORK INST. HISTORY

Note: Cost defaults to Inventory cost unless provided.

Note: Selecting (unset) for revision defaults to the current revision

Edit Revision BOM

Comp #	Prcpart	Revision	Desc	Pick Comments
1	PRT1	+	▼	
2	PRT2	+	▼	Component

Explain and Send Screenshots
https://demo.cetecerp.com/otd/revision/512/edit_bom

BOM Creation

Import a BOM a time with a template - creates new parts in Cetec

Use?	(Specify Column) ▾	(Specify Column) ▾	(Specify Column) ▾	(Specify Column) ▾	(Specify Column) ▾	(Specify Column) ▾
1: <input type="checkbox"/>	(Specify Column)	description	qty	cost	component #	component revision
2: <input checked="" type="checkbox"/>	Prc		1		1	
3: <input checked="" type="checkbox"/>	Part (no PRC)		2		2	
4: <input checked="" type="checkbox"/>	Prcpart		3		3	
5: <input checked="" type="checkbox"/>	CustPart		1		4	
6: <input checked="" type="checkbox"/>	Description					
7: <input checked="" type="checkbox"/>	Qty					
8: <input checked="" type="checkbox"/>	Cost					
9: <input checked="" type="checkbox"/>	Component #					
	Component UOM					
	Reference Designator					
	Scrap Factor					
	Scrap Adder					
	Sourcing					
	Component Revision					
	Manufacturer Name					

BOM Creation

Multi-Level BOM Import

CETEC ERP SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

USERS ▾ CONFIG SETTINGS ▾ MAINTENANCE ▾ LOGS ▾ DOCS ▾ APIS & MORE ▾ DASHBOARDS ▾ CETEC ERP ▾

Import Data To Cetec ERP

All Support/Assistance For Data Import And Related Issues Will Be Bi
Password protected files are not supported.

Data Type To Import

BOMs ▾

Upload a New XLS/CSV Document

Choose File No file chosen

API OVERVIEW
IMPORT JSON OVERVIEW
DATA IMPORT
DATA IMPORT DOCUMENTATION
SCHEMA DIAGRAM
SITE MAP

Explains and Gets Screenshots
https://demo.cetecerp.com/importdata/import

BOM Creation

Multi-Level BOM Import - import all levels of a BOM

Displaying 1 - 11 of 11

Use?	Top Level Part Number	Component Line Number	Component Part Number	Top Level Revision	Quantity Per Top
1: <input type="checkbox"/>	Top Level	Component Line #	Component Part Number	Top Level Rev	Qty/Top
2: <input checked="" type="checkbox"/>	BOM1000	1	PRT1	2	1
3: <input checked="" type="checkbox"/>	BOM1000	2	PRT2	2	2
4: <input checked="" type="checkbox"/>	BOM1000	3	PRT3	2	3
5: <input checked="" type="checkbox"/>	BOM1000	4	PRT4	2	4
6: <input checked="" type="checkbox"/>	BOM1000	5	PRT5	2	5
7: <input checked="" type="checkbox"/>	BOM1000	6	SUB100	2	1
8: <input checked="" type="checkbox"/>	SUB100	1	SUB200	2	1
9: <input checked="" type="checkbox"/>	SUB100	2	PRT11	2	1
10: <input checked="" type="checkbox"/>	SUB100	3	PRT12	2	2
11: <input checked="" type="checkbox"/>	SUB100	4	PRT13	2	3

Displaying 1 - 11 of 11

Explain and Send Screenshots
<https://www.guru.com/learn/ImportData/Import>

BOM Creation

Multi-Level BOM Import

Top Level	Component Line #	Component Part Number	Top Level Rev	Qty/Top
BOM1000	1	PRT1	2	1
BOM1000	2	PRT2	2	2
BOM1000	3	PRT3	2	3
BOM1000	4	PRT4	2	4
BOM1000	5	PRT5	2	5
BOM1000	6	SUB100	2	1
SUB100	1	SUB200	2	1
SUB100	2	PRT11	2	1
SUB100	3	PRT12	2	2
SUB100	4	PRT13	2	3
SUB200	1	SUB300	2	1
SUB200	2	PRT21	2	1
SUB200	3	PRT22	2	2
SUB300	1	SUB400	2	1
SUB300	2	PRT31		1
SUB300	3	PRT32		2
SUB400	1	PRT41		5
SUB400	2	PRT42		5

BOM Creation

Multi-Level BOM Import - additional fields

BOM IMPORT

Required Fields: Top Level Component, Component Line Number, Component Part Number, Quantity Per Top

Optional Fields: Scrap Adder, Scrap Factor, Customer Part (cross parts-> Customer), Top Level Revision, Component Revision, & Bonus Columns related to Parts.

Prerequisite Data:

Data To Be Deleted If 'Delete Related Data' Is Checked: N/A at this time

Notes: Component Line Numbers must be unique for each Sub Component on a Top Level Component!

If a Top Level Revision or Component Revision is filled in and Obsolete that line will fail.

Explains and Send Screenshots:
<https://demo.celerp.com/importdata/import>

BOM Creation - Labor Plans

Revision 2, Part BOM1000

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

[Back To Revisions](#)

Labor multiplier set to 1

[Stop Using 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)		0	0s	0s	0s	\$25.00	\$0.00	\$5.00	\$0.00	\$0.00	Remove
2	Warehouse		1	10m 0s	10m 0s	0s	\$15.00	\$2.50	\$5.00	\$0.83	\$3.33	Remove
3	Production		2	2h 0s	1h 0s	1h 0s	\$20.00	\$40.00	\$5.00	\$10.00	\$50.00	Remove
4	Quality		1	5m 0s	0s	5m 0s	\$25.00	\$2.08	\$5.00	\$0.42	\$2.50	Remove
5	Shipping		0	0s	0s	0s	\$20.00	\$0.00	\$5.00	\$0.00	\$0.00	Remove
Unit Total Time (no lead time):				2 hours, 15 min	1 hour, 10 min	1 hour, 5 min		\$44.58		\$21.25	\$65.83	

(add location)



Add

Add All Default Locations

Remove All Locations

Preview Work List

BOM Creation

Labor Plan - Copy from Revision
- Copy and edit

Copy All Labor From Other Revision Of This Part:

(Specify Revision)



Copy

Copy All Labor From Another Part

Specify Source Prcpart:

or, Copy All Labor From Another Part
or, Link Labor To Master Part Revision

Explain and Send Screenshots

https://demo.celcerp.com/old/revision/512/build_process

BOM Creation

Labor Plan - Copy from Revision - Copy and edit

Copy All Labor From Other Revision Of This Part:

(Specify Revision)

or, Copy All Labor From Another Part
or, Link Labor To Master Part Revision

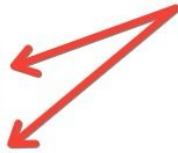
Copy All Labor From Another Part

Specify Source Prcpart:

BOM1001

Specify Source Revision:

Choose Revision



Explain and Send Screenshots
https://demo.cetecerpdevelop.com/otd/revision/512/build_process

BOM Creation

Labor Plan - Master Revision for a 'template'

- Edits to the master revision are maintained for all linked BOM rev labor plans

Copy All Labor From Other Revision Of This Part:

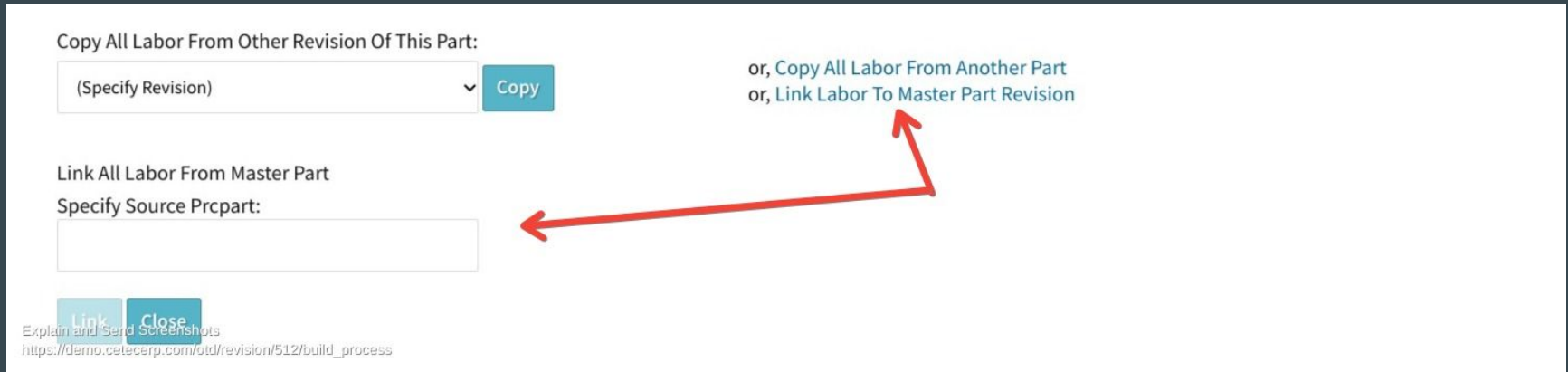
(Specify Revision)

or, Copy All Labor From Another Part
or, Link Labor To Master Part Revision

Link All Labor From Master Part

Specify Source Prcpart:

Explain and Send Screenshots
https://demo.cetecerp.com/otd/revision/512/build_process



Questions!

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