For Smart Factory

Operating
User

MANUAL

MES 3D

ERP + MES + SCADA

Auto & S.I

Table of Contents

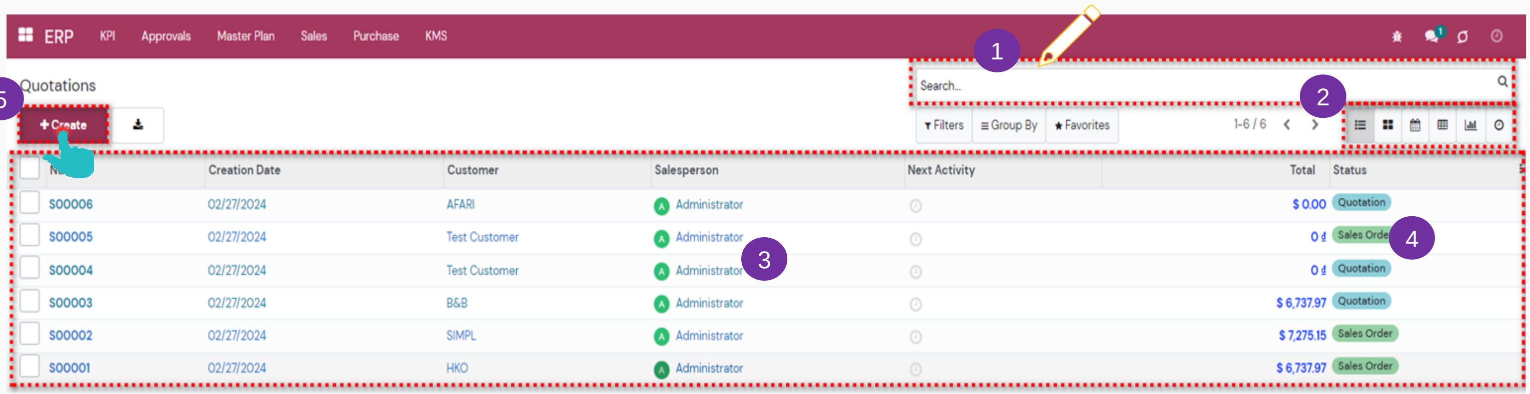
User Manual

SALES

I. Quotations

Purpose:

_ View information on the list of sales quotations



Explain

Step by step:

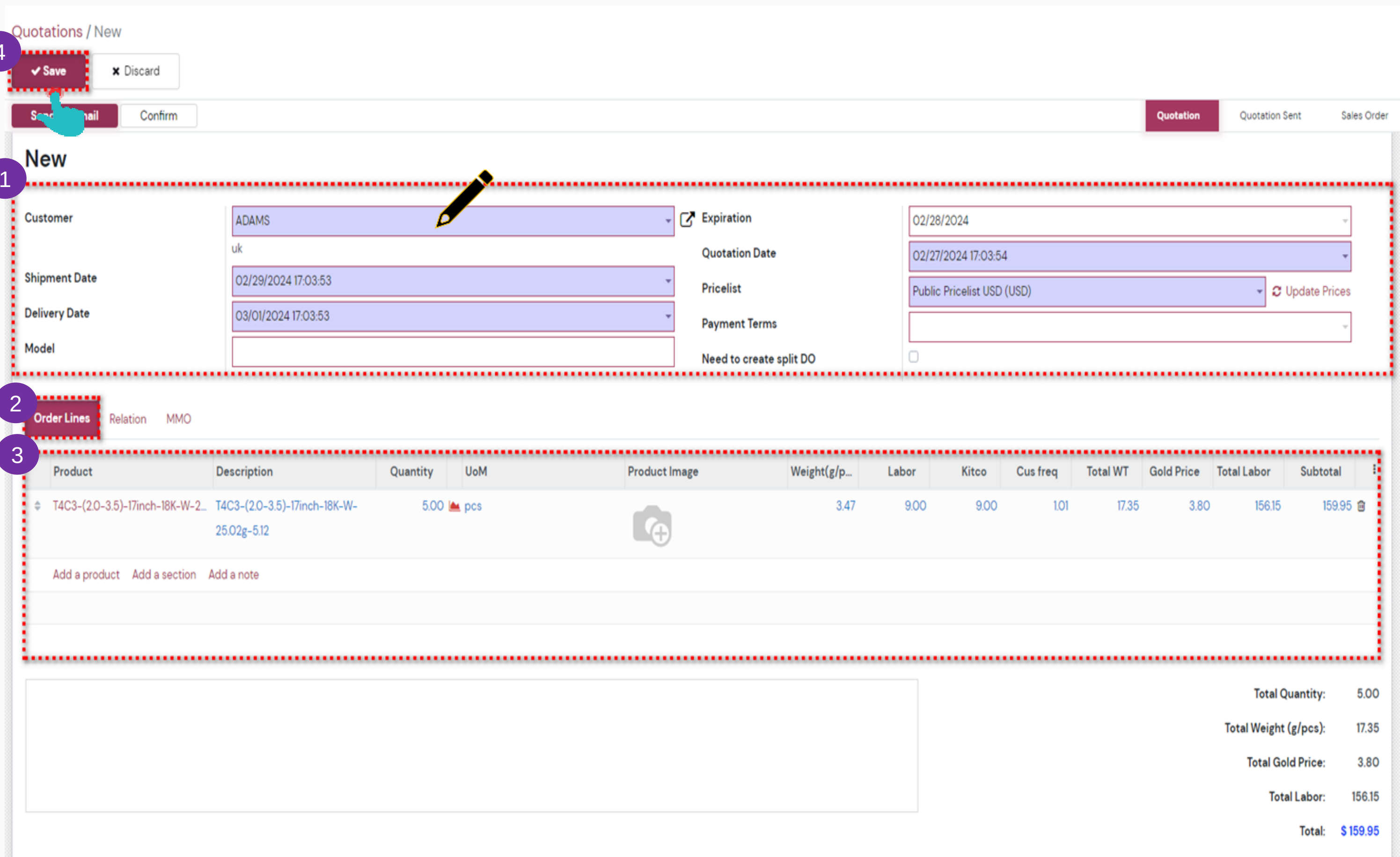
1. Search function
2. List of display modes: List, Kanban, Calendar, Pivot, Graph and Activity.
3. Information about the list of created quotations
4. Quotation status : Quotation , Quotation Sent, Cancelled and Sales Order
5. Click “Create” to create a quotations. See the next slide.

SALES

I. Quotations

Purpose:

_ Create sales quotations form



Explain

Step by step

1. Fill in the information:
   - _ Customer
   - _ Shipment Date
   - _ Delivery Date
   - _ Model
   - _ Expiration
   - _ Quotation Date
   - _ Pricelist
   - _ Payment Terms
   - _ Need to create split DO: Tick if using DO to create
2. The tab “Order Lines”
3. Fill in the information :
   - _ Product
   - _ Description
   - _ Quantity
   - _ UoM
   - _ Weight(g/pcs)
   - _ Labor
   - _ Kitco
   - _ Cus freq
4. Then click “Save”

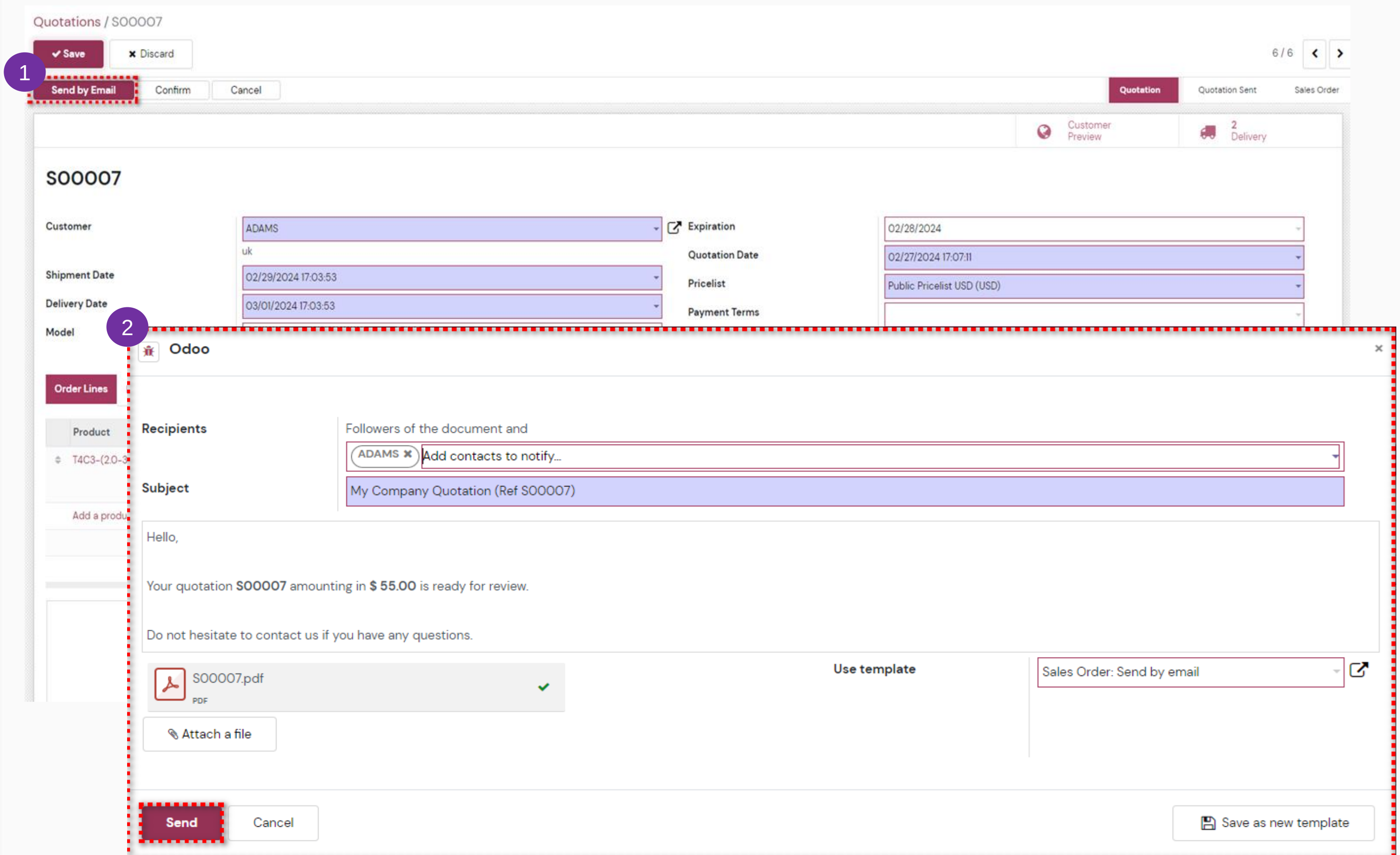
SALES

Explain

I. Quotations

Purpose:

_ Send quotation to customer email



Step by step

1. Click the "Send by Email" button to send the quote to the customer's email
2. Recipient email information, title content and quotation form... Then click the "Send" button .

SALES

Explain

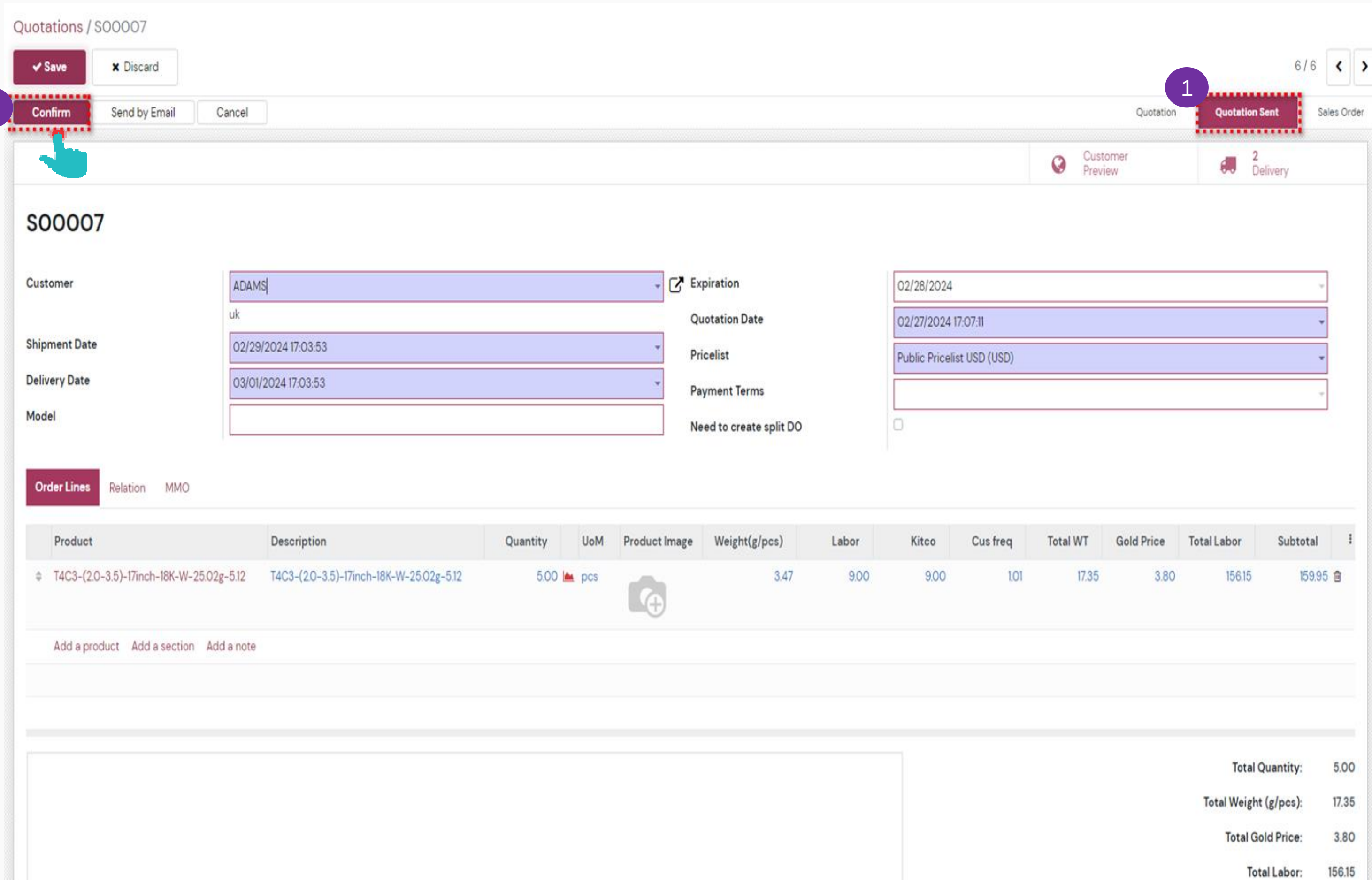
Step by step

1. After sending the quote to the customer, the form will automatically update to "Quotation Sent" status.
2. Click “Confirm” to confirm the sales quote. After confirmation, the form will change to "Sales Order" status and automatically updated to a sales order.

I. Quotations

Purpose:

_ Send quotation to customer email

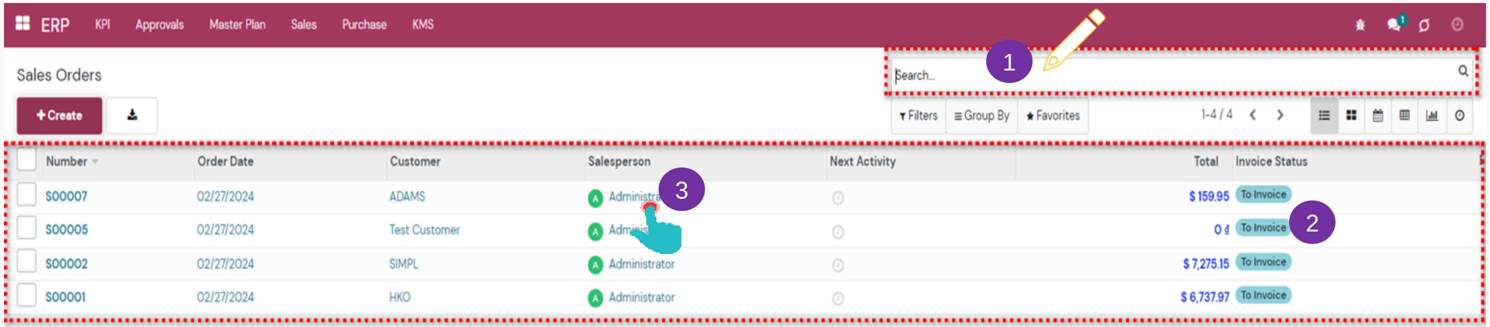


SALES

II. Orders

Purpose:

_ Sales order list information



Explain

Step by step

1. Search function
2. Sales Orders status:
   _ Nothing to Invoice
   _ To Invoice
   _ Fully Invoice
3. Click to select the sales order in the list to show detail.

SALES

Explain

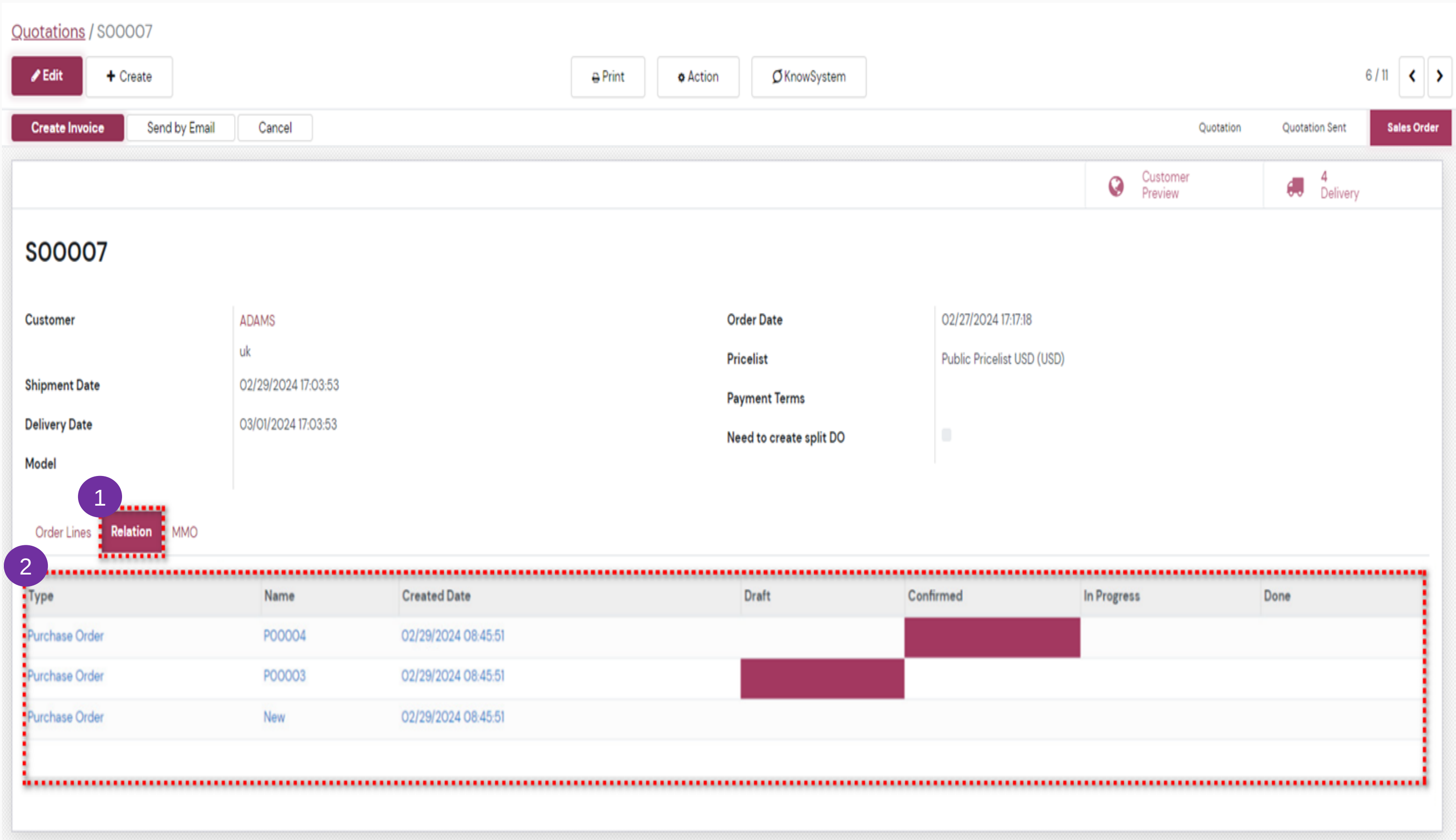
Step by step

1. The tab “Relation”
2. PO and MMO dashboard. Color palette meaning : White (None), Red(Doing), Black (Done).

II. Orders

Purpose:

_ View the status of the SO's relationship with purchasing and production orders



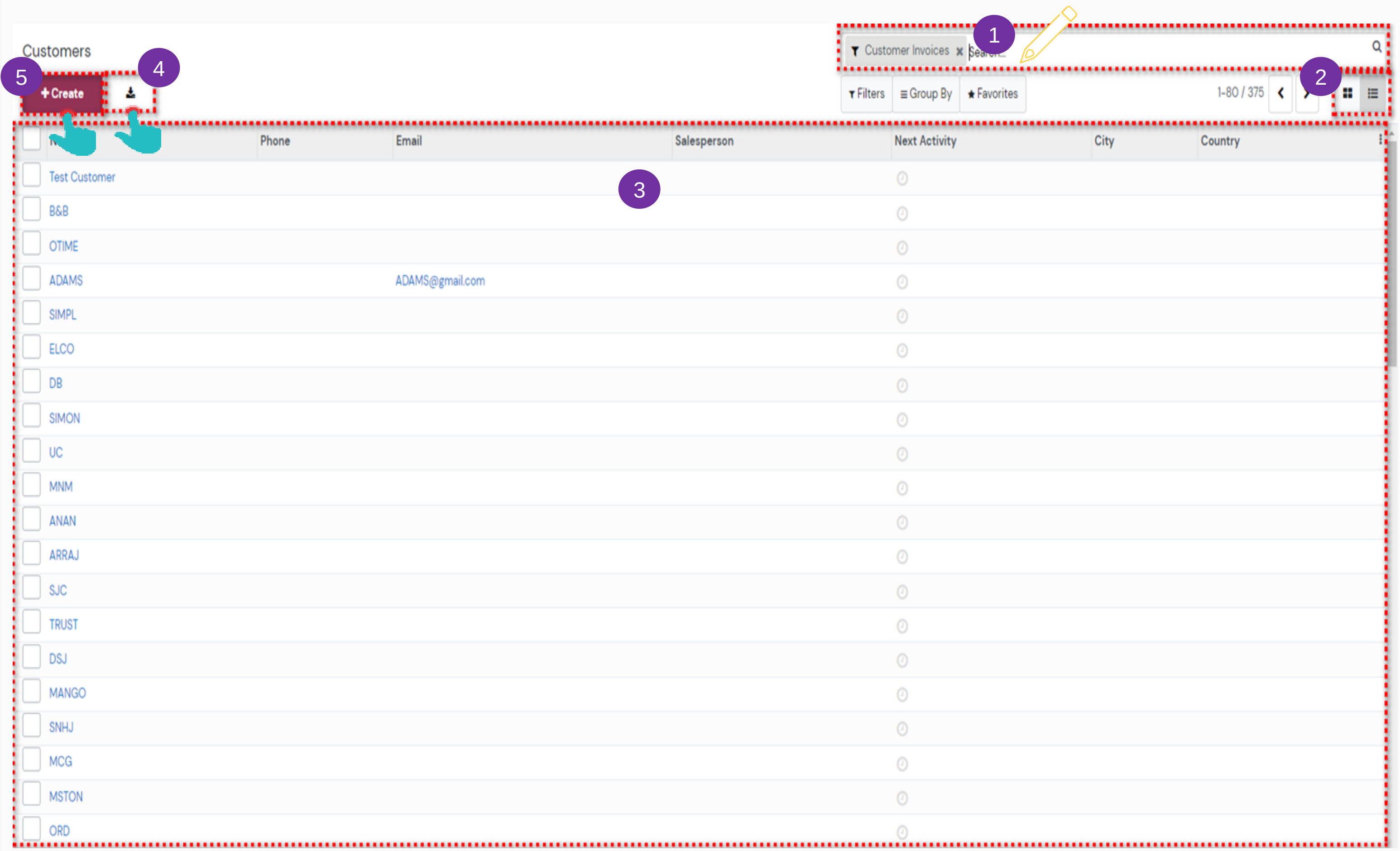
SALES

Explain

III. Customers

Purpose:

_ Customer list information



Step by step

1. Search function
2. List of display modes
3. Created customer list information
4. Download excel function
5. Click “Create” to create a customer.

   See the next slide..

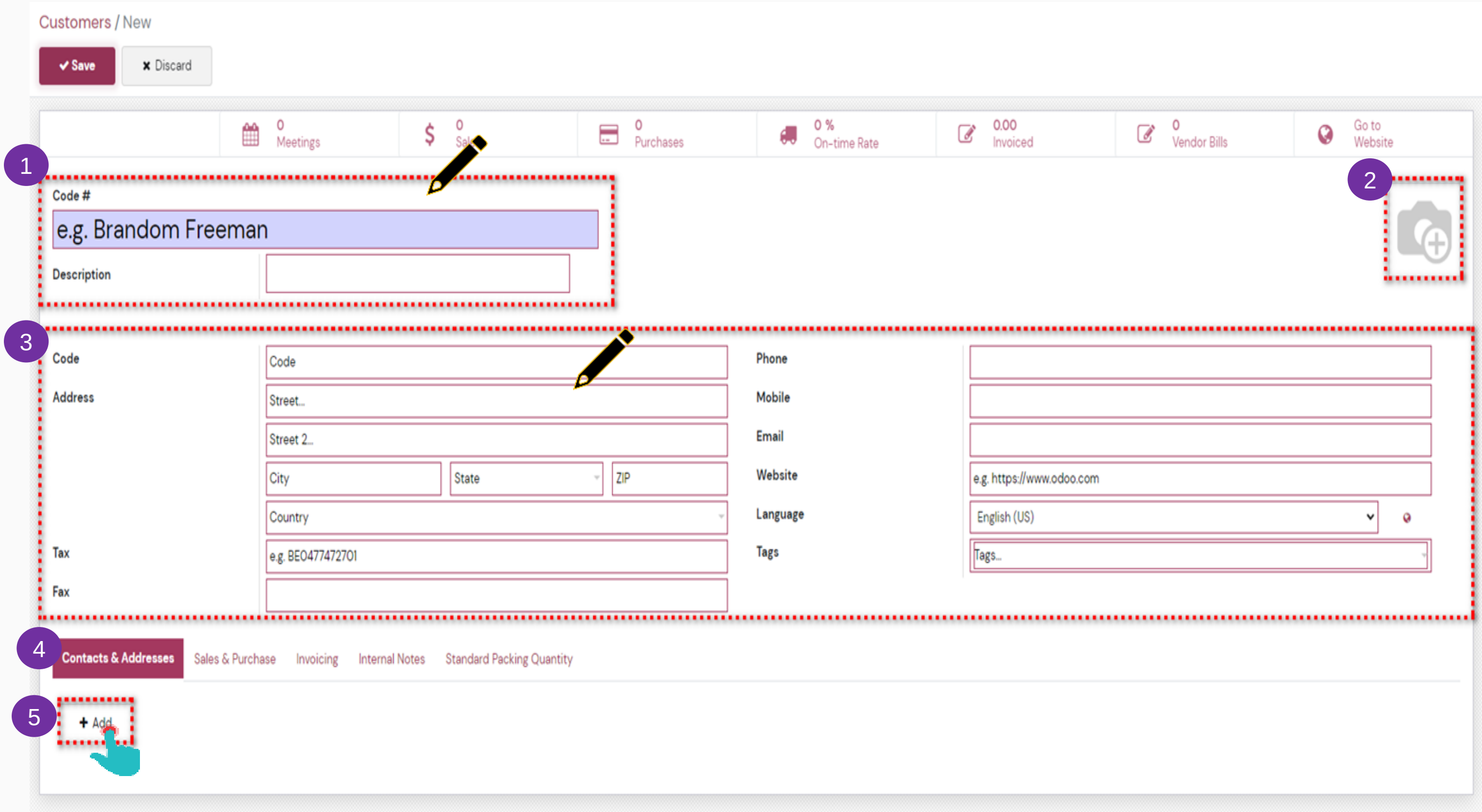
SALES

Explain

III. Customers

Purpose:

_ Create customer



Step by step

1. Fill in the Customers Code and description information
2. Click to add images
3. Fill in the information :
   _ Code
   _ Address
   _ Tax
   _ Fax
   _ Phone
   _ Mobile
   _ Email
   _ Website
   _ Language
   _ Tags

4. At the tab “Contacts & Addresses” proceed to add contact and address information.

5. Click “Add” to add. See the next slide .

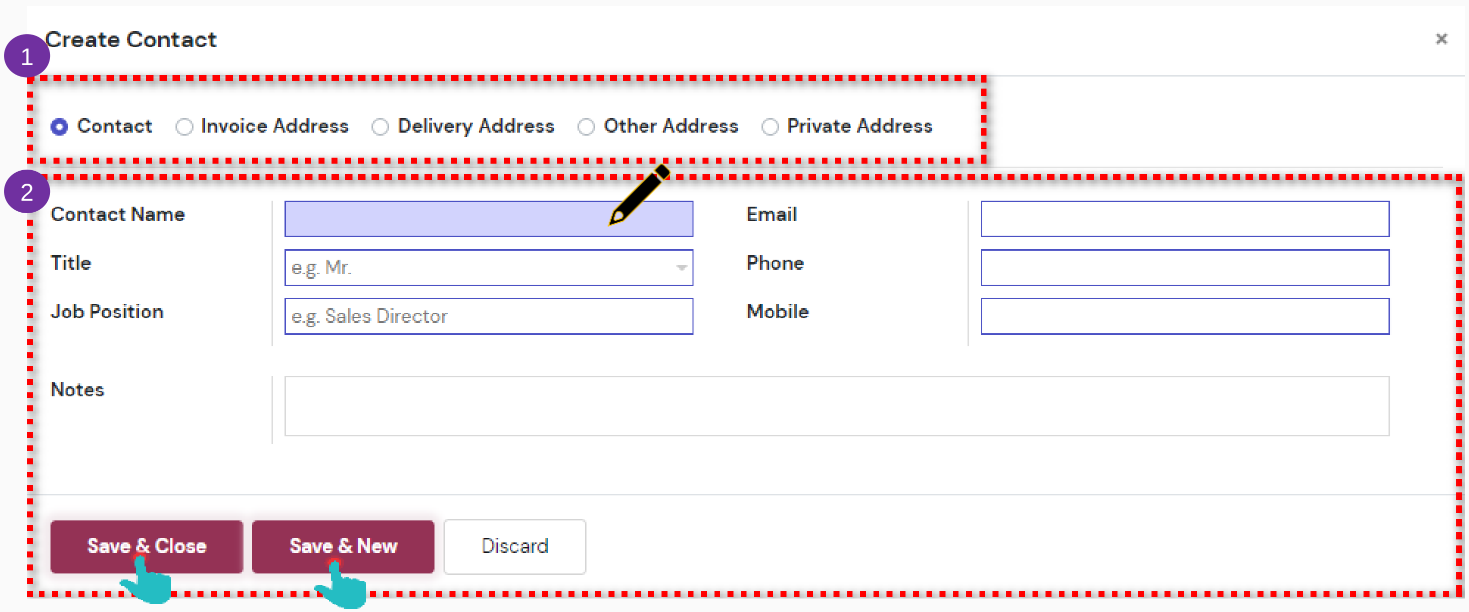
SALES

Explain

III. Customers

Purpose:

_ Add contacts and customer addresses



Step by step

1. Check the button to create contact information: Contact, Invoice Address, Delivery Address, Other Address and Private Address .
2. Fill in the information:

   - Contact Name
   - Email
   - Title
   - Phone
   - Job Position
   - Mobile
   - Notes

   Then save

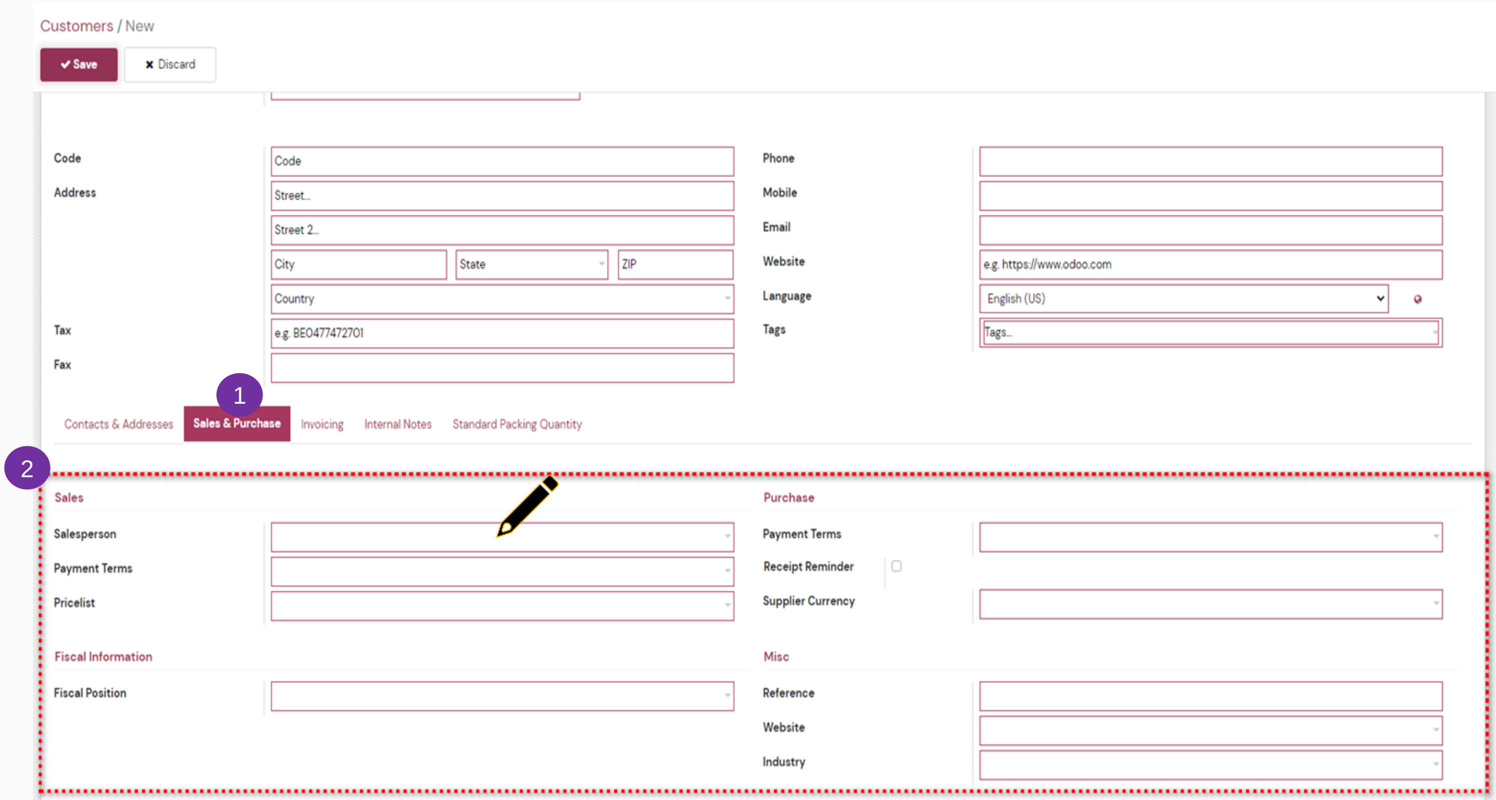
SALES

Explain

III. Customers

Purpose:

_ Input additional data for customer



Step by step

1. At the “Sales & Purchase” tab proceed to add Sales and Purchase information.
2. Fill in the Sales, Purchase, Fiscal Information and Misc

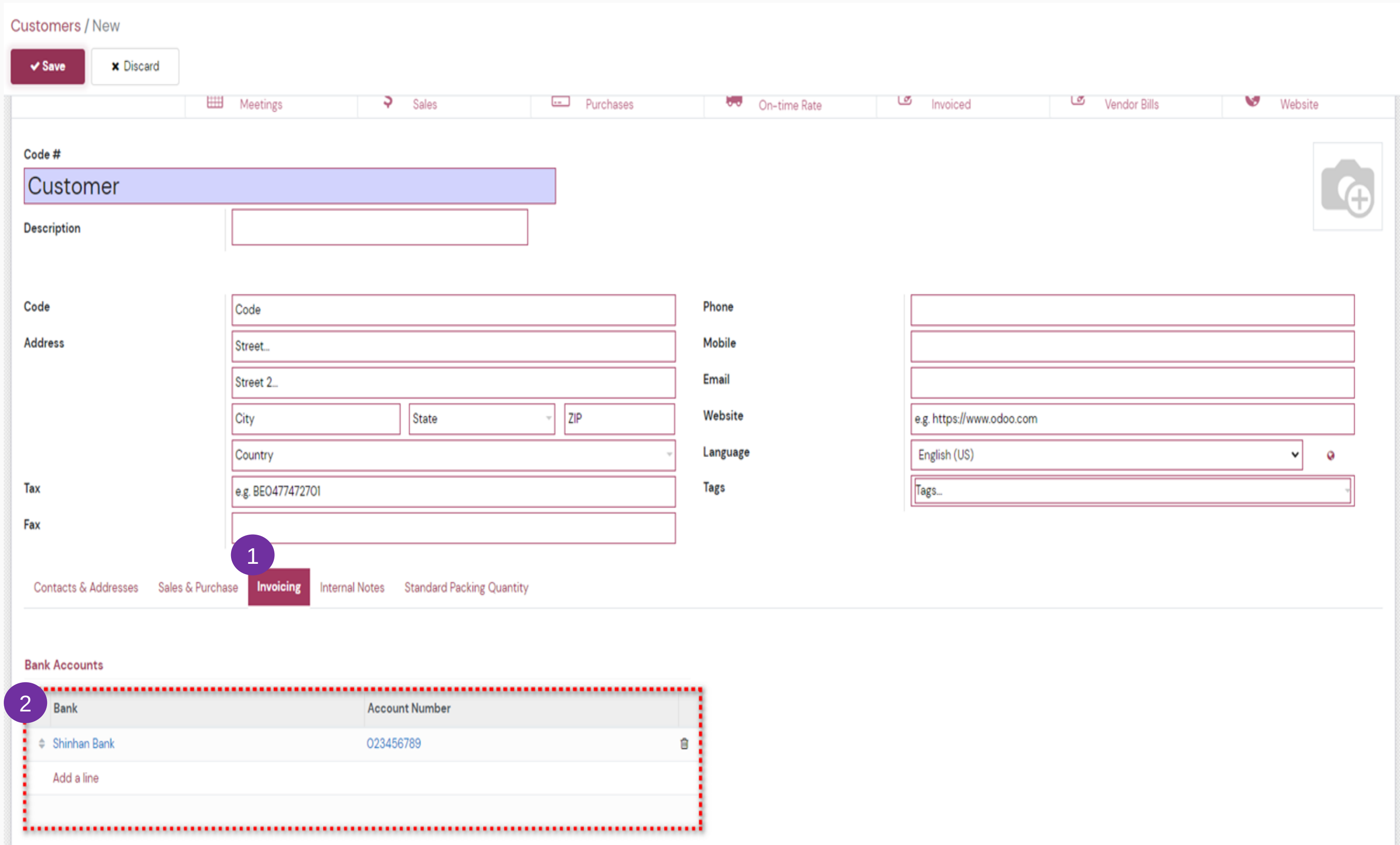
SALES

Explain

III. Customers

Purpose:

_ Input additional date for customer



Step by step

1. The “Invoicing” tab contains invoicing information
2. Fill in the information:

   _ Bank

   _ Account Number

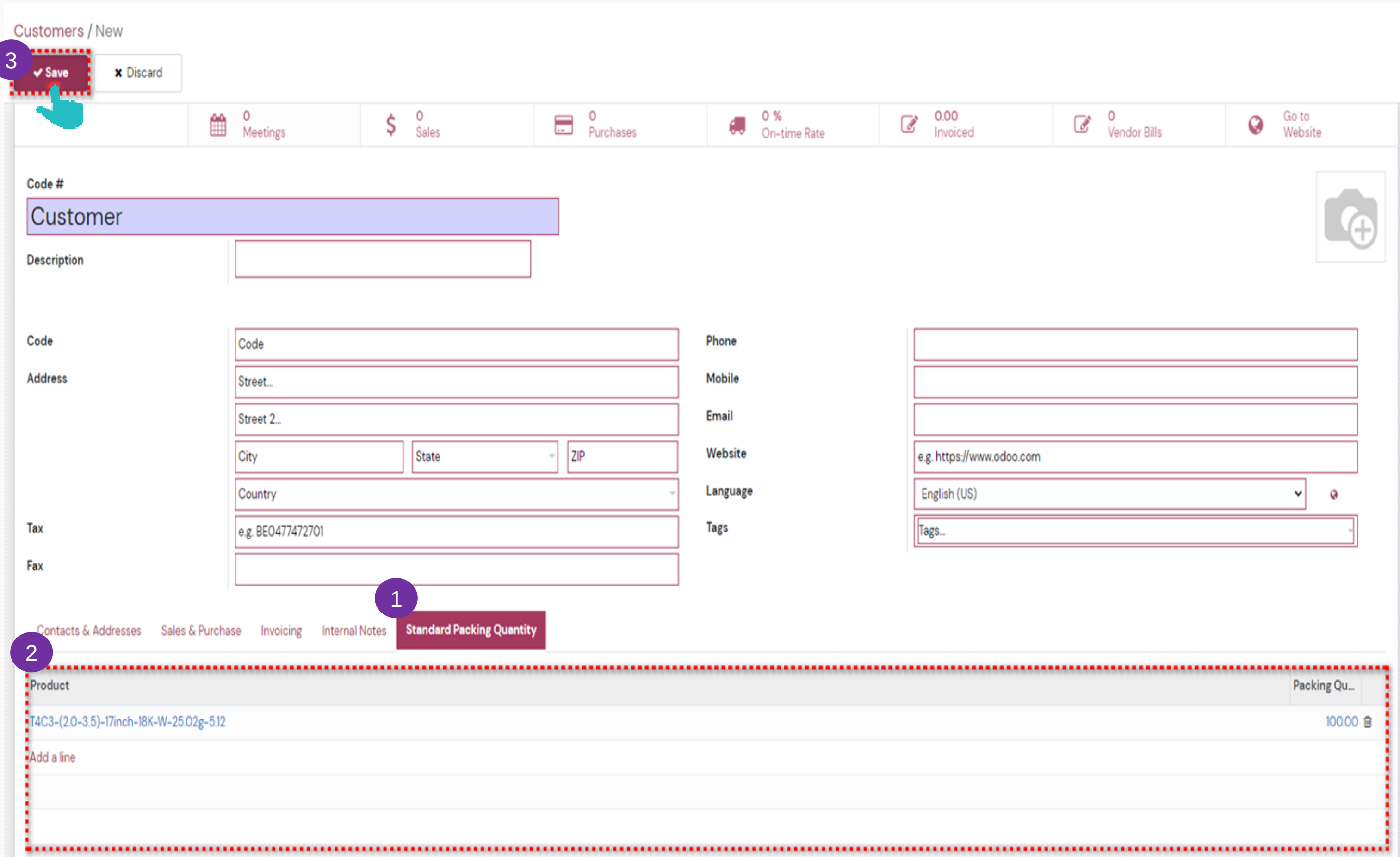
SALES

Explain

III. Customers

Purpose:

_ Input additional data for customer



Step by step

1. At the “Standard Packing Quantity” tab contains information about the product's standard packing quantity.
2. Fill in the information:
   - _ Product
   - _ Packing Quantity.
3. Click “Save” to add.

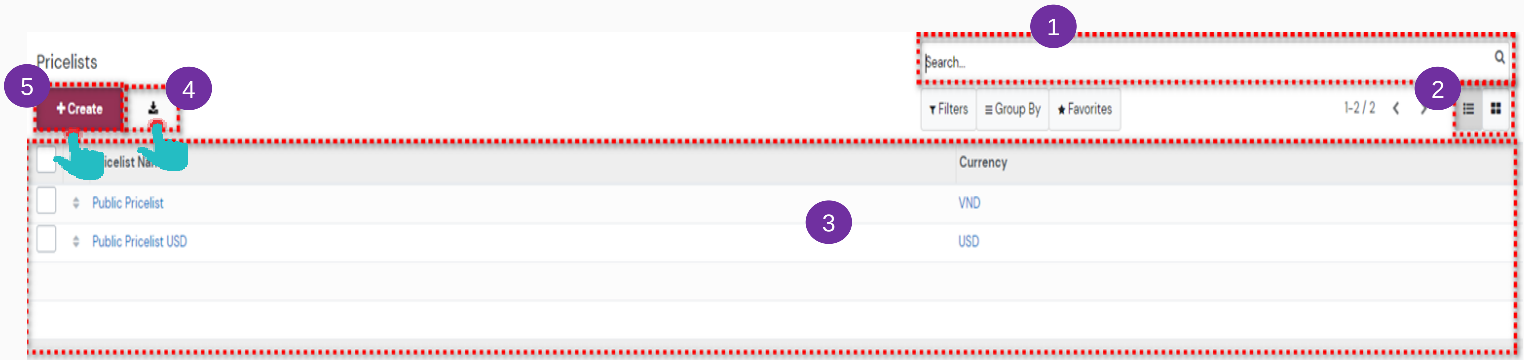
SALES

Explain

IV. Pricelists

Purpose:

_ Price lists information



Step by step

1. Search function
2. List of display modes: List & Kanban
3. Price list information
4. Excel file export function
5. Click "Create" to create price list .

   See the next slide

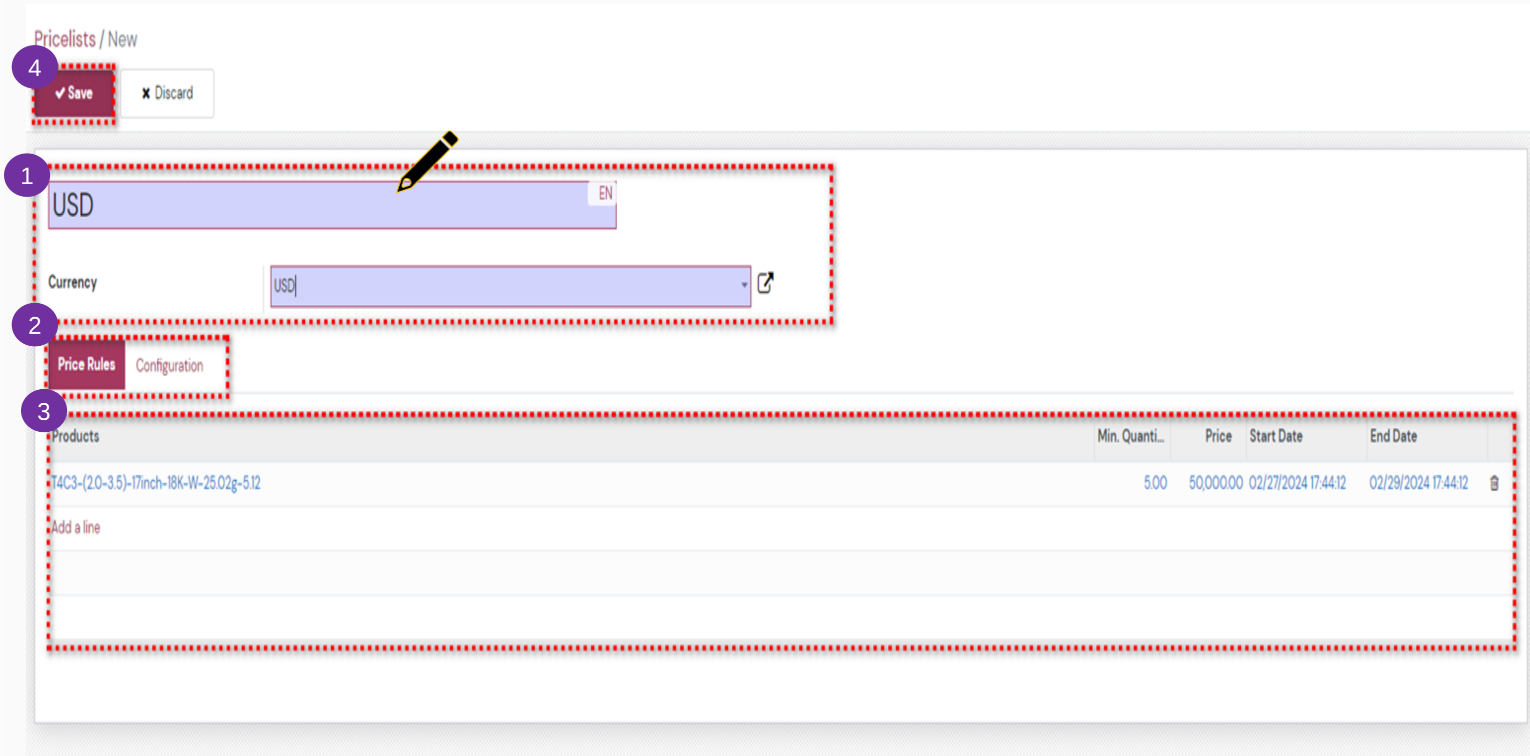
SALES

Explain

IV. Pricelists

Purpose:

_ Create pricelists



Step by step

1. Fill in price lists and currency information
2. At the "Price Rules" tab proceed to create price lists for product tab "Configuration" tab proceeds to create configuration
3. Fill in the information :
   - _ Products
   - _ Min Quantity
   - _ Price
   - _ Start Date
   - _ End Date
4. Click "Save" to add

SALES

Explain

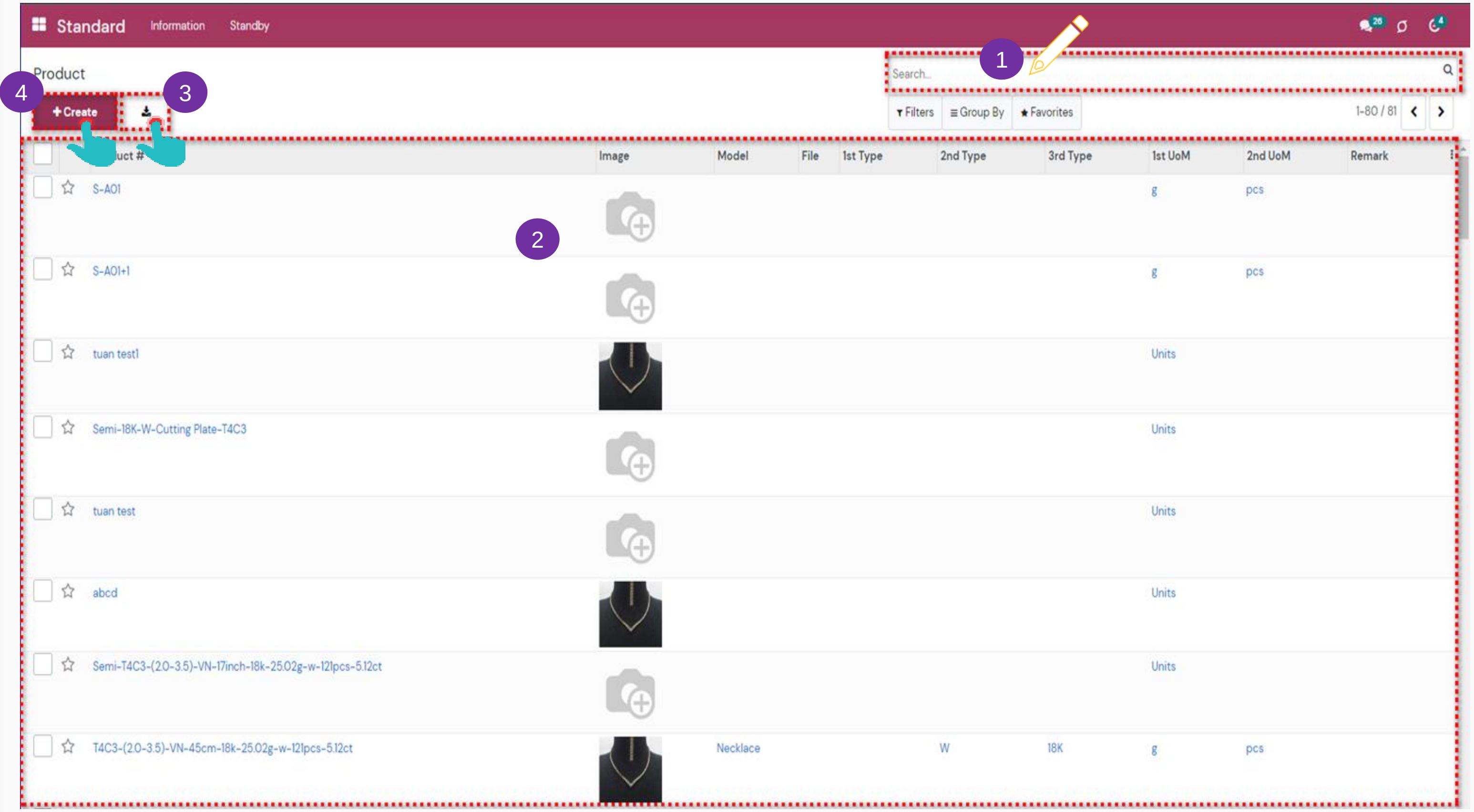
Step by step:

1. Search function
2. Information about the created products list
3. Excel file export function
4. Click “Create” to create the product. See the next slide.

V. Product

Purpose:

_ Product list information



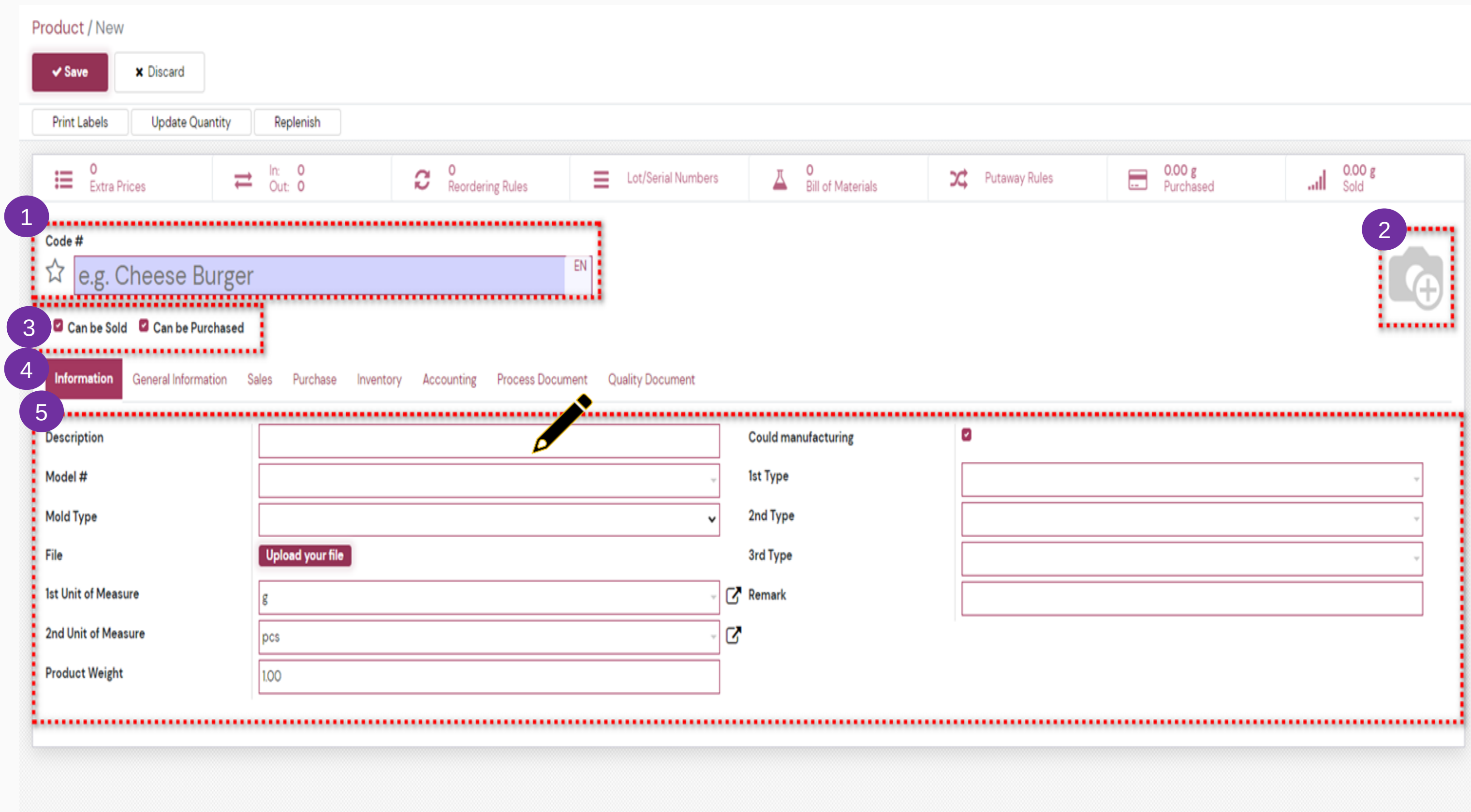
SALES

Explain

V. Product

Purpose:

_ Create product



Step by step:

1. Fill in Product code
2. Click to add photo
3. Tick select “Can be Sold” if it can be sold, “Can be Purchased” if it can be purchased.
4. At the "Information" tab, create standard information
5. Fill in the information:

   _ Description

   _ Model #

   _ Mold Type

   _ File

   _ 1st Unit of Measure (Weight unit)

   _ 2nd Unit of Measure

   _ Product Weight

   _ Could manufacturing

   _ 1st Type (polishing agent)

   _ 2nd Type (color)

   _ 3rd Type (type gold)

   _Remark

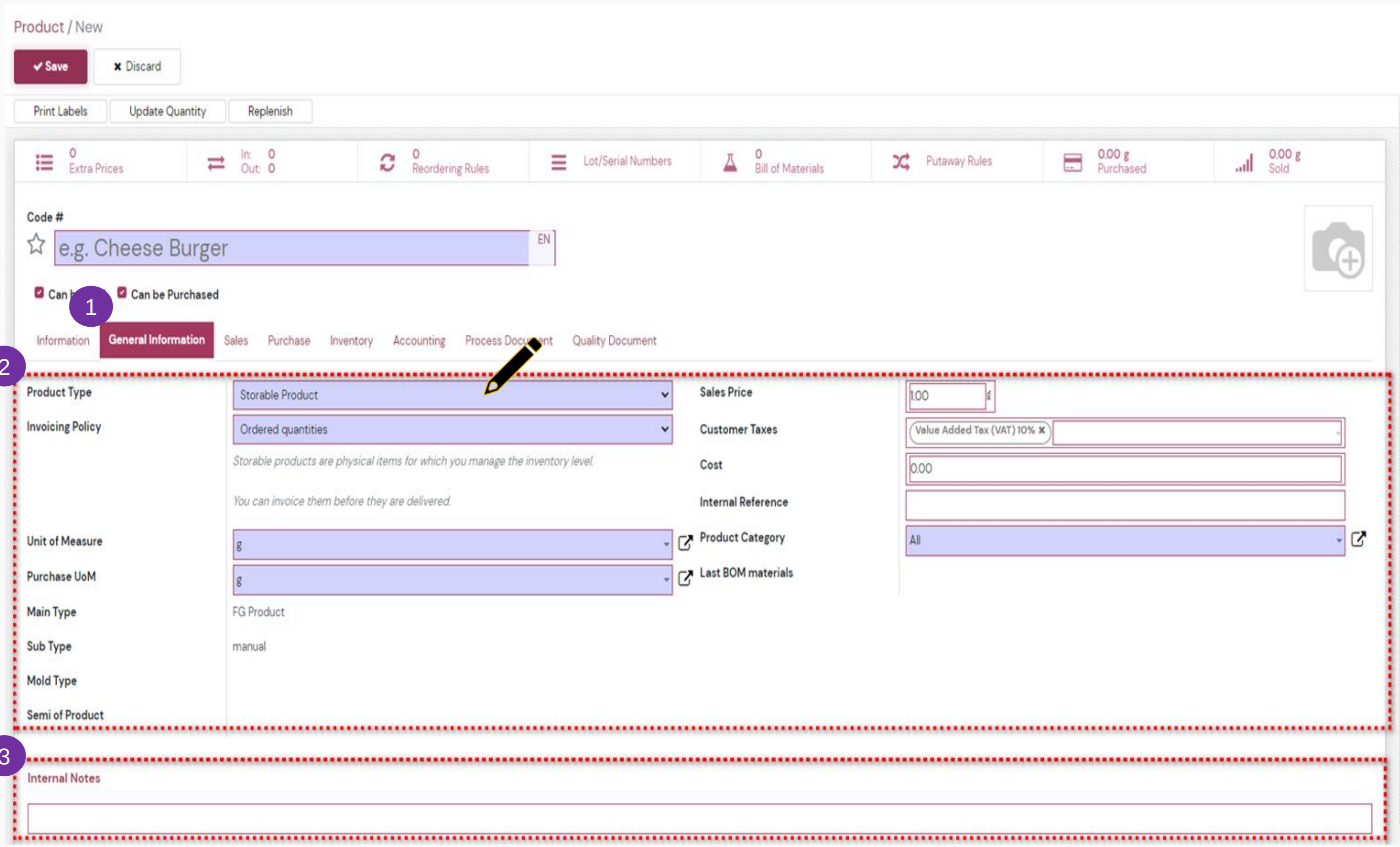
SALES

Explain

V. Product

Purpose:

_ Create product



Step by step:

1. At the "General Information" tab, create general information
2. Fill in the information:
   - _ Product Type
   - _ Invoicing Policy
   - _ Unit of Measure
   - _ Purchase UoM
   - _ Sales Price
   - _ Customer Taxes
   - _ Cost
   - _ Internal Reference
   - _ Product Category

3. Fill in internal note information

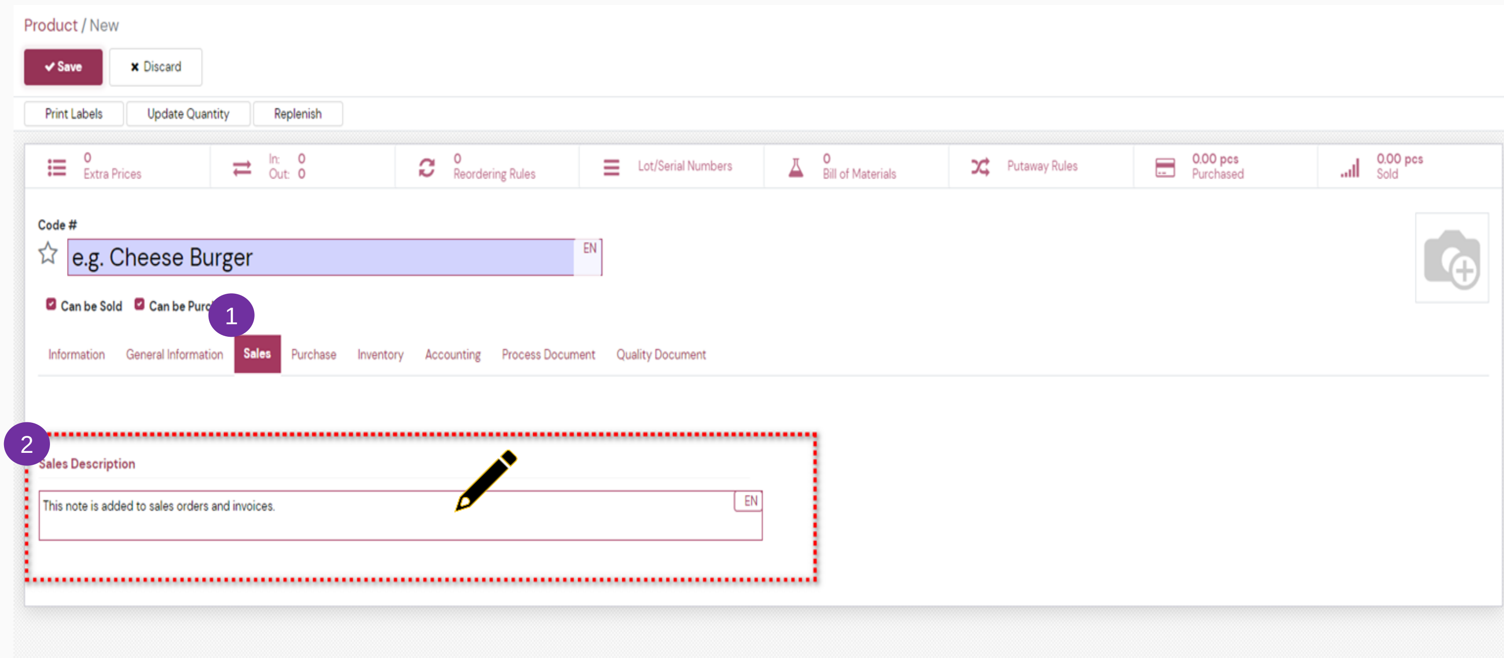
SALES

Explain

V. Product

Purpose:

_ Create product



Step by step

1. The "Sales" tab contains sales content information
2. Fill in the sales description information

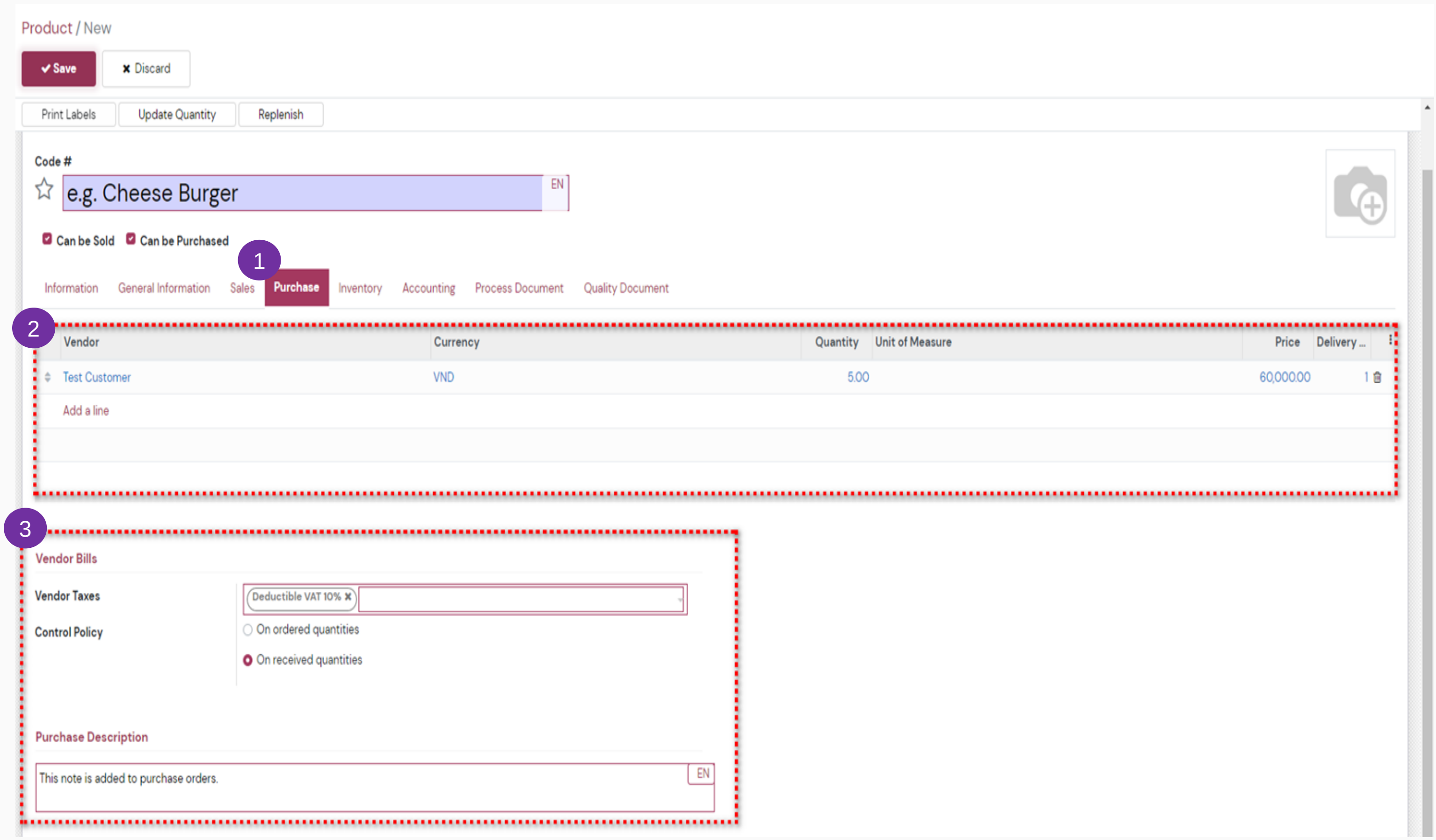
SALES

Explain

V. Product

Purpose:

_ Create product



Step by step

1. At the "Purchase" tab, add purchase information
2. Fill in the information:
   - _ Vendor
   - _ Currency
   - _ Quantity
   - _ Unit of Measure
   - _ Price
   - _ Delivery Lead Time

3. Select vendor invoice information: Vendor Taxes and Control Policy. Fill in the purchase description information

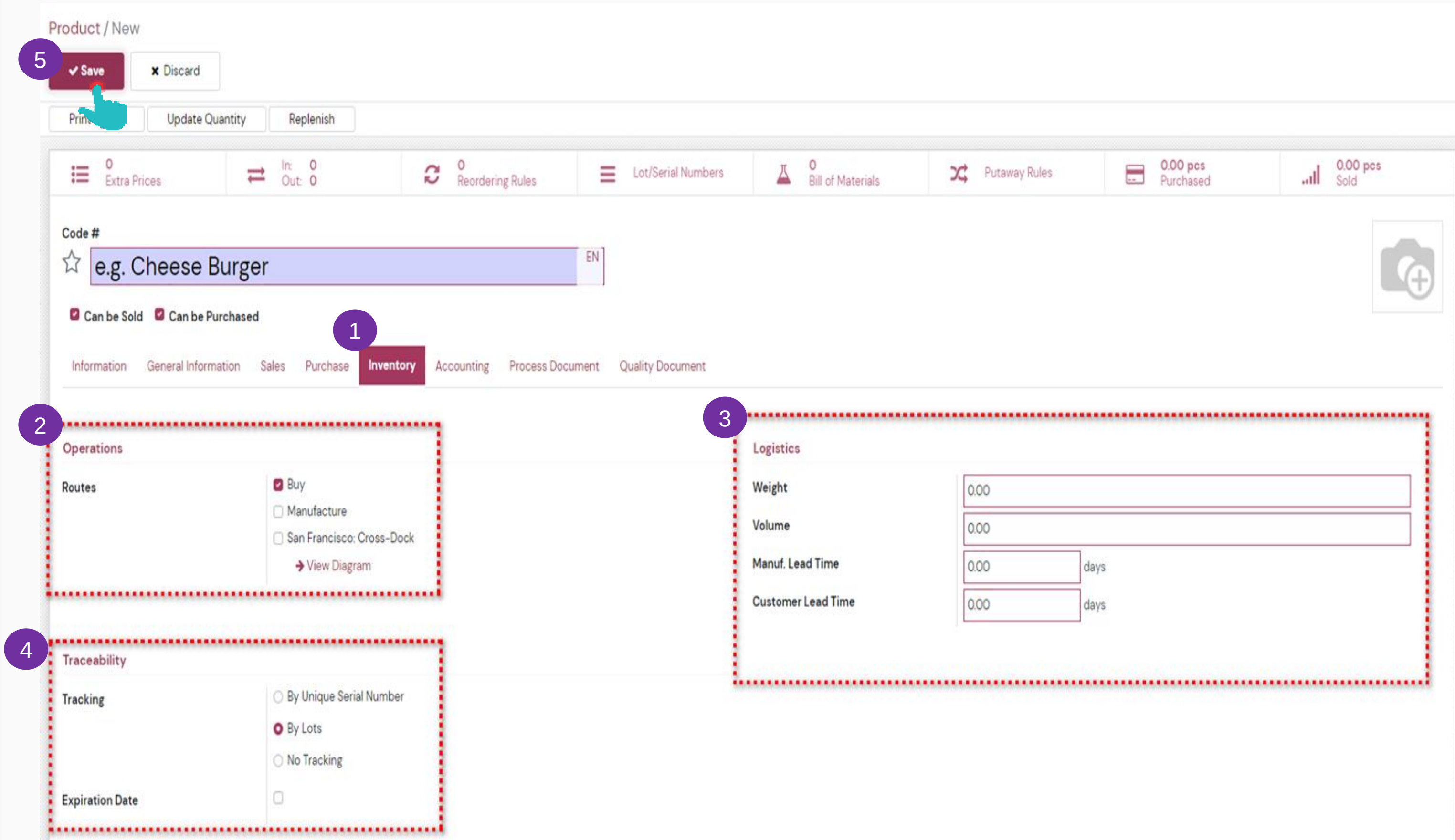
SALES

Explain

V. Product

Purpose:

_ Create product



Step by step

1. On the “Inventory” tab, add inventory information
2. Select operations information to use
3. Fill in logistics information:

   _ Weight

   _ Volume

   _ Manufacturing Lead Time

   _ Customer Lead Time
4. Click to select traceability type and expiration date
5. Click “Save” to add.

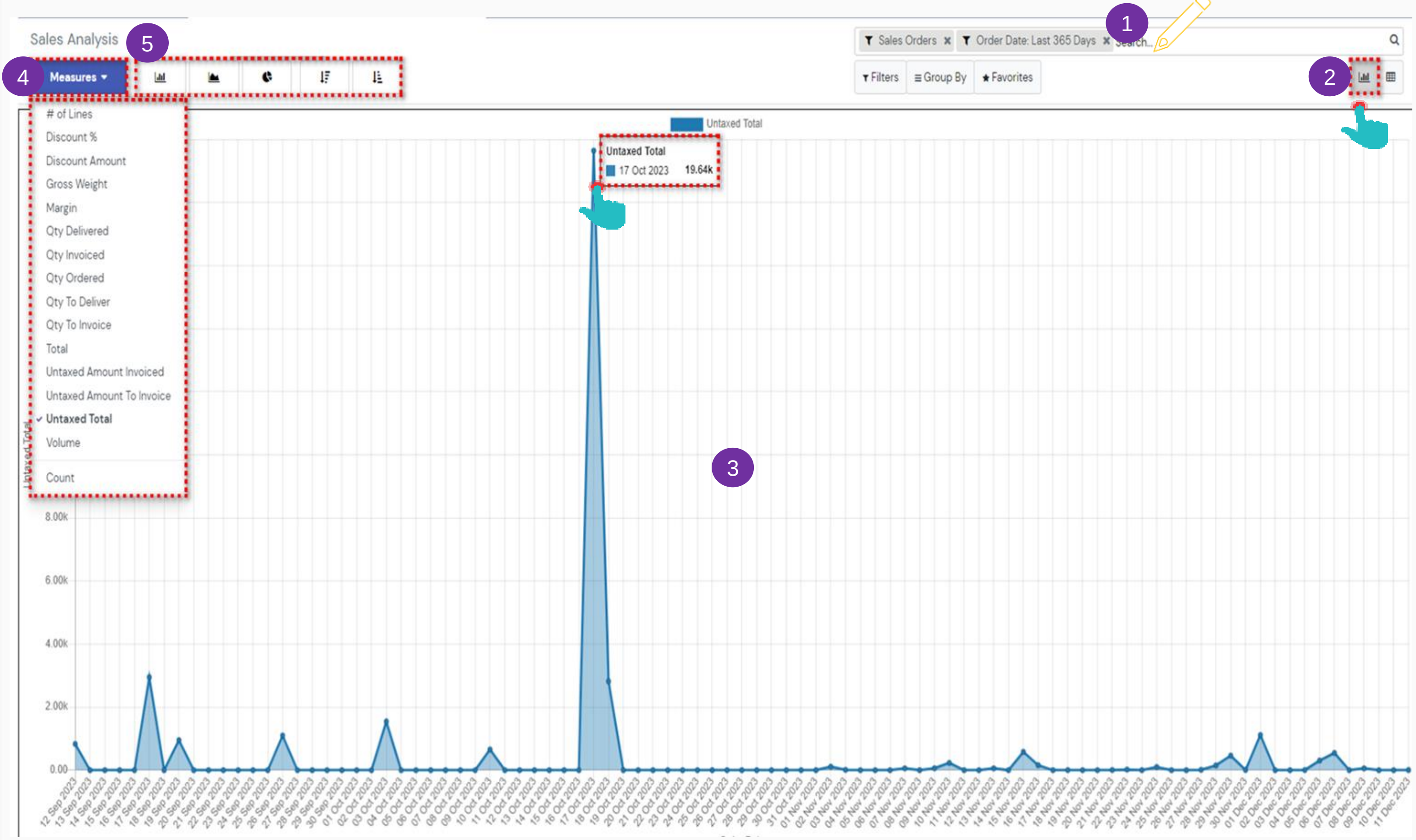
SALES

Explain

VI. Reporting

Purpose:

_ View sales report information



Step by step

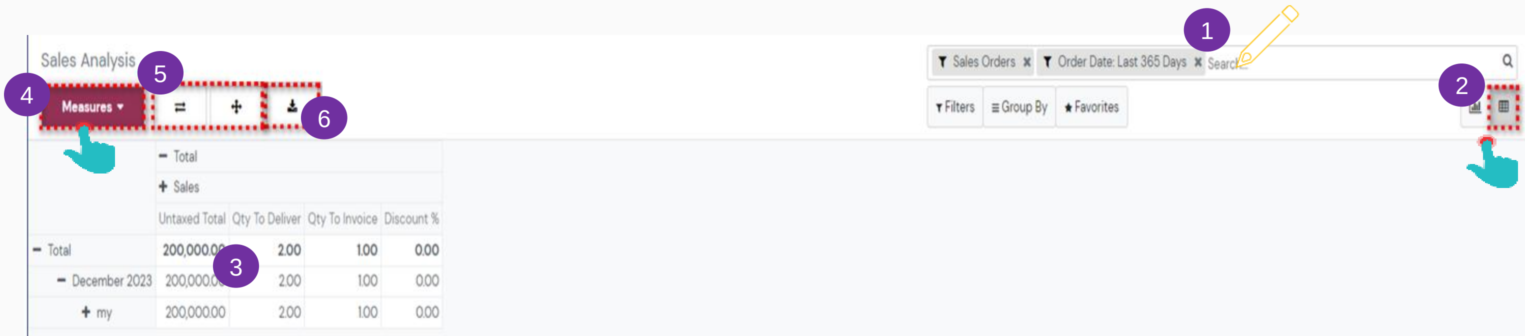
1. Search function
2. Select report display mode in graph form
3. The graph shows information about the total number of sales orders
4. Click "Measures" to select the value information to view
5. List of views: Bar Chart, Line Chart, Pie Chart, Graph view in descending order, Graph view in ascending order.

SALES

VI. Reporting

Purpose:

_ View sales report information



Explain

Step by step

1. Search function
2. Select the report display mode in pivot format
3. Information about the total number of sales
4. Click "Measures" to select the value information to view
5. Click to view flip view or expand all sales order information
6. Excel file download function.

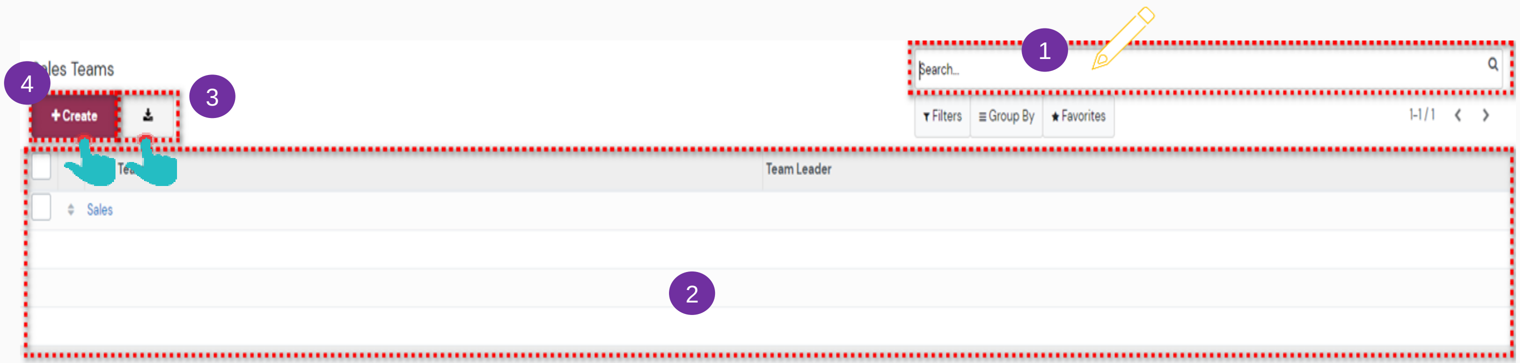
SALES

Explain

VII. Configuration > 1. Sales Teams

Purpose:

_ Sales team information



Step by step

1. Search function
2. Sales team list information
3. Excel file export function
4. Click “Create” to create a sales team. See the next slide

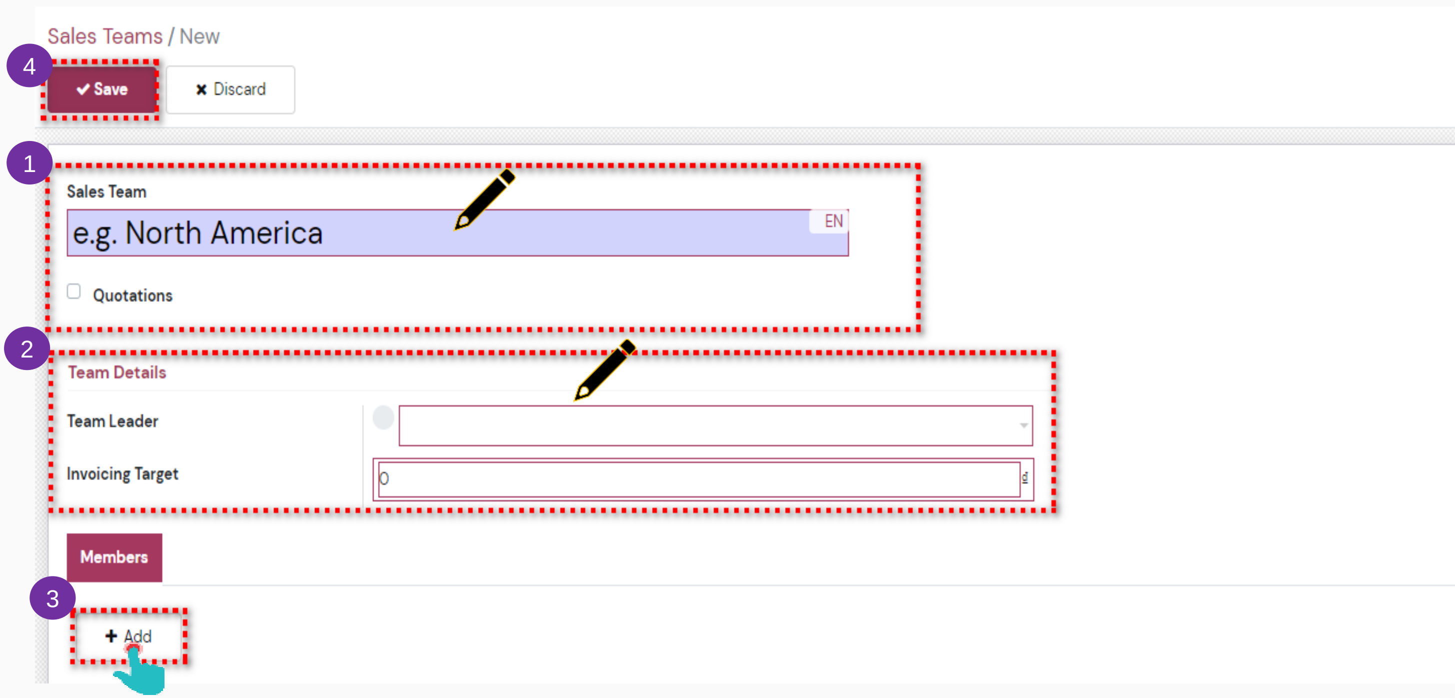
SALES

Explain

VII. Configuration > 1. Sales Teams

Purpose:

_ Create sales teams



Step by step

1. Fill in the sales team name. Activation of the Quotations option will enable the sales team to create quotes.
2. Fill in the information:
   - Team Leader
   - Invoicing Target

3. Click the “Add” button to add team members.

4. Then click “Save”

SALES

Explain

VII. Configuration > 2. Units of Measure Categories

Purpose:

_ Unit of measurement category type information

Step by step

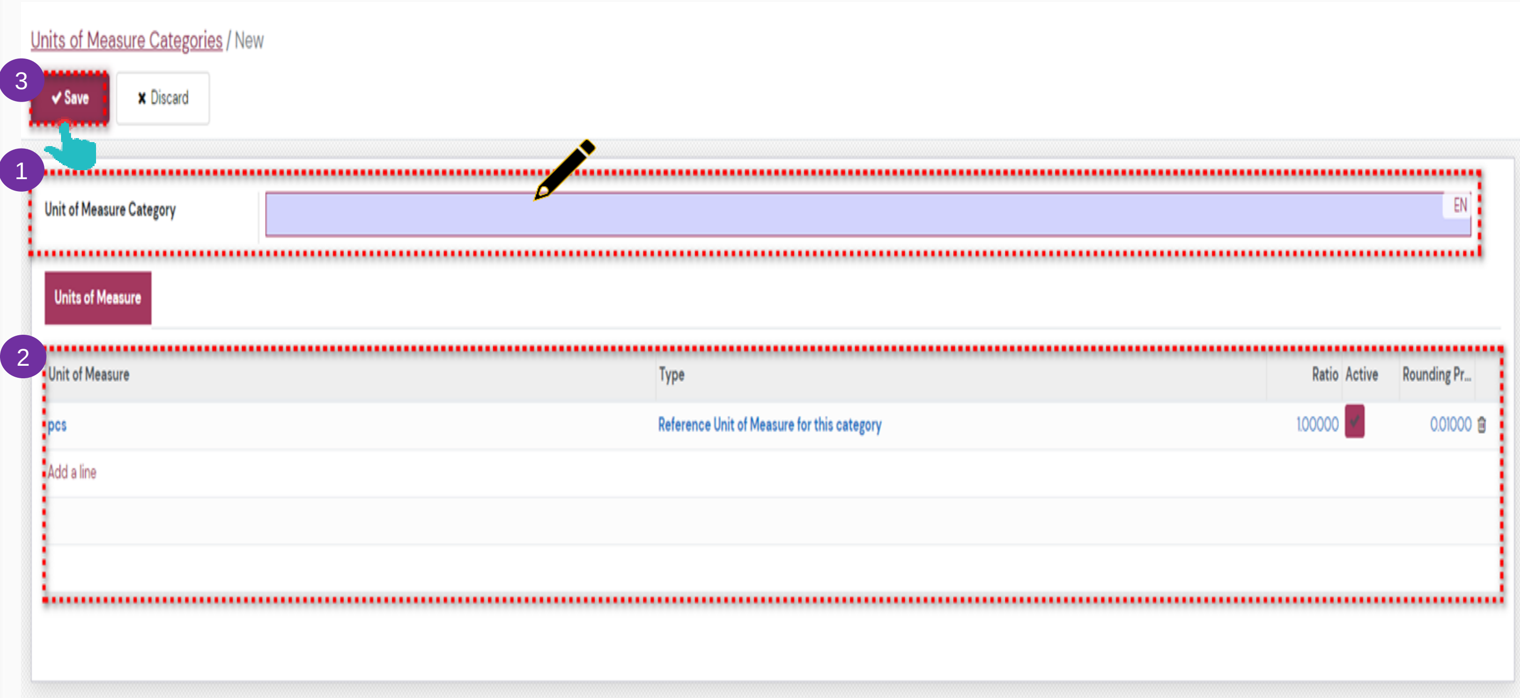
1. Search function
2. Created list information
3. Download excel function
4. Click "Create" to create a unit of measurement category. See the next slide.

SALES

VII. Configuration > 2. Units of Measure Categories

Purpose:

_ Create a category of measurement units



Explain

Step by step

1. Fill in the name of the category of measurement units
2. Fill in the information:

_ Unit of Measure

_ Type

_ Ratio

_ Active: Tick to confirm use

_ Rounding Precision

3. Then “Save”

Thank you for using

For Smart Factory

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