

For Smart Factory



Operating |
User |

MANUAL



MES^{3D}

ERP + MES + SCADA

Auto & S.I

User Manual

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SALES



Explain

I. Quotations

Purpose:

_ View information on the list of sales quotations

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.

The screenshot shows the ERP Quotations list interface. The top navigation bar includes ERP, KPI, Approvals, Master Plan, Sales, Purchase, and KMS. The main header for the Quotations list includes a search bar (1), filters, group by, favorites, and pagination (1-6 / 6). The table below lists quotations with columns for ID, Creation Date, Customer, Salesperson, Next Activity, Total, and Status. A '+ Create' button (5) is located in the top left of the table area. Callout 2 points to the display mode icons, callout 3 points to the Salesperson column, and callout 4 points to the Status column.

ID	Creation Date	Customer	Salesperson	Next Activity	Total	Status
S00006	02/27/2024	AFARI	Administrator		\$ 0.00	Quotation
S00005	02/27/2024	Test Customer	Administrator		0	Sales Order
S00004	02/27/2024	Test Customer	Administrator		0	Quotation
S00003	02/27/2024	B&B	Administrator		\$ 6,737.97	Quotation
S00002	02/27/2024	SIMPL	Administrator		\$ 7,275.15	Sales Order
S00001	02/27/2024	HKO	Administrator		\$ 6,737.97	Sales Order

SALES



Explain

I. Quotations

Purpose:

_ Create sales quotations form

Quotations / New

4

Quotation Quotation Sent Sales Order

1 **New**

Customer: ADAMS  Expiration: 02/28/2024
uk Quotation Date: 02/27/2024 17:03:54
Shipment Date: 02/29/2024 17:03:53 Pricelist: Public Pricelist USD (USD)
Delivery Date: 03/01/2024 17:03:53 Payment Terms:
Model: Need to create split DO:

2 **Order Lines** Relation MMO

3

Product	Description	Quantity	UoM	Product Image	Weight(g/p..	Labor	Kitco	Cus freq	Total WT	Gold Price	Total Labor	Subtotal
T4C3-(2.0-3.5)-17inch-18K-W-2	T4C3-(2.0-3.5)-17inch-18K-W-25.02g-512	5.00	pcs		3.47	9.00	9.00	101	17.35	3.80	156.15	159.95

Add a product Add a section Add a note

Total Quantity: 5.00
Total Weight (g/pcs): 17.35
Total Gold Price: 3.80
Total Labor: 156.15
Total: \$159.95

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 .

Quotations / S00007

6 / 6

1 **Send by Email** Confirm Cancel

Quotation Quotation Sent Sales Order

Customer Preview 2 Delivery

S00007

Customer ADAMS Expiration 02/28/2024
uk Quotation Date 02/27/2024 17:07:11
Shipment Date 02/29/2024 17:03:53 Pricelist Public Pricelist USD (USD)
Delivery Date 03/01/2024 17:03:53 Payment Terms

Model 2

Order Lines

Product T4C3-(20-5

Add a product

Recipients Followers of the document and
ADAMS Add contacts to notify...

Subject My Company Quotation (Ref S00007)

Hello,

Your quotation S00007 amounting in \$ 55.00 is ready for review.

Do not hesitate to contact us if you have any questions.

S00007.pdf PDF Use template Sales Order: Send by email

Attach a file

Send Cancel Save as new template

SALES



Explain

I. Quotations

Purpose:

_ Send quotation to customer email

Quotations / S00007

6 / 6

Save Discard

2 Confirm Send by Email Cancel

1 Quotation Quotation Sent Sales Order

Customer Preview 2 Delivery

S00007

Customer: ADAMS | Expiration: 02/28/2024
uk | Quotation Date: 02/27/2024 17:07:11
Shipment Date: 02/29/2024 17:03:53 | Pricelist: Public Pricelist USD (USD)
Delivery Date: 03/01/2024 17:03:53 | Payment Terms:
Model: | Need to create split DO:

Order Lines Relation MMO

Product	Description	Quantity	UoM	Product Image	Weight(g/pcs)	Labor	Kitco	Cus freq	Total WT	Gold Price	Total Labor	Subtotal
T4C3-(2.0-3.5)-17inch-18K-W-25.02g-512	T4C3-(2.0-3.5)-17inch-18K-W-25.02g-512	5.00	pcs		3.47	9.00	9.00	101	17.35	3.80	156.15	159.95

Add a product Add a section Add a note

Total Quantity: 5.00
Total Weight (g/pcs): 17.35
Total Gold Price: 3.80
Total Labor: 156.15

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.

SALES



Explain

II. Orders

Purpose:

_ Sales order list information

Number	Order Date	Customer	Salesperson	Next Activity	Total	Invoice Status
S00007	02/27/2024	ADAMS	Administr		\$ 159.95	To Invoice
S00005	02/27/2024	Test Customer	Adminis		0.0	To Invoice
S00002	02/27/2024	SIMPL	Administrator		\$ 7,275.15	To Invoice
S00001	02/27/2024	HKO	Administrator		\$ 6,737.97	To Invoice

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

II. Orders

Purpose:

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

Step by step

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

Quotations / S00007

Edit Create Print Action KnowSystem 6 / 11 < >

Create Invoice Send by Email Cancel Quotation Quotation Sent Sales Order

S00007

Customer ADAMS Order Date 02/27/2024 17:17:18
uk Pricelist Public Pricelist USD (USD)
Shipment Date 02/29/2024 17:03:53 Payment Terms
Delivery Date 03/01/2024 17:03:53 Need to create split DO
Model

Order Lines Relation MMO

Type	Name	Created Date	Draft	Confirmed	In Progress	Done
Purchase Order	P00004	02/29/2024 08:45:51				
Purchase Order	P00003	02/29/2024 08:45:51				
Purchase Order	New	02/29/2024 08:45:51				

SALES



Explain

III. Customers

Purpose:

_ Create customer

Customers / New

0 Meetings 0 Sales 0 Purchases 0% On-time Rate 0.00 Invoiced 0 Vendor Bills Go to Website

1

2

3

4 **Contacts & Addresses** Sales & Purchase Invoicing Internal Notes Standard Packing Quantity

5

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 .



III. Customers

Purpose:

_ Add contacts and customer addresses

1 Create Contact ×

Contact Invoice Address Delivery Address Other Address Private Address

2

Contact Name	<input type="text"/>	Email	<input type="text"/>
Title	<input type="text" value="e.g. Mr."/>	Phone	<input type="text"/>
Job Position	<input type="text" value="e.g. Sales Director"/>	Mobile	<input type="text"/>
Notes	<input type="text"/>		

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
 - NotesThen 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

Customers / New

Code	<input type="text"/>	Phone	<input type="text"/>
Address	<input type="text"/>	Mobile	<input type="text"/>
	<input type="text"/>	Email	<input type="text"/>
	<input type="text"/> <input type="text"/> <input type="text"/>	Website	<input type="text" value="e.g. https://www.odoo.com"/>
	<input type="text"/> <input type="text"/> <input type="text"/>	Language	<input type="text" value="English (US)"/>
Tax	<input type="text" value="e.g. BE0477472701"/>	Tags	<input type="text" value="Tags..."/>
Fax	<input type="text"/>		

Contacts & Addresses **Sales & Purchase** Invoicing Internal Notes Standard Packing Quantity

1

Sales		Purchase	
Salesperson	<input type="text"/>	Payment Terms	<input type="text"/>
Payment Terms	<input type="text"/>	Receipt Reminder	<input type="checkbox"/>
Pricelist	<input type="text"/>	Supplier Currency	<input type="text"/>
Fiscal Information		Misc	
Fiscal Position	<input type="text"/>	Reference	<input type="text"/>
		Website	<input type="text"/>
		Industry	<input type="text"/>

2

SALES



Explain

III. Customers

Purpose:

_ Input additional data for customer

Step by step

1. The "Invoicing" tab contains invoicing information
2. Fill in the information:
 - _ Bank
 - _ Account Number

Customers / New

Save Discard

Meetings Sales Purchases On-time Rate Invoiced Vendor Bills Website

Code #
Customer

Description

Code
Code

Address
Street...
Street 2...
City State ZIP
Country

Tax
e.g. BE0477472701

Fax

Phone
Mobile
Email
Website
e.g. https://www.odoo.com
Language
English (US)
Tags...

Contacts & Addresses Sales & Purchase **Invoicing** Internal Notes Standard Packing Quantity

Bank Accounts

Bank	Account Number
Shinhan Bank	023456789
Add a line	



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.

Customers / New

3

0 Meetings 0 Sales 0 Purchases 0% On-time Rate 0.00 Invoiced 0 Vendor Bills Go to Website

Code #
Customer

Description

Code Code Phone

Address Street_ Mobile

Street 2_ Email

City State ZIP Website
e.g. https://www.odoo.com

Country Language
English (US)

Tax e.g. BE047742701 Tags

Fax

1 **Standard Packing Quantity**

2

Product	Packing Qu...
T4C3-(2.0-3.5)-17inch-18K-W-2502g-512	100.00
Add a line	

SALES



Explain

IV. Pricelists

Purpose:

_ Price lists information

The screenshot shows the 'Pricelists' interface. At the top left, there is a '+ Create' button (callout 5) and a download icon (callout 4). A search bar (callout 1) is located at the top right. Below the search bar are buttons for 'Filters', 'Group By', and 'Favorites'. The main area contains a table with two columns: 'Pricelist Name' and 'Currency'. The table lists two items: 'Public Pricelist' with currency 'VND' (callout 3) and 'Public Pricelist USD' with currency 'USD'. A pagination indicator '1-2 / 2' and navigation arrows are visible on the right side of the table (callout 2).

Pricelist Name	Currency
Public Pricelist	VND
Public Pricelist USD	USD

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

Pricelists / New

4

1 USD

Currency

2

3

Products	Min. Quanti...	Price	Start Date	End Date
74C3-(20-3.5)-17inch-18K-W-25.02g-5.12	5.00	50,000.00	02/27/2024 17:44:12	02/29/2024 17:44:12
Add a line				

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

V. Product

Purpose:

_ Product list information

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.

The screenshot shows a software interface for product management. At the top, there is a search bar (1) and a '+ Create' button (4). Below the search bar are filters and group options. The main area is a table with columns: Product #, Image, Model, File, 1st Type, 2nd Type, 3rd Type, 1st UoM, 2nd UoM, and Remark. The table contains several rows of product data, including 'S-A01', 'S-A01+1', 'tuan test1', 'Semi-18K-W-Cutting Plate-T4C3', 'tuan test', 'abcd', 'Semi-T4C3-(20-35)-VN-17inch-18k-25.02g-w-12|pcs-5.12ct', and 'T4C3-(20-35)-VN-45cm-18k-25.02g-w-12|pcs-5.12ct'. A callout (2) points to the 'Image' column, and another callout (3) points to the 'Export' icon in the top right of the table area.

Product #	Image	Model	File	1st Type	2nd Type	3rd Type	1st UoM	2nd UoM	Remark
S-A01							g	pcs	
S-A01+1							g	pcs	
tuan test1							Units		
Semi-18K-W-Cutting Plate-T4C3							Units		
tuan test							Units		
abcd							Units		
Semi-T4C3-(20-35)-VN-17inch-18k-25.02g-w-12 pcs-5.12ct							Units		
T4C3-(20-35)-VN-45cm-18k-25.02g-w-12 pcs-5.12ct		Necklace			W	18K	g	pcs	

SALES



Explain

V. Product

Purpose:

_ Create product

Product / New

0 Extra Prices In: 0 Out: 0 0 Reordering Rules Lot/Serial Numbers 0 Bill of Materials Putaway Rules 0.00 g Purchased 0.00 g Sold

1 2

3 Can be Sold Can be Purchased

4 **Information** General Information Sales Purchase Inventory Accounting Process Document Quality Document

5

Description	<input type="text"/>	Could manufacturing	<input checked="" type="checkbox"/>
Model #	<input type="text"/>	1st Type	<input type="text"/>
Mold Type	<input type="text"/>	2nd Type	<input type="text"/>
File	<input type="button" value="Upload your file"/>	3rd Type	<input type="text"/>
1st Unit of Measure	<input type="text" value="g"/>	Remark	<input type="text"/>
2nd Unit of Measure	<input type="text" value="pcs"/>		
Product Weight	<input type="text" value="1.00"/>		

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

Product / New

✓ Save ✕ Discard

Print Labels Update Quantity Replenish

0 Extra Prices In: 0 Out: 0 0 Recordering Rules Lot/Serial Numbers 0 Bill of Materials Putaway Rules 0.00 g Purchased 0.00 g Sold

Code #
☆ e.g. Cheese Burger [EN]

Can be Sold Can be Purchased

1

2

Information **General Information** Sales Purchase Inventory Accounting Process Document Quality Document

Product Type: Storable Product (dropdown) Sales Price: 100 €

Invoicing Policy: Ordered quantities (dropdown) Customer Taxes: Value Added Tax (VAT) 10% ✕

Unit of Measure: g (dropdown) Cost: 0.00

Purchase UoM: g (dropdown) Internal Reference: (empty)

Main Type: FG Product Product Category: All (dropdown)

Sub Type: manual Last BOM materials: (empty)

Mold Type: (empty)

Semi of Product: (empty)

3

Internal Notes

(Empty text area)

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

Product / New

Save Discard

Print Labels Update Quantity Replenish

Extra Prices In: 0 Out: 0 Reordering Rules Lot/Serial Numbers Bill of Materials Putaway Rules 0.00 pcs Purchased 0.00 pcs Sold

Code #
☆ e.g. Cheese Burger EN

Can be Sold Can be Purchased 1

Information General Information Sales Purchase Inventory Accounting Process Document Quality Document

2 Sales Description
This note is added to sales orders and invoices. EN

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

Product / New

Code #
☆ e.g. Cheese Burger

Can be Sold Can be Purchased

1

Information General Information Sales **Purchase** Inventory Accounting Process Document Quality Document

2

Vendor	Currency	Quantity	Unit of Measure	Price	Delivery ...
Test Customer	VND	5.00		60,000.00	1
Add a line					

3

Vendor Bills

Vendor Taxes

Control Policy
 On ordered quantities
 On received quantities

Purchase Description

SALES



Explain

V. Product

Purpose:

_ Create product

Product / New

5

0 Extra Prices In: 0 Out: 0 0 Reordering Rules Lot/Serial Numbers 0 Bill of Materials Putaway Rules 0.00 pcs Purchased 0.00 pcs Sold

Code #
☆ e.g. Cheese Burger EN

Can be Sold Can be Purchased

1 **Inventory** | Accounting | Process Document | Quality Document

2 **Operations**

Routes

Buy
 Manufacture
 San Francisco: Cross-Dock
→ View Diagram

3 **Logistics**

Weight

Volume

Manuf. Lead Time days

Customer Lead Time days

4 **Traceability**

Tracking

By Unique Serial Number
 By Lots
 No Tracking

Expiration Date

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

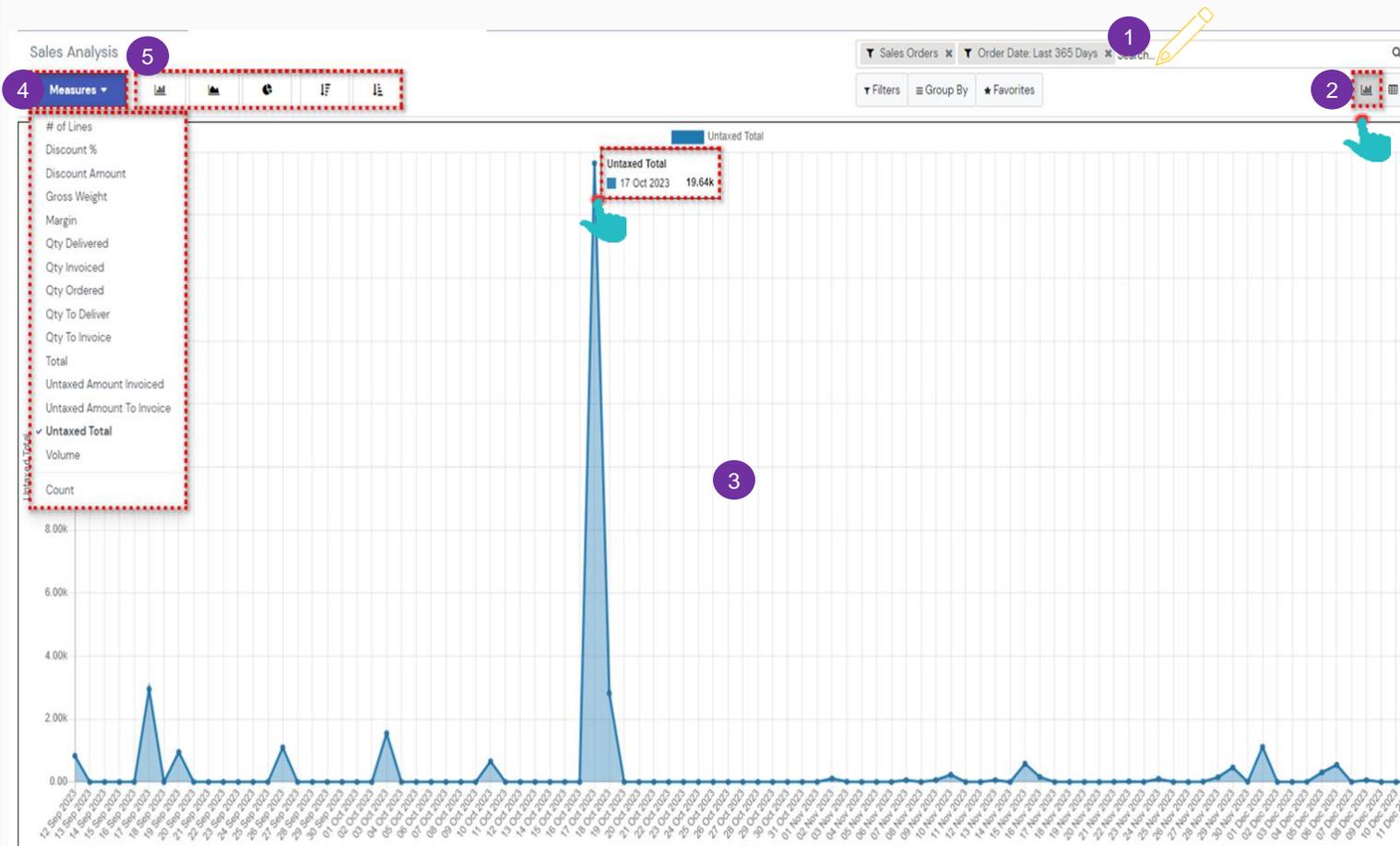


Explain

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



Explain

VI. Reporting

Purpose:

_ View sales report information

Sales Analysis

▼ Sales Orders x | ▼ Order Date: Last 365 Days x | Search []

▼ Filters | ≡ Group By | ★ Favorites

Measures ▾ | = | + | ↓ | 6

	Untaxed Total	Qty To Deliver	Qty To Invoice	Discount %
- Total	200,000.00	2.00	1.00	0.00
- December 2023	200,000.00	2.00	1.00	0.00
+ my	200,000.00	2.00	1.00	0.00

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

The screenshot shows the 'Sales Teams' configuration interface. It features a search bar at the top right with a magnifying glass icon and a pencil icon, labeled with a purple circle '1'. Below the search bar are buttons for 'Filters', 'Group By', and 'Favorites', along with a page indicator '1-1/1' and navigation arrows. On the left side, there is a '+ Create' button and a download icon, both labeled with a purple circle '3'. A red dashed box highlights the main table area, which contains a table with columns for 'Team' and 'Team Leader'. The first row shows 'Team' and 'Team Leader'. A purple circle '2' is placed in the middle of the table. A purple circle '4' is placed over the '+ Create' button. A hand icon is shown pointing to the 'Team' column header.

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

Sales Teams / New

4

Save Discard

1

Sales Team

e.g. North America

EN

Quotations

2

Team Details

Team Leader

Invoicing Target

0

Members

3

+ Add

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”



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.

Units of Measure Categories

Search...

Filters Group By Favorites 1-6/6

Unit of Measure Category	Uom
Unit	Units g pct
Weight	kg l lb oz
Working Time	Hours Days
Length / Distance	m km cm in ft mi mm
Surface	ft ² m ²
Volume	qt (US) gal (US) in ³ m ³ ft ³ L fl oz (US)

SALES



Explain

VII. Configuration > 2. Units of Measure Categories

Purpose:

_ Create a category of measurement units

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
 - _ Rounding Precision
3. Then "Save"

Units of Measure Categories / New

3

Save

Discard

1

Unit of Measure Category

EN

Units of Measure

2

Unit of Measure

Type

Ratio

Active

Rounding Pr...

pcs

Reference Unit of Measure for this category

100000



0.01000

Add a line



Thank you for using
For Smart Factory

MES 3D

ERP + MES + SCADA