

For Smart Factory



Operating |  
User |

# MANUAL



# MES<sup>3D</sup>

ERP + MES + SCADA

Auto & S.I

# User Manual

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# PURCHASE ORDERS



Explain

## I. Requests for Quotation

### Purpose:

\_ View information on the list of purchase quotations

Step by step:

1. On the “Requests for Quotation” page
2. Search function
3. List of display modes: List, Kanban, Pivot, Graph, Calendar and Activity.
4. Information table of the number of RFQ waiting to be sent, waiting and delayed.
5. Information about the list of created quotation requests
6. Click “Create” to create a quote request. See the next slide.

1

2

3

4

5

6

Reference	Vendor	Purchase Representative	Order Deadline	Next Activity	Source Document	Total	Status
P00002	My test	my	Today			55,000 €	RFQ
P00001	My Vender	Autonsi				0 €	Purchase Order

55,000.00

# PURCHASE ORDERS



Explain

## I. Requests for Quotation

### Purpose:

\_ Create a quotation request form

Step by step:

1. Fill in the information
  - \_ Vendor
  - \_ Vendor Reference
  - \_ Currency
  - \_ Order Deadline
  - \_ Receipt Date
  - \_ Request confirmation days
2. On the "Products" tab, add products to the quotation request, and on the "Other Information" tab, add other information.
3. Fill in the product information:
  - \_ Product
  - \_ Description
  - \_ Quantity
  - \_ UoM (Unit of measurement)
  - \_ Unit Price
  - \_ Taxes
4. Then click "Save"

Requests for Quotation / New

4 Save Discard

Send by Email Print RFQ Confirm Order Cancel RFQ RFQ Sent Purchase Order

Request for Quotation

☆ New

1

Vendor Name, TIN, Email, or Reference Order Deadline 12/19/2023 16:30:41

Vendor Reference Receipt Date 12/20/2023 16:30:41

Currency VND  Ask confirmation

2 Products Other Information

3

Product	Description	Quantity	UoM	Unit Price	Taxes	Subtotal
LJ69-9999	LJ69-9999	1.00	cm	100,000.00	Deductible VAT 10% ✖	100,000

Add a product Add a section Add a note

Untaxed Amount: 100,000 đ  
VAT 10%: 10,000 đ  
Total: 110,000 đ

# PURCHASE ORDERS



Explain

## I. Requests for Quotation

**Purpose:**

**\_ Send quotation request to vendor email**

Step by step:

1. Click the "Send by Email" button to send the quotation request to the vendor email
2. Recipient email information, title content and quotation request form... Then click the "Send" button.

Requests for Quotation / P00002 (001)

[Edit](#) [+ Create](#) [Print](#) [Action](#) [KnowSystem](#)

[Send by Email](#) [Print RFQ](#) [Confirm Order](#) [Cancel](#) [RFQ](#) [RFQ Sent](#) [Purchase Order](#)

Request for Quotation  
☆ **P00002**

Vendor: My test      Order Deadline: 12/19/2023 16:18:13  
Vendor Reference: 001      Receipt Date: 12/19/2023 16:18:13  
Currency: VND

**Products**    Other Information

Product	Description
LJ69-9999	LJ69-9999

[Add a product](#)   [Add a section](#)   [Add a note](#)

**Compose Email**

Recipients: Followers of the document and  
(My test ✖) Add contacts to notify...

Subject: JEWELPARK – VINA COMPANY LIMITED Order (Ref P00002)

Dear My test

Here is in attachment a request for quotation P00002 with reference: 001 from JEWELPARK – VINA COMPANY LIMITED.

If you have any questions, please do not hesitate to contact us.

Best regards,

RFQ\_P00002.pdf PDF ✓

Attach a file

Use template: Purchase Order: Send RFQ

[Send](#)   [Cancel](#)   [Save as new template](#)

# PURCHASE ORDERS



Explain

## I. Requests for Quotation

**Purpose:**

**\_ Confirm order**

Requests for Quotation / P00002 (001)

Edit Create

Print

Action

KnowSystem

2 Confirm Order

Re-Send by Email

Print RFQ

Cancel

RFQ

1

RFQ Sent

Purchase Order

Request for Quotation

☆ P00002

Vendor My test  
Vendor Reference 001  
Currency VND

Order Deadline 12/19/2023 16:18:13  
Receipt Date 12/19/2023 16:18:13  
 Ask confirmation

Products Other Information

Product	Description	Quantity	UoM	Unit Price	Taxes	Subtotal	
LJ69-9999	LJ69-9999	1.00	cm	100,000.00	Deductible VAT 10%	100,000 đ	

Add a product Add a section Add a note

Untaxed Amount: 100,000 đ  
VAT 10%: 10,000 đ  
Total: 110,000 đ

Step by step:

1. After sending the request for quotation to the vendor, the form will automatically update to the status "RFQ Sent".
2. Click "Confirm Order" after the vendor has quoted the price and the order is confirmed, the quotation request status will change to "Purchase Order".

# PURCHASE ORDERS



Explain

## II. Purchase Orders

### Purpose:

\_ Purchase orders list information

Reference	Confirmation Date	Vendor	Receipt Date	Purchase Representative	Next Activity	Source Document	Total	Billing Status
P00002	12/19/2023	My test	12/19/2023 16:18:13	my			110,000 €	Nothing to Bill
P00001	12/18/2023	My Vender	12/15/2023 12:57:33	Autonsi			0 €	Nothing to Bill

Step by step:

1. On the "Purchase Orders" page: Quotation information after "Confirm Order" will be updated here. The accountant will make the payment and the warehouse will receive the product according to the purchase order.
2. Search function
3. List of display modes: List, Kanban, Pivot, Graph, Calendar and Activity.
4. Billing :
  - \_ Nothing to Bill: No invoicing required
  - \_ Waiting Bills: Wait for purchase bill
  - \_ Fully Billed: have paid the bill in full
5. Purchase orders list information
6. Purchase orders creation function

# PURCHASE ORDERS



Explain

## III. Vendors

**Purpose:**

**\_ Vendors list information**

The screenshot shows the Microsoft Dynamics 365 interface for the Vendors list. The top navigation bar includes 'Purchase', 'Orders', 'Products', 'Reporting', and 'Configuration'. The left sidebar shows 'Vendors' with a '+ Create' button. The main area displays a search bar for 'Vendor Bills' and a table of vendors. The table has columns for Name, Phone, Email, Salesperson, Next Activity, City, and Country. Two vendors are listed: GEM01 and ORC01. Numbered callouts indicate: 1. The 'Vendors' tab in the left sidebar; 2. The search bar; 3. The table view controls (filters, group by, favorites, and view options); 4. The 'Next Activity' column; 5. The '+ Create' button.

Name	Phone	Email	Salesperson	Next Activity	City	Country
GEM01	09090909					
ORC01						

Step by step:

1. At the Vendors page
  2. Search function
  3. List of display modes: Kanban and List.
  4. Created customer list information
  5. Click "Create" to create a vendor.
- See the next slide.



# PURCHASE ORDERS



Explain

## III. Vendors

**Purpose:**

**\_ Create vendor**

Step by step:

1. Fill in the Vendor Code and description information
2. Click to add images
3. Fill in the information:
  - \_ Address
  - \_ Tax
  - \_ Fax
  - \_ Phone
  - \_ Mobile
  - \_ Email
  - \_ Website
  - \_ Language
  - \_ Tags
4. At the "Contact & Address" tab, proceed to add contact and address information
5. Click "Add" to add. See the next slide.

Vendors / New

✓ Save

✗ Discard

Code #

e.g. Brandom Freeman

Description

Address

Street...

Street 2...

City

State

ZIP

Country

e.g. BE0477472701

Tax

Fax

Phone

Mobile

Email

Website

Language

Tags

e.g. https://www.odoo.com

English (US)

Tags...

Contacts & Addresses

Sales & Purchase

Invoicing

Internal Notes

+ Add

# PURCHASE ORDERS



Explain

## III. Vendors

### Purpose:

\_ Add contacts and vendor 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
  - Notes

Then Save

# PURCHASE ORDERS




Explain

## III. Vendors

### Purpose:

\_ Input additional data for vendor

Vendors / New

Code #  
e.g. Brandom Freeman 

Description

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

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

Tax  
e.g. BE0477472701

Fax

Contacts & Addresses **Sales & Purchase** Invoicing Internal Notes

1

2

Sales  
Salesperson  
Payment Terms

Purchase  
Payment Terms  
Receipt Reminder  
Supplier Currency

Fiscal Information  
Fiscal Position

Misc  
Reference  
Company  
Industry

Step by step:

1. At the "Sales & Purchase" tab, proceed to add Sales and Purchase information.
2. Fill in the sales, purchase, Fiscal Information, Inventory and misc.

# PURCHASE ORDERS



Explain

## III. Vendors

### Purpose:

\_ Input additional data for vendor

Vendors / New

3

Code #  
Test 01

Description  
Test 01

Address

Street...	Phone	0234444534
Street 2...	Mobile	0234444534
City Yên Bái (VI)	Email	
ZIP	Website	e.g. https://www.odoo.com
Vietnam	Language	English (US)
Tax e.g. BE0477472701	Tags	Tags...
Fax		

1

Bank Accounts

Bank	Account Number
Shinhan Bank	0123456789
<input type="button" value="Add a line"/>	

Step by step:

1. The "Invoicing" tab contains invoicing information
2. Fill in the information:  
\_ Bank  
\_ Account Number
3. Then click "Save"

# PURCHASE ORDERS



Explain

## IV. Products

**Purpose:**

**\_ Product list information**

Step by step:

1. On the Products page
2. Search function
3. Product list information
4. List of display modes: Kanban, List and Activity.
5. Click "Create" to create the product.  
See the next slide.

Product #	Model	File	1st Type	2nd Type	3rd Type	Remark	Created by	Created on	Last Updated by	Last Updated on	Cost	Quantity On Hand	Unit of Measure
A							Autonsi	12/18/2023 14:58:44	Autonsi	12/18/2023 17:06:51	0.00		mm
LJ69-9999							my	12/18/2023 09:38:56	my	12/19/2023 16:40:31	50,000.00		cm
Material A							Autonsi	12/19/2023 13:42:11	Autonsi	12/19/2023 13:42:11	0.00		mm
RAB01 B W 18K	RAB01		Bight: B	Pink	14K		Autonsi	12/19/2023 09:50:27	Autonsi	12/19/2023 09:50:27	0.00		Units
Test 1811							Autonsi	12/15/2023 08:42:13	my	12/18/2023 16:01:16	0.00		g

# PURCHASE ORDERS



Explain

## IV. Products

**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 #
- \_ File (upload file or picture)
- \_ 1<sup>st</sup> Type (polishing agent)
- \_ 2<sup>nd</sup> Type (color)
- \_ 3<sup>rd</sup> Type (type gold)
- \_ Unit of Measure
- \_ Unit of Weight
- \_ Remark

Products / New

✓ Save ✗ Discard

Print Labels

0.00 Sold 0.00 Purchased In: 0 Out: 0 Bill of Materials Putaway Rules Storage Capacities

1 Code #  
★ e.g. Cheese Burger EN

2

3  Can be Sold  Can be Purchased

4 **Information** General Information Sales Purchase Inventory Accounting

5

Description

Model #

File

1st Type

2nd Type

3rd Type

Unit of Measure

Unit of Weight

Remark

# PURCHASE ORDERS



Explain

## IV. Products

**Purpose:**

**\_ Create product**

Products / New

0.00 Sold | 0.00 Purchased | In: 0 Out: 0 | Bill of Materials | Putaway Rules | Storage Capacities

Code #  EN

Can be Sold  Can be Purchased

1 **General Information** | Sales | Purchase | Inventory | Accounting

2

Product Type	<input type="text" value="Consumable"/>	Sales Price	<input type="text" value="1.00"/>
Invoicing Policy	<input type="text" value="Ordered quantities"/> <i>Consumables are physical products for which you don't manage the inventory level: they are always available. You can invoice them before they are delivered.</i>	Customer Taxes	<input type="text" value="Value Added Tax (VAT) 10%"/>
Unit of Measure	<input type="text"/>	Cost	<input type="text" value="0.00"/>
Purchase UoM	<input type="text" value="Units"/>	Internal Reference	<input type="text"/>
		Barcode	<input type="text"/>
		Is FG Product	<input checked="" type="checkbox"/>
		Product Category	<input type="text" value="All"/>

Internal Notes

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
  - \_ Barcode
  - \_ Is FG Product: Tick if it is a finished product
  - \_ Product Category

# PURCHASE ORDERS



Explain

## IV. Products

**Purpose:**

**\_ Create product**

Step by step:

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

Products / New

✓ Save

✕ Discard

Print Labels

0.00  
Sold

0.00  
Purchased

In: 0  
Out: 0

0  
Bill of Materials

Putaway Rules

Storage  
Capacities

Code #



Test 1

EN



Can be Sold  Can be Purchased

Information General Information **Sales** Purchase Inventory Accounting

Sales Description

2

This note is added to sales orders and invoices.



EN



# PURCHASE ORDERS



Explain

## IV. Products

**Purpose:**

**\_ Create product**

Products / New

✓ Save ✕ Discard

Print Labels

0.00 Sold 0.00 Purchased In: 0 Out: 0 Bill of Materials Putaway Rules Storage Capacities

Code #  
☆ Test 1 EN

Can be Sold  Can be Purchased

1

Information General Information Sales **Purchase** Inventory Accounting

2

Vendor	Currency	Quantity	Unit of Measure	Price	Delivery ...
My test	VND	1.00		100,000.00	1
Add a line					

3

Vendor Bills

Vendor Taxes  
Deductible VAT 10% ✕

Control Policy  
 On ordered quantities  
 On received quantities

Purchase Description  
This note is added to purchase orders. EN

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 supplier invoice information: Vendor Taxes and Control Policy.  
Fill in the purchase description information

# PURCHASE ORDERS



Explain

## IV. Products

**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
  - \_ Manufacture Lead Time
  - \_ Customer Lead Time
4. Then click "Save"

Purchase Orders Products Reporting Configuration

Products / New

4 Save Discard

Print Labels

0.00 Units Sold 0.00 Units Purchased In: 0 Out: 0 Bill of Materials Putaway Rules Storage Capacities

Code # ☆ e.g. Cheese Burger EN

Can be Sold  Can be Purchased

1 Information General Information Sales Purchase **Inventory** Accounting

2 Operations

Routes  Manufacture [View Diagram](#)

3 Logistics

Weight 0.00

Volume 0.00

Manuf. Lead Time 0.00 days

Customer Lead Time 0.00 days

Description for Receipts This note is added to receipt orders (e.g. where to store the product in the warehouse). EN

Description for Delivery Orders This note is added to delivery orders. EN

Description for Internal Transfers This note is added to internal transfer orders (e.g. where to pick the product in the warehouse). EN

# PURCHASE ORDERS



Explain

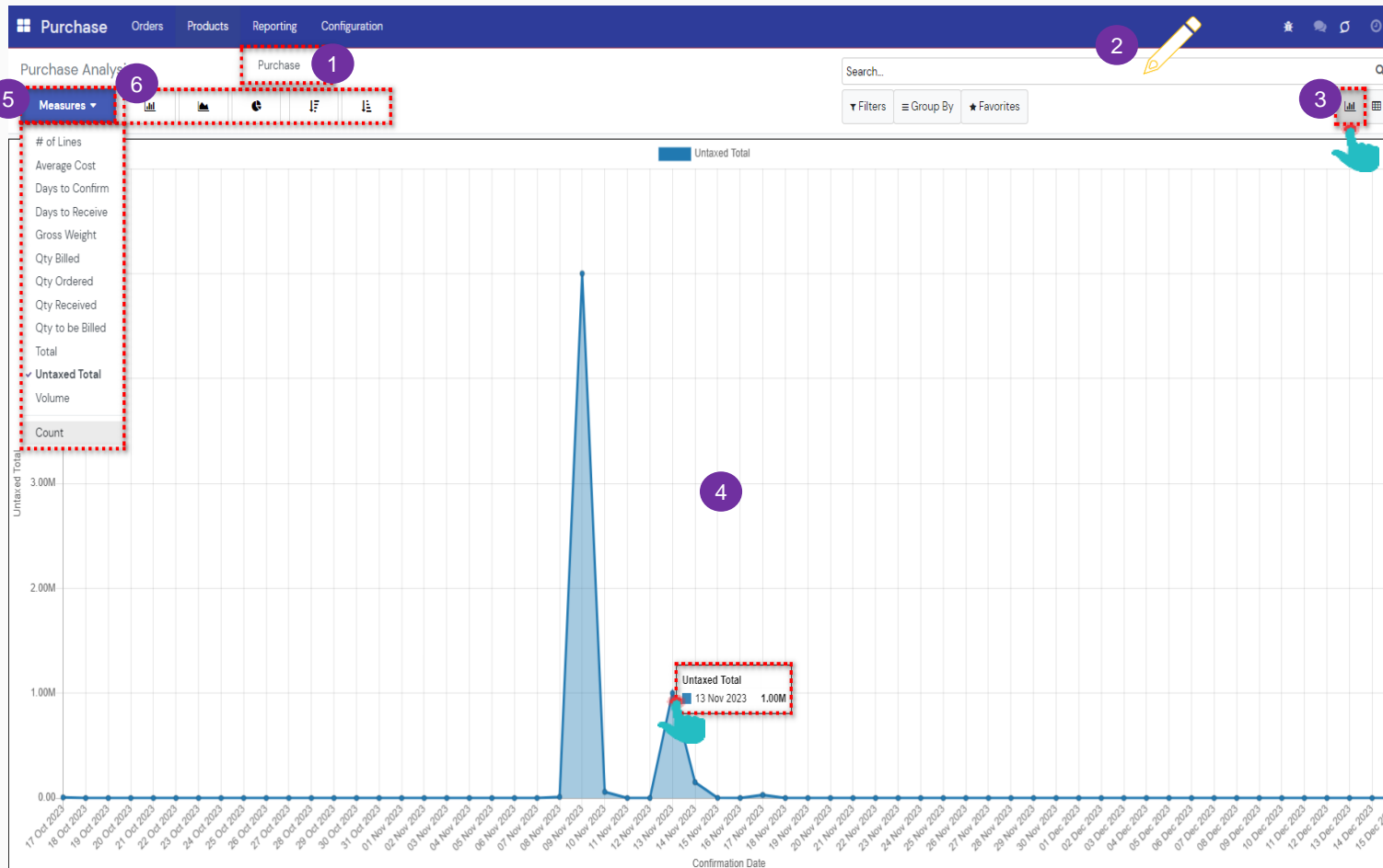
## V. Reporting

**Purpose:**

**\_ View purchase report information**

Step by step:

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



# PURCHASE ORDERS



Explain

## V. Reporting

**Purpose:**

**\_ View purchase report information**

The screenshot shows the 'Purchase Analysis' report interface. The top navigation bar includes 'Purchase', 'Orders', 'Products', 'Reporting', and 'Configuration'. The main area displays a table with columns: Count, Order, Untaxed Total, Total, Qty Billed, and Qty Ordered. The table data is as follows:

	Count	Order	Untaxed Total	Total	Qty Billed	Qty Ordered
+ Total	2	2	100,000.00	110,000.00	0.00	21.00
- Total	2	2	100,000.00	110,000.00	0.00	21.00
- All	2	2	100,000.00	110,000.00	0.00	21.00
+ Vietnam	1	1	100,000.00	110,000.00	0.00	1.00
+ Undefined	1	1	0.00	0.00	0.00	20.00

Numbered callouts in the image indicate the following steps:

1. Purchase report title
2. Search bar
3. Report display mode selector (Pivot, Grid, Excel)
4. Table data
5. Measures dropdown menu
6. Filter and aggregation icons
7. Excel file download icon

Step by step:

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

# PURCHASE ORDERS



Explain

## VI. Configuration > 1. Vendor Pricelists

**Purpose:**

**\_ Vendor price list information**

Step by step:

1. Search function
2. List of display modes: List and kanban
3. Information about the created vendor price list list
4. Click "Create" to create a vendor price list. See the next slide

Vendor	Product	Currency	Quantity	Unit of Measure	Price
my	LJ69-9999	VND	1.00	cm	100,000.00
My Vender	Test 1811	VND	0.00	g	0.00
GEM01	LJ69-9999	VND	0.00	cm	0.00
My test	LJ69-9999	VND	0.00	cm	100,000.00

# PURCHASE ORDERS



Explain

## VI. Configuration > 1. Vendor Pricelists

### Purpose:

\_ Create vendor price list

Step by step:

1. Fill in Vendor information:
  - \_ Vendor
  - \_ Vendor Product Name
  - \_ Vendor Product Code
  - \_ Delivery Lead Time
2. Fill in the Pricelist information:
  - \_ Product
  - \_ Quantity
  - \_ Unit Price
  - \_ Validity
  - \_ Company
3. Then click "Save"

Vendor Pricelists / New

3

1

Vendor	<input type="text"/>	2	Pricelist	<input type="text"/>
Vendor Product Name	<input type="text"/>	Product	<input type="text"/>	
Vendor Product Code	<input type="text"/>	Quantity	<input type="text" value="0.00"/>	
Delivery Lead Time	<input type="text" value="1"/> days	Unit Price	<input type="text" value="0.00"/> VND <input type="button" value="↗"/>	
		Validity	<input type="text"/> to <input type="text"/>	
		Company	JEWELPARK - VINA COMPANY LIMITED <input type="button" value="↗"/>	

# PURCHASE ORDERS



Explain

## VI. Configuration > 2. Product Categories

**Purpose:**

**\_ Product category list information**

Step by step:

1. Search function
2. Product category creation function
3. Click "Create" to create a product category. See the next slide

Purchase Orders Products Reporting Configuration

Product Categories

Search...

Filters Group By Favorites 1-3 / 3

<input type="checkbox"/>	Product Category
<input type="checkbox"/>	All
<input type="checkbox"/>	All / Expenses
<input type="checkbox"/>	All / Saleable

+ Create

# PURCHASE ORDERS



Explain

## VI. Configuration > 2. Product Categories

### Purpose:

\_ Create product category

Step by step:

1. Fill in the information:
  - \_ Category
  - \_ Parent Category
  - \_ Force Removal Strategy
  - \_ Costing Method
  - \_ Inventory Valuation
2. Then click "Save"

Product Categories / New

2

1

Category

Parent Category

Logistics

Force Removal Strategy

Inventory Valuation

Costing Method

Inventory Valuation

0 Products

Putaway Rules



# PURCHASE ORDERS



Explain

## VI. Configuration > 3. Units of Measure Categories

### Purpose:

\_ Unit of measurement category type information

Step by step:

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

Units of Measure Categories

Unit of Measure Category	Uom
<input type="checkbox"/> Unit	<input type="radio"/> Units <input type="radio"/> Dozens
<input type="checkbox"/> Weight	<input type="radio"/> g <input type="radio"/> oz <input type="radio"/> lb <input type="radio"/> kg <input type="radio"/> t
<input type="checkbox"/> Working Time	<input type="radio"/> Hours <input type="radio"/> Days
<input type="checkbox"/> Length / Distance	<input type="radio"/> mm <input type="radio"/> cm <input type="radio"/> in <input type="radio"/> ft <input type="radio"/> m <input type="radio"/> km <input type="radio"/> mi
<input type="checkbox"/> Surface	<input type="radio"/> ft <sup>2</sup> <input type="radio"/> m <sup>2</sup>
<input type="checkbox"/> Volume	<input type="radio"/> in <sup>3</sup> <input type="radio"/> fl oz (US) <input type="radio"/> qt (US) <input type="radio"/> L <input type="radio"/> gal (US) <input type="radio"/> ft <sup>3</sup> <input type="radio"/> m <sup>3</sup>

# PURCHASE ORDERS



Explain

## VI. Configuration > 3. 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 use
  - \_ Rounding Precision
3. Then click "Save"

Purchase Orders Products Reporting Configuration

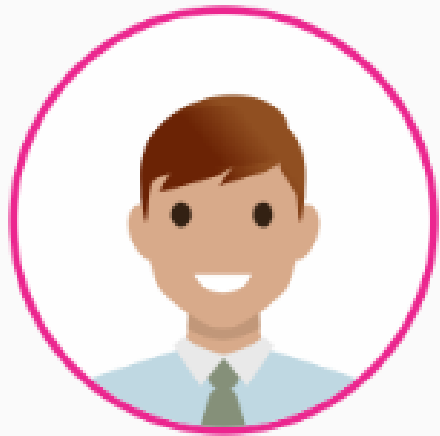
Units of Measure Categories / New

3 Save Discard

1 Unit of Measure Category

Units of Measure

Unit of Measure	Type	Ratio	Active	Rounding Pr...
Test	Reference Unit of Measure for this category	100000	<input checked="" type="checkbox"/>	0.01000
Add a line				



Thank you for using  
For Smart Factory

**MES** 3D

ERP + MES + SCADA