

1C:ERP



- Case study**
- The company works with large orders and performs expensive unique projects.
 - The sales process is long, a significant part of it is occupied by pre-sale events: participation in exhibitions, presentations, meetings.
 - It is necessary to quickly calculate the cost of the order according to the parameters.
 - An important role is played by post-sale work-the work of appeals and complaints of customers.



Company description

- The company works with large orders and performs expensive unique projects.
- The sales process is long, a significant part of it is occupied by pre-sale events: participation in exhibitions, presentations, meetings.
- It is necessary to quickly calculate the cost of the order according to the parameters.
- An important role is played by post-sale work-the work of appeals and complaints of customers.



Scenario

1. At the marketing event (exhibition), our employee meets with the client and tells about the products, the client is interested
2. Our Manager further leads this client, meetings, correspondence, SMS. Makes product presentations. As a result, the customer is ready to make an order with us.
3. To implement this complex order, we develop a work plan, with stages, deadlines and responsible persons. And we conduct this sales process inside the system.
4. Since the product we produce for this client is complex and unique, we separately estimate the cost of the project. If the price suits our customer, we start production.
5. The process of production and supply is planned and taken into account in the system. Based on the customer's order, we create a production order. We plan its implementation, calculate the production schedule, the load of work centers.
6. We calculate the necessary material resources under the order. If necessary, if there are not enough materials in stock, then we make orders of materials to the supplier
7. After the completion of the project, we process complaints received from the client (if the complaints will be)



CRM and marketing



Marketing activities

Demonstration base / 1C:ERP WE (1C:Enterprise)

Home Bills of res... x Modules

Quick menu

Budgeting and planning

CRM and marketing

Sales

Purchases

Warehouse and delivery

Production

Cash flow

Financial result and controlling

Capital assets

International financial accounting

Master data and settings

CRM and marketing reports

Settings and catalogs

Sales master data

Customers

Standard agreements with customers

Customer segments

Payment schedules

Gift certificate kinds

Prices and discounts

Prices (price list)

Discounts (markups)

Accruals and deductions of bonus points

CRM

Customer transactions

Channels of advertising impacts

Bulk mails to customers

Conduct surveys

Questionnaires

Customer claims

Marketing

Competitors

Competitor prices (price lists)

Assortment

Assortment change

Marketing activities and projects

Marketing activities

See also

Product segments

Create

Customer transaction

Customer claim

Tools

ABC/XYZ classification of customers

ABC/XYZ classification of products

Additional data processors



Marketing activities

Marketing activities

Create

Change selected

Search (Ctrl+F)

More actions

Description	Responsible per...	Planned start date	Start date	Planned end date	Co
Appliances World -2015 exhibition	Gus Oliver	4/15/2015		4/19/2015	
Celebrate anniversary!	Dan Olsen	4/5/2015	4/5/2015	4/20/2015	
Deal: Appliance sales	Dan Olsen	6/1/2015		6/30/2015	
Electro World exhibition	Mohan Bist	4/1/2015	4/1/2015	4/11/2015	
New style of woodwork advertising	Leonard Cooper	1/1/2015	1/1/2015	4/30/2015	

Appliances World -2019 exhibition (Marketing activity) *

Main Interactions Project plan My notes Tasks

Save and close Save Generate Files More actions

Main Partners and contact persons (4)

Description: Appliances World -2019 exhibition Code: 00-00000003

Planned start date: 10/01/2019 Start date: / / Completed

Planned end date: 10/25/2019 End date: / /

Responsible person: Dan Olsen

Segments:

Customers: VIP customers Products: Appliances

Appliances World -2019 exhibition (Marketing activity)

Main Interactions Project plan My notes Tasks

Interactions

Status: All Responsible person:

Create Meeting Scheduled interaction SMS message Phone call Email



Presale

- Bills of res...
- Modules
- Quick menu**
- Budgeting and planning
- CRM and marketing
- Sales
- Purchases
- Warehouse and delivery
- Production
- Cash flow
- Financial result and controlling
- Capital assets
- International financial accounting
- Master data and settings

Mail, tasks

My tasks

Interactions

Jobs

All notes

My reminders

User reminders

Event calendar

Files

Budgeting and planning

My budget tasks

CRM and marketing

Prices (price list)

Sales

Sales wizard

Sales orders

Purchases

Purchase orders

Production

Production orders

Cash flow

Payment requests

Master data

★ Products

Partners

Reports

Main

Budgeting and planning

CRM and marketing

Sales

Purchases

Warehouse and delivery

Production

Cash flow

Financial result and controlling

International financial accounting

All reports

Tools

Additional data processors

Change password

← → ☆ **Interactions** 🔗 ×

Find: in mail or attachments (Ctrl+Shift+F) × Responsible person: [] ×

< By subjects ▾ + Create ▾ ✓ 📎 👤 ⏪ Usage instances More actions ▾

- Meeting
- Scheduled interaction
- Phone call**
- SMS message
- Email Ctrl+N

Participants	Date
Subject	

⏪ ⏩ ⏴ ⏵



Presale

Meeting (create) *

Main Interactions My notes Tasks

Save and close [Print] [List] Generate [Add] [Remove] [Edit] Files More actions

Start: 10/21/2019 11:00
End: 10/21/2019 11:30
Place:
Subject: presentation

Subject: Home page
Person responsible: Dan Olsen
 Reviewed
Review after: 10/29/2019 11:00:00 AM
In 15 min.
In 30 min.
In an hour
In 3 hours
Tomorrow

My tasks
Open [Refresh] Group by For execution [Download] Forward...

Task

Interactions
Find: [Search] Responsible person: [Search]
Created: 10/21/2019 12:00:00
Author: Dan Olsen
By subjects Create [Check] [Print] [Add] [Remove] Usage instances More actions

	Last interaction	Participants	Date
presentation out of 10/21/2019 (Meeting)			
1	10/21/2019 5:37:49 PM	Aleksey Ivanov presentation	17:37

Details Members (1) Comment
Add [Up] [Down] Create contact More actions
Contact presentation How to contact Contact
Aleksey Ivanov

To-do list
Sales
Account sales from consignees
To register (2)
Customer transactions
Total transactions in progress (2)
Individual agreements with customers
Overdue agreements (8)
Standard agreements with customers
Overdue agreements (1)
Contracts with customers
Overdue contracts (2)
Documents of selling goods and services
References for registration in progress (5)
Requests for goods return from customers
Total requests in process (2)
Letters of authority for receiving cash
Bases for issuing (receiving cash) (34)
Sales orders
Order payment is overdue (1)
Overdue order execution (5)
As of today (9)
Number of orders in progress (14)
Purchases
Warehouse and delivery
Production
Cash flow

Customize [Refresh]



Presale



☆ presentation out of 10/21/2019 (Meeting)



Main [Interactions](#) [My notes](#) [Tasks](#)

Save and close



Generate



Files

More actions

Start: 10/21/2019

End: 10/21/2019

Place:

Subject: presentation

- Customer claim
- Customer transaction
- Individual
- Job**

Subject:

presentation out of 10/21/2019 (Meeting)

Person responsible:

Dan Olsen

Reviewed

Review after:

10/29/2019 11:00:00 AM

Importance:

High

Not all contacts are selected

Created: 10/21/2019 5:37:49 PM

Author: [Dan Olsen](#)

Details **Members (1)**

our presentation

Job (create) *

Main: [Tasks](#)

[Start and close](#) [Save](#) [Start](#) [@](#) [📄](#) [📎](#) [Files](#)

Main task: not specified

Job: Prepare a product presentation Importance: Normal

Assignee: Dan Olsen Deadline: // : : AM

Subject: [presentation_out_of_10/21/2019_\(Meeting\)](#)

2019		October						
Jan	Jul	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Feb	Aug	29	30	1	2	3	4	5
Mar	Sep	6	7	8	9	10	11	12
Apr	Oct	13	14	15	16	17	18	19
May	Nov	20	21	22	23	24	25	26
Jun	Dec	27	28	29	30	31	1	2
	Today	3	4	5	6	7	8	9

Check execution Dan Olsen Deadline: // : : AM

Author: Dan Olsen Started: 10/22/2019 11:20:15 AM



Presale

presentation out of 10/21/2019 (Meeting)

Main Interactions My notes Tasks

Interactions

Status: All Responsible person:

Create More actions

Participants	Date
Subject	
Aleksey Ivanov	11:32
we sent all	
Aleksey Ivanov	11:31
another presentation	
Aleksey Ivanov	10/21/2019
presentation	

Meeting (interaction #1)

Call (interaction #2)

Customer transactions



Customer transactions

- Home
- Bills of res... x
- Modules
- Quick menu
- Budgeting and planning
- CRM and marketing**
- Sales
- Purchases
- Warehouse and delivery
- Production
- Cash flow
- Financial result and controlling
- Capital assets
- International financial accounting
- Master data and settings

CRM and marketing reports

Sales master data

- Settings and catalogs
- Customers
- Standard agreements with customers
- Customer segments
- Payment schedules
- Gift certificate kinds

Prices and discounts

- Prices (price list)
- Discounts (markups)
- Accruals and deductions of bonus points

CRM

Customer transactions

- Channels of advertising impacts
- Bulk mails to customers
- Conduct surveys
- Questionnaires
- Customer claims

Marketing

- Competitors
- Competitor prices (price list)

Assortment

- Assortment change

Marketing activities and pr

- Marketing activities

See also

- Product segments

Create

- Customer transaction
- Customer claim

Customer transactions

Responsible person: All Status: All Grouping: No grouping

Create Reports Generate Search (Ctrl+F) More actions



Description	Customer	Potential	Start date
Air conditioner purchase	Video Market	707.76	04/07/15
Fan sale	Assol	884.70	03/03/15
Selling goods to chain stores of Sigma sh...	Sigma shopping center	5,000.00	03/03/15
Selling goods to Household Goods chain s...	Household Goods store	10,000.00	03/03/15
TV sales	Proton	884.70	03/03/15
Vacuum cleaner sale	Altair	884.70	03/03/15





Customer transactions

← → ☆ presentation out of 10/21/2019 (Meeting)

Main [Interactions](#) [My notes](#) [Tasks](#)

Save and close   **Generate**    [Files](#)

Start:  

End:  

Place:

Subject:

- Customer claim
- Customer transaction**
- Individual
- Job

Details **Members (1)** [Comment](#)

our presentation



Customer transactions

← → ☆ sale of components (Customer transaction) [🔗](#) ×

[Main](#) [Files](#) [Interactions](#) [Project plan](#) [Transaction documents](#) [Transaction participants](#) [My notes](#) [Tasks](#)

Save and close Save Generate Reports Files More actions

Customer: Agreement: ...

General information **Participants** Primary demand (1)

Description: Code:

Responsible person: Start:

Potential: USD Probability:

Primary interest

Channel:

Source:

State: Status: Closed Reason for losing:

Transaction kind: [Instructions](#)

Stage: [Condition approval](#) [Map of busine](#)

Separate accounting of goods by transaction

Marketing activities 🔗 ×

Select Create Generate Search (Ctrl+F) × More actions

Description	Code
Appliances World -2015 exhibition	00000001
Appliances World -2019 exhibition	00-0000003
Celebrate anniversary!	CU-0000001
Deal: Appliance sales	00-0000002
Electro World exhibition	CU-0000003
New style of woodwork advertising	00-0000001



Customer transactions



Customer transaction (create) *

Main Files Interactions Project plan Transaction documents Transaction participants My notes Tasks

Save and close

Save



Generate



Reports



Files

Customer: Agreement:

General information

Participants

Description: Code:

Responsible person: Start: 10/22/2019

Potential: USD Probability:

Primary interest

Channel:

Source:

State

Status: Closed Reason for losing:

Transaction kind: [Instructions](#)

Separate accounting of goods by transaction

Transaction kinds

Select

Create



Search (Ctrl+F)



More actions

Description	Transaction type
Arbitrary sale	Transactions with ...
Long-term projects	Other non-process ...
Separate transaction accounting	Other non-process ...
Standard sale	Standard sale





Business process

← → ☆ sale of components (Customer transaction) [link] ×

Main [Files](#) [Interactions](#) [Project plan](#) [Transaction documents](#) [Transaction participants](#) [My notes](#) [Tasks](#)

Save and close Save [icon] Generate [icon] [icon] Reports [icon] Files [icon] Mo

Customer: [input] Agreement: [input]

General information **Participants** Primary demand (1)

Description: sale of components Code: 00-0000007

Responsible person: Dan Olsen Start: 10/22/2019

Potential: 0.00 USD Probability: 0

Primary interest

Channel: [input]

Source: [input]

State

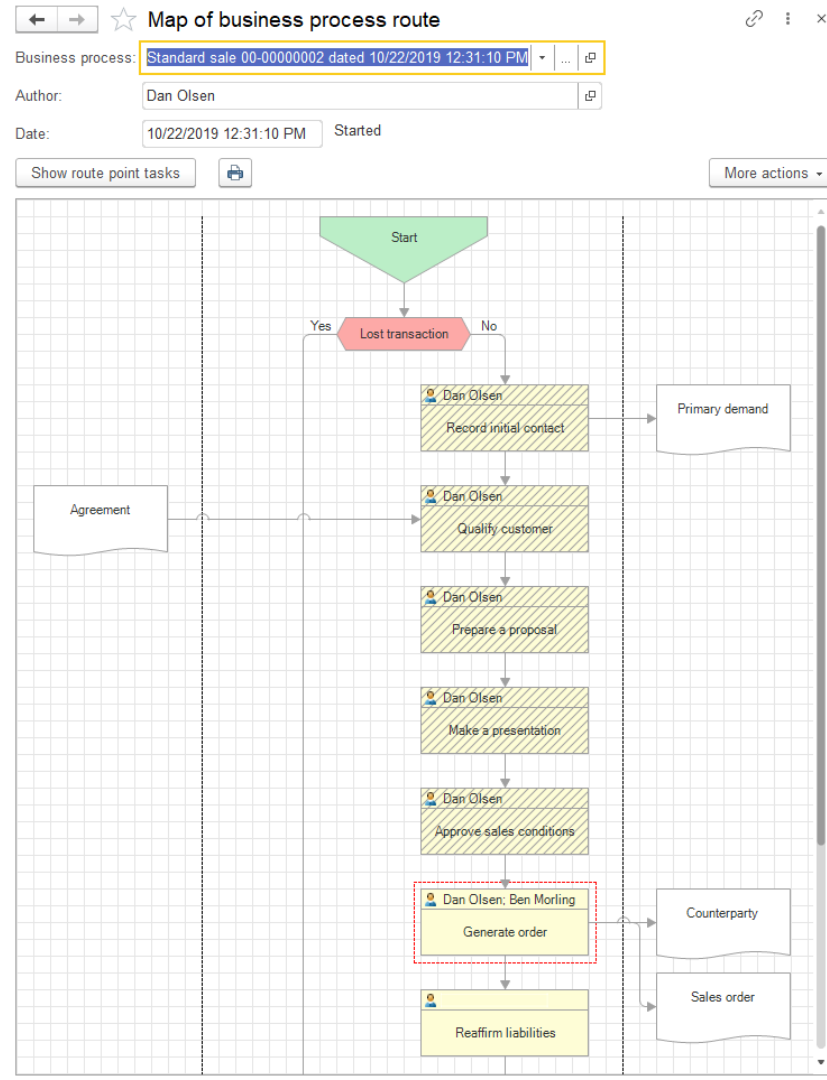
Status: In progress Closed Reason for losing: [input]

Transaction kind: Standard sale [icon] [Instructions](#)

Stage: [Initial contact](#)

Separate accounting of goods by transaction

Map of business process route [icon] [icon]





Business process

← → ☆ Standard sale (Transaction kind)

Save and close Save Files

Description: Standard sale

Transaction type: Standard sale

Usage is allowed Separate accounting of goods by transaction

Record primary demand

Details Process steps

Add	More actions ▾
1	Initial contact
2	Customer qualification
3	Proposal creation
4	Presentation
5	Condition approval
6	Preparation for fulfillment of obligations
7	Fulfillment of obligations

Responsible person: Gus Oliver

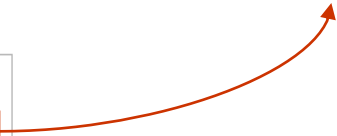
Save and close Save Forward...

Author: Dan Olsen

Execution
DueDate: 10/24/2019 12:31:10 PM Importance: Normal Start date: / / : : AM

Content
Subject: sale of components

- plan and establish initial contact (required);
- find out product categories and products that may be of interest to the customer;
- find out the details of contact persons who are potentially interested in buying the offered products.





Reports

Prices and discounts

[Price list](#)

Price list generation by the selected prices, only available goods if required.

[Remaining bonus points](#)

How many bonus points are left to accrue to the customer? For which bonus programs there are remaining accrued points?

Transactions

[Gross profit by transactions by companies](#)

Which transaction kinds and transactions bring the most sales to customers by companies?

[Primary demand](#)

What are the reasons for unfulfilled demand by transactions and managers? For which transactions the demand is fulfilled?

[Primary interest](#)

Comparison of primary interest sources according to quantity of registered customers and concluded transactions.

[Probabilistic forecast of winning the transaction steps](#)

What is the probability that transactions will win on each step of the sales process?

[Reason for losing transactions](#)

What are the reasons for the transaction loss? Which managers? With which customers?

[Sales by transactions for enterprise as a whole](#)

Which transaction kinds and transactions bring the most sales to customers by enterprise?

[Sales pipeline](#)

What is the efficiency of each sale stage?

[Transaction efficiency](#)

How many transactions are won, lost or in progress? For what potential sales amount?

- Home
- Bills of res... x
- Modules
- Quick menu
- Budgeting and planning
- CRM and marketing**
- Sales
- Purchases
- Warehouse and delivery
- Production
- Cash flow
- Financial result and controlling
- Capital assets
- International financial accounting
- Master data and settings

CRM and marketing reports

Settings and catalogs

Sales master data

- Customers
- Standard agreements with customers
- Customer segments
- Payment schedules
- Gift certificate kinds

Prices and discounts

- Prices (price list)**
- Discounts (markups)
- Accruals and deductions of bonus points

CRM

Customer transactions

- Channels of advertising impacts
- Bulk mails to customers
- Conduct surveys
- Questionnaires
- Customer claims

Marketing

- Competitors
- Competitor prices (price lists)

Assortment

- Assortment change

Marketing activities and projects

- Marketing activities

See also

- Product segments

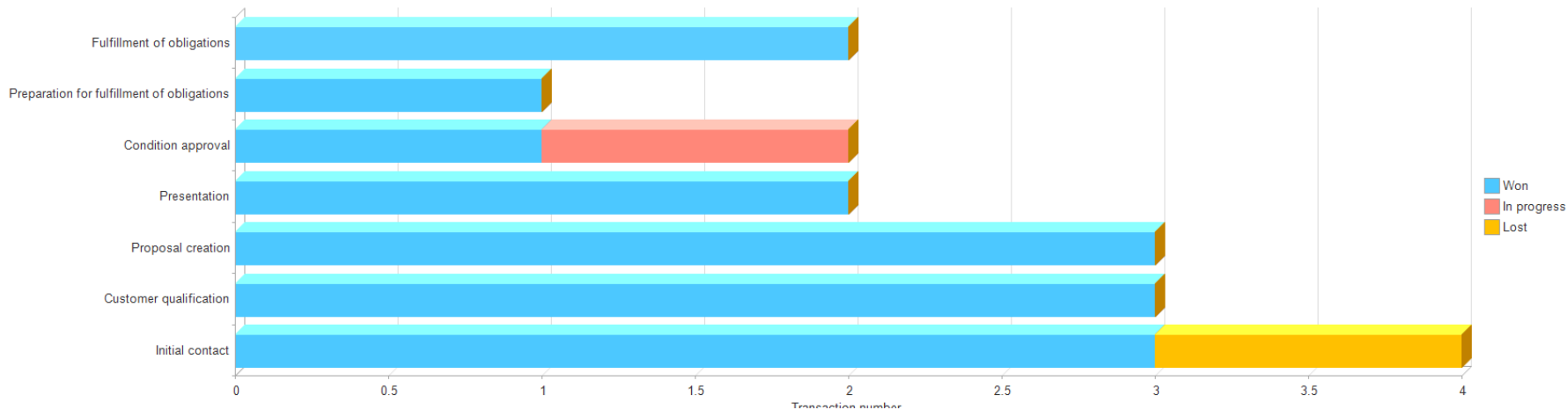


Reports

Sales pipeline

Process step	In progress		Won		Lost		Duration, days
	Number of transaction steps in progress	Potential in operation	Number of won transaction steps	Won potential	Number of lost transaction steps	Lost potential	
Initial contact			3	1,769.4	1	707.76	8.50
Customer qualification			3	1,769.4			
Proposal creation			3	1,769.4			
Presentation			2	884.7			
Condition approval		1	1	884.7			
Preparation for fulfillment of obligations			1	884.7			
Fulfillment of obligations			2	1,769.4			

Количество сделок





Master data

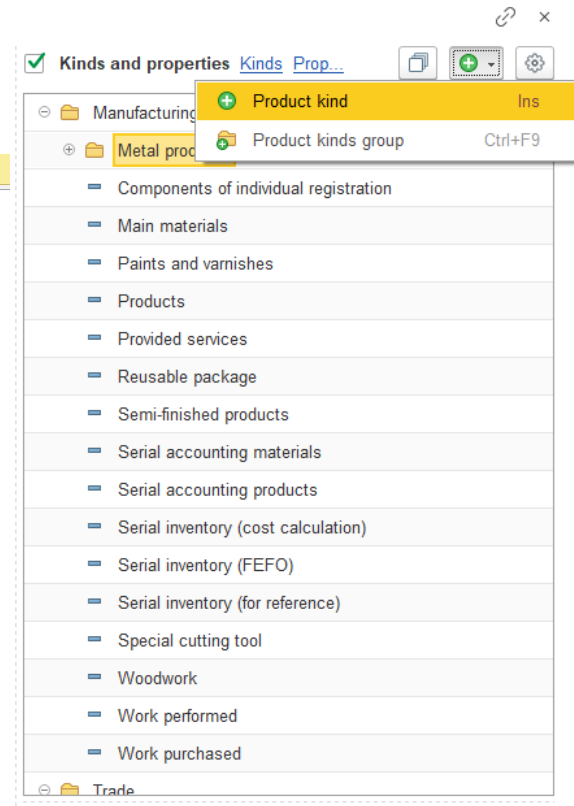


Preliminary cost of the transaction

- **Task:** calculation of the preliminary cost of the project is relevant when the exact cost at the initial stages can not be determined. Often, the preliminary calculation of the cost of complex products is a long process. And the faster we execute this process, the higher the chances that the client will stay with us. We will slow down-the client will leave to competitors.
- **Example from practice:** In shipbuilding, the customer initially provides the contractor with a set of input parameters (performance characteristics): tonnage of the vessel, cruising range, propulsion system, etc. And the ship and its exact characteristics appear in the design process (if this is the first vessel in the series, the design can often be conducted in the process of manufacture of the vehicle).
- At the time of signing the contract, we do not yet have the design and construction documentation for the ship, and therefore we can not estimate exactly how much this ship will cost. It is possible to speak only about "approximate" estimated cost of the order, but not about exact cost.
- To calculate the cost in this case, some generalized parameterizable scheme is used. Depending on the complexity of the product, the number of such parameters may vary. For the bridge support these parameters can be 20, for the ship 200.



Master data



Demonstration base / 1C:ERP WE (1C:Enterprise)

Home Bills of res... x Modules

Quick menu

- Budgeting and planning
- CRM and marketing
- Sales
- Purchases
- Warehouse and delivery
- Production
- Cash flow
- Financial result and controlling
- Capital assets
- International financial accounting
- Master data and settings**

Initial filling

- Initial filling
- Register adjustment

Base classifiers

- Currencies

Master data

- Products**
- Product classifiers
- Partners
- Companies
- Company structure
- Warehouses and stores
- Bank accounts
- Enterprise cash accounts
- Cash registers
- Projects
- Work schedules
- Authorized signatories
- Individuals

Settings

- Servicing
- General settings
- Users and rights settings
- Organizer

Master data and sections

- Enterprise
- Products
- Budgeting and planning
- CRM and marketing
- Sales
- Purchases
- Warehouse and delivery
- Production
- Cash flow and mutual settlements
- Financial result and controlling
- VAT accounting, import and export
- Capital assets
- International financial accounting

Integration

- Applied solution design system
- Data synchronization

See also

- Currencies
- Banks
- World countries
- Business calendars

Reports

- Additional reports

Tools

- Additional data processors
- Personal settings



Master data

☆ Modules (Product kind)

Save and close Save Generate Navigate Files More actions Show all Collapse all

▼ Main

Product type: Product ?

Group of product kinds: Metal products Access group: Other

Description: Modules

Details:

When printing a cargo name in the waybill, use:

name from application settings: <none>

individual name:

Product categories: Configured for this product kind List

Characteristics: ?

Series: ?

For this type of products you can choose **only** those series accounting policies, which include balance accounting by series. At the warehouse is advanced for shipment or receiving, then the policy shall imply cost accounting by series.

Additional attributes

- > Name templates
- > Quick selection in lists
- > Visibility, control filling and uniqueness
- > Values used to create
- > Additional information

▼ Additional attributes

Using additional attributes, describe object properties (for example, color, size, brand, etc.)

Use one of the features:

- attributes common to all products;
- attributes common to several product kinds;
- attributes with the common value list;
- attributes specific only to one product kind.

Set an add. attribute order - attributes will follow in the object form in this order.

+ Add - X ↑ ↓

Product attributes
Min. supply
Insulation area
Area
WC



Master data

☆ Modules (Product kind)

Save and close Save Generate Navigate Files

Main

Product type: Product

Group of product kinds: Metal products

Description: Modules

Details:

When printing a cargo name in the waybill, use:

name from application settings: <none>

individual name:

Product categories: Configured for this product

Characteristics: ?

Series: ?

For this type of products you can choose **only** the attributes by series.

Additional attributes

Using additional attributes, describe object properties

Use one of the features:

- attributes common to all products;
- attributes common to several product kinds;
- attributes with the common value list;
- attributes specific only to one product kind.

Set an add. attribute order: - attributes will follow in this order

Product attributes

Min. supply

Additional attribute (create) *

Save and close Save More actions

Description: Insulation area

Value type: **Number** ... ? Default format

Visible: [always](#)

Available: [always](#)

Required: [always](#)

Tooltip:

Comment:

> For developers

Show all Collapse all More actions

Edit data type

Composite data type

- Boolean
- Date
- Number**
- String
- Additional value
- Additional value (hierarchy)
- Cash flow item
- Company
- Contract between companies
- Contract with counterparty
- Counterparty
- Currency
- Customer segment
- Department
- Expense item

Length: Precision: Nonnegative

OK Cancel



Master data

- Home page
- Products
- Quick menu
- Budgeting and planning
- CRM and marketing
- Sales
- Purchases
- Warehouse and delivery
- Production**
- Cash flow
- Financial result and controlling
- Capital assets
- International financial accounting
- Master data and settings

Manufacturing reports
 Settings and catalogs
 Order fulfillment states

Master data
Bills of resources

Work centers
 Availability of work center kinds
 Material substitution permissions
 Operations sheets
 Costing items
 Set up inventory level control
 Production expense standards
 Standard costings

Intershop management

Order queue management
Stage dispatching
 Production orders

Shop management

Stage execution
 Execution of operations
 Material orders for production

Intrashop accounting

Production documents (all)
 Invoices for registration
 Register production without orders
 Allocation of materials and works
 Expense allocation to product cost
 Enter indicators for cost allocation

Labor costs

Employee output
 Kinds of employee activities
 Teams

Repairs

Facilities
 Repair activities
 Repair orders
 Defect log
 Repair activity planning
 Running time of facilities

See also

Reasons for production cancellation
 Expense allocation rules

Create

Production order

Tools

Additional data processors

← → ☆ **Bills of resources** ↗ ×

Status: Any Products: <without filter> Used as: <without filter> Work center kind: <without filter> Used in orders: <without filter>

+ Create Create group Set status Product BOR BOM tree Compare bills of resources More actions

	Code	Type	Status	Validity period		Main product
				from	to	
Production, assembly	Ins					
Repair						
Disassembly, disposal	00-000005					
Door frame for greenhouse GH-1 3x6	00-000086	Production, assembly	Valid	3/1/2017		Door frame for greenh...
Greenhouse GH-1 3x6	00-000085	Production, assembly	Valid	3/1/2017		Greenhouse GH-1 3x6
Landing 3 m for 1 pcs (multi-step) MS	00-000070	Production, assembly	Valid	1/1/2015		Landing 3m colored
Landing 3 m for 1 pcs (multi-step) PR	00-000008	Production, assembly	Valid	3/1/2015		Landing 3m colored
Landing 3 m for 1 pcs (single-step) MS	00-000071	Production, assembly	Valid	1/1/2015		Landing 3m
Landing 3 m for 1 pcs (single-step) PR	00-000007	Production, assembly	Valid	1/1/2015		Landing 3m
Landing 3m (production by toller)	00-000091	Production, assembly	Closed			Landing 3m colored
Landing PLO-3M	00-000081	Production, assembly	Valid	1/1/2017		Landing 3m colored
Spiral Staircase II	00-000083	Production, assembly	Valid	3/1/2017		Spiral Staircase II
Spiral staircase II (PF in process)	00-000084	Production, assembly	Valid	3/1/2017		Spiral Staircase II
Spiral Staircase II frame	00-000082	Production, assembly	Valid	3/1/2017		Frame of Spiral Stairc...



Master data

← → ☆ Bills of resources



Status: Products: Used as: Work center kind: Used in orders:

	Code	Type	Status	Validity period		Main product
				from	to	
Production, assembly Ins						
Repair						
Disassembly, disposal	00-000005					
— Door frame for greenhouse GH-1 3x6	00-000086	Production, assembly	Valid	3/1/2017		Door frame for greenh...

Bill of resources (Production, assembly) (create) *

Group: Code: Status:

Description: Valid from: to:

Product: Quantity: pcs. % defective goods:

Dispatcher department



Master data

← → Bill of resources (Production, assembly) (create) * ×

Main [Standard costings](#) [BOM tree](#) [Material substitution permissions](#) [Usage in orders](#) [My notes](#) [Tasks](#)

Save and close Save Compare bills of resources Usage instances Product BOR

Group: Metalwork Code: Status: Under development Set status

Description: Modules 11-5 Valid from: 10/23/2019 to: / /

Main Side and intermediate product Materials and works (2) Labor costs Manufacturing process More

Add Select Auto selection Calculation using formula Enter substitution permission

#	Products	Characteristic	Quantity	UOM	Method of receiving material
1	1000x1000 Styrofoam	<characteristics ...		m2	Supply
2	2000x1000 foam rubber	<characteristics ...		m2	Supply

More actions

Edit formula

Save and close Check formula More actions

Available attributes

- Main product
 - Quantity
 - Insulation area
 - Area
- Finished products
 - Line[1].Quantity
 - Line[1].Insulation area
 - Line[1].Area

Operators and functions

- Separators
- Operators
 - +
 -
 - *
 - /
- Logical operators and constants
- Numerical functions
 - Maximum
 - Minimum
 - Rounding
 - Integer part



Master data

← → ☆ Modules 11-5 (Production, assembly) (Bill of resources) 🔗 ×

Main **Standard costings** [BOM tree](#) [Material substitution permissions](#) [Usage in orders](#) [My notes](#) [Tasks](#)

Save and close Save

Group: Code: Status:

Description: Valid from: to:

Main

#	Products	Characteristic	Quantity	UOM	Method of receiving material	Costing item
1	1000x1000 Styrofoam	<characteristics are not u...	<using formula>	m2	Supply	Main materials
2	2000x1000 foam rubber	<characteristics are not u...	<using formula>	m2	Supply	Main materials

← → ☆ Modules 11-5 (Production, assembly) (Bill of resources) 🔗 ×

Main **Standard costings** [BOM tree](#) [Material substitution permissions](#) [Usage in orders](#) [My notes](#) [Tasks](#)

Standard costings

Company: Dispatcher department: State:

Number	Date	Company	Dispatcher department	State	Costing object
<input type="button" value="✖"/> 000000005	10/23/2019 1...	Andromeda Plus	Assembly and welding...	Not calculated	Bill of resources



Master data

← → ☆ Standard costing 00000006 dated 10/23/2019 12:55:18 PM 🔗 ×

Post and close



Print

Reports

More actions

✓ Costing is calculated.

Calculation can be incorrect ?

- Calculation protocol
- Target product cost
- Document register records Ctrl+Shift+L
- Usage instances

Main Bills of resources (1)

Add ↑ ↓ Select

#	Products	Characteristic	Quantity	UOM	Bill of resources
1	Modules 11-5	<characteristics are not used>	1.000	pcs.	Modules 11-5

← → ☆ Target product cost (Additional filter is set)

Cost data:

Run report Find... 📄 🔍 📁 📧 Σ

Target product cost

Filter: Calculation Equal to "Standard costing 00000007 dated 10/23/2019 1:08:07 PM"

Products, Modules 11-5, , pcs.
Characteristic,
Assignment, UOM

Products/semi-finished product, Characteristic, UOM Cost, Characteristic, UOM	Quantity	Price	Profit	Including				
				Material	Labor costs	Itemized constants	Itemized variables	Off-balance
Total			18,312.50	7,112.50	11,200.00			
Modules 11-5, pcs.	1.000		18,312.50	7,112.50	11,200.00			
1000x1000 Styrofoam, , m2	1.500	75.00	112.50					
2000x1000 foam rubber, , m2	200.000	35.00	7,000.00	7,000.00				
Carpenter works, grade 3, , h	10.000	200.00	2,000.00		2,000.00			
Electrotechnical works, grade 4, , h	3.000	400.00	1,200.00		1,200.00			
Welding, grade 3, , h	20.000	400.00	8,000.00		8,000.00			



Manufacturing



Sales order

← → ☆ sale of components (Customer transaction) 🔗 ×

Main [Files](#) [Interactions](#) [Project plan](#) [Transaction documents](#) [Transaction participants](#) [My notes](#) [Tasks](#)

Save and close Save **Generate** Reports Files More actions

Customer: ...

General information **Participants** **Files**

Description: ...

Responsible person: ...

Potential:

Primary interest

Channel: ...

Source: ...

State

Status: Closed Reason for losing: ...

Transaction kind: ... [Instructions](#)

Stage: [Condition approval](#) [Map of business process route](#)

Separate accounting of goods by transaction

Generate dropdown menu:

- Acceptance note
- Customer claim
- Job
- Purchase order
- Request for goods return from customer
- Sales of goods and services
- Sales order**

Save and close Save **Forward** More actions

DueDate: 10/23/2019 1:25:58 PM Importance: Start date: AM

Content

Subject: [sale of components](#) **Create order**

Job result

Assignee: [Dan Olsen](#) Completed: ... **Completed**



Sales order

☆ Sales order MS00-000001 dated 11/23/2018 6:27:17 PM



Main Approval My notes Tasks

Post and close



Reports Files

More actions

Status: For completion Priority: Normal Close

Main Goods (3) Delivery More

Add Add Fill in

#	Products	Characteristic	Actions
1	Landing 3m colored	<characteristics a...	Ship on peg.
2	Landing 3m colored	<characteristics a...	Ship on peg.
3	Painting of metal ...	<characteristics a...	Ship on peg.

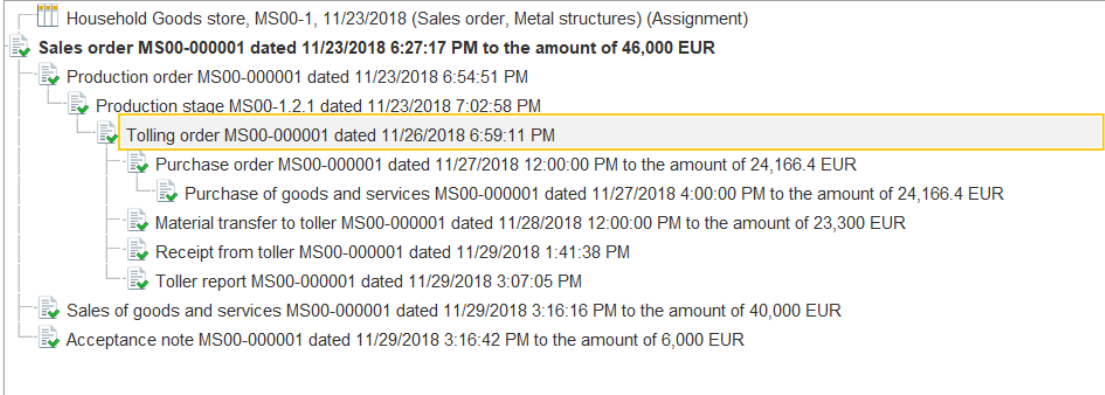
- Execution state
- Card of settlements with customers
- Customer debts
- Sales by order
- Sales profitability assessment
- Applied discounts
- Variations from sales conditions
- Document register records
- Linked documents**
- Usage instances

Linked documents

Update Display for the current one

Required shipment date: / / Ship in one day 11/30/2018

Discount: 0.00 VAT: 7,016.94 Ord





Production order

← → ☆ Sales order SC00-000001 dated 10/23/2019 4:24:44 PM



Main Approval My notes Tasks

Post and close

Print Reports Files More actions

Status: For completion

Acceptance note for supply

Acquiring transaction

Assembly (disassembly) order

Cash receipt statement

Customer claim

Goods assignment adjustment

Inpayment

Instruction for shipping agent

Job

Letter of authority

Material orders for production

Material substitution permission

Production order

Proforma invoices

Purchase order

Purchase orders

Sales of goods and services

Sales order approval

Transfer order

Transfer released products to warehouse

Main Goods (2) Delivery

Number: SC00-000001

Customer: Alfa

Counterparty: Alfa

Agreement: DS Tools sales

Payment: For payment 11/13

Comment:

Production order (production, assembly) (create) *

Main My notes Tasks

Post and close

Production order

Order structure

Reports

More actions

Status: Being generated

Priority: Normal

Main Products (2) More

Add



Fill in

More actions

#	Product ID	Products	Characteristic	Assignment	Quantity	UOM	Bill of materials	Recipient
1		Modules 11-5	<characteri...		10.000	pcs.	Modules 11-5	Commercial departme
2		Greenhouse GH-1 ...	<characteri...		8.000	pcs.	Greenhouse GH-1 3x6	Commercial departme

Discount: 0.00 VAT: 17,694.92 Ordered VAT in

Start not earlier than: 10/23/2019

Required release date: //

Release placement: To start



Manufacturing

Production order (production, assembly) SC00-000001 dated 10/23/2019 5:31:39 PM

Main My notes Tasks

Post and close Production order Order structure Reports More actions ?

Status: Being generated Priority: Normal

- Main
- Being generated
- Add
- For production
- Closed

#	Product	Characteristics	Assignments
1	Modules 11-5	<characteri...	
2	Greenhouse GH-1 ...	<characteri...	

Start not earlier than: 10/23/2019 Required release date:

Structure of production order No. 1 dated 10/23/2019

Stage generation is required Generate

Products: <without filter> Stage: <without filter>

Hide completed Show stages Gantt chart Stage details More actions

Order, products, stage	Sequence	Department	UOM	Quantity			Date by schedule	Execution d
				Plan	Actual	Shortage		
Order No. 1, 10/23/20...								
Modules 11-5			pcs.	10.000		10.000		
Greenhouse GH-1 3x6			pcs.	8.000		8.000		

- Designations
- Bold** is for products
- Light gray is for fully manufactured positions
- Overdue positions are shown in **red**
- stage
- manufactured (repaired) product
- product being disassembled



Manufacturing

← → ☆ Structure of production order No. 1 dated 10/23/2019



Products: <without filter> Stage: <without filter>

Hide completed Show stages

Order, products, stage	Sequence	Department	UOM	Quantity			Date by schedule	Execution date
				Plan	Actual	Shortage		
⊖ Order No. 1, 10/23/2019, demand date								
⊕ Modules 11-5			pcs.	10.000		10.000		
⊖ Greenhouse GH-1 3x6			pcs.	8.000		8.000		
↳ Lining	5	Assembly and welding shop	pcs.	4.000		4.000		
↳ Polycarbonate cutting	4	5 Plastic product shop	pcs.	4.000		4.000		
⊖ Door installation	3	5 Assembly and welding shop	pcs.	4.000		4.000		
↳ Door frame for greenhouse GH-1			pcs.	8.000		8.000		
↳ Welding of door blanks	2	Assembly and welding shop	pcs.	8.000		8.000		
↳ Profile cutting	1	2 Metal working shop	pcs.	8.000		8.000		
↳ Frame welding	2	3 Assembly and welding shop	pcs.	4.000		4.000		
↳ Profile cutting	1	2 Metal working shop	pcs.	4.000		4.000		
↳ Lining	5	Assembly and welding shop	pcs.	4.000		4.000		
↳ Polycarbonate cutting	4	5 Plastic product shop	pcs.	4.000		4.000		
⊖ Door installation	3	5 Assembly and welding shop	pcs.	4.000		4.000		
↳ Door frame for greenhouse GH-1			pcs.	8.000		8.000		
↳ Welding of door blanks	2	Assembly and welding shop	pcs.	8.000		8.000		
↳ Profile cutting	1	2 Metal working shop	pcs.	8.000		8.000		
↳ Frame welding	2	3 Assembly and welding shop	pcs.	4.000		4.000		
↳ Profile cutting	1	2 Metal working shop	pcs.	4.000		4.000		

✓ Designations
Bold is for products
 Light gray is for fully manufactured positions
 Overdue positions are shown in **red**

↳ - stage
 ↕ - manufactured (repaired) product
 ↪ - product being disassembled



Manufacturing

- Home page
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- Quick menu
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- CRM and marketing
- Sales
- Purchases
- Warehouse and delivery
- Production**
- Cash flow
- Financial result and controlling
- Capital assets
- International financial accounting
- Master data and settings

- Manufacturing reports**
 - Settings and catalogs
 - Order fulfillment states
- Master data**
 - Bills of resources**
 - Work centers
 - Availability of work center kinds
 - Material substitution permissions
 - Operations sheets
 - Costing items
 - Set up inventory level control
 - Production expense standards
 - Standard costings
- Intershop management**
 - Order queue management**
 - Stage dispatching
 - Production orders
- Shop management**
 - Stage execution
 - Execution of operations
 - Material orders for production

- Intrashop accounting**
 - Production documents (all)**
 - Invoices for registration
 - Register production without orders
 - Allocation of materials and works
 - Expense allocation to product cost
 - Enter indicators for cost allocation
- Labor costs**
 - Employee output
 - Kinds of employee activities
 - Teams
- Repairs**
 - Facilities
 - Repair activities
 - Repair orders
 - Defect log
 - Repair activity planning
 - Running time of facilities
- See also
 - Reasons for production cancellation
 - Expense allocation rules

Production order queue management

Required release date: <without filter> Priority: <without filter> Dispatcher department: <without filter> Responsible person: <without filter>

	Number	Date	Priority	Production start
✓	MS00-000006	1/11/2017	Normal	1/12/2017
✓	MS00-000001	1/9/2017	Normal	1/10/2017
✓	MS00-000004	1/11/2017	Normal	1/11/2017
✓	MS00-000002	1/10/2017	Normal	1/11/2017
✓	MS00-000005	1/11/2017	Normal	1/12/2017
✓	MS00-000003	1/11/2017	Normal	1/12/2017
✓	MS00-000008	1/4/2017	Normal	1/9/2017
⚠	MS00-000009	1/9/2017	Normal	1/10/2017
✓	MS00-000010	3/1/2017	Normal	3/13/2017
✓	MS00-000011	3/1/2017	Normal	3/6/2017
✓	MS00-000012	3/1/2017	Normal	3/10/2017
✓	MS00-000013	3/1/2017	Normal	3/6/2017
✓	MS00-000014	11/23/2017	Normal	11/23/2018
⚠	SC00-000001	17:31	Normal	10/23/2019

- [Generate orders](#)
- [Orders being generated \(0\)](#)
- Pick orders for which the following is required
 - Generate stages
 - Check stages
 - Plan schedule
 - Pass stages for execution
- Or by which
 - Supply is required
 - Demand date is violated
 - Everything is produced
- [Supply shop storerooms with materials](#)
- [Closed orders](#)

[Collapse >>](#)



Manufacturing

Production order queue management

Required release date: <without filter> Priority: <without filter> Dispatcher department: <without filter> Responsible person: <without filter>

Home
Refresh
Print
Actions
Stage dispatching
Order structure
Production order

Search (Ctrl+F)
 More actions
Refresh
Help

Number	Date	Priority	Production start	Required release date	Dispatcher department	Responsible person	Comment
MS00-000006	1/11/2017	Normal	1/12/2017	1/20/2017	SDC	Leonard Cooper	Generated automatic...
MS00-000001	1/9/2017	Normal	1/10/2017	1/20/2017	SDC	Leonard Cooper	Example of productio...
MS00-000004	1/11/2017						
MS00-000002	1/10/2017						
MS00-000005	1/11/2017						
MS00-000003	1/11/2017						
MS00-000008	1/4/2017						
MS00-000009	1/9/2017						
MS00-000010	3/1/2017						
MS00-000011	3/1/2017						
MS00-000012	3/1/2017						
MS00-000013	3/1/2017						
MS00-000014	11/23/2017						
SC00-000001	17:31						

Production schedule planning for order No.1 dated 10/23/2019

Plan Save

Summary information Products Stages

	Launch date	Release date	Delay	Duration
Required by order	10/23/2019	/ /		
On schedule	/ /	/ /		
By model	/ /	/ /		

Execution dates Equipment load, % (model) Delay in supply, days (model)

Order schedule is not relevant. There are stages which require replanning (total: 15).

⚠ There are orders with a higher priority that require replanning. It is recommended that you plan them first as it may affect the production schedule of the current order.

[Generate orders](#)
[Orders being generated \(0\)](#)
 Pick orders for which the following is required

- Generate stages
- Check stages
- Plan schedule
- Pass stages for execution

Or by which

- Supply is required
- Demand date is violated
- Everything is produced



Manufacturing

← → ★ Production schedule planning for order No.1 dated 10/23/2019 [🔗](#) ✕

Plan Save More actions ▾

Summary information | **Products** | Stages

Launch date: **10/23/2019** Re

Required by order: 10/23/2019 / /

On schedule: / / / /

By model: / / / /

Execution dates

Week	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
1														
2														
3														
4														
5														
6														
7														
8														
9														
10														
11														
12														
13														
14														
15														
16														
17														
18														
19														
20														
21														
22														
23														
24														
25														
26														
27														
28														
29														
30														

required schedule model

Order schedule is not relevant

⚠ There are orders with a higher priority that recommended that you plan them first as it may affect the production schedule of the current order.

Plan More actions ▾

Planning settings

Plan schedule

Material and equipment limits are taken into account while planning.

- Use availability reserve
- Plan model

One or several limits are ignored while planning. The schedule model allows you to evaluate the impact of limits to the product release time.

- Use availability reserve
- Unlimited equipment fleet
- Twenty-four hour operation without weekends (24/7)
- No other orders

Accept assumptions

- All materials in stock
- Unlimited equipment fleet
- Twenty-four hour operation without weekends (24/7)
- No other orders

Other settings

- Full replanning
- Discard manual changes of schedule

Plan the schedule of all stages that require recalculation except for stages placed manually.

0.6 0.8



Manufacturing

Production schedule planning for order No.1 dated 10/23/2019

Plan Save

More actions

Summary information Products Stages Errors

Details

When planning schedule, the Profile cutting (SC00-1.2.1) stage was not placed due to: there is not enough available time of work center kinds.

When planning schedule, the Profile cutting (SC00-1.3.1) stage was not placed due to: there is not enough available time of work center kinds.

When planning schedule, the Profile cutting (SC00-1.4.1) stage was not placed due to: there is not enough available time of work center kinds.

When planning schedule, the Profile cutting (SC00-1.5.1) stage was not placed due to: there is not enough available time of work center kinds.

When planning schedule, the Polycarbonate cutting (SC00-1.4.4) stage was not placed due to: department

Availability of work center kinds

Save changes

Enter availability: Department: Period from: to:

To generate a production schedule Metal working shop 10/24/2019 10/24/2019 (required to fill in by 11/3/2019) (install)

Fill in availability Show manual changes Find... Cancel search

Messages:

Errors occurred when planning the schedule.

Work center kind		Filled in to	Total, h	24 October (Thu)
Bandsaw machines		12/25/2017	0	0
Plasma cutting machines		12/25/2017	0	0

- Designations
- availability entered for WC type
 - availability defined by WC schedules
 - availability occupied by production schedule
 - availability is being entered
 - availability shortage
 - bold** is for WC availability to which manual changes were made



Manufacturing

☆ **Planning settings** 🔗 □ ×

Plan More actions ▾

Plan schedule
Material and equipment limits are taken into account while planning.

Use availability reserve

Plan model
One or several limits are ignored while planning. The schedule model allows you to evaluate the impact of limits to the product release time.

Use availability reserve

Accept assumptions

All materials in stock

Unlimited equipment fleet

Twenty-four hour operation without weekends (24/7)

No other orders

Other settings

Full replanning

Discard manual changes of schedule

Plan the schedule of all stages that require recalculation except for stage manually.

☆ **Production schedule planning for order No.1 dated 10/23/2019** 🔗 ×

Plan Save More actions ▾

Summary information **Products** **Stages**

	Launch date	Release date	Delay	Duration
Required by order	10/23/2019	//		
On schedule	10/24/2019	11/ 7/2019		14 days
By model	//	//		

Execution dates

10/20/2019	10/27/2019	11/3/2019	
	[Schedule bar]		

Equipment load, % (model)

Delay in supply, days (model)



Manufacturing

Production schedule planning for order No.1 dated 10/23/2019

Plan Save

More actions

Summary information Products Stages

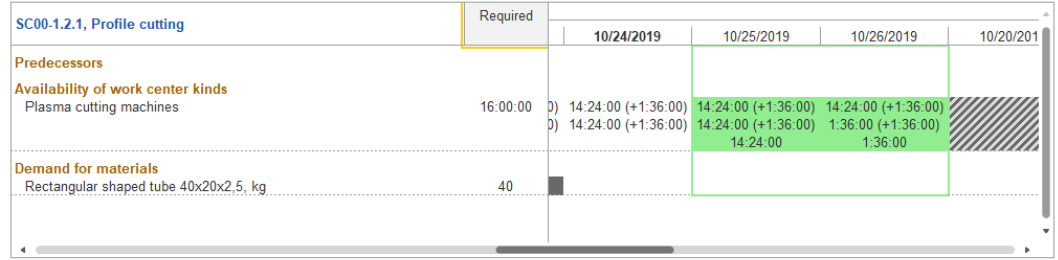
Only ones which delay the order

Diagnostics Gantt chart Search (Ctrl+F) More actions

Stage	Department	Start	End
SC00-1.1.1, Step 1	Metal working shop	10/25/2019	10/25/2019
SC00-1.2.1, Profile cutting	Metal working shop	10/24/2019	10/25/2019
SC00-1.2.2, Welding of door blanks	Assembly and wel...	10/26/2019	10/26/2019
SC00-1.3.1, Profile cutting	Metal working shop	10/25/2019	10/28/2019
SC00-1.3.2, Welding of door blanks	Assembly and wel...	10/29/2019	10/29/2019
SC00-1.4.1, Profile cutting	Metal working shop	10/28/2019	
SC00-1.4.2, Frame welding	Assembly and wel...	10/31/2019	
SC00-1.4.3, Door installation	Assembly and wel...	11/1/2019	
SC00-1.4.4, Polycarbonate cutting	Plastic product shop	10/25/2019	
SC00-1.4.5, Lining	Assembly and wel...	11/5/2019	
SC00-1.5.1, Profile cutting	Metal working shop	10/30/2019	
SC00-1.5.2, Frame welding	Assembly and wel...	11/5/2019	
SC00-1.5.3, Door installation	Assembly and wel...	11/6/2019	
SC00-1.5.4, Polycarbonate cutting	Plastic product shop	10/25/2019	

Diagnostics of the "SC00-1.2.1, Profile cutting" stage schedule

Generate Gantt chart



Designations - stage schedule planning is required - stage delays the order

Legend (click to hide)

- Green box - current stage
- White box - free interval
- Grey box - partially available interval
- Black box - interval is occupied
- Hatched box - unavailable interval
- Red box - busy interval

Availability of work center kinds

- 6:30:00 (+1:30:00) - total availability (reserve)
- 3:30:00 (+1:30:00) - available for the current step (reserve)
- 15:00 - occupied by current stage



Manufacturing

Production order queue management

Required release date: <without filter> Priority: <without filter> Dispatcher department: <without filter> Respons: <without filter>

Actions - Stage dispatching Order structure Search (Ctrl+F)

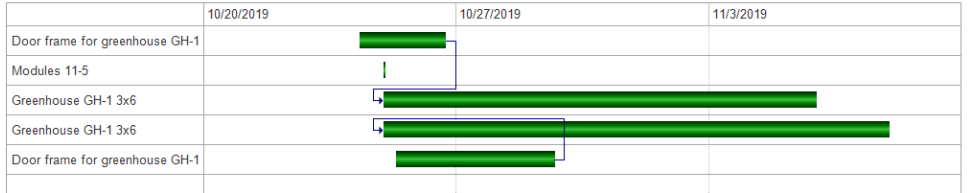
Number	Production start
MS00-00000	2/2017
MS00-00000	0/2017
MS00-00000	1/2017
MS00-00000	1/2017
MS00-00005	1/11/2017 Normal 1/12/2017
MS00-00003	1/11/2017 Normal 1/12/2017
MS00-00008	1/4/2017 Normal 1/9/2017
MS00-00009	1/9/2017 Normal 1/10/2017
MS00-00010	3/1/2017 Normal 3/13/2017
MS00-00011	3/1/2017 Normal 3/6/2017
MS00-00012	3/1/2017 Normal 3/10/2017
MS00-00013	3/1/2017 Normal 3/6/2017
MS00-00014	11/23/2017 Normal 11/23/2018
SC00-00001	10/23/2019 Normal 10/23/2019

Order production schedule

Order: Production order SC00-000001 dated 10/23/2019 5:31:39 PM

Display mode: By departments By work center kinds By starting batches

Generate

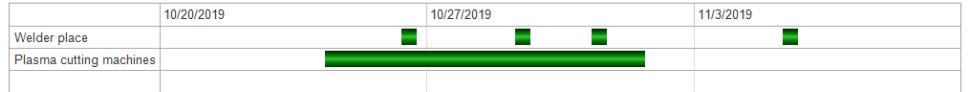


Order production schedule

Order: Production order SC00-000001 dated 10/23/2019 5:31:39 PM

Display mode: By departments By work center kinds By starting batches

Generate

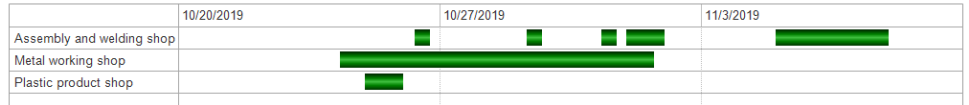


Order production schedule

Order: Production order SC00-000001 dated 10/23/2019 5:31:39 PM

Display mode: By departments By work center kinds By starting batches

Generate





Manufacturing

Demonstration base / 1C:ERP WE (1C:Enterprise)

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- Purchases
- Warehouse and delivery
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- Capital assets
- International financial accounting
- Master data and settings

Manufacturing reports

- Settings and catalogs
- Order fulfillment states

Master data

- Bills of resources**
- Work centers
- Availability of work center kinds
- Material substitution permissions
- Operations sheets
- Costing items
- Set up inventory level control
- Production expense standards
- Standard costings

Intershop management

- Order queue management
- Stage dispatching**
- Production orders

Shop management

- Stage execution
- Execution of operations
- Material orders for production

Intrashop accounting

- Production documents (all)**
- Invoices for registration
- Register production without orders
- Allocation of materials and works
- Expense allocation to product cost
- Enter indicators for cost allocation

Labor costs

- Employee output
- Kinds of employee activities
- Teams

Repairs

- Facilities
- Repair activities
- Repair orders
- Detect log
- Repair activity planning
- Running time of facilities

See also

- Reasons for production cancellation
- Expense allocation rules

← → ☆ Stage dispatching

Dispatcher department: Department: Status: Start: Order:

<without filter> <without filter> <without filter> <without filter> <without filter>

Actions Show Filter Supply state Search (Ctrl+F) More actions

Stage	State	Department	Start date	End date	Delay	Required supply date
MS00-1.12.1, Manufacturing	Completed	Electronic compon...	12/3/2018	12/4/2018	1 days	12/3/2018
MS00-1.8.2, Assembly	Completed	Electronic compon...	12/5/2018	12/5/2018	2 days	12/5/2018
SC00-1.2.1, Profile cutting	Generated, Ready for fulfillment	Metal working shop	10/24/2019	10/25/2019		10/23/2019
SC00-1.1.1, Step 1	Generated, Ready for fulfillment	Metal working shop	10/25/2019	10/25/2019		10/23/2019
SC00-1.4.4, Polycarbonate cutting	Generated, Ready for fulfillment	Plastic product shop	10/25/2019	10/25/2019		10/23/2019
SC00-1.5.4, Polycarbonate cutting	Generated, Ready for fulfillment	Plastic product shop	10/25/2019	10/25/2019		10/23/2019
SC00-1.3.1, Profile cutting	Generated, Ready for fulfillment	Metal working shop	10/25/2019	10/28/2019		10/23/2019
SC00-1.2.2, Welding of door blanks	Generated	Assembly and weld...	10/26/2019	10/26/2019		10/24/2019
SC00-1.4.1, Profile cutting	Generated, Ready for fulfillment	Metal working shop	10/28/2019	10/30/2019		10/23/2019
SC00-1.3.2, Welding of door blanks	Generated	Assembly and weld...	10/29/2019	10/29/2019		10/24/2019
SC00-1.5.1, Profile cutting	Generated, Ready for fulfillment	Metal working shop	10/30/2019	11/1/2019		10/23/2019
SC00-1.4.2, Frame welding	Generated	Assembly and weld...	10/31/2019	10/31/2019		10/24/2019
SC00-1.4.3, Door installation	Generated	Assembly and weld...	11/1/2019	11/1/2019		10/25/2019
SC00-1.4.5, Lining	Generated	Assembly and weld...	11/5/2019	11/5/2019		10/26/2019
SC00-1.5.2, Frame welding	Generated	Assembly and weld...	11/5/2019	11/5/2019		10/24/2019
SC00-1.5.3, Door installation	Generated	Assembly and weld...	11/6/2019	11/6/2019		10/25/2019
SC00-1.5.5, Lining	Generated	Assembly and weld...	11/7/2019	11/7/2019		10/26/2019

More actions

Pick stages with status

- Clarification is required
- Ready for fulfillment
- Awaiting predecessors
- Awaiting start
- Awaiting completion
- Completed

And with status

- Planning is required
- Supply is required
- Assignment of operations is required
- Require population by operations
- Overdue
- On critical path
- Delay the order

Collapse >>





Supply



Purchases

- Bills of resources x Mod
- Quick menu
- Budgeting and planning
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- Sales
- Purchases**
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Purchasing reports
Order fulfillment states

Purchase master data

- Suppliers
- Contracts with suppliers
- Agreements with suppliers
- Supplier prices (price lists)
- Product certificates

Purchases

Purchase orders

Purchase documents (all)

- Invoices for registration
- Letters of authority for goods receipt
- CCD for registration
- Delivery from suppliers
- Package return and redemption
- Redemptions to register
- Write-off from storage for registration

Settlements with suppliers

- Create payment requests**
- Requests for approval
- Reconciliations

Consignment purchases

- Reports to consignors

See also

- Purchase order cancellation reasons
- Supplier packing lists

Create

- Purchase order

Tools

- Additional data processors
- Export goods database to PDT
- Import supplier prices from file

← → ☆ **Order fulfillment states**

Warehouse: <without filter> Manager: <without filter> Products: <without filter>

Generate Customize list More actions

Order, Customer / No, Products, Characteristic	Status/Unit of measure	Reserve		To supply		Actions	Warehouse
		In warehouse	In all warehouses	Quantity	Delivery date		

- Designations
- products are available
 - products are partially available
 - products are unavailable
 - necessary shipment date
 - available shipment date
 - available shipment date matches the necessary date
 - reserve later (supply chain failure)
 - reserve later (closer to necessary date)
 - reserve earlier (closer to necessary date)
 - it stops the shipment of your order
 - same date shipment



Purchases

Order fulfillment states



Warehouse: <without filter> Manager: <without filter> Products: <without filter>

Generate Customize list

More actions

Order, Customer / No, Products, Characteristic	Status/Unit of measure	Reserve to date		Reserve	To supply		Actions
		10/25/2019	10/26/2019		In all warehouses	Quantity	
3 Etching solution <characteristics are not...>	l.				92.000	10/24/2019	Reserve
4 Tin GOST 860-75 <characteristics are not...>	kg				6.000	10/24/2019	Reserve
Production stage MS00-9.6.1 from 1/10/2017	For completion						Actions with the order...
1 Wire MM - 1.9 TU 16.K... <characteristics are not...>	m				16.000	10/24/2019	Reserve
Production stage MS00-9.7.1 from 1/10/2017	For completion						Actions with the order...
1 Wire MM - 1.9 TU 16.K... <characteristics are not...>	m				8.000	10/24/2019	Reserve
Production stage MS00-9.8.1 from 1/10/2017	For completion						Actions with the order...
1 Cutting fluid CRC 03400... <characteristics are not...>	l.				240.000	10/24/2019	
2 Round bar 12 S355 <characteristics are not...>	kg				30.000	10/24/2019	Reserve
3 Casting mold cleaning ... <characteristics are not...>	l.				52.000	10/24/2019	Reserve
4 Electrode for electroche... <characteristics are not...>	kg				6.000	10/24/2019	Reserve
Production stage MS00-9.9.1 from 1/10/2017	For completion						Actions with the order...
1 Sheet 0.8 T30102 <characteristics are not...>	kg				4.000	10/24/2019	Reserve
2 Abrasive particle No. 4 <characteristics are not...>	kg				100.000	10/24/2019	Reserve
3 Etching solution <characteristics are not...>	l.				52.000	10/24/2019	Reserve
4 Electrode for electroche... <characteristics are not...>	kg				6.000	10/24/2019	Reserve
Production stage MS00-9.10.1 from 1/10/2017	For completion						Actions with the order...
1 Sheet 0.6 S41000 <characteristics are not...>	kg				2.000	10/24/2019	Reserve
2 Abrasive particle No. 4 <characteristics are not...>	kg				100.000	10/24/2019	Reserve

Designations

- products are available
- products are partially available
- products are unavailable
- necessary shipment date
- available shipment date
- available shipment date matches the necessary date
- reserve later (supply chain failure)
- reserve later (closer to necessary date)
- reserve earlier (closer to necessary date)
- it stops the shipment of your order
- same date shipment



Purchases

Order fulfillment states

Warehouse: <without filter> Manager: <without filter> Products: Cellular polycarbonate 10 mm 600x150

Order, Customer / No, Products, Characteristic	Status/Unit of measure	Reserve	Reserve to date	Reserve	To supply		Actions	Warehouse
		In warehouse	10/24/2019	In all warehouses	Quantity	Delivery date		
Production stage SC00-1.4.4 from 10/23/2019	Generated						Show all positions	
1 Cellular polycarbonat... <characteristics are ...	m2				300.000	10/24/2019	Reserve	Procurement departm...
Production stage SC00-1.5.4 from 10/23/2019	Generated						Show all positions	
1 Cellular polycarbonat... <characteristics are ...	m2				300.000	10/24/2019	Reserve	Procurement departm...

Order fulfillment states

Warehouse: <without filter> Manager: <without filter> Products: Cellular polycarbonate 10 mm 600x150

Order, Customer / No, Products, Characteristic	Status/Unit of measure	Reserve	Reserve to date	Reserve	To supply		Actions	Warehouse
		In warehouse	10/24/2019	In all warehouses	Quantity	Delivery date		
Production stage SC00-1.4.4 from 10/23/2019	Generated						Show all positions	
1 Cellular polycarbonat... <characteristics are ...	m2	25.000				10/24/2019		Procurement departm...
2 Cellular polycarbonat... <characteristics are ...	m2				275.000	10/24/2019		Procurement departm...
Production stage SC00-1.5.4 from 10/23/2019	Generated						Show all positions	
1 Cellular polycarbonat... <characteristics are ...	m2				300.000	10/24/2019		Procurement departm...

Designations

- products are available
- products are partially available
- products are unavailable
- necessary shipment date
- available shipment date
- available shipment date matches the necessary date
- reserve later (supply chain failure)
- reserve later (closer to necessary date)
- reserve earlier (closer to necessary date)
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- same date shipment



Purchases

- Bills of resources x Mod
- Quick menu
- Budgeting and planning
- CRM and marketing
- Sales
- Purchases
- Warehouse and delivery**
- Production
- Cash flow
- Financial result and controlling
- Capital assets
- International financial accounting
- Master data and settings

Warehouse reports

Settings and catalogs

Demand fulfillment

- Order fulfillment states
- Goods assignment adjustment
- Set up inventory level control
- Generation of orders based on demands

Internal goods movement

Internal documents (all)

- Invoices for registration
- Orders for internal consumption
- Transfer orders
- Assembly (disassembly) orders
- Pegged goods transfer

Advanced warehouse

- Acceptance**
- Shipment**
- Warehouse notes
- Packing lists

Bin location warehousing

- Goods picking (placement)
- Set storage bin locks

Surplus, shortage, damage

- Goods recount**
- Warehouse acts
- Surplus, shortage and damage of goods

Delivery management

- Delivery**
- Vehicles
- Instructions for shipping agents

See also

- Product certificates
- Goods placement rules
- Warehouses and stores

Warehouse reports

Search: Report description, field, or author x Find

Inventory analysis

Goods in warehouses list

Analysis of quantitative goods movement in the enterprise warehouses.

Inventory turnover in warehouses

Which warehouses have low goods turnover?
Which are the current stock balance and level of stock balance of interest?

Stock balance and availability

How many remaining goods are there and how many of them are available?
How many goods are shipped, in reserve or separated?
Which orders reserved the goods?

Application of product series

In which product series of products was used?

Carry out goods acceptance

Analysis of receipt reference states.

Goods assembly and shipment

Analysis of shipment reference states.

Goods calendar

What are the current stock balance in warehouses?
When shipment and delivery are planned?

Goods list in product prices

Movement analysis and warehouse stock valuation by the selected price type.

Goods movements in bin location warehouses

Which goods are placed in the storage bins?
Which goods are planned for direct withdrawal or placement?

Product series list

Summary analysis of movement of product series in warehouses and production.

Product series structure

Which series were used to release the product series?

Stock balance by shelf lives

Which goods are expiring soon?
How many of such goods are there and in which warehouse?

Setting More actions

Warehouse management

Control of goods movement creation

Control transaction recording with details to products.

Goods placement in bin location warehouse

Which warehouses are out of action (empty or not full enough)?
Which areas are overloaded and require extension?

Goods placement into bins for reference

For which goods in stock is the main storage bin not assigned?
Which storage bins are empty and not assigned for goods?

Performance of bin location warehouse workers

Evaluation of cargo quantity processed by warehouse workers for a period.
How many acceptances, placements, pickings or recounts have been made?



Purchases

Warehouse reports

Search:

Inventory analysis

Goods in warehouses list

Analysis of quantitative goods movement in the enterprise warehouses.

Inventory turnover in warehouses

Which warehouses have low goods turnover?
Which are the current stock balance and level of stock balance of interest?

Stock balance and availability

How many remaining goods are there and how many of them are available?
How many goods are shipped, in reserve or separated?
Which orders reserved the goods?

Warehouse management

Control of goods movement creation

Control transaction recording with details to products.

Goods placement in bin location warehouse

Which warehouses are out of action (empty or not full enough)?
Which areas are overloaded and require extension?

Goods placement into bins for reference

For which goods in stock is the main storage bin not assigned?
Which storage bins are empty and not assigned for goods?

Stock balance and availability

Warehouse: Product ID:

Stock balance and availability

Data parameters: Goods quantity: In storage units
Filter: Products in list group "Cellular polycarbonate 10..."

Warehouse			Now				Expected		
Product ID	Products, Characteristic	UOM	In stock	Being shipped	In reserve	Available	Receipt	Consumption	Remaining quantity
Procurement department warehouse M1			25.000		25.000			25.000	
	Cellular polycarbonate 10 mm 600x150,	m2	25.000		25.000			25.000	
Total			25.000		25.000			25.000	

Stock balance and availability report settings

Goods quantity: Product ID:

Warehouse: Characteristic:

Product segment:

Products:

Cellular polycarbonate 10 mm 600x150

Kind:



Purchases

- Home
- Bills of reso... x
- Module
- Quick menu
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- Purchasing reports
- Order fulfillment states
- Purchase master data**
 - Suppliers
 - Contracts with suppliers
 - Agreements with suppliers
 - Supplier prices (price lists)
 - Product certificates
- Purchases**
 - Purchase orders**
 - Purchase documents (all)**
 - Invoices for registration
 - Letters of authority for goods receipt
 - CCD for registration
 - Delivery from suppliers
 - Package return and redemption
 - Redemptions to register
 - Write-off from storage for registration

Table with columns for Settlement, Create, Request, Record, Consignment, Report, and See also. A red box highlights a cell in the Record column.



Purchases

← → ☆ **Generation of orders based on demands** [🔗](#) ×

Step 1 of 5. Demand filter

[More actions](#) ▾

Filters by demand properties

Warehouse: ▾ ×

Receiving department: ▾ ×

Assignment: ▾ ×

Line of business: ▾ ×

Product segment: ▾ ×

Products: Cellular polycarbonate 10 r ... ×

Brand: ▾ ×

Category: ▾ ×

Filters by supply method parameters

Department: ▾ ×

Supply type: Purchase

Supply source: ... ×

[Custom filters](#)

[Configure inventory level control](#)

[Configure consumption statistics calculation](#)

[Next >](#) [Close](#)

← → ☆ **Generation of orders based on demands** [🔗](#) ×

Step 2 of 5. Customize supply methods

[📄](#) [📄](#) [Fill in "Goods to order"](#) ▾ [More actions](#) ▾

	Supply method	Before the order on s...	Goods to order	Delivery date	Next delivery ...
<input checked="" type="checkbox"/>	<supply without indication of a method>	<only for deliveries on...	Order point reached	10/24/2019	<only for sch...

[< Back](#) [Next >](#) [Close](#)



Purchases

← → ☆ Generation of orders based on demands



Step 4 of 5. Orders for shipment

Only checked Priority: For shipment from: to: Only not supplied

Order	Products, Characteristic	UOM	Required	Shipment date	Order shipment date	To order	Supply method	Supply
Production stage SC00-1.5...	Cellular polycarbonate 10 mm 600x150	m2	300.000	10/23/2019	10/23/2019	<input checked="" type="checkbox"/>	300.000	Assol
Production stage SC00-1.4...	Cellular polycarbonate 10 mm 600x150	m2	275.000	10/24/2019	10/24/2019	<input checked="" type="checkbox"/>	275.000	Assol

[Cellular polycarbonate 10 mm 600x150, Procurement department warehouse M1](#): Total to order: 575 m2 (by inventory: 0, by orders: 575), Amount: -0 USD

Orders to be registered

Supply source	Supply method	Receipt date	Agreement with supplier	Agreement currency	Amount (in the agreement currency)	Amount (USD)	Lines in order	Weight (kg)
<input checked="" type="radio"/> Assol						~ 0.00	2	~ 0.000
		10/24/2019	Material purchasing	EUR	0.00	~ 0.00	2	~ 0.000
						0.00	2	0.000

< Back

Next >

Close



Purchases

← → ☆ Purchase order MS00-000001 dated 10/24/2019 2:41:28 PM *



Main [Approval](#) [My notes](#) [Tasks](#)

Post and close



Print



Reports



Files

More actions

Status: Priority: [Close order](#)

Main **Goods (1)** **Delivery** **More**

Add



Fill in

Prices and discounts

More actions

#	Supplier products	Products	Characteristic	Assignment	Quantity	UOM	Price type
1		Cellular polycarbo...	<characteristics a...		575.000	m2	

Required receipt date: One date receipt

Discount: Ordered VAT inclusive: EUR



CRM and marketing



After-sales service

← → ☆ sale of components (Customer transaction) 🔗 ×

Main [Files](#) [Interactions](#) [Project plan](#) [Transaction documents](#) [Transaction participants](#) [My notes](#) [Tasks](#)

Save and close Save Generate 👤 📄 📊 Reports 📎 Files More actions

Customer: ... 📄

General information **Participants**

Description:

Responsible person:

Potential:

Primary interest

Channel: ...

Source: ...

State

Status: Closed

Reason for losing: 📄

Transaction kind: 📄 [Instructions](#)

Stage: [Condition approval](#) [Map of business process route](#) 📍 📌

Separate accounting of goods by transaction

- Acceptance note
- Customer claim**
- Job
- Purchase order
- Request for goods return from customer
- Sales of goods and services
- Sales order

← → **Customer claim (create) *** ×

Main [Interactions](#) [Project plan](#) [My notes](#) [Tasks](#)

Save and close Save Generate 👤 📄 🖨️ Customer claim More actions

Status:

Main **Review results** **Participants**

Base:

Customer: ... Code:

Description:

Claim description:

Reason for incurrence: ... Responsible person: ...

Guilty department: ... Registration date: 📅

Guilty employee: ... End date: 📅

Comment:



After-sales service

← → ☆ Goods quality claim (Customer claim) [↗](#) [×](#)

Main [Interactions](#) **Project plan** [My notes](#) [Tasks](#)

Save and close Save [📄](#) [Generate](#) [🔄](#) [📄](#) [🖨️ Customer claim](#) [More actions](#) ▾

Status: Registered ▾

Main [Review results](#) [Participants \(2\)](#) [More actions](#) ▾

Add [↑](#) [↓](#)

#	Partner	Partner role	Contact person	Contact person role	Comment
1	Joe Anderson	Customer	Eddie Romanie		
2	Groceries mart	Supplier	Dave Wooly		

← → ☆ Goods quality claim (Customer claim) [↗](#) [×](#)

Main [Interactions](#) **Project plan** [My notes](#) [Tasks](#)

Project plan

Create [📄](#) [📄](#) [Generate](#) [🔄](#) [Change selected](#) Search (Ctrl+F) [🔍](#) [More actions](#) ▾

Description	Planned start date	Start date	Stage	Progress perce
Find out reasons for shipping low-quality goods	2/1/2011		Planned	
Call supplier	2/1/2011		Planned	
Call transportation company	2/3/2011		Planned	

← → ☆ Call supplier (Project task) [↗](#) [×](#)

Main [My notes](#) [Tasks](#)

Save and close Save [📄](#) [Generate](#) [📄](#) [More actions](#) ▾

Description: **Call supplier** Code: CU-00000004

Project: Goods quality claim [⌵](#) [⌵](#) Parent task: Find out reasons for shipping low-quality [⌵](#) [⌵](#)

Supervisor: Dan Olsen [⌵](#) Assignee: Dan Olsen [⌵](#) [⌵](#)

Stage: Planned [⌵](#) Progress percentage: Closed

Task description

Call supplier and find out whether they accept the claims

Planned start date: 2/ 1/2011 [📅](#) Planned duration: days

Task execution result

Actual start date: [📅](#) End date: [📅](#)



Balanced scorecard



Target indicators

Demonstration base / 1C:ERP WE (1C:Enterprise)

Home page Demo mode:

- Quick menu
- Budgeting and planning
- CRM and marketing
- Sales
- Purchases
- Warehouse and delivery
- Production
- Cash flow
- Financial result and controlling**
- Capital assets
- International financial accounting
- Master data and settings

Financial result reports

Goods movement between companies

Documents between companies (all)

- Transfers to register
- Reports on commission to register

Income and expense accounting

- Enter indicators for cost allocation

Income and expenses, financial result

Expense allocation to product cost

- Purchases of services and other assets
- Sales of services and other assets
- Recording of other income and expenses
- Deferred expense allocation
- Cash deposit/withdraw by line of business

Balance sheet statement

- Asset and liability items
- Records of other assets and liabilities

Month-end closing

Month-end closing

- Exchange rate difference calculation

Target indicators

Target indicator dashboard

- Analysis options of target indicators**
- Target categories

See also

- Settings of goods transfer between companies
- Income items
- Expense items
- Expense allocation rules
- Other expenses
- Line of business
- Methods of allocating income by line of business
- Customize sales allocation by line of business

Reports

- Additional reports

Tools

- Additional data processors
- Goods handover and redemption generation wizard
- Wizard of correcting company stock balance

← → ★ Analysis options of target indicators

Create target [Icons] Usage instances More actions ↓

Target	Target indicator
Structure of targets	
Supplied indicator model	
Profit growth	Profit
Floating asset optimization	Working capital
Cash balance optimization	Cash
Control of inpayment plan	Inpayments
Control of cash debiting plan	Cash debiting
Receivable optimization	Customer debts
Accounts payable optimization	Accounts payable
Stock optimization	Inventory cost
Order fulfillment	Order fulfillment
Plan fulfillment	Plan fulfillment
Liquidity and creditworthiness	Liquidity and creditworthiness
Exchange rates	Exchange rates

Create analysis option [Icons] Usage instances More actions ↓

Analysis option name	Responsible person	Analysis type	Target values ...
Plan/actual received cash		Component-wise comparison (structure)	
Plan/actual received cash		Component-wise comparison (dynamics)	

Appearance setting

Colors Comparison colors Value scale More

Indicator value:

Forecast:

Target values

Value:

Positive variance:

Negative variance:

Allowable variance:

OK Cancel Standard appearance settings

Plan/actual received cash (Target indicator analysis option) *

Main Target values (ranges)

Save and close Save Print Usage instances More actions ↓

Option name:

Indicator value calculation Appearance and forecast

Appearance

Chart type:

Display option (default):

Indicator display option in "Target indicator dashboard" if the user did not specify otherwise.

[Set appearance](#)

Set up color design of indicator, chart, and value scale.

[Set up demo data](#)

Indicator value data which is used for displaying in the demo mode of the "Target indicator dashboard" (Alt+D).

Forecasting

Calculate forecast

Depth: days and horizon: One day 00

Forecasting is available for analysis types "Change dynamics" and "Comparison with previous period".

Control: [set up reports](#)

Responsible person: [change availability](#)

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- Demo mode:
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- Financial result reports
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 - Transfers to register
 - Reports on commission to register
- Income and expense accounting
 - Enter indicators for cost allocation
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- Month-end closing**
- Exchange rate difference calculation

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- Additional reports

Target indicators

- Target indicator dashboard**
- Analysis options of target indicators
- Target categories

Tools

- Additional data processors
- Goods handover and redemption generation wizard
- Wizard of correcting company stock balance
- Set up availability of analysis options

Demonstration base / 1C:ERP WE (1C:Enterprise)

Home page | Demo mode: Target indicator dashboard | Analysis options of target indicators | Demo mode: Target indicator dashboard (print)

Quick menu

Budgeting and planning

CRM and marketing

Sales

Purchases

Warehouse and delivery

Production

Cash flow

Financial result and controlling

Capital assets

International financial accounting

Master data and settings

Indicators: All | Stateless

Cash

Balance / USD / thous. / 10/23/2019 - 10/29/2019: **69.30 thousand**

Balance / EUR / thous. / 10/23/2019 - 10/29/2019: **35.10 thousand**

Balance in / SD: **33,900.00 thousand USD**

• Quick ratio / 12/31/2019: **0.76**

USD exchange rate / EUR / 10/23/2019 - 10/29/2...: **60.6649 EUR**

EUR exchange rate / EUR / 10/23/2019 - 10/29/2...: **65.5242 EUR**

Finances

• Customer debts / thous. / USD / 10/1/2019 - 12...: **46,700.00 thousand USD**

• Accounts payable / thous. / USD / 10/1/2019 - ...: **105,937.50 thousand USD**

• Inventory / thous. / USD / 10/1/2019 - 12/31/2019: **13,400.00 thousand USD**

Business activity

• Av. delay of customer debts / days / ...: **39 days**

Plan fulfillment

• Sales plan fulfillment / % / 10/29/2019: **95 %**

• Sales plan fulfillment / % / 10/29/2019: **95 %**

• Purchase plan fulfillment / % / 10/29/2019: **87 %**

[How can I check indicators on a smartphone or a tablet?](#)

- Quick menu
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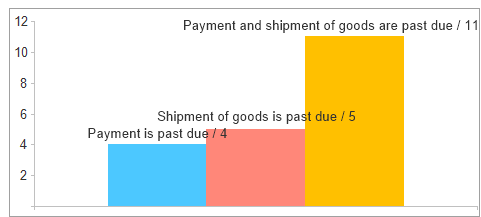
← → ☆ Demo mode: Target indicator dashboard

Indicators: All Stateless

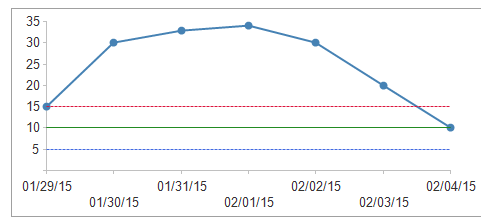
More actions

Order fulfillment

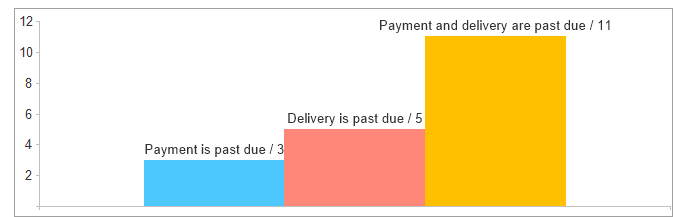
Overdue sales orders / ord. / 10/28/2019



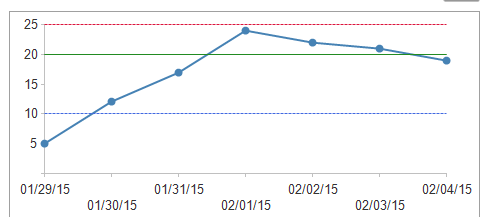
Overdue sales orders / ord. / 10/23/2019...



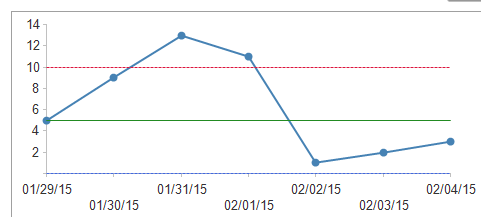
Overdue purchase orders / ord. / 10/28/2019



Overdue purchase orders / ord. / 10/23/...

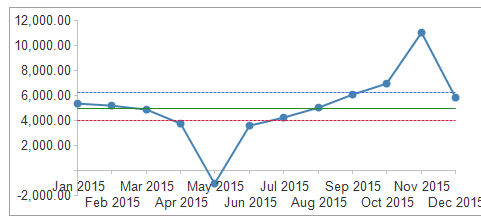


Overdue production orders / ord. / 10/2/...



Financial results

Profit / thous. / USD / 1/1/2019 - 12/31/...



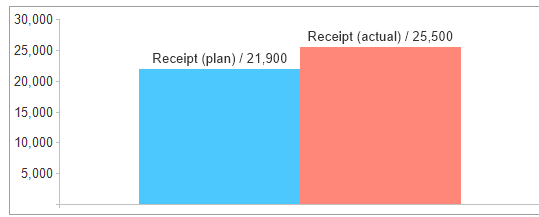
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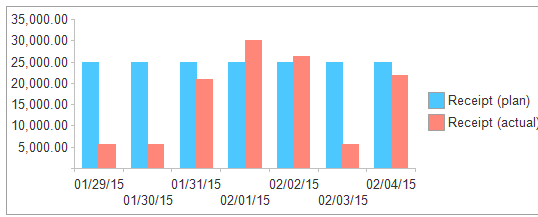
Demo mode: Target indicator dashboard

Indicators: ANI Stateless

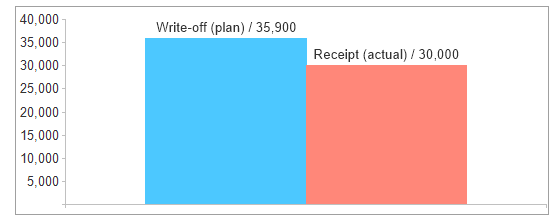
Plan/actual received cash / thous. / 10/28/2019



Plan/actual received cash / 10/23/2019 - 10/29/...



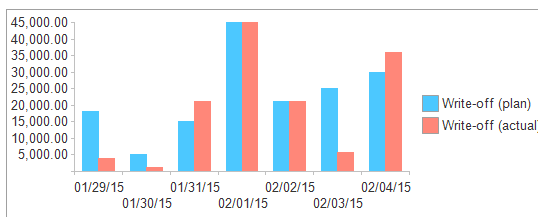
Plan/actual debited cash / thous. / 10/28/2019



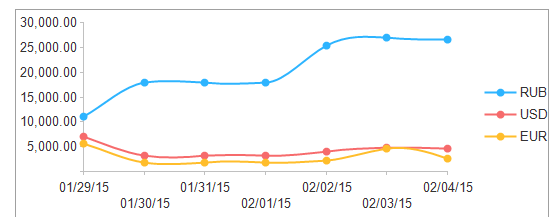
TOP 5 Future payments (for 7 days) / thous. / 1...

Payment of credits and other borrowed funds	34,700
Salary payment to employees	56,000
Payment to supplier (goods, works, services)	40,000
Payment of other taxes	52,000
Dividend payment to stockholders	32,000

Plan/actual debited cash / thous. / 10/23/2019 - ...

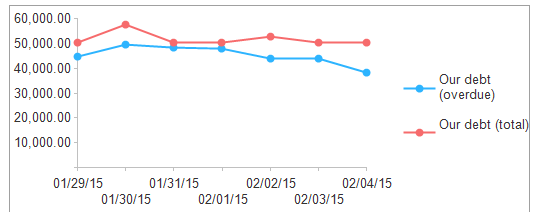


Balance in mngt acct currency / thous. / USD / ...

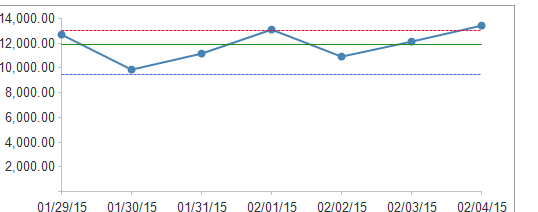


Finances

Overdue debts to suppliers / thous. / USD / 10/...



Inventory / thous. / USD / 10/23/2019 - 10/29/...



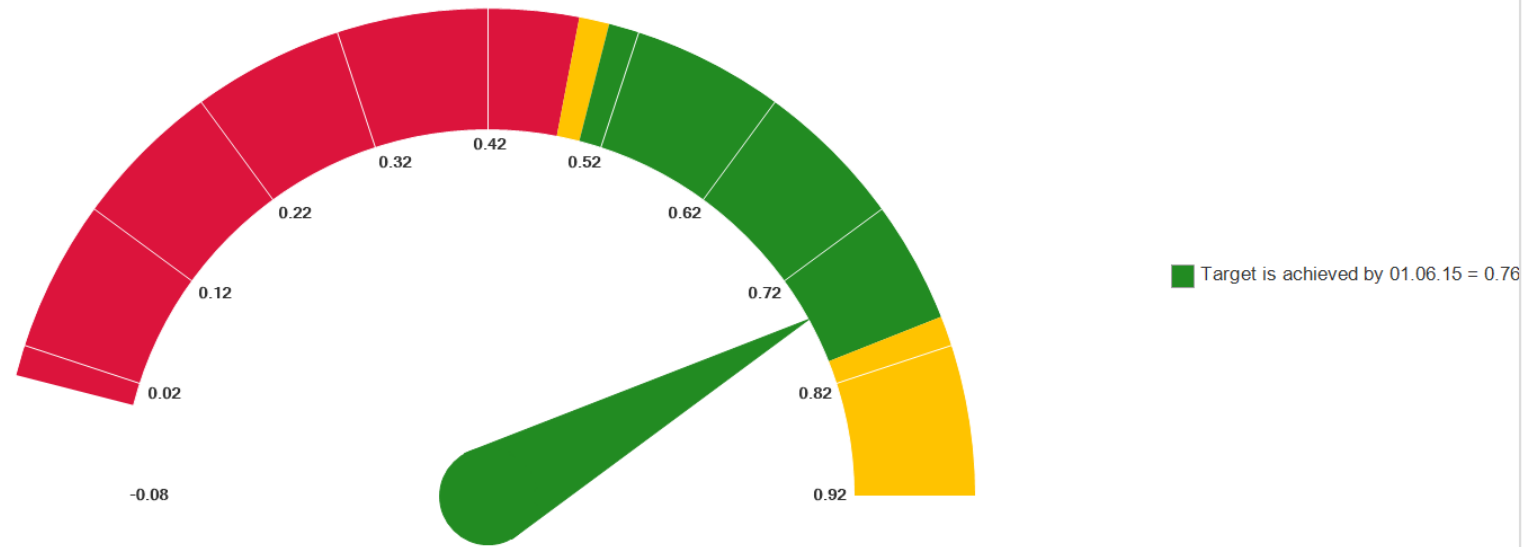
[How can I check indicators on a smartphone or a tablet?](#)

Target	
Target:	difficulties with the inventory sale
Target category:	
Target trend:	
Target values:	with positive variance 15% and negative variance 5%

Actual state	
Actual trend:	Values increase within the limits of the target range
Actual value:	0.76
Actual state:	Target is achieved

Analysis parameters	
Analysis period:	This half-year (7/1/2019 - 12/31/2019)
Analysis value:	Quick rat.
Value calculation method:	Amount

Responsible person:	Responsible person is not determined
Generated:	10/29/2019 2:19:26 PM Dan Olsen



Thank you for your attention!

