

CETEC ERP Onboarding

Welcome to Cetec ERP! This document will help you take your first steps towards a successful implementation of Cetec. Please fill it out and return it to your Cetec ERP Account Representative. If you have questions, please feel free to email us at software@cetecerp.com. We are excited to have you onboard.

Hosting Options

Hosting is offered for free on the Google cloud infrastructure. Cetec ERP may also be installed on local hardware, running within your corporate network or on a cloud provider of your choice; see online at cetecerp.com/pricing/ for details. Please select your hosting preference.

Free Cloud Hosting Resident Hosting

Support Options

On-site consulting and training is offered a la carte at our standard billable rate of \$200/hour. Ongoing support is also available at our hourly rate, or as a monthly support package at \$500/month. Email support is always free. Please select all that apply.

Implementation Consulting (50 hours = one week on-site): # hours

Ongoing Email Support (included) Ongoing Priority Support

Data Migration Options

Cetec ERP offers upload of your customer, vendor, parts, and any additional data areas requested (expected delivery from customer in .CSV format) for \$250/hour (or current hourly rate). Please indicate your anticipated needs for data migration.

Data areas requested to load

No Data Migration Needed? (e.g. your company is a startup)

Desired Integration Points

Some integration is built in (e.g. UPS WorldShip, FedEx Ship Manager, and BluePay Credit Card processing) and included out of the box. Additional integration may be performed by Cetec ERP at our hourly rate. Please indicate any additional desired integration points to Cetec ERP, e.g. eCommerce, EDI, etc.

Target Launch Date

You can begin running your company on Cetec ERP in the cloud immediately. Your system is setup in the cloud within one day of request, and data migration and validation can begin immediately, without any dependency on your month end or year end processes. On site implementation consulting may be scheduled subject to Cetec ERP availability. Please indicate your target launch date below.

Designated (Internal) Project Manager

We strongly recommend assigning one or more points of contact to manage both the implementation of Cetec ERP in addition to new user training and ongoing support. If your company employs a dedicated IT person, that is often a fine choice. However, our strongest recommendation is for the internal project manager with knowledge of and ability to coordinate between all company departments/operations efficiently.

Please indicate an internal project manager below.

Cutover Plan

Contact us to coordinate a timeline and needed steps for cutting over from your legacy system and “going live” with Cetec ERP. Schedule a session with one of our onboarding experts at least two weeks before go-live.

Date for onboarding session and cut-over plan: __ - __ - ____ (mm-dd-yyyy)

(see next page for implementation checklist)

Receive confirmation on target launch date from Cetec	
Receive proposed training prep schedule from Cetec (based on above target launch date)	
Confirm proposed training prep schedule, schedule training dates, and make assignments for training	
Send Cetec approval of upfront payment (credit card or invoice) for any consulting/support packages	
Receive confirmation from Cetec of travel booked for on-site implementation consulting (if on-site consulting is selected)	
Send Cetec requested URL for ERP environment (e.g. "your_company.cetecerp.com")	
Send Cetec image file (e.g jpg, png) of your company logo to be used on form documents in ERP	
Send Cetec your company's terms & conditions to be populated on company quotes, POs, invoices, etc.	
Send Cetec your company's bill to and ship to addresses to be populated on company quotes, POs, invoices, etc.	
Send Cetec your company's completed configuration settings form	
Send Cetec data extracts in .csv format for upload into system	
Validate imported data into Cetec ERP correctly for all areas of data migrated	
Schedule onboarding session with implementation expert to review Migration/Launch Coordination (i.e. "cutover" plan)	
Site Survey Checklist Below. Hardware / device support may be requested from Cetec at hourly rate.	
Google Chrome web browser installed on every client	
Laser jet printers to print PDF documents, e.g. quotes, POs, invoices, travelers, etc.	
Scanners for document upload: <ul style="list-style-type: none"> Any basic scanner to scan documents onto desktop, then attach documents from Desktop to Cetec ERP. If automatic file transfer to Cetec ERP server is needed (resident hosting only), scanner with FTP and onboard OCR (searchable PDF) capabilities required. 	
Mobile Warehousing / Shop Floor Hardware? <ul style="list-style-type: none"> Validate internet connectivity in warehouse / shop floor. Mobile tablet or chromebook (Google Nexus, Samsung, Galaxy Tab, Apple iPad, etc.) =~ \$400 Tablet Case =~ \$50 Mobile Scanner + Charger/Cradle + Power Supply (Symbol brand is recommended) =~ \$800 or USB connected Scanner =~ \$125 Cetec ERP currently supports 1D barcode scanning (no 2D imaging or QR code support available.) Scanner/tablet setup instructions here: https://cetecerp.com/support/documentation/mobile-warehouse.html	
Printing checks from the system? <ul style="list-style-type: none"> Laser printer MICR ink for printer Check stock (default format: blank check format in middle of page) <ul style="list-style-type: none"> http://www.asapchecks.com/shop/blank-business-voucher-check-in-middle-check-paper/p-15064.htm 	