

# CETEC ERP

## Day 2: Session #1 - Config Settings Seminar

*Jordan Jolly*

# DISCLAIMER

This might be the most boring class of them all.

*“ERP system configuration seminar”*

*(really??)*



*tings*

# WHY?

This is how you “customize” your ERP.

There are literally thousands of configuration options.

I whittled it down to the most interesting ones.

# Config Settings Seminar

**Cool & Interesting (maybe beneficial to you!)**

**System Controls**

**Defaults & Autopopulation**

**Display Stuff**

**Accounting**

**BAD CONFIG SETTINGS (Boooooo...!)**

**Misc. (Inventory, Quality, Scheduling, Workflows) - if time permits**

# Interesting

# Global Search Results To Show	Interesting		
wkhtmltopdf_add_flags	Interesting	--zoom 1.2	
Allow Order Auto Pick & Fill Labor	Interesting		
Auto Set Primary Bin To Be Part Number	Interesting		
auto_dock_date	Interesting		
blind_receive	Interesting		Qty Field Not Editable At Receiving
boring notes	Interesting		
disable_ar_payment_auto_apply	Interesting		
Email Cetec ERP Invoices To	Interesting		
leadtime_unit	Interesting	0 = default, 1 = weeks, 2 = days	
Lockout User Account After _ Failed Attempts	Interesting		
lot_code_scheme	Interesting		
disable_email_sending	Interesting		

# Interesting

New Part Number Suggestion - Enable	Interesting		
quote_expire_with_reconcile_code	Interesting		
sga_rate	Interesting	number	Against BOM overhead number
Force Use Of Chrome Browser	Interesting		
Global Search - Search OEM Part	Interesting		
Include Forecast for MRP	Interesting		
Invoice - Show PDF After Creation If No Customer Notifier Set	Interesting		
Outsource Leadtime Unit	Interesting	weeks, days, hours, minutes, seconds.	
Pick Queue Work Start Date Edit	Interesting		Allows user to edit Work Start Date on Pick Queue page
PO Line qty over percentage allowed	Interesting	value 0 - 100. -1 to disable	The percentage greater than the po line qty allowed to receive.
PQuote_Approval_Anyone_If_Under_Value	Interesting		
pquote_attach_waterfall_snapshot	Interesting		

# Controls

<b>Stop Under Pick Invoice</b>	Controls		Important!
Allow BOM With Zero Components	Controls		
Allow Orders With No Cust PO #	Controls		
allow_invoicedate_edit	Controls		
allow_receiptdate_edit	Controls		
Block Non PO Receipts	Controls		
block_lot_code_edit	Controls		
BOM Quote - Require Component Parts To Exist	Controls		
create_part_from_pquote_disallow	Controls		
create_part_from_quote_disallow	Controls		
quote_enforce_unique_po	Controls		
quote_show_wip_date	Controls		
force_lot_code	Controls		Force Lot Code upon receiving

# Controls

force_outsource_pquote	Controls		
Hide Cost At Receipt, Force To PO Line Cost	Controls		
Order - Block Invoicing Of Order Lines Linked To Open NCRs	Controls		
Part Non-Sellable	Controls		
part_pick_forbid_overpick	Controls		
part_pick_hide_other_bins	Controls		
part_pick_require_scan	Controls		
Prevent Bin Merge	Controls		Highly recommended!
Quote - Minimum GM To Order (admin/manager can override)	Controls		
Quote - Require Approval Workflow State	Controls		
Workorder-Require All Work Instructions To Be Completed	Controls		



# Defaults & Autopops

BOM Quote - Default 'Update Order/Temp Bom Only' To Yes	Defaults & Autopopulation		
Default BOMs To 'Use Total Labor Estimate'	Defaults & Autopopulation		
Default Date Code On Receiving Screen	Defaults & Autopopulation		
Default Lot Code On Receiving Screen	Defaults & Autopopulation		
Default Order Auto Pick & Fill Labor to 'Yes'	Defaults & Autopopulation		
Default Order Auto Pick to 'Yes'	Defaults & Autopopulation		
Default Order Fill Labor to 'Yes'	Defaults & Autopopulation		
Default Part Revision Name	Defaults & Autopopulation	A, 1, etc.	(unnamed) is default
Default Tooling PRCPart	Defaults & Autopopulation		
default_credit_limit	Defaults & Autopopulation		
default_document_tags_for_CAR	Defaults & Autopopulation		
default_document_tags_for_CustomerComplaint ... Ordhead ... Part ... PO ... POLineReceipt ... Process ... Quote ... User	Defaults & Autopopulation		

# Defaults & Autopops

default_quote_fob_code	Defaults & Autopopulation		
default_selling_location	Defaults & Autopopulation		Default selling location code
default_ship_via	Defaults & Autopopulation		
default_suborder	Defaults & Autopopulation	Accepted values: 1 == "No" (Default), 0 == "Yes", phantom == "With Top"	
default_tax_group_id	Defaults & Autopopulation		
default_unit_of_measure	Defaults & Autopopulation		
pquote_default_ship_via	Defaults & Autopopulation		
Quote Default Transcode	Defaults & Autopopulation	SN, SA, NN	
Quote_Default_Dock_Date_Adder	Defaults & Autopopulation		
Quote_Default_Ship_Date_Adder	Defaults & Autopopulation		

# Defaults & Autopops

Check Remittance Email - Default Body	Default Email Content	
Check Remittance Email - Default Subject	Default Email Content	
Check Remittance Email - Email Body	Default Email Content	
Customer Satisfaction Case - Email CC	Default Email Content	
Customer Statement Email - Email Body	Default Email Content	
default_po_email_body	Default Email Content	
Invoice Email - Email Body	Default Email Content	
Order Email - Default Body	Default Email Content	
Order Email - Default Subject	Default Email Content	

# Defaults & Autopops

Order Email - Email Body	Default Email Content	
PO Email - Default Body	Default Email Content	
pquote_email_default_body	Default Email Content	
pquote_email_default_subject	Default Email Content	
Quote Email - Default Body	Default Email Content	
Quote Email - Default Subject	Default Email Content	
Vendor Email - Email Body	Default Email Content	
Vendor PO Report Email - Email Body	Default Email Content	

# Display Stuff

show_bins_on_printable_pick_parts	Display Stuff		Show bin information on the printable part pick PDF
Important Order Tags	Display Stuff		Print On Plate, Highlighted On Order
Include Labor Plan On License Plate	Display Stuff		
Include Part Pick List On License Plate	Display Stuff		
License Plate Part - Include PRC?	Display Stuff		
order_pick_parts_show_comments	Display Stuff		
Pick Parts - Order By First Bin	Display Stuff		
Pick Parts - Order Parts Alphabetically	Display Stuff		
Default User ID	Display Stuff		PDF show/hide columns
Check Format	Display Stuff	preprinted_top	
check_bank_info	Display Stuff		

# Display Stuff

check_currency_precision	Display Stuff		
inv_currency_precision	Display Stuff		
line_currency_precision	Display Stuff		
po_currency_precision	Display Stuff		PO currency decimals
po_total_currency_precision	Display Stuff		
quote_currency_precision	Display Stuff		
total_currency_precision	Display Stuff		
navigation_hide_accounting	Display Stuff		
navigation_hide_admin	Display Stuff		
navigation_hide_operations	Display Stuff		
navigation_hide_parts	Display Stuff		
navigation_hide_production	Display Stuff		
navigation_hide_purchasing	Display Stuff		
navigation_hide_sales	Display Stuff		
navigation_hide_warehouse	Display Stuff		

# Accounting

<b>COGS - Auto Post Labor/Overhead/Outsourcing From Original SA On SN Shipment</b>	Accounting		
ap_summary_use_date_config	Accounting		invoiced_on, received_on, pay_by
AR Aging Transaction Date - Invoiced On Or Due (set 'due_date' or 'invoicedate')	Accounting		AR Aging Date Preference
Block Parent GL Account Posting	Accounting		Ledger splits are blocked from posting to any account with children
cost_center_required	Accounting		Require a Cost Center on the PQuote header before placing a PO
Voucher - Require Explicit Approval With No 3 Way Match	Accounting		Require Manual Approval Of Voucher If No Match Between PO, Receipt, And Vendor Requested Value
Voucher GL Post Date - Use Received On	Accounting		

# Accounting

force_cc	Accounting		Forces a cost center to be applied to the following objects: Quote, Order, Invoice, PO, PO Receipt, Voucher
GL - Break Out Std Cost	Accounting		(Invoice)
GL - Break Out Std Cost At Receipt	Accounting		(Receipt)
GL Lock Date	Accounting	yyyy-mm-dd	
GL Lock Date Blocks Admin Also	Accounting	1 or 0	
global_voucher_auto_approval	Accounting		
Hide Vendor YTD And AP For Non Admin Or Accounting Users	Accounting		
Invoice Notifier - Skip 0 resale invoices	Accounting		Skip delivery of zero dollar invoices
order_over_credit_limit	Accounting		Place customer on credit hold if order total places them over credit limit
prevent_order_restricted_customers	Accounting		
ytd_start_day	Accounting		
ytd_start_month	Accounting		



# Bad / Naughty List

Allow Invoice Qty > Qty Due	Bad	
Allow No Parts Picked for Invoice Creation	Bad	
Auto Put Away Stock At Receipt	Bad	Merge Bins To Primary Bin Automatically At Receipt. This will DESTROY TRACEABILITY and merge Bin Costs and is not recommended!
Auto Voucher PO Line Receipts	Bad	Auto Voucher PO Line Receipts At Time Of Receipt
Automatically Voucher Outsource POs	Bad	Automatically create vouchers for Outsource POs when related Order is completed
Invoice Allow No Components Picked	Bad	Allow creation of a build invoice with zero components picked

# Misc. (Inventory)

cost_use_last_buy_cost	Inventory	
Lock Bins When Expired	Inventory	
Reserve Inventory for All Orders	Inventory	
Reserve Quantity on Pick	Inventory	
ROP Buy Qty EOQ Only	Inventory	
rop_against	Inventory	Options include 'avail', 'qoh', 'qoh and qoo', and 'avail and qoo'. Default is qoh.
set received parts to pending	Inventory	
Global Scrap Factor	Inventory	
Use locked bins in waterfall	Inventory	
Warn if inventory pick is Not from oldest FIFO Bin	Inventory	

# Misc. (Quality, Scheduling, Workflow)

create_ncr_from_failed_inspection	Quality	
create_ncr_from_rma	Quality	
Use 8 Disciplines On	Quality	Set this to 1 to have all created CARs default to use 8 Disciplines
ord_schedule_[max / min]_days_between_wip_and_promise	Scheduling	
work_[start / end]_hour	Scheduling	Hour of day to start work (default 16, or 4pm)
Force_WorkDate_to_EntryDate	Scheduling	Force the Work Date for Orders to Order Entry Date
hours_per_workday	Scheduling	
prod_floor_wait_time_multiplier	Scheduling	Production floor wait time multiplier
Workflow - Disable email on Status change for [Object]	Workflow Stuff	Disable sending email with status changes For [Object]
Workflow_[object]_Auto_CC_Users	Workflow Stuff	Specify the email address of anyone that needs to be cced on the email

# CETEC ERP

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