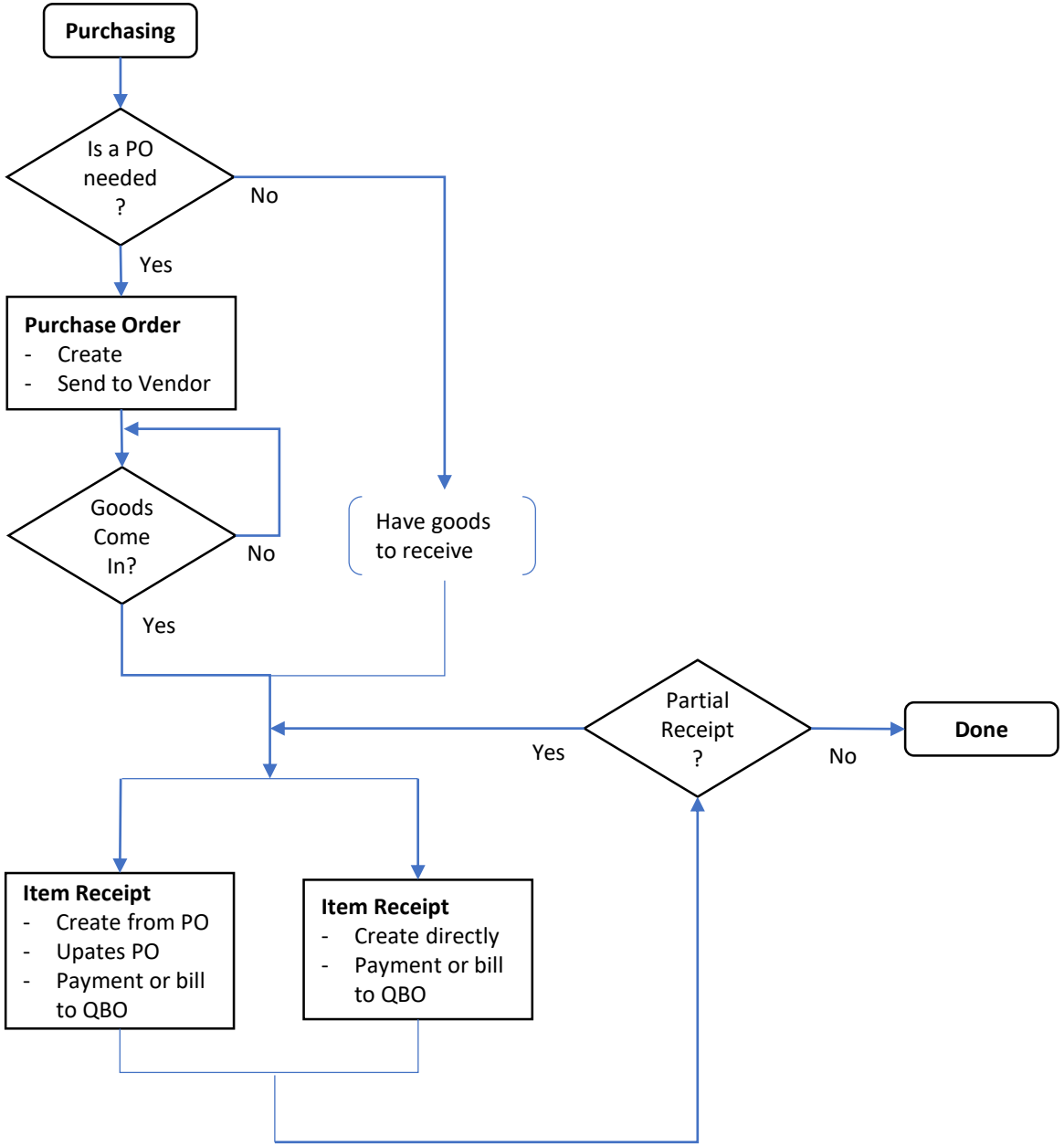
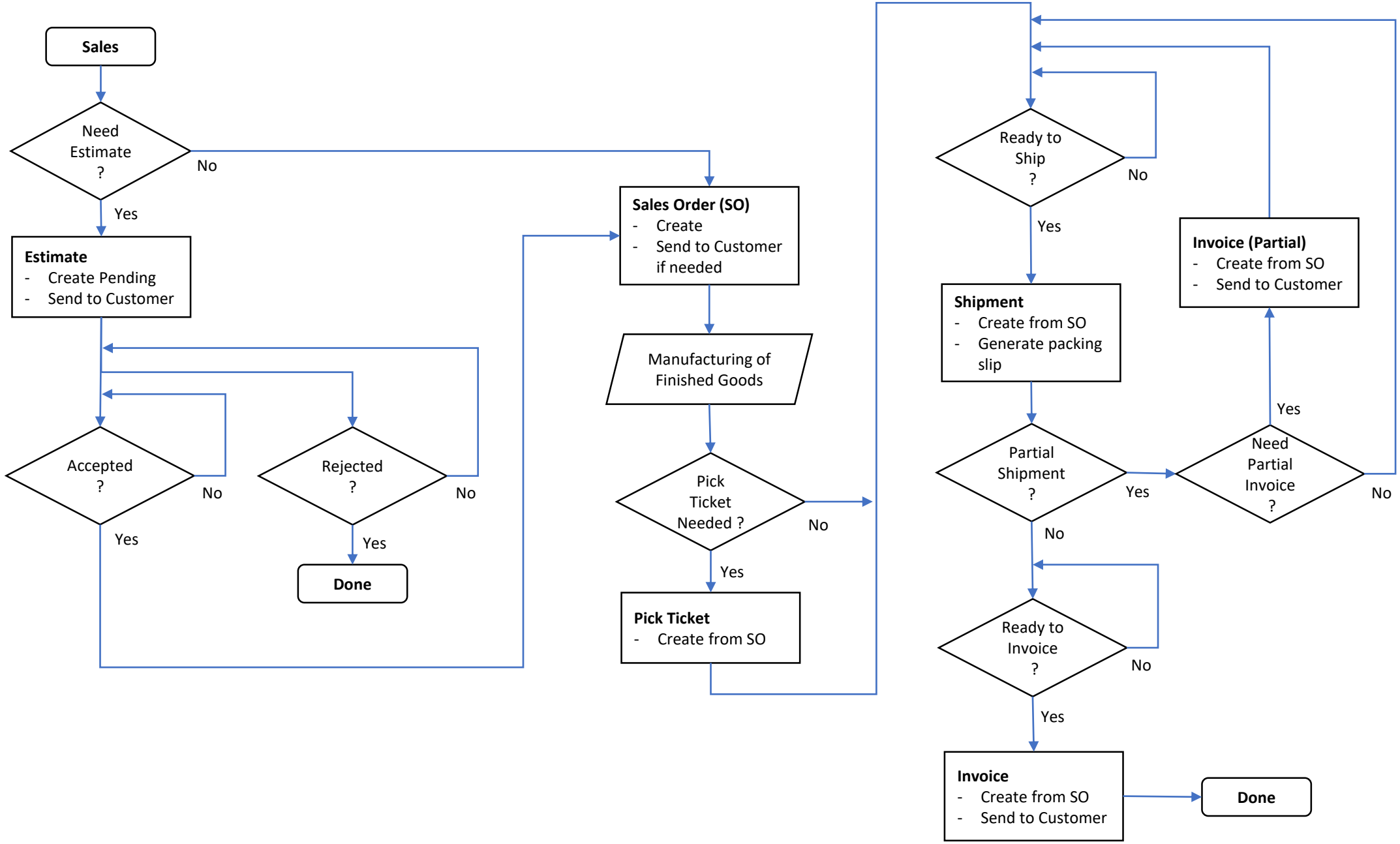
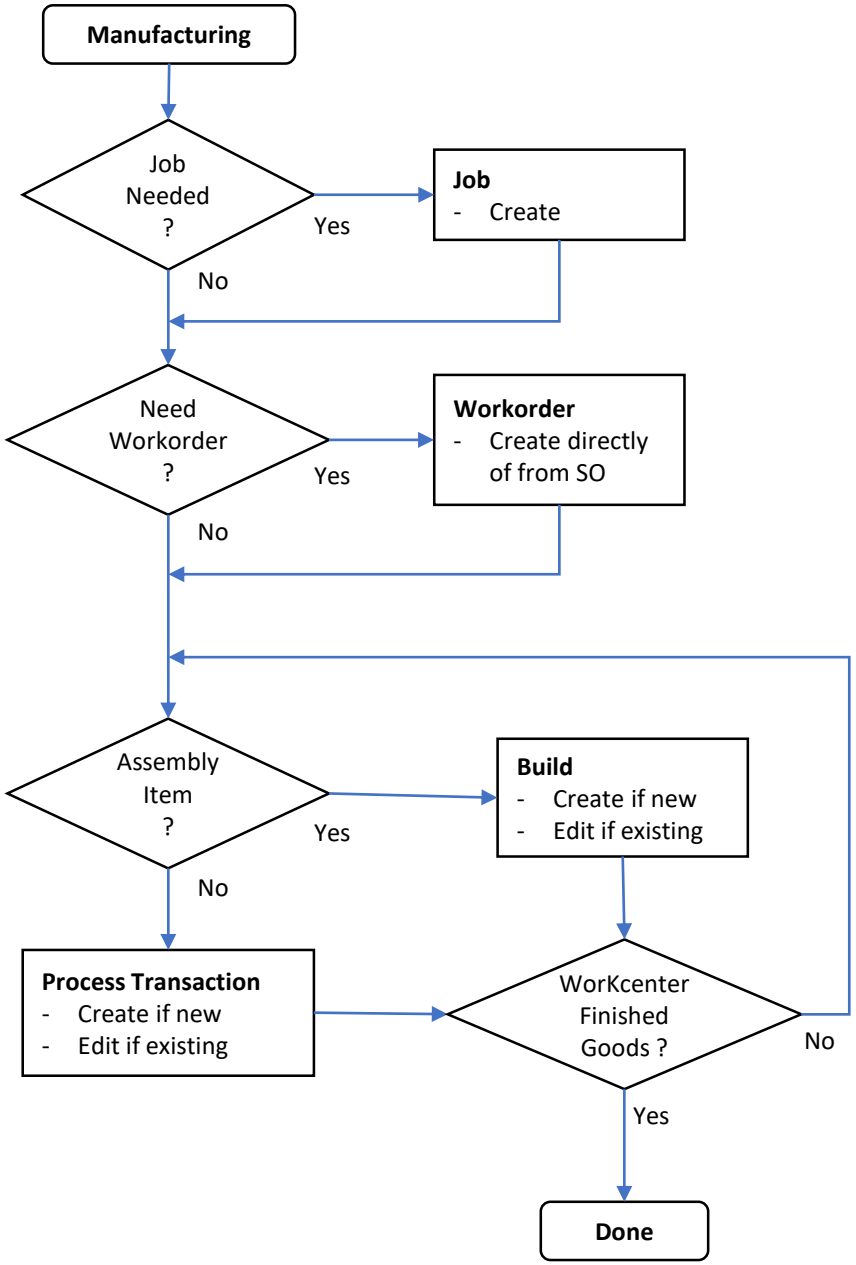

Purchasing
Is a PO needed ?
No
Yes
Purchase Order
- Create
- Send to Vendor
Goods Come In?
No
Yes
Have goods to receive
Partial Receipt ?
Yes
No
Done
Item Receipt
- Create from PO
- Upates PO
- Payment or bill to QBO
Item Receipt
- Create directly
- Payment or bill to QBO


Sales
Need Estimate ?
No
Yes
Estimate
- Create Pending
- Send to Customer
Accepted ?
No
Yes
Rejected ?
No
Yes
Done
Sales Order (SO)
- Create
- Send to Customer if needed
Manufacturing of Finished Goods
Pick Ticket Needed ?
No
Yes
Pick Ticket
- Create from SO
Ready to Ship ?
No
Yes
Shipment
- Create from SO
- Generate packing slip
Partial Shipment ?
Yes
No
Need Partial Invoice ?
Yes
No
Invoice (Partial)
- Create from SO
- Send to Customer
Ready to Invoice ?
No
Yes
Invoice
- Create from SO
- Send to Customer
Done


Manufacturing
Job Needed ?
Yes
No
Job
- Create
Need Workorder ?
Yes
No
Workorder
- Create directly of from SO
Assembly Item ?
Yes
No
Build
- Create if new
- Edit if existing
Process Transaction
- Create if new
- Edit if existing
WorKcenter Finished Goods ?
No
Yes
Done