



# **INVENTORY**

# PARTS - ADD PART DEFINITION USER DEFINED

A **User Defined** panel has been added to the **Part Maintain** screens (the Add new Part and Edit Part screens).

User defined fields in BPO enable the user to provide more information within a module so that work or associated processes can be carried out more efficiently.

These custom fields benefit the user in the following ways:

- They cut down the transition time between screens.
- They reduce the amount of screens open in order to find information.

In essence these fields serve as a shortcut, so that users do not have to leave the listing or maintain fields affected.

At present, these fields in the *Inventory - Parts* module can be used to add *extra* information relevant to the selected part definition. The added fields will reflect in the User Defined panel in the in the *Add new Part* screen and the *Edit Part* screens across *all* part definitions on the system, but the *Variable Values* selected for each User Defined field will be <u>unique</u> to the selected part definition.

Follow the process below to **add** User Defined custom fields to a part definition.

**Ribbon Access:** Inventory > Parts





- 1. The *Part Listing* screen will open.
- 2. The data grid will display a list of <u>all</u> the part definitions currently on the system.
- 3. Click on Add.

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BOMs	MOU001	Mouse	A	С	Toner Part Site					0.00		
	KEYB001	Keyboard	Α	С	Toner Part Site					0.00		
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- 1. The *Add new Part* screen will be displayed.
- 2. Once the following information has been added to this screen:
  - Part definition Details
  - Part definition Defaults
  - Part definition BOM Allocation (if applicable)
  - Part definition Part Meters (if applicable)
  - Part definition Yield Config (if applicable
- 3. Click on the *User Defined* tab.



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- 1. The *User Defined* panel will open.
- If there is an existing *Code* in the data grid, then a User Defined *custom field* has *already* been added to another part definition in the system.
- 3. The *Code* and *Code Description* are not specific to an individual part definition. When a Code and Description are entered and saved here, they are subsequently available in *every* part definition User Defined panel.
- 4. The *Variable Value* is unique. These are set up per specific part definition.



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Open Windows 🕶				User : AbigailM 06/12/2021 Vers	sion : 2.5.0.4 Example Company v2.5.0.0

## **ADD NEW CUSTOM ELEMENT**

- 1. *Right-click* anywhere in a row of the data grid.
- 2. A *Process* menu will pop up.
- 3. Click on Add Add New Custom Field.



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#### 1. The *Add new custom element* screen will open.

All of the fields in this screen are mandatory [\*].

**Note**: These fields can be populated according to *individual* company requirements. The example given here is pertinent to the system being demonstrated and is not universal.

#### **CODE AND DESCRIPTION**

- 2. **Code**: Type in a *unique* code specific to the custom field you wish to add.
- 3. **Description**: Type in the long, descriptive version of the code above.

**Reminder**: When saved, both of these fields will reflect in the *User Defined* panel in the *Part Maintain* screen across all part definitions on the system.





In this example we are documenting information relevant to a particular part definition: a *copier machine*. The data added to this screen will therefore be pertinent to the *copier industry*. However, *any* data relevant to this module for the specific user and their company can be added here.

In this example, the *Code* and *Description* added are relevant to the database of the demonstrating system: TTR - *Type of Technician Required*.

#### **INPUT TYPE**

- 2. Click on the drop-down arrow in the *Input Type* field.
- 3. A *Type* menu will display.
- 4. The options are :
  - FREETEXT *Free Input Text*: you can type data directly into the text box.



- LOOKUP Lookup list: you can select the desired value from the list.
- YesNo Yes or No Value: this field is used to collect data with only a 'Yes' or 'No' answer. Until this field is answered one way or the other, the field's value is considered to be missing.

Select the Type that is *most applicable* to the custom element being added.

- 5. In this example, the *LOOKUP* list selection seems the most congruous for the following reasons:
  - YESNO does not give the right parameters needed for the user to select what *type* of technician is required to install and / or service this part.
  - The FREETEXT selection could be used, but a lookup list would give a more restricted selection which in this case would help prevent the potential of human error.





#### SAVE NEW CUSTOM ELEMENT

- 1. When you have finished adding the information to these fields,
- 2. Click on *Save*.

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- 1. You will return to the *New Equipment* screen.
- 2. The newly created custom element will be added to the panel.

### ADD LOOKUP FIELDS TO THE CUSTOM ELEMENT

If the *Lookup* **Type** was selected in the previous step, lookup options will need to be *added* to a Lookup Item list.

- 1. Right-click in the *row* of the *new* custom element.
- 2. A *Process* menu will display.
- 3. Select Lookup Add new lookup item from the list.



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Home Equipment	/Locations Contract Fina	ance / HR Inventory Maintenance / Pr	ojects Manufacturin	g Procurement Sales Service	Reporting Utilities		e x
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- 1. The *Add new lookup element* screen will open.
- 2. **Code**: Type in a *unique* code specific to the lookup element you wish to add.
- 3. **Description**: Type in the long, descriptive version of the code above.





**Reminder**: In this example we are documenting information relevant to a particular part definition: a *copier machine*. The data added to this screen will therefore be pertinent to the *copier industry*. However, *any* data relevant to this module for the specific user and their company can be added here.

- In this example, the *Code* and *Description* added are relevant to the database of the demonstrating system: CST - *Company Standard Technician*.
- When you have finished adding the information to these fields, click on Save.

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### **VIEW ADDED LOOKUP ELEMENTS**

- 1. You will return to the *Add new part* screen.
- 2. Click in the *Variable Value* field of the new custom element row.
- 3. A *drop-down arrow* will appear. Click on this arrow.



- 4. A *Type* menu will display.
- 5. The newly added *Lookup List element* will be available in the list.

Follow the process above to add as many lookup elements as required.

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Processing	Life Cycle	0 🗘							
Requisitions									

- 1. In this example, a total of **3** lookup elements have been added to the list:
  - CST: Company Expert Technician
  - CET: Company Standard Technician
  - PST: Product Specific Technician

**Scenario**: The selection made in this lookup *Type* list, would help the part screen monitor decide which *type* of technician should be assigned for an installation, repair or service.

#### ADD VARIABLE VALUE

Click on the required *Type* of technician in the list. In this example,
 *Product Specific Technician* is selected.



**Note**: Although the *Lookup Type* list will be available to all part definitions on system, The actual Type selected and added to this *Variable Value* field is <u>unique</u> to the selected part definition and will <u>not</u> reflect in any other part or other module *User Defined* fields.

Home Fauinment	/Locations Contract Fin	Add new Part - BPO: Version 2	2.5.0.4	- E	xample Comp	<b>bany v2.5.0.0</b> huring Procurement Sales Servici	Repo	ting Utilities	_ 0	x c
Save Back Save Layout	Workspaces									0
Links 4				Us	er Defined				+ ×	
inter text to search 🔎	Part Code	AM-Copier	*							
Functions	Description	AB Marv Multi Copier 1001 Series	*		fldCode	fldCodeDescription	fldVar	iableValue		4
				ę	REC		REC			
Items Supplied	Model No	1001-A1	1		T01	Test01				
	Part Type	Serialised Equipment			T02	Test02				
	Taxable	√			T03	Test03				
Substitutes	Tax Rate	15.00 -	*	Ø.	TTR	Type of Technician Required		-		
	Category	Sprint Copiers 🔹					Type	M Description		
	Weight	45	1			1	CST	Company Expert	d Technician	
Documents	Volume	645mm x 770mm x 1220mm					PST	Product Specific T	echnician	
	Unit of Measure	kg								
	Single Supplier									
BOMs	Shelf Life	3					×			
	Shelf Life Period	Years •							_	1
	Depreciation Method	3 Year straight line 🔻							2	
Stock Control	Wear and Tear Method	3 Year straight line 👻								
	Maintenance Craft	Technician -								
	Manufacturer	Sprint ,C	'							
	Default Fee	-								
Processing	Duty Cycle	0 ‡								
	Life Cycle	0 🗘								
Requisitions										

## SAVE NEW CUSTOM ELEMENT

- 1. When you have finished adding the information to the User Defined fields,
- 2. Click on *Save*.



<b>\$</b> •	Add new Part - BPO: Version 2.5	.0.4 -	Example Com	pany v2.5.0.0			x
Home Equipment / Locations Contract	Finance / HR Inventory Maintenance	/ Proje	cts Manufac	turing Procurement Sales Servic	e Reporting Utilities	_ 8	×
Save Layout Workspaces							$\diamond$
Links #			Iser Defined			÷ )	× à
Enter text to search Part Co	e AM-Copier	E					ditio
Functions	AB Marv Multi Copier 1001 Series		fldCode	fldCodeDescription	fldVariableValue		al D
	-	•	R BC	• <b>•</b> •	A 🛛 C		ata
Items Supplied Model	lo 1001-A1		T01	Test01			Us
Part Ty	e Serialised Equipment		T02	Test02			er De
Taxat	e 🗸		T03	Test03			fine
Substitutes Tax Ra	e 15.00 🔹 *	1	TTR	Type of Technician Required	Product Specific Technician	•	-
Catego	y Sprint Copiers 🔹						
Weig	1t 45						
Documents Volur	e 645mm x 770mm x 1220mm						
Unit of Measu	ne kg						
Single Suppli	r 🗌						
BOMS Shelf L	fe 3						
Shelf Life Peri	d Years 👻						
Depreciation Meth	d 3 Year straight line 🔻						
Wear and Tear Meth	d 3 Year straight line 🔹						
Maintenance Cra	ft Technician 🔹						
Manufactur	sprint ,P						
Default F	•e 🗾 🔻						
Processing Duty Cyc	le 0 🗘						
Life Cyc	le 0 🗘						
Requisitions							
		_					

- 1. The new custom element will be saved in the *User Defined* panel and you will return to the *Part Listing* screen.
- 2. The newly added part definition with the new custom element will be indicated in the screen.

## VIEW NEW CUSTOM FIELD NOW LINKED TO ALL PARTS

- 3. Select the row of a *different* part in the data grid.
- 4. Click on *Edit*.



### Parts - Add Part Definition User Defined

The second	1	Part Listing - BPO: Version	2.5.0.4 - E	xample Co	mpany v2.5.0.0			in Deserve			x
Add Edit View Si	ave Layout Workspaces Refin	esh Export Reports	Projects	Manurac	turing Procurem	ent Sai	es sen	vice Reportin	ig Dalities	_	
Processing	Format Curre	nt A Print A Reports A									۵
Links #	Drag a column header here to grou										
Enter text to search P	PartCode	Description	Status	PartType	CatDescription	Weight	Volume	ModelNo	UnitOfMeasure	ShelfLife	Period
Functions	₽ R <mark>B</mark> C	R <mark>B</mark> C	8 8 C	8 <b>8</b> 0	88 C	RBC	RBC	88C	s C	=	88c -
		Compatible black toner	A	С	Toners					0.00	
Items Supplied	🗄 SAN	Sanitizer	A	С	Spare Parts					0.00	
		Copier	A	A	Hardware			SP 1020		0.00	
	1020-478	Staple Unit	A	В	Accessories			1020-478		0.00	
Substitutes	1020-147K     1020-147K	Toner Black	A	С	Toners					0.00	
	1020-147C	Toner Cyan	A	С	Toners					0.00	
		Toner Magenta	A	С	Toners					0.00	
Documents	⊞ 1020-147Y	Toner Yellow	Α	C	Toners					0.00	
3>	▶ 1 2020-147Y	Yellow toner SP2020	A	С	Toners					0.00	
	ADAP001	Adaptor	A	С	Toners					0.00	
POMe	SABS001	Testing for Kame	A	A	Hardware			SABS		0.00	
DOMS	SABS002	Testing for Kame	A	в	Spare Parts					0.00	
	SABS003	Test for Kame	A	С	Toners					0.00	
	MASPCP060      MASPCP060     MASPCP	Sprint Copier SP060	A	A	Sprint Copiers	21	2000	SP060	ea	5.00	уууу
Stock Control	E SP-ABI-COP-100-1	Sprint Copier ABI 100 Series	A	A	Sprint Copiers	10		ABI 100-1	ea	10.00	уууу
	BP-ABI-DRU-100-2	Sprint Drum ABI 100 Series	A	в	Accessories	3		ABI 100-2	ea	5.00	уууу
	MASPDRU060     MASPDRU060	Drum for SP060 Copier	A	В	Accessories	6	10 x 24	SP060-1	ea	12.00	m
	MASPTON060     MASPTON060	Black Toner SP060	A	С	Toners	6	10 x 24	BLACK-SP060	ea	12.00	m
2	▶ 🖭 AM-Copier	AB Marv Multi Copier 1001 Series	A	A	Sprint Copiers	45	645m	1001-A1	kg	3.00	уууу
Deservation		Sprint Toner Black ABI 100 Series	A	С	Toners	1		ABI 100-3	ea	12.00	m

- 1. The *Edit Part []* screen will open.
- 2. If not already extended, click on the *User Defined tab* to open the panel.
- 3. The custom element added to the *previous part* is now available to this part as is the *Type* drop-down list.
- 4. Note that the *Variable Value* column is not populated.

**Reminder**: The data added to this *Variable Value* field is <u>unique</u> to the selected part and will <u>not</u> reflect in any other part or other module *User Defined* fields.

Note: For more information about <u>editing</u> the part User Defined panel fields, click on the link.

5. Click on *Back* or *Close* the screen to return to the *Part Listing* screen.



## Parts - Add Part Definition User Defined

¢ · 1	Edit Part - Code2020-147Y - BPO: Ve	rsion	2.5.0.4 - Examp	le Company v2.5.0.0					
Home Equipment / Locations Contract	Finance / HR Inventory Maintenance / I	Projec	ts Manufactur	ing Procurement Sales Ser	vice	Repor	ting Utilities		y ×
Save Back Save Layout Workspaces	5							3	\$
Links #		U	ser Defined 🛛 🚽	<			2	-	× a
Enter text to search P Part Co	le 2020-147Y *	D							ditio
Functions	Yellow toner SP2020		fldCode	fldCodeDescription		fldVar	iableValue		nal D
	-	٩	# <b>0</b> 0	100	4	RBC			ata I
Items Supplied Model	io		T01	Test01		V			S <sup>2</sup>
Part Ty	e Non Serialised Parts 👻 *		T02	Test02					ar De
Taxa	le 🗹		T03	Test03					finec
Substitutes Tax Ra	te 15.00	Ø.	TTR	Type of Technician Required			1	·	
Catego	ry Toners 3					Type	A Description	t Technician	
Weig	ht		11111			CST	Company Stand	ard Technician	1
Documents Volum	ie l					PST	Product Specific	Technician	
Unit of Measu	re								
Single Suppli	r 🗆								
Shelf L	fe 0					×			11.
Shelf Life Peri	•d •								
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Wear and Tear Meth	▼ v								
Maintenance Cr	ft -								
Manufactur	P P								
Default F	*e •								
Processing Duty Cy									
Life Cy	ie 0 -								
Requisitions									
		_			-	-		_	

#### **Related Topics**

- Add Part Definition Details
- Add Part Definition Defaults
- Add Part Definition BOM Allocation
- Add Part Definition Part Meters
- Add Part Definition Yield Config
- Add Part Definition Additional Data

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