

# **INVENTORY**

# **PARTS - ADD PART DEFINITION DEFAULTS**

Once the part definition <u>details</u> have been added, <u>at least one</u> **default site** warehouse must be linked to the part definition. More than one site warehouse can be added but <u>only one</u> warehouse *per site* can be selected as the primary one. The primary site warehouse will be the default *receiving* warehouse when this part is GRN'd into store.

**Ribbon Access:** Inventory > Parts



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



#### Parts - Add Part Definition Defaults

Hore         Equipment / Locations         Contract         Finance / HR         Inventory         Maintenance / Projects         Manufacturing         Procurement         Sale         Service         Reporting         Utilities         —         Adv         C           Edit         Very         Service         Advant         Finance / HR         Enventory         Reports         Contract         Finance / HR         Enventory         Contract         Finance / HR         Finance / Projects         Contract         Finance / Projects         Finance / Pr		Part Listin	g - BPO: Ve	ersion 2.5.0	0 - Example Con	npany v2	2.5.0.0					_ • ×
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# **SELECT THE PART SITE WAREHOUSE**

- 1. The *Add new part* screen will open.
- 2. Once the part definition details have been <u>added</u>, move across the screen to the Defaults panel.
- This panel will be populated with a list of all the *site warehouses* that are linked to the part *category*. (This category was selected when <u>adding the part definition details</u>.)

Note: You can amend this category at this stage, if required. Any amendment will refresh the Defaults panel to populate with the site warehouses linked to the amended category.

- 4. There may be more than one *warehouse* listed per site.
  - In this example, there are **3** warehouses linked to the Durban site.
- 5. In the *Selection* column, select the check box in front of all the site warehouses that you wish to link to the part definition.



Note: You can select multiple part sites warehouses but <u>only one</u> **primary** part site default warehouse (see below).

<b>≜</b> ∓		Add new Part - BPO: Vers	ion 2.	5.0.	3 - Exan	nple Company	/ v2.5.0.	0					
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Note: If the selected site *Warehouse Name* needs to be changed - refer to <u>Edit Part</u> <u>Definition Defaults</u>.

### **SELECT THE PART SITE WAREHOUSE BIN**

 Once the part site default warehouses have been selected, move across to the *Bin Name* column.

#### **DEFAULT BIN**

Each part site warehouse selected, must have a *default bin* allocated. This is the bin within the warehouse that will receive the part as it is <u>GRN</u>'d into store.



- 2. In the row of a selected site warehouse, click in the *BinName* field to reveal an *ellipsis button*.
- 3. Click on this button and select from the pop up screen, the *default bin* for this part warehouse.

Note: If there is <u>only one bin</u> linked to the warehouse then the *BinName* field will auto populate with the name of that one bin. No *Select* screen will pop up.

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,	Description	AB Marv Multi Copier 1001	Series 🔺 *		1	Durban	Ma	ain Wareho	ouse 🖌		No		15/07/2021	
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	Part Type	Serialised Equipment	• *			Cape Town	CF	PT Main			No		15/07/2021	Ŧ
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# SELECT THE PART SITE PRIMARY WAREHOUSE

<u>Only one</u> warehouse and bin can be selected as the **primary** site warehouse. This means that when GRN'ing this part into store, it will be received into the primary default site warehouse and bin set up here.

**Note**: There is an opportunity to select an *alternative* or secondary receiving warehouse (if there is one linked here) during the <u>GRN</u> process.



 Once the selected default bin has populated the *BinName* field, you can move across to the *IsPrimarySiteWhse* column. All the fields in this column are initially populated with 'No'.

Note: Any of the site warehouses selected in the previous steps can be chosen as the *primary* site warehouse. Ensure that the *BinName* field is populated first.

 Ensure that you are in the row of the warehouse that you wish to make the *primary* site warehouse and click in the *IsPrimarySiteWhse* field. An *arrow* button will appear. Click on this button.

<b>⊕</b> <i>∓</i>		Add new Part - B	PO: Version 2.	5.0.	3 - Exan	nple Company	y v2.5.0	.0				_	
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Save Back Save Layout	Workspaces									1			
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Enter text to search	Part Code	AM-Copier	*		Selecti	SiteDescriptio	n Wh	seName	BinName /	IsPrimarySite	Whse	AmendDate	
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Functions				•	$\checkmark$	Durban	Geo	rge_Whse	George_Bin	No	Þ	15/07/2021	
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	Model No	1001-A1	_		$\checkmark$	Pretoria	PTA	Main Warehouse		No	Т	15/07/2021	
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Stock Control	Wear and Tear Method	3 Year straight line	•			Colour		Colour Meter	CYCLE	Copies	ABS		
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- The text in the field will change to 'Yes'. This warehouse will now be the primary site warehouse and bin when this part is <u>received into store</u>.
- It is important to ensure that <u>no other warehouses</u> in the *same site* are selected as the primary site warehouse. The system will not allow you to save the changes if there is <u>more than one</u> *IsPrimarySiteWhse* field within the *same site* marked as 'Yes'.



	Add new Part - B	PO: Version 2.	5.0.	3 - Exan	nple Compan	ıy v2.5.	0.0						
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Shelf Life Perio	I Years	•	•		ACCYC		AC Cycles	CYCLE		Cycle	ABS		n
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Wear and Tear Metho	d 3 Year straight line	•			ColourA3		Colour A3	CYCLE		Copies	ABS		
Maintenance Crat	t Technician	•		-						Copico			Ψ.
Manufacture	r Sprint	Q	Yie	ld Confi	g								4
Default Fe	2	•		Selecti	MeterDefCod	de Yie	ld YieldFact	or ServiceCo	de S	erviceDesc		PriceType	
Processing Duty Cycl	• 0 \$		•		Mono		0.00 0	.00					- îl
Life Cycl	e 0 ‡				Mono A 3		0.00 0	.00					_ 0
Requisitions					ColourA3		0.00 0	.00					
				1									

#### **INPUT VALIDATION ERROR**

- 1. If you have not selected the bins for the other selected site warehouses and you try to *Save* at this point, you will receive an error message:
  - The default warehouse/bin must be specified for the selected site [].
- Click on *Ok* and go back and specify the default bin for each selected site warehouse.



<b>⊕</b> =		Add new Part	- BPO: Versi	on 2.5.	0.3 - Exar	nple Company v	/2.5.0.0							(
Home Equipment	nt / Locations Contract	Finance / HR Inventory	Maintenance	e / Proj	ects M	anufacturing	Procurement	t Sales	Service	Reporting	Utilities	-	8 3	c
Save Back Save Layout	Workspaces		1											
	+		1		1.11	·								
Process a For	mat 4			_										2
Links 4	Deut Cada	AM Carrier		I	efaults	1.							4	Ado
Enter text to search P	Part Code	AB Mary Multi Copier 1001 Set	iec . *		Selecti	SiteDescription	WhseNam	ie -	BinName	IsPrimary	SiteWhse	AmendDate		lition
Functions	Description	Ab Harv Hurb Copier 1001 Ser	ics i		V	Durban	Main War	ehouse -		No		15/07/2021	î	nal Da
				H		Durban	George_v	vnse	George_Bin	Tes	<u> </u>	15/07/2021		ata
Items Supplied	Model No	1001-A1				Pretoria	PTA Main	Warehouse		No		15/07/2021	U	S
	Part Type	Serialised Equipment	•			Cape Town	CPT Main	an en rodde		No		15/07/2021		ar De
	Taxable	Z	Y											fine
Substitutes	Tax Rate	Tax Rate 15.00 Input Validation X											4	-
	Category	Sprint Copiers			Quartuty									
	Weight	45		The de	default warehouse/bin must be specified for the selected site									
Documents         Weight         545mm x 770mm x 1220mm         The default warehouse/bin must be specified for the selected site         the						t List	tList							
	Unit of Measure	kg								+ Liet		1	Ŧ	
	Single Supplier								OK				û.	
BOMs	Shelf Life	3				2			UK	Unit	Acti	onType		
	Shelf Life Period	Years	•			ACCYC	AC C	ydes	CYCLE	Cycle	ABS		â	
	Depreciation Method	3 Year straight line	-			ClearA3	Clear	A3	CYCLE	Copies	ABS		U	
Stock Control	Wear and Tear Method	3 Year straight line	-			Colour	Colou	r Meter	CYCLE	Copies	ABS			
	Maintenance Craft	Technician	-	L		ColourA3	Colou	IF A 3	CYCLE	Copies	ABS		-	
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	Default Fee		-		Selecti	MeterDefCode	Yield 1	rieldFactor	ServiceCode	ServiceDesc		PriceType		
Duty Cycle         0         Mono         0.00         0.00												â		
Processing	Life Cycle	0 🗘				Colour	0.00	0.00						
Requisitions						MonoA3	0.00	0.00					- 1	
						ColourA3	0.00	0.00						
	2													_

## **SAVE PART DEFINITION DEFAULTS**

- 1. Once the default bins have been selected, at this point you can either:
- 2. Click on Save, or
- 3. Move down to the **BOM Allocation** panel, if applicable.

Note: If you click on *Save* at this point, you will return to the *Part Listing* screen.



<b>• •</b>		Add new Part - BPO:	Version 2.5.0.3	- Ex	ample C	ompany v2.5.	0.0					-	
Home Equipr	ment / Locations Contract	Finance / HR Inventory	Maintenance / P	rojec	ts M	anufacturing	Procure	nent Sales	Service	Rep	oorting Utilities	. –	₽ ×
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Process _ Process	Format _												\$
Links	4			De	faults					1			# A
Enter text to search	p Part Code	AM-Copier			Selecti	SiteDescription	Whse	Name	BinName 🖌	-	IsPrimarySiteWhs	e AmendDate	lition
Functions	Description	Ab Mary Multi Copier 1001 Serie	5 A T		¥	Durban	Main	Narehouse	DBN-A1	1	No	17/07/2021	î D
			-	ľ	Y	Durban	lobos	e_vvnse Root	George_Bin	~	Tes P	01/01/1000	ata
Items Supplied	Model No	1001-A1		H		Pretoria	PTAN	tain Warehouse	PM-01	-	No	17/07/2021	S
	Part Type	Serialised Equipment	+	F		Durban	OTC	Whse DBN	10184		No	01/01/1900	y De
	Taxable	☑ 3					_	-		_			fine
Substitutes	Tax Rate	15.00	• *	BU	Selecti	BOMCode D	escription		ROMType	BOM	TypeDesc	Quantity	
	Category	Sprint Copiers	<b>*</b> *			MCL N	lachine se	rvice - deaning	TASK	Main	itenance Part List	0.00	
	Weight	45		È		TONERS T	oners Ind	uded	CI	Cont	tract Indusion	0.00	0
Documents	Volume	645mm x 770mm x 1220mm				KM147 K	M147 Par	tList	PARTS	Part	List	0.00	
	Unit of Measure	kg				K7N123 K	7NI 172 D:	et Liet	DADTS	Dart	Liet	0.00	· ·
	Single Supplier			Pa	irt Meter	rs							.p.
BOMs	Shelf Life	3			Selecti	MeterDefCode	M	eterDescription	MeterType		Unit Ad	tionType	_
	Shelf Life Period	Years	•	Ľ		ACCYC	A	C Cycles	CYCLE		Cycle AE	IS	n
	Depreciation Method	3 Year straight line	•			Colour	0	ear As	CYCLE		Copies Ab	15	U
Stock Control	Wear and Tear Method	3 Year straight line	•			ColourA3	0	olour A3	CYCLE		Copies AE	15	
	Maintenance Craft	Technician	•	L	-	00000.00			e. att		copies in		Ŧ
	Manufacturer	Sprint	Q	Yi	eld Confi	g							4
	Default Fee		•		Selecti	MeterDefCode	Yield	YieldFactor	ServiceCode	Serv	viceDesc	PriceType	
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	Life Cycle	0 ‡		-		Mono A 3	0.0	0 0.00					
Requisitions						ColourA3	0.0	0.00					
				L									· ·
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#### **Related Topics**

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

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