

# **INVENTORY**

# **PARTS - ADD PART DEFINITION DETAILS**

Part Definition (or Inventory Definition) describes and defines a part. A Part Definition is a way of classifying a part when dealing with inventory. Keeping good records of parts is critical to inventory management.

When adding a new part definition to the system, it is important to include as much information as possible about the part to differentiate it from other similar parts.

The **Add new Part** screen details fields will differ slightly for a **C**-class part definitions compared to an **A** or **B**-class part definition. The differences are set out below.

**Ribbon Access:** Inventory > Parts



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



	1-	Part Listin	) - BPO: V	ersion 2.5.	0.0 - Example Con	npany v2	.5.0.0					_ <b>– x</b>
Home Equipm	ent / Locations Cont	ract Finance / HR Inventory	Main	tenance / Pro	ojects Manufact	uring	Procureme	ent Sales	Service Re	eporting	Utilities	_ & ×
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Items Supplied	CHA001	Chair	A	C	Toner Part Site					0.00		
	26/89-101	101 Black Toher	A	C	Toners					0.00		
	20-755	SP2020 Puser Unit	A .	L .	Spare Parts			1454		0.00	-	Months
Culture the second	E 60500	Carries Calaux Carries		A .	Accessories			1424		0.00	m	monuis
Substrates	E 500 1474	SDE00 Black Topor		с С	Tanaviare					0.00		
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	WHEEL01	Wheels	Δ	C	Toper Part Site					0.00		
	MOLIOD1	Mouse	4	c	Toper Part Site					0.00		
BOMs	E KEYB001	Keyboard	Δ	c	Toner Part Site					0.00		
	A4NB78	A4 Bound Notebook - 78 pages	Δ.	C	Stationery					0.00		
	1717-147K	Black Toper SP1717	A	c	Topers	0.5		147K		0.00	VVVV	Years
Stock Control	SP1717MEC	SP1717 Multi Functional Copier	A	A	Hardware					0.00		
	17-856	Drum for SP1717	A	В	Spare Parts	1.5			ea	0.00		-
	ACR11111	Acer Copier	A	A	Hardware					0.00		
		Acer copier outer shell	A	в	Accessories					0.00		
		Acer rollers	A	С	Spare Parts					0.00		
Processing	DR111111	Drum	A	в	Accessories					0.00		
		Drum Component 1	A	с	Accessories					0.00		
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- 1. The *Add new Part* screen will be displayed.
- 2. The part definition *details* section is on the left-hand side of the screen.

## **ADD A-CLASS PART DEFINITION DETAILS**

In this example, an **A-**class part definition will be added to the system.

- 3. Type directly in the fields to enter the following information:
  - **Part Code**: Type in the unique **A**-class part definition number.
  - **Description**: Type in a text description for this **A**-class part definition.
  - Model No: Type in a valid supplier model number for this A-class part definition, if applicable.



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Home Equipment	nt / Locations Contract	Finance / HR Inventory	Maintenance / Pr	oject	s Mar	ufacturing	Procurement	Sales	Service R	eporting Utilities	;	-	8
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Items Supplied			Ψ.			Durban	JohnS_Boo	t		No	01/01	/1900	
	Model No					Durban	OTC_Whee	_DBN		No	01/01	/1900	-
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	Unit of Measure				-								-
0011-	Single Supplier			Pa	art Meter	S Col							- qu
DOMS	Shelf Life			L.	Selecti	MeterDetCode	Meter	Description	MeterType	Unit A	vction i ype	e	
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Stock Control	Wear and Tear Method		*			ColourA3	Colou	r A3	CYCLE	Copies 4	BS		
	Maintenance Craft		-		-	Goldarite						_	Ŧ
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	Default Fee		•		Selecti	MeterDefCode	Yield	YieldFactor	ServiceCode	ServiceDesc	Pric	ceType	
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Requisitions						MonoA3	0.00	0.00					
						ColourA3	0.00	0.00					-

- Part Type: Click on the drop-down arrow to display the part definition *Type* menu:
  - A Serialised Equipment<sup>1</sup>
  - **B** Serialised Spares<sup>2</sup>
  - C Non Serialised Parts<sup>3</sup>
- 5. In this example, **Type A** will be selected as an **A**-class part is being added.

<sup>&</sup>lt;sup>1</sup>Serialised or A-Class refers to a uniquely identified inventory item. Generally sold at a higher price than B and C-Class items.

<sup>&</sup>lt;sup>2</sup>These are serialised single-line items These are like C-Class items, in that a B-Class stock item can be issued out and not billed.However, they are generally more expensive than C-Class parts. These items would not be a main unit/machine but an accessory e.g. a drum for a copier machine.

<sup>&</sup>lt;sup>3</sup>These are (non-serialised) stock items. These are stored in the system with a weighted average unit cost per warehouse and bin. These items can be managed in batches if batch tracking is enabled.



<b>⊕</b> <i>∓</i>	Add new Par	rt - BPO: Version 2.5	5.0.0	) - Exan	ple Company	v2.5.0.0					_		×
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					Durban	George_W	hse		No	01/0	1/1900	U	)ata
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Part Typ	Tuno # Description		BC	5 1002	tion							ą.	Defin
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Documents					KM147	GM 147 Part Li	st	PARTS	Part List			1	
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Shelf Life	1		b.		ACCYC	ACC	vdes	CYCLE	Cycle	ARS	~	*	
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Depreciation Method	I	•			Colour	Color	ır Meter	CYCLE	Copies	ABS		0	
Wear and Tear Metho		-			ColourA3	Color	Jr A3	CYCLE	Copies	ABS			
Maintenance Craf	t	-										Ť	
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Requisitions					ColourA3	0.00	0.00					-	

- Select the check box, type in or use the drop-down arrows to add the the required information to the following fields:
  - **Taxable**: Select this check box if this part is taxable.
  - Tax Rate: Click on the drop-down arrow and select from the list, the tax code applicable to this part. These <u>tax rates</u> are set up in the Configurator.
  - **Category**: Click on the drop-down arrow and select from the list, the <u>category</u> applicable to this part.

**Note**: The Category selected here will affect the Sites and Warehouses that are available for selection in the Defaults panel. See <u>Add</u> and <u>Edit</u> a Category for more information.

- Weight: Type in the weight of the part, if required.
- **Volume**: Type in the **volume**<sup>1</sup> of the part, if required.

<sup>1</sup>This is the amount of space that this item occupies. This three dimensional space is measured in length, height and width.



• Unit of Measure: Type in the unit used to measure the part, for example: kilograms, pounds.

⊕	Add new Par	t - BPO: Version 2	.5.0.	3 - Exan	nple Company	v2.5.0.0						
Home Equipment / Locations Contract	Finance / HR Inventory	Maintenance / Proje	cts	Manu	ifacturing Pr	rocurement	Sales	Service Rep	orting Utilitie	ts	-	ø
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Enter text to search P Part Code	AM-Copier 1001			Selecti	SiteDescription	h WhseNam	ne	BinName	IsPrimary	SiteWhse	AmendDate	
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Turcuons					Durban	George_V	Vhse		No		01/01/1900	U
Items Supplied	1001.01	*			Durban	JohnS_Bo	ot		No		01/01/1900	
Model No	1001-A1				Durban	OTC_Whe	se_DBN		No		01/01/1900	-
Part Type	Serialised Equipment	•	во	M Alloca	ation							4
Substitutes	¥.	Π.		Selecti	BOMCode D	Description		BOMType	BOMTypeDesc		Quantity	
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6 Category					TONERS 1	Foners Include	d	CI	Contract Indus	ion	1	0
Decuments					KM147 K	M147 Part Lis	t	PARTS	Part List		1	
Volume					KZN123 K	CZN 123 Part L	ist	PARTS	Part List		1	-
Unit of Measure												
Single Supplier			Pa	rt Mete	rs MaterDefCada	Make	Description	MakerTurn	. 11-24	đ việ	Ture	4
Shelf Life				Jelecu	MCONASSETS	MCO	ASSETS	DESET	Conies	ARS	an ype	*
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Wear and Tear Method		-			MonoA3	Mono	A3	CYCLE	Copies	ABS		U
Maintenance Craft		-		_								*
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Default Fee		-		Selecti	MeterDefCode	e Yield	YieldFactor	ServiceCode	ServiceDesc		PriceType	
Duty Cycle	0 🗘				MonoA3	0.00	0.00					
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Requisitions					ALCTC ClearA2	0.00	0.00					- ĭ
					Ciedi A3	0.00	0.00					-

- Select the check box, type in or use the drop-down arrows to add the required information to the following fields:
  - **Single Supplier**: Select this check box if the part is procured from only <u>one</u> supplier.
  - Shelf Life: Type in the shelf life or life expectancy of this part.
  - Shelf Life Period: Click on the drop-down arrow and select from the list, the unit of time applicable to the shelf life period e.g. months, years.



 Depreciation Method: Click on the drop-down arrow and select from the list, a depreciation<sup>1</sup> method (e.g. 3/5 Year Straight Line<sup>2</sup>).

**Note**: You will only be able to add a depreciation method here, if this is serialised equipment item (**Class-A**) or a serialised spares item (**Class B**). Otherwise the field will be greyed out (inactive).

• Wear and Tear Method: Click on the drop-down arrow and select a wear and tear method<sup>3</sup> from the list (e.g. 3/5 year straight line).

# <sup>1</sup>Depreciation refers to the decline in the value of this item due to it's usage, passage of time or obsolescence.

<sup>2</sup>This is the most commonly used method to calculate depreciation. It is also known as fixed instalment method. Under this method, an equal amount is charged for depreciation of every fixed asset in each of the accounting periods. This uniform amount is charged until the asset gets reduced to nil or its salvage value at the end of its estimated useful life. This method derives its name from a straight line graph. This graph is deduced after plotting an equal amount of depreciation for each accounting period over the useful life of the asset. Thus, the amount of depreciation is calculated by simply dividing the difference of original cost or book value of the fixed asset and the salvage value by useful life of the asset. The formula for annual depreciation under straight line method is: Annual Depreciation Expense = (Cost of an asset – Salvage Value)/Useful life of an asset

<sup>3</sup>Wear and tear tracks the total asset life from it's first conversion from stock to asset as it would be determined by Inland Revenue. If an internal asset is converted back to stock, the wear and tear will pause until such time as the item becomes an asset again and will catch up any wear and tear not calculated while the item was deemed to be stock.



<b>4</b> •		Add new Part	- BPO: Version 2	.5.0	.3 - Exan	nple Company	v v2.5.0.0						
Home Equipment	nt / Locations Contract	Finance / HR Inventory I	Maintenance / Proje	cts	Manu	facturing P	rocurement Sa	les S	ervice Repo	orting Utilities		-	₽ ×
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Enter text to search 🔎	Part Code	AM-Copier 1001	*		Selecti	SiteDescription	n WhseName	В	inName	IsPrimarySi	teWhse	AmendDate	000
Functions	Description	Ab Marv Multi Copier 1001 Series	* *	×		Durban	Main Warehou	se		No		26/05/2021	- î la
runctions						Durban	George_Whse			No		26/05/2021	
Items Supplied			<b>*</b>			Durban	JohnS_Boot			No		26/05/2021	
	Model No	1001-A1				Pretoria	PTA Main Ware	ehou		No		26/05/2021	+ Jser
	Part Type	Serialised Equipment	• •	BO	DM Allocz	tion							a Derin
Substitutes	Taxable				Selecti	BOMCode [	Description		BOMType	BOMTypeDesc		Duantity	leg
	Tax Rate	15.00	•	,		MCL 1	Machine service - di	eaning	TASK	Maintenance Part	List	1	
	Category	Sprint Copiers	•			TONERS 1	Toners Included		CI	Contract Inclusion	ı	1	0
Documents	Weight	45				KM147	M147 Part List		PARTS	Part List		1	
Documents	Volume	645mm x 770mm x 1220mm				KZN123	CZN 123 Part List		PARTS	Part List		1	_
	Unit of Measure	kg									_		
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BOMS	Shelf Life			Ŀ	Select	MeterDefCode	e MeterDeso	ription	Meterlype	Unit	Acto	nlype	
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- Click on the *search* icon, *type in* or use the *drop-down arrows* to add the required information to the following fields:
  - Maintenance Craft: Click on the drop-down arrow and select from the list, the default craft<sup>1</sup> (skill) utilised when maintaining this part.
  - Manufacturer: Click on the search button and select the manufacturer<sup>2</sup> of this part.
  - **Default Fee**: Click on the drop-down arrow and select from the list, the default fee<sup>3</sup> associated with this part, if applicable.
  - **Duty Cycle**: The cycle of operation of an item that operates intermittently rather than continuously. This is generally expressed as a percentage.

<sup>1</sup>A craft is the skill set or qualification(s) linked to an employee.

<sup>3</sup>For an A-class part, you can use this field to note what the default fee is for a specific type of item at part level, instead of at contract level.

<sup>&</sup>lt;sup>2</sup>A manufacturer is a company that produces goods in large numbers often by converting raw materials into finished products.



• Life Cycle: The full lifespan of the item, generally from commission through acquisition, operation and maintenance to decommission.

¢ -		Add new Part	BPO: Version 2.5	0.3	- Exam	ole Company	v2.5.0.0						
Home Equipmen	t / Locations Contract	Finance / HR Inventory	Maintenance / Proje	cts	Manu	facturing	Procureme	nt Sales	Service R	eporting Utili	ies	-	8 3
Save Back Save Lavout	Workspaces												
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inks 4	<b>B</b> 16 L			De	faults								4
nter text to search P	Part Code	AM-Copier 1001			Selecti	SiteDescriptio	on Whs	Name	BinName	IsPrimarySit	eWhse /	AmendDate	
Functions	Description	AD Marv Multi Copier 1001 Series	5 🔺 🕈	۲		Durban	Main	Warehouse		No		26/05/2021	Â
			-			Durban	Geor	je_Whse		No		26/05/2021	U
Items Supplied	Model No	1001-01				Durban	John	5_Boot		No		26/05/2021	
	Part Type	Serialized Equipment				Pretoria	PIA	iain warenouse		NO		26/05/2021	-
	Tavable			BO	M Alloca	ition							4
Substitutes	Tax Rate	15.00	*		Selecti	BOMCode	Descriptio		BOMType	BOMTypeDesc		Quantity	
	Category	Sprint Conjers	• *	۲		MCL	Machine s	rvice - deaning	TASK	Maintenance Par	t List	1	_
	Weight	45				TONERS	Toners In	luded	CI	Contract Inclusio	n	1	U
Documents	Volumo	645mm x 770mm x 1220mm				KM147	KM 147 Pa	t List	PARTS	PartList		1	
	Volume	045mm X 770mm X 1220mm				KZN123	KZN 123 F	art List	PARTS	Part List		1	-
	Circle Creation	kg		Pa	rt Meter	~							
BOMs	Single Supplier	-			Selecti	MeterDefCod	de I	leterDescription	MeterType	Unit	Actio	nType	-
	Shell Life	3		Þ		ACCYC		C Cydes	CYCLE	Cyde	ABS		
	Shelf Life Period	rears	•			ClearA3		lear A3	CYCLE	Copies	ABS		
Stock Control	Depreciation Method	3 Year straight line	•			Colour		olour Meter	CYCLE	Copies	ABS		Ŭ
	Wear and Tear Method	3 Year straight line	-			ColourA3		olour A3	CYCLE	Copies	ABS		-
	Maintenance Craft		·										
	Manufacturer		P	YIE	Solocti	g MotorDofCod	do Viold	VioldEactor	Som isoCodo	SamiraDaas		DriceTune	#
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 Once you have filled in the mandatory details and the optional details, as required, you can follow the process to <u>Add the Part Definition</u> <u>Defaults</u>.



	Add new Part - BP	O: Version 2.	5.0.3	8 - Exan	ple Company	y v2.5.	0.0			_	
Home Equipment / Locations Contract	Finance / HR Inventory Ma	intenance / Pr	oject	s Ma	anufacturing	Proc	urement Sale	s Service	Reporting Utilitie	s –	вx
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		Ψ.			Durban	Jo	hnS_Boot		No	26/05/2021	
Items Supplied Model No	1001-A1				Pretoria	PT	A Main Warehous	e	No	26/05/2021	5
Part Type	Serialised Equipment	• •				-					
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Tax Rate	15.00	• *		selecti	MCI I	Machine	oon a service - cleanin	a TASK	Maintanance Part List	Quantity	
Category	Sprint Copiers	• *	ŕ		TONERS	Topers	Included	CI	Contract Inclusion	1	0
Weight	45				KM147	KM147	PartList	PARTS	Part List	1	
Volume	645mm x 770mm x 1220mm				KZN123	KZN 12	3 Part List	PARTS	Part List	1	
Unit of Measure	kg			r==1							-
Single Supplier		_	Par	t Meter	5						4
Shelf Life	3			Selecti	MeterDefCode	le	MeterDescriptio	n MeterType	Unit A	ctionType	
Shelf Life Period	Years	•	•		Clear A 3		AL LYCIES	CYCLE	Cycle A	BS	n
Stock Control	3 Year straight line	•			Colour		Colour Meter	CYCLE	Copies A	BS	0
Wear and Tear Method	3 Year straight line	•			ColourA3		Colour A3	CYCLE	Copies A	BS	
Maintenance Craft	Technician	•		-							
Manufacturer	Sprint	2	Yie	ld Confi	9				1		ų
Default Fee		•		Selecti	MeterDefCode	le Yiel	ld YieldFactor	ServiceCode	ServiceDesc	PriceType	1
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Requisitions		- 1			ColourA3		0,00 0.0	10			-
				1001							

**Note:** A part definition must have at least one site selected in the Defaults panel. If none are linked you will not be able to *Save* the part definition details.

### **ADD C-CLASS PART DEFINITION DETAILS**

In this example, **C**-class part definition details will be added to the system. The process to add **C**-class<sup>1</sup> part definitions differs in that, by selecting the *Part Type* as **C** - Non Serialised Parts:

- i. The *Depreciation Methods* field will automatically grey out (become inactive). Depreciation does <u>not</u> apply to **C**-class parts.
- ii. The *Part Meters* panel will automatically grey out (become inactive). **C**-class parts do not have meters linked to them.
- 1. Navigate to the *Add new Part* screen.
- 2. Type directly in the fields to enter the following information:

<sup>&</sup>lt;sup>1</sup>These are low cost, non-serialised items that can be received in batches.



- **Part Code**: Type in the **C**-class part definition number.
- **Description**: Type in a text description for this **C**-class part definition.
- Model No: Type in a valid supplier model number for this C-class part definition, if applicable.
- 3. **Part Type**: Click on the drop-down arrow to display the part definition *Type* menu:
  - A Serialised Equipment<sup>1</sup>
  - **B** Serialised Spares<sup>2</sup>
  - C Non Serialised Parts<sup>3</sup>
- 4. In this example, **Type C** will be selected as a **C**-class part is being added.

<sup>&</sup>lt;sup>1</sup>Serialised or A-Class refers to a uniquely identified inventory item. Generally sold at a higher price than B and C-Class items.

<sup>&</sup>lt;sup>2</sup>These are serialised single-line items These are like C-Class items, in that a B-Class stock item can be issued out and not billed.However, they are generally more expensive than C-Class parts. These items would not be a main unit/machine but an accessory e.g. a drum for a copier machine.

<sup>&</sup>lt;sup>3</sup>These are (non-serialised) stock items. These are stored in the system with a weighted average unit cost per warehouse and bin. These items can be managed in batches if batch tracking is enabled.



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- 5. Note that after the *Part Type* is selected, the *Part Meters* panel greys out and became inactive.
- 6. *Select* the check box, *type in* or use the *drop-down arrows* to add the required information to the following fields:
  - **Taxable**: Select this check box if this part is taxable.
  - Tax Rate: Click on the drop-down arrow and select from the list, the tax code applicable to this part. These <u>tax rates</u> are set up in the Configurator.
  - **Category**: Click on the drop-down arrow and select from the list, the <u>category</u> applicable to this part.

Note: The *Category* selected here will affect the Sites and Warehouses that are available for selection in the Defaults panel. See <u>Add</u> and <u>Edit</u> a Category for more information.



- Weight: Type in the weight of the part, if required.
- **Volume**: Type in the **volume**<sup>1</sup> of the part, if required.
- Unit of Measure: Type in the unit used to measure the part, e.g. kg.

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- Select the check box, type in or use the drop-down arrows to add the required information to the following fields:
  - **Single Supplier**: Select this check box if the part is procured from <u>only one</u> supplier.
  - Shelf Life: Type in the shelf life or life expectancy of this part.
  - Shelf Life Period: Click on the drop-down arrow and select from the list, the unit of time applicable to the shelf life period e.g. months, years.
  - Depreciation Method: This field will be greyed out (inactive) for a C-class part.

<sup>1</sup>This is the amount of space that this item occupies. This three dimensional space is measured in length, height and width.



Note: You will not be able to add a *depreciation method* here. Only a serialised equipment item (A-class) or a serialised spares item (B-class) can have depreciation applied. If Type C is selected in the Part Type field, the Depreciation field will become greyed out (inactive).

• Wear and Tear Method<sup>1</sup>: As wear and tear methods are linked to asset depreciation, this field will not be applicable to C-class part definitions.

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- 8. Click on the *search* icon, *type in* or use the *drop-down arrows* to add the required information to the following fields:
  - Maintenance Craft: Click on the drop-down arrow and select from the list, the default craft<sup>2</sup> (skill) utilised when maintaining

<sup>2</sup>A craft is the skill set or qualification(s) linked to an employee.

<sup>&</sup>lt;sup>1</sup>Wear and tear tracks the total asset life from it's first conversion from stock to asset as it would be determined by Inland Revenue. If an internal asset is converted back to stock, the wear and tear will pause until such time as the item becomes an asset again and will catch up any wear and tear not calculated while the item was deemed to be stock.



this part.

- **Manufacturer**: Click on the search button and select the manufacturer of this part.
- **Default Fee**: Click on the drop-down arrow and select from the list, the default fee associated with this part, if applicable.
- Duty Cycle: [to be confirmed]
- Life Cycle: [to be confirmed]

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- 9. Once you have filled in the mandatory details and the optional details, as required;
- 10. follow the process to Add the Part Definition Defaults.

Note: A part definition must have at least one site warehouse selected in the *Defaults* panel. If none are linked you will not be able to *Save* the part definition details.



#### Parts - Add Part Definition Details

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#### **Related Topics**

- Add Part Definition Defaults
- 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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