

INVENTORY

PARTS - INTRODUCTION TO PARTS

There are some terms that are useful to know when managing inventory:

PART DEFINITIONS

A part definition (also known as inventory definition), describes and defines a part.

You can link the following to a part:

- [Default Supplier](#) (and multiple other suppliers)
- [Supplier Warranty](#) which automatically comes in to effect when the part is received into stock.
- [Meter Definitions](#)
- [Toner Yields](#)

PART CLASSIFICATION

Inventory is divided into **3** classes:

A-CLASS PARTS

- These items would be the main unit such as a **copier** machine.
- These are **serialised single-line** items.

B-CLASS PARTS

- 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 or machine but an **accessory**, such as a **drum** for a copier machine.

C-CLASS PARTS

- 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.

A, B and **C-Class** items can further be classified as **stock** or **assets**.

STOCK

- Stock is a store of **A, B,** and **C-Class** items, ready for sale or servicing purposes.

ASSET DEFINITION

- **Assets** are **A** or **B--Class**, serialised, non-stock items, such as a **copier** machine. These items may require a maintenance schedule and have traceability records.
- These items are stored as '**single-line**' items and each item will have it's own unique serial number, unit cost and traceable history.

Ribbon Select Inventory > Parts



- The **Part Listing** screen will be displayed.

THE PART LISTING SCREEN

- Here you can view a list of the **part definitions** that have been set up on the system.
- These **part definitions** store information relevant to the part, including:
 - the part Type
 - the part Category
 - the part Unit of Measure
 - the part Shelf Life
- Select **Column Chooser** to customize the data grid to your own preference. Refer to [Data Grid Layouts](#).

Part Code	Description	Status	Part Type	Cat Description	Weight	Volume	Model No	Unit of Measure	Shelf Life	Sold Supplier	Taxable	Tax Type	Rate	Craft Code	Craft Desc	Amend Date
SP2020	Sprint Multi Functional Copier	A	A	Retail - Office Supplies - Equipment	10	10	SP2020	ea	10.00	No	Yes	VAT	15.00			Sep 15 2023 4:09PM
SP2020-1992	Paper Tray	A	B	Retail - Office Supplies - Accessories	2	2		ea	10.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-3671	Staple Unit	A	B	Retail - Office Supplies - Accessories	2	2		ea	10.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-7223	Fuser Unit	A	B	Retail - Office Supplies - Accessories	2	2		ea	5.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-6143	High Yield Reset Lever Gear	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-8649	Fuser Heat Roller	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-5304	Fuser Roller Gear	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-4933	Paper Pickup Roller	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-8684	Picker Finger	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-5588	Wiper Blade	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-2352	Mag Roller	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-7335	Mag Roller Sleeve	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-5526	Fuser Film	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-6028	Fixing Film Assembly Unit	A	C	Retail - Office Supplies - Spares	2	2		ea	2.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-7652	Maintenance Kit	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-3295	Fuser Cleaning Web	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-2671	Toner Black	A	C	Retail - Office Supplies - Consumables	1	1		ea	1.00	No	Yes	VAT	15.00			Sep 26 2023 1:44PM
SP2020-0102	Toner Magenta	A	C	Retail - Office Supplies - Consumables	1	1		ea	1.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-2333	Toner Cyan	A	C	Retail - Office Supplies - Consumables	1	1		ea	1.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-6376	Toner Yellow	A	C	Retail - Office Supplies - Consumables	1	1		ea	1.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP500	Sprint Multi Functional Copier	A	A	Retail - Office Supplies - Equipment	10	10	SP500	ea	10.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP500-1992	Paper Tray	A	B	Retail - Office Supplies - Accessories	2	2		ea	10.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP500-3671	Staple Unit	A	B	Retail - Office Supplies - Accessories	2	2		ea	10.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP500-7223	Fuser Unit	A	B	Retail - Office Supplies - Accessories	2	2		ea	5.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP500-6143	High Yield Reset Lever Gear	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP500-8649	Fuser Heat Roller	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM

VIEW STOCK - A OR B-CLASS PARTS

- Click on the **expand button** in the row of an **A or B-Class part definition** to open the **Stock** frame.
- Here you can:

- View the **Serial Numbers**¹ (**A** and **B-Class** items only) of the current stock.
- View the current stock **Quantity** for each warehouse and bin where the **A** or **B-Class** stock item exists.
- Each **A** or **B-Class** item will be on a single line, so the **Quantity** column will always register **1**.
- View the **Unit Cost**² of each individual single line **A** or **B-Class** items.
- **Collapse** the stock frame when you are done.

PartCode	Description	Status	PartType	CatDescription	Weight	Volume	ModelNo	UnitID/Measure	ShelfLife	SolidSupplier	Taxable	TaxType	Rate	CraftCode	CraftDesc	AmenuDate
SP2020	Sprint Multi Functional Copier	A	A	Retail - Office Supplies - Equipment	10	10	SP2020	ea	10.00	No	Yes	VAT	15.00			Sep 15 2023 4:05PM

WarehouseName	BinName	Batch/SerialNo	Quantity	UnitCost
GT - Main	GT - Receiving Bin	SP2020-91281474	1.00	3,500.00
GT - Main	GT - Receiving Bin	SP2020-88784586	1.00	3,500.00
GT - Main	GT - Receiving Bin	SP2020-90750128	1.00	3,500.00
GT - Main	GT - Receiving Bin	SP2020-49524855	1.00	3,500.00
GT - Main	GT - Receiving Bin	SP2020-03428202	1.00	3,500.00
GT - Main	GT - Receiving Bin	SP2020-3382815	1.00	3,500.00
GT - Main	GT - Receiving Bin	SP2020-34324521	1.00	3,500.00
GT - Main	GT - Receiving Bin	SP2020-17711947	1.00	3,500.00
GT - Main	GT - Receiving Bin	SP2020-45035758	1.00	3,500.00
KZ - Internal Assets	KZ - Internal Assets Bin	SP2020-50437121	1.00	3,500.00
KZ - Main	KZ - Receiving Bin	SP2020-46970482	1.00	3,500.00
KZ - Main	KZ - Receiving Bin	SP2020-86113575	1.00	3,500.00
KZ - Main	KZ - Receiving Bin	SP2020-92323275	1.00	3,500.00
KZ - Main	KZ - Receiving Bin	SP2020-02743938	1.00	3,500.00
KZ - Main	KZ - Receiving Bin	SP2020-59573349	1.00	3,500.00
KZ - Main	KZ - Receiving Bin	SP2020-44982858	1.00	3,500.00
KZ - Main	KZ - Receiving Bin	SP2020-62345767	1.00	3,500.00
KZ - Main	KZ - Receiving Bin	SP2020-07949295	1.00	3,500.00
KZ - Main	KZ - Receiving Bin	SP2020-07629164	1.00	3,500.00
KZ - Main	KZ - Receiving Bin	SP2020-46042446	1.00	3,500.00
KZ - Main	KZ - Receiving Bin	SP2020-51594586	1.00	3,500.00

VIEW STOCK - C-CLASS PARTS

- Click on the **expand button** in the row of a **C-Class** part definition to open the **Stock** frame.

¹A serial number is a unique character string (it can be letters, numbers or a combination of both) that is given to an A or B-class item to distinguish it from other similar items.

²Generally, unit costs represent the total expense involved in creating one unit of a product or service. A unit cost forms the base level for a market offering price. A unit cost can be lowered through economies of scale.

- Here you can:
- View the **Batch Numbers (C-Class items only and, if [batch tracking](#)¹ is enabled, of the current stock.**
- View the current stock **Quantity** for each warehouse and bin where that **C-Class** stock item exists. You will note that there can be several items in a batch.
- View **weighted average**² **Unit Cost** across each batch (for **C-Class** items only). This is calculated over multiple batches, within the same bin location.
- **Collapse** the stock frame when you are done.

PartCode	Description	Status	PartType	CatDescription	Weight	Volume	ModelNo	UnitOfMeasure	ShelfLife	SolidSupplier	Taxable	TaxType	Rate	CraftCode	CraftDesc	AmendDate
SP2020-7223	Fuser Unit	A	B	Retail - Office Supplies - Accessories	2	2	ea	5.00	No	Yes	VAT	15.00				Jan 1 1900 12:00AM
SP2020-6143	High Yield Reset Lever Gear	A	C	Retail - Office Supplies - Spares	1	1	ea	2.00	No	Yes	VAT	15.00				Jan 1 1900 12:00AM
SP2020-8649	Fuser Heat Roller	A	C	Retail - Office Supplies - Spares	1	1	ea	2.00	No	Yes	VAT	15.00				Jan 1 1900 12:00AM
SP2020-5304	Fuser Roller Gear	A	C	Retail - Office Supplies - Spares	1	1	ea	2.00	No	Yes	VAT	15.00				Jan 1 1900 12:00AM
SP2020-4933	Paper Pickup Roller	A	C	Retail - Office Supplies - Spares	1	1	ea	2.00	No	Yes	VAT	15.00				Jan 1 1900 12:00AM

WarehouseName	BinName	Quantity	UnitCost
EC - Main	EC - Receiving Bin	180.00	781.00
FS - Main	FS - Receiving Bin	180.00	781.00
GT - Main	GT - Receiving Bin	180.00	781.00
KZ - Main	KZ - Receiving Bin	180.00	781.00
LP - Main	LP - Receiving Bin	180.00	781.00
MP - Main	MP - Receiving Bin	180.00	781.00
NW - Main	NW - Receiving Bin	180.00	781.00
NC - Main	NC - Receiving Bin	180.00	781.00
WC - Main	WC - Receiving Bin	180.00	781.00
IN - Main	IN - Receiving Bin	180.00	781.00

¹Batch Tracking is a system that allows you to group and monitor a set of stock that share similar properties. Batch tracking enables a company to monitor its inventory with advanced traceability.

²The weighted average method divides the cost of an item available for sale (in stock) by the number of units of that item available for sale. This gives the weighted average cost per unit. This weighted average figure is then used to assign a cost to all of these items in stock.

PARTS RIBBON ACTION BUTTONS

- From this screen you can [Add](#), [Edit](#), and [View](#) a part definition.
- This screen supports the [Save Layout](#) and [Workspaces](#) functionality.
- The **Refresh** button triggers the memory of the system to reload with the most up to date information.
- **Export** allows you to [export](#) the part definition list to an Excel spreadsheet.
- **Reports** allows you to print **Inventory** reports directly from this screen. For more information on selecting and running a report, refer to [All Reports](#).

The screenshot shows the 'Part Listing' screen in a software application. The top navigation bar includes tabs for Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below this is a ribbon with buttons for Add, Edit, View, Save Layout, Workspaces, Refresh, Export, and Reports. The main area contains a table with columns for PartCode, Description, Status, PartType, CatDescription, Weight, Volume, ModelNo, UnitOfMeasure, ShelfLife, SoldSupplier, Taxable, TextType, Rate, CraftCode, CraftDesc, and AmendDate. The table lists various parts such as 'Sprint Multi Functional Copier', 'Paper Tray', 'Staple Unit', 'Fuser Unit', 'High Yield Reset Lever Gear', 'Fuser Heat Roller', 'Paper Roller Gear', 'Paper Pickup Roller', 'Pickup Finger', 'Wiper Blade', 'Mag Roller', 'Mag Roller Sleeve', 'Fuser Film', 'Fixing Film Assembly Unit', 'Maintenance Kit', 'Fuser Cleaning Web', 'Toner Black', 'Toner Magenta', 'Toner Cyan', and 'Toner Yellow'. On the left side, there is a 'Links' panel with a search bar and several navigation tiles: 'Home Supplied', 'Substitutes', 'Documents', 'Roles', 'Stock Control', and 'Processing'.


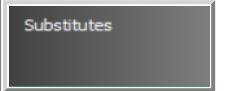
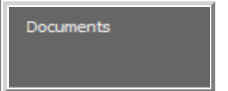
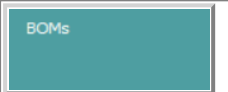
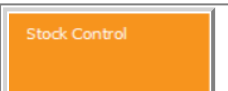
FUNCTIONS AND PROCESSING TILES

On the left side of the **Part Listing** screen is the **Links** panel which contains the part definitions **Functions** and **Processing** tiles.

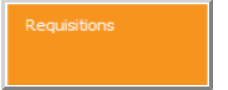
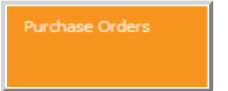
Each tile, when clicked on, will take you to further information concerning the **selected** part definition.

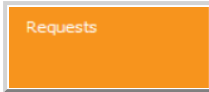
These tiles are also available in the **View Part** and **Edit Part** screens.

FUNCTIONS TILES

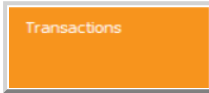
	<p>The Items Supplied tile will direct you to the Suppliers for Part screen. From here you can Add, Edit and Delete linked item suppliers.</p>
	<p>The Substitutes tile will direct you to the Substitute Items for Part screen. Here you can Add, Edit and Delete linked alternative, substitute items.</p>
	<p>The Documents tile will direct you to the Documents for Part screen. Here you can Add, Edit, Delete and View linked digital documents.</p>
	<p>The BOMs tile will direct you to the BOM Listing for Part screen. Here you can Add, Delete and View linked BOMs.</p>
	<p>The Stock Control tile will direct you to the Stock Control for Part screen. Here you can Add, Edit and Delete a part stock control Reorder Point Method and a part stock control Min/Max Reorder Method.</p>

PROCESSING TILES

	<p>The Requisitions tile will direct you to the Purchase Requisitions for Part screen. Here you can Add, Edit, Delete, View, Hold, Release, Approve, Decline and Clone linked purchase requisitions.</p>
	<p>The Purchase Orders tile will direct you to the Purchase Orders for Part screen. Here you can View, Delete and Print linked purchase orders, as well as add Notes, Addresses, and Delivery Instructions to linked purchase orders.</p>



The **Requests** tile will direct you to the **Part Requests for Part** screen. Here you can [Add](#), [Edit](#) and [Delete](#) a linked part request. You can also raise a [Requisition](#) for, [Issue](#), and [Transfer](#) a part. A [Note](#) can be linked, the requesting [warehouse can be changed](#) and the requested part can be [Remapped](#) to another part. A [Picking Slip](#) can also be printed from this screen.



The **Transactions** tile will direct you to the **Transactions for Part** screen where you can [view](#) a data grid of transactional information relating to the part.

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