MMS

Inventory Part Set up

In this manual you will learn to

- Add a new inventory part to part profile screen
- Set up a bin in the warehouse bin definition screen
- Set the mark up on a part in the warehouse definition screen
- Create an inventory adjustment for initial part entry
- Associate parts in vendor catalogs

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812-856-2407 Pager: 812-337-4710

Inventory

Adding a part

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From the Module Menu, choose Inventory. From the Inventory Menu, choose Inventory Part Profile.

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Above you will see a blank Part Profile Screen. Click on the new icon. Below you can see that I have filled in the fields for the part. Description, Class, Commodity, item, type, MSDS required, Active, and UOM. Once you fill in the blanks, click on save.

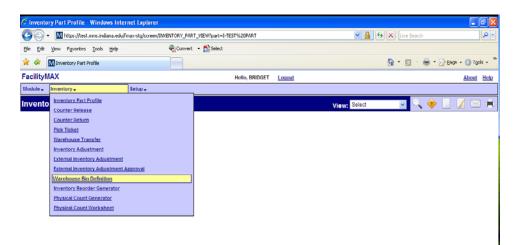
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Here is the saved part profile screen.

Warehouse Bin Definition

Adding a bin and associating a part



You are still using the Inventory Module, but this time from the Inventory Menu, choose Warehouse Bin Definition. Below, you will see what the blank Warehouse Bin Definition screen looks like. Click on the NEW icon.

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Reorder	Quantity	4	Frequency		8					
Target Le	evel									



Name your bin, add a description of the location, choose your warehouse and part. Put in your quantities for reordering purposes. Choose bin order if there is more than one bin with this part. Click the save icon once you have filled in the blanks.

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Quantities		Cycle Count					
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Maximum Quant	ty 7	Cycle Code					
Reorder Level	3	Start Date	Jul 02, 20	09			
Reorder Quantity	4						
Target Level		Frequency					

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Warehouse Definition – Update ONLY



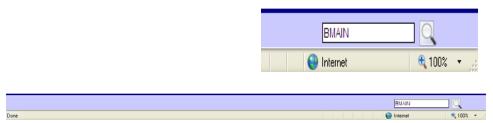
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Now we need to take a look at the Warehouse Definition. This time look at the setup drop down menu and go to warehouse definition.

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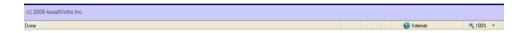
At the very bottom right of the screen, enter the warehouse name and click on the filter icon. In this case I am using BMAIN. (I have enlarged the picture for you)

Click on the edit icon.

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	BLOOMINGTON		BLOO	MINGTON AUX	Monday	Yes	
Facility	SERVICE BLDG	Department	BA-82		Tuesday	Yes	
	1800 N RANGE RD	Coportinoin			Wednesday	Yes	
Property	<u>BL630</u>		BLOU	MINGTON AUX PHYSICAL PLANT	Thursday	Yes	
Location	SERVICE BLDG	Organization	BA-PS	<u>TO</u>	Friday	Yes	
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Once you have clicked the **edit** icon, the fields turn red. Go to the view drop down menu and click on Inventory Parts.

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Part	Description		UOM	Average Cost	Markup Percent
9021000	WELDING ROD PALCO 808 1/8"		BG	0	10
B-A/C CHILLER	A/C CHILLER		EA	0	0
B-A/C DX UNIT	A/C DX UNIT		EA	0	10
B-A/C HEAT PUMP	A/C HEAT PUMP		EA.	0	10
3-A/C TOWER	A/C TOWER		EA	0	0
B-A/C-DX SYS	A/C+< 50 LB UNITS		EA	0	10
B-AHU BLDG SYS	BLDG SYS SF&RF		EA	0	10
B-AHU EXF	AHU EXF		EA	0	0
B-AHU SYS	AHU SYS		EA	0	10
B-AIR COMP	AIR COMP		EA	0	0
B-BACKFLOW DEVICE	BACKFLOW DEVICE		EA	0	0
B-BOILER	HEAT BOLER		EA	0	10
8-8ULDINGS	BUILDING		EA	0	10
B-CHAIR LIFT	CHAIR LIFT		EA	0	0
	CHILLED WATER CLOSED LOOPS		EA	0	10
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B-COLD LOOP B-CYCLORTON CEILING	CYCLORTON CEILING		EA	0	0

Notice there are several pages and the page navigation buttons are on the TOP of this page.

Find your part and click on it

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<u>B0001050</u>	JOHNSON SYSTEM AR CONDITIONING CONTROL COMPRESSOR (USED)	EA	2500.05	10	
80005000	REFURBISHED FIBERGLASS SION MATRIAL PANEL FINSH BOTH SIDES	EA	0	10	
80005050	SLIDE FOR FIBERGLASS SIGNS	EA	16	10	
80008090	R-11 RECLAINED REFRIGERANT GAS	LB	5	10	
B0100035	J-C .007 IN ORFICE RESTRICTOR AGUA R-3710-2007	EA	2.05	10	
80100070	J-C PNEUMATIC TERPERATURE INDICATOR 3-1/2" DIAL 0 TO 100 DEG	EA	53	10	
80100100	PEN-SIZE LOW VOLTAGE DETECTOR 24-90V AC SYSTEM	EA	30.11	10	
BOEMERGENCY	MATERIAL NOT IN INVENTORY	EA	0	10	
B12TESTNGPART34	THIS IS A REALLY BIG TESTING PART FOR TRAINING	EA	0	0	
82000150	ADHESIVE ARMSTRONG 520 16 OZ. CAN	EA	6.54	10	
32001050	BELT SANDING 80 GRIT 2" X 48" NORTON 78072721235	EA	1.28	10	
2001100	BELT PORTABLE SANDER 60 GRIT 3" X 24" NORTON 78072721755	EA	2.3	10	
32001150	BELT PORTABLE SANDER 100 GRIT 3" X 24" NORTON 78072721745	EA	2.08	10	
32001550	BLADE MASONRY 6-1/2" X 1/8" X 1/2"-5/8" BORE	EA	5.74	10	
32001650	BLADE MASONRY 7" X 1/8" X 5/8" BORE	EA	2.91	10	
32002550	CORK GREENSTEEL T-30 7/32" X 48" X 98'	UF	9.9	10	
32004150	CEILING ACOUSTIC OMNIC FILIGREE REG. FINISH 24" X 48" X 5/8	EA	2.16	10	
32004160	CEILING TILE ACOUSTIC 12" X 12" X 3/4" ARMSTRONG NO 580 CIRR	EA	2.37	10	
32004220	CEILING TILE ACOUSTIC 24" X 24" X 3/4" ARMSTRONG NO 584 CIR	EA	3.84	10	
82004300	CEILING ACOUSTIC CLASSIC DESIGN LAY-IN 24" X 24" X 5/8" ARMS	EA	1.65	10	

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(c) 2009 AssetWorks Inc									

Fill in the Account number, Subcode and Mark up percentage. You can use the zoom icon on the account and subcode if needed. Click on the green done flag. Click the green done flag on the parts list page and then click on save on the warehouse definition page.

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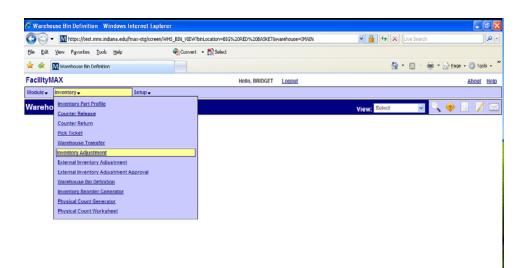
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Part		Adjustment			
Warehouse	BMAIN	Unit Cost	2.0000		
	BPP MAIN STOREROOM				
Part	B12TESTINGPART34				
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	THIS IS A REALLY BIG TESTING PART FOR TRAINING	Quantity	35.0000		
Current Unit Cost	2.0000				
Current Quantity	35				

Done

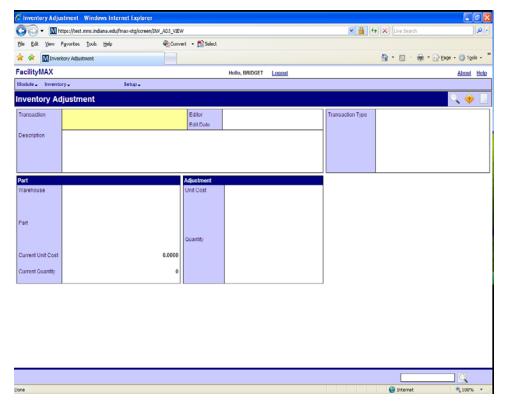
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Inventory Adjustment Initial part entry



You are still in the inventory module, but this time choose inventory adjustment from the inventory menu. Below you will see a blank inventory adjustment screen. Click the new icon.



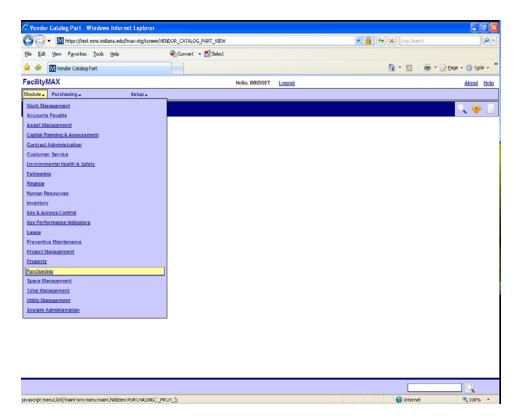
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Inventory Adjustment Transaction Type Please Select C quantity		

First we will start by doing an adjustment to enter a brand new part. The blue box above gives you the choice of Quantity, cost or Initial Entry adjustments. For this example we are choosing Initial Entry.

A transaction number is assigned. Enter a description of the adjustment. **This is very important to document so that others know why you made an adjustment.** Fill in the warehouse, part, bin, unit cost and quantity. You can now click on the save icon.

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	BPP MAIN STOREROOM				
Part	B12TESTINGPART34				
Bin	B-SHELF-34				
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Current Unit Cost	2.0000				
Current Quantity	35				
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Vendor Catalog Part Associate a part and vendor



Now lets associate our part to a vendor catalog. You will need to select Purchasing from the Module Menu. Then from the Purchasing menu, choose Vendor Catalog Part.

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Vendor Catalog Part			🔍 🧇 🗔
Contractor			
Address Code			
Vendor	Inventory	Classification	
Vendor Part	Inventory Part	Class	
UOM			
	UOM	Commodity	
Unit Cost	Unit Cost \$0.0000		
Subledger	Unit Cost \$0.0000		
Lead Time	Issue Factor	Inventory Item	
	Preference		
Active			

This is dealing with one part and one vendor. The Vendor Catalog deals with multiple parts for a vendor. Click on the new icon at the top right.

Choose your contractor/address code, enter the vendor part number, a description, UOM, Cost, lead time, and INV part number. Click zoom and the rest will auto fill. This is where you change the issue factor if needed. Click on save once you have all of the information entered.

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lodule - Purch	asing - Setup - Reports -	RECEIVE DISBURSE			
/endor Cat	alog Part				S 1
Contractor	00011126900				
	BIG LOTS				
Address Code	BL				
/endor		Inventory		Classification	
Vendor Part	VENDORTESTINGPART34	Inventory Part	B12TESTINGPART34	Class	B-PLUMBING
	THIS IS JUST A PART				BPP PLUMBING RELATED ITEMS
	USED FOR TRAINING		THIS IS A REALLY BIG TESTING PART FOR		BFF FLOMBING REDATED TIENS
MOL	EA 8	UOM	EA	Commodity	B-CHROME
	EACH				
Unit Cost	1.00	Unit Cost	\$1.0000		BPP CHROME / PLUMBING
Subledger	Material	Issue Factor	1	Inventory Item	B-ELL
Lead Time	5				
Active	Yes 🗸	Preference			BPP ELL, CHROME

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Vendor Catalog

🖉 Vendor	Catalog Part - Windows Internet I	Explorer						
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venuo	Purchase Receive							
	Purchase Card							
	Spot Purchase							
	Purchase Disbursement							
	Blanket Purchase Order							
	Vendor Catalog							
	Vendor Catalog Part							
	Reverse Disbursement							

Staying in the purchasing module, select vendor catalog from the purchasing menu this time. Lets look at the Vendor Catalog. Click on the search icon in the upper right corner.

🖉 Vendor	Catalog - Windows Intern	ret Explorer						
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* *	C Vendor Catalog						🏠 - 🖶 - 🕞 Bogo	- 💮 Tgols - »
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Address (Code							
Parts I	Listing		,					
Vendor P		Description	UOM	Unit Cost	Class	Commodity	Inventory Part	
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Module + Purchasing +	Setup 🗸	Reports - RECEIVE	DISBURSE								
Vendor Catalog 📃 🖉 🖧 📎											
Contractor											
Contractor	= ~	8)								
Description	contains 👻	big lots			< >						
Address Code											
Address Code	=	8									

I am looking for Big lots by description so I am going to use CONTAINS in my drop down menu. You can look by the contractor number also if you know it. Click the execute search icon.

C Vendor Catalog - Windows Interne	t Explorer a.edu/mms-stg/screen/VENDOR_CATALOG_BROWSE				h P
C C Hitps://test.fims.indians	sedumms-sig/scieen/VENDUR_CATADDS_BRUWSE	rdescription#BlG-%20L015	fadescription, operator=		🖶 • 🔂 Eage • 🍈 Tgols •
FacilityMAX		Hello, BRIDGET	Logout		About Heli
Module - Purchasing -	Setup Reports Receive DISBU	RSE			
Vendor Catalog					् 📃 🄇
Contractor	Description			Address Code	
00011126900	BIG LOTS			BL	
00011126900	BIG LOTS			N	

There are two results. Make sure you choose the right address code. We want BL

🕈 Vendor Catalo	g - Windows	Internet Explorer										
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🈫 🕸 🗘 Ve	ndor Catalog						💁 • 🖶 • 🗈 Bage • 🎯	Tgols +				
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Vendor Catalog 🔍 🧇 🔏 🖂												
Contractor	000111269	00]									
	BIG LOTS											
Address Code	BL											
Parts Listing												
Vendor Part		Description	UOM	Unit Cost	Class	Commodity	Inventory Part					
VENDORTESTING	PART34	THIS IS JUST A PART USED FOR TRAINING MANUALS	EA	\$1.0000	8-PLUMBING	B-CHROME	B12TESTNGPART34					

My test part is the only one for Big Lots but if there were more in the catalog they would all be listed here.

🖉 Vendor Catalog	Part - Windows Internet Explorer				
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/endor Cata	log Part				S 🗎
Contractor	35101671701]			
	SOUTH CENTRAL COMPANY, INC.				
Address Code	BL				
Vendor		Inventory		Classification	
Vendor Part	12TESTING34PART	Inventory Part	B12TESTINGPART34	Class	B-PLUMBING
	THIS IS THE TESTING OPART FOR MANUALS		THIS IS A REALLY BIG TESTING PART FOR		BPP PLUMBING RELATED ITEMS
UOM	EA ®	UOM	EA	Commodity	B-CHROME
	EACH	Unit Cost	\$1.0000		BPP CHROME / PLUMBING
Unit Cost	0.95	Chin Coust	1.000		BPP CHROME/PLOMBING
Subledger	Material	Issue Factor	1	Inventory Item	B-ELL
Lead Time	2				BPP ELL, CHROME
Active	Yes 🛩	Preference			OFF ELL, UNITOME
	1				

I have added this part to the South Central catalog so that I can show how the part screen looks with two vendor's associated to the part.

If I go back to my Part Profile screen and pull up the part, I can look at the associated information. Here I have pulled up the part, I am going to click edit to show you how to set your vendor preference. Look at the drop down menu at the top of the screen.

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Part	B12TESTINGPAR	T34	Editor BLGENTRY		Extra Description Substitute Parts
December 201			Edit Date Jul 02, 2009 01:56 PM		Vendors Warehouses
Description	THIS IS A REALLY BIG TESTING	S PART FOR TRAININ	G 🔄		Notes Log
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lassification		Attributes			
Class	B-PLUMBING	Туре	Material 👻		
		Cycle Code			
	BPP PLUMBING RELATED	Manufacturer			
Commodity	B-CHROME				
		Model		Active	Yes 🗸
	BPP CHROME / PLUMBING	MSDS Number			
tem	B-ELL	MSDS Number			EA ®
					EACH
	BPP ELL, CHROME	MSDS Required	100 🗸	UOM Fractional	No 🛩
lost		Analysis		Quantity	
werage Cost	\$1.00	LastIssue		On Hand	25.00
on Hand Value	\$25.00	Last Commitment Last Receive		Committed On Order	0.00
	323,00	Last Adjustment	Jul 02, 2009 02:57 PM	Expected	25.00

Vend	lors - Wind	lows Inte	met Explorer											
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/endors														
Part		B12T	ESTINGP	ART34		Editor Edit Date	BLGENTRY Jul 02, 2009 01:	6 PM						
Edit Date Juli 02, 2009 01:56 PM Description THIS IS A REALLY BIG TESTING PART FOR TRAINING														
ine	Vendor		Address Code	Description			Preferen	e Reorder Method	Туре	Blanket Number	Bank	Account		
	000111269	00	BL.	THIS IS JUST A PAR MANUALS	T USED FOR	R TRAINING								
	351016717	01	BL	THIS IS THE TESTING	3 PART FOR	RMANUALS								
	AssetVor													

You can see that there are 2 vendors associated with this part. Lets click on the second vendor which is South Central.

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Here I will enter 1 in the preference field so that this will be the first vendor selected when this part is ordered. Select the re-order method and if you choose PO for that, fill in the PO type. Click on the done flag. To get back to vendors, click on the done flag again to get back to the part screen. Click save.

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Vendors 🚫 🏴														
Line	2													
Contractor		Purchase Order	Purchase Order Purchase Card											
Contractor	35101671701	PO Type		8	Bank	8								
Address Code	BL													
	THIS IS THE TESTING PART FOR MANUALS													
Preference	1	Blanket Number		9	Account									
Reorder Method	Image:													

🖉 Inventory Part	Profile - Windows Internet Explo	ner					
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Inventory P	art Profile				Vie		💌 🔍 🛄 📈 🛤
Part	B12TESTINGPAR	Т34	Editor	BLGENTRY		Select Extra Descript Substitute Par	ion
			Edit Date	Jul 02, 2009 01:56 PM		Vendors	5
Description	THIS IS A REALLY BIG TESTING	PART FOR TRAINING	5			Warehouses Notes Log	
						User Defined I Related Docu	
							nenca
01							
Classification Class	B-PLUMBING	Attributes Type	Material				
01000	D-PEONDING		material				
	BPP PLUMBING RELATED	Cycle Code					
Commodity	B-CHROME	Manufacturer					
Commoniy	B-CHRONIE						
	BPP CHROME / PLUMBING	Model				Active	Yes
	B-ELL	MSDS Number				UOM	EA
ltem	D-CLL						EACH
	BPP ELL, CHROME	MSDS Required	No			UOM Fractional	No
			10				10
Cost		Analysis				Quantity	
Average Cost	\$1.00	Last Issue Last Commitment				On Hand Committed	25.0000
On Hand Value	\$25.00	Last Communent				On Order	0.0000
		Last Adjustment	Jul 02, 2009 0	2:57 PM		Expected	25.0000
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You can also view the associated warehouses by clicking on warehouse on the drop down menu.

C Wa	rehouses - '	Windows In	lernet Explorer							
G)- 🖸	https://test.fin	ns.indiana.edu/mms-stg/scre	en/BIN_VIEW				 Certificate Error 	👍 🗙 Live Search	P -
* 4	🕈 🗘 Wa	ehouses							<u>ه د</u>	🖶 🔹 💽 Bage - 🎯 Tgols - 🇯
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Ware	ehouse	5								ui N
Part Descr	iption		EALLY BIG TESTING PA		Editor Edit Date	BLGENTRY Jul 02, 2009 01:56 P	M			
Line	Warehou	se	Bin	Description						Quantity
1	BMAIN		B-SHELF-34	THE BIG METAL SH	HELF IN BACK OF	STOREROOM				25

Done

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