Create a New Part

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Prior to setting up new parts, three key setup tables must first be populated with your company values that are used in the part setup. These setup tables -- Warehouse, Product Line, and Manufacturer -- are located and maintained within the SedonaSetup application. The Manufacturer table is optional except if your company is using either QuoteWerks or WeSuites quoting software. Setting up manufacturers is highly recommend to make the task of searching for parts easier.

Follow the topic links below for information on these three setup tables.

Warehouse   **Product Line**   **Manufacturer**

To create a new inventory part follow the instructions below.

1. Navigate to the Inventory module from the Main Application Menu. Select the Parts option within the Inventory module tree.

2. The Inventory Parts search list will be displayed. Click the New button located at the lower right of the form.

3. The Part Edit/Part Detail form will be displayed. This form is divided into several setup information forms, each of which will be defined within this topic group. If your company is not using Stock Tracking, the Warehouse form will not be available. The Part Detail, Vendors and Warehouse forms are required; all other information is optional. Continue on for Part Detail form setup instructions.

Part Detail Form

Data Entry Field Definitions

Required fields are denoted with an asterisk after the field name.

Description Section

- Part (Code)* - This field is used to enter the code by which the warehouse is identified. Most companies use the manufacturer's part number.
- Description* - The description field will automatically fill in with the value entered into the Part Code field. Typically this description is very generic and will print if the part is sold on a Miscellaneous Invoice. Most companies do not enter the actual part number as a part of the description of the part. The User may enter up to 50 characters into this field.
- Detail* - The description field will automatically fill in with the value entered into the Part Code field. This is considered the technical description of the part. The User may enter up to 256 characters into this field.
- Product Line* - Select the appropriate Product Line from the drop-down list. If a new Product Line needs to be created, click the "+" icon to the right of the field to add a new record to the Product Line setup table. Once the new Product Line is saved, it will appear in the drop-down list for selection.
- Manufacturer - Select the appropriate Manufacturer from the drop-down list. If a new Manufacturer needs to be created, click the "+" icon to the right of the field to add a new record to the Manufacturer setup table. Once the

new Manufacturer is saved, it will appear in the drop-down list for selection.

- Manuf Part Code - Enter the manufacturer part number for the new part.
- Manuf Warranty* - Select from the drop-down list the appropriate manufacturer's warranty for the new part.
- U.P.C. - If available, enter the Universal Product Code for the part (number below the barcode on a part label).
- Notes - The User may enter information which is pertinent to the part. For example, if another part is needed when using this part, you may type in a note referencing the other part.

Costing Section

- Method* - Select the costing method from the drop-down list that will be used for this part. Standard Costing is highly recommended for regular inventory parts.
- PPV Account* - The field will auto-populate with the PPV Account assigned in Inventory Setup in the SedonaSetup module. Consult your accounting team prior to changing this account number from the default. This account is used when the purchase cost on the Vendor Bill is different than the received cost from a Purchase Order.
- Direct Expense Account* - Select the Cost of Goods sold G/L account that will be used when direct expensing a part purchase on Jobs or on a Miscellaneous Invoice.

AR Setup Section

- Invoice Item* - Select the Invoice Item from the drop-down list that will be used when creating an invoice for this part. The income account linked to the Invoice Item will be used when a part is sold through a new Installation Job or an over the counter sale made with a Miscellaneous invoice.

Sales Section

- Invoice Description* - This field will automatically populate with the information entered into the Description field; you may override this description. The Sales description will print on customer invoices if parts are sold separately on a Job or on a Miscellaneous invoice.
- Price - Enter the default sales price that will be used on parts sales for Jobs or Miscellaneous invoices.
- Pricing Level - To the right of the Price field is the Price Level setup button. Your company has the ability to create up to 10 unique price levels. For more detailed information on the setup and use of this feature click on this link: Part Price Levels Any Price Levels setup for the Sales Price will copy down to the Price Levels for Service Price 1.
- Available for Sales - The option is used with the QuoteWerks, WeEstimate, and SalesAutomation applications. If this part is to be exported to the QuoteWerks, WeEstimate, or SalesAutomation parts list, select this option.

Service Section

- Each inventory part may have two price levels. Each Service Level is linked to a Service part price level. When service is performed on a service ticket where parts are used, the application uses the part price of the price level setup on the service ticket service level.
- Invoice Description* - This field will automatically populate with the information entered into the Description field; You may override this description. The Service description will print on Service Ticket invoices when invoicing the customer for this part.
- Price 1 - Enter the default level 1 sales price that will be used on parts sales for Service or Inspection Tickets.

- Pricing Level - To the right of the Price 1 field is the Price Level setup button. Your company has the ability to create up to ten unique price levels. For more detailed information on the setup and use of this feature click on this link: Part Price Levels
- Price 2 - Enter the default level 2 sales price that will be used on parts sales for Service or Inspection Tickets.
- Available to FSU - Select this option if this part is to be available to Technicians using the Field Service Units or SedonaX Mobile. This field is only available to SedonaOffice customers who have purchased the add-on module FSU or SedonaX Mobile.

Options

- Inactive - This check box should remain un-checked unless the part is no longer going to be used. If a part is marked as inactive, all history remains stored in the database for reporting and research purposes.
- Part Kit - If the part is a kit; the part is comprised of one or more other parts select this option. If this option is selected, a new data entry form, Parts in Kit will be displayed to the right of the Warehouses form. A part should only be marked as a Kit if your company is purchasing the part as a kit. Refer to the Part Kit setup topic for details on how to build a Part Kit.
- Special Order - If this option is selected, the part may only be ordered on a Purchase Order as a Direct Expense part. Special Order parts are devices your company rarely orders and do not want to keep as a part of your inventory.
- Customer Equipment - This option should be selected on all parts that will become a part of a System Equipment List. Basically this indicates whether this is a serviceable part. Parts such as wire or miscellaneous hardware are typically not flagged as Customer Equipment.
- Stock Item For Jobs - This option works in conjunction with the Job Materials List. If a Part is flagged as a Stock Item, then it is assumed that the part is typically in stock and the application will not allow you to create a Purchase Order (through the Job) unless the flag is removed from the Job Materials List.
- Freeze All Purchasing - If a Part is flagged to freeze purchasing, a User will not be able to select this part on a Purchase Order.
- Ship Weight - Enter the weight of the part (in pounds). This field works in conjunction with the Shipments feature.
- Labor Units - The total number of labor units required to install one of these devices. This option works in conjunction with the Job Materials List. If values are entered into this field, when parts are selected on the Job Materials list, the application will tally up all the labor units for all the parts entered to arrive at a total estimated labor units for the Job.

Vendors Form

4. The Vendors form is used to create a list of Accounts Payable Vendors from which the part may be purchased. You may have an unlimited number of Vendors on this list, however only one Vendor may be flagged as the Primary Vendor; the Vendor from which the part is most frequently purchased. Flagging a Vendor as the Primary is used in the Job Management module with the auto Purchase Order creation feature.

When this form is first accessed, the Vendor code field will default to the Default Vendor from SedonaSetup; the Vendor Part Number will automatically fill with the value entered in the Part Code field on the Part Detail form. If the defaulted Vendor this is not the correct Primary Vendor, change the Vendor by clicking the drop-down arrow to the right of the Vendor field and select the desired Vendor from the list.
Definitions for each data entry field on the Vendor setup form may be found below.

Vendors Form - Data Entry Field Definitions

- Vendor - Select an Accounts Payable Vendor from the drop-down list.
- Vendor Part - Enter the part number used by the Vendor. If the Vendor is a parts distributor, this part number may be different from the Part Code entered on the Part Detail form.
- Description - Type in the Vendor's description for the part. If the description is the same as entered on the Part Detail form, you can copy and paste into this field.
- Purchase Cost - Enter the cost to your company when purchasing one of these parts.
- List Price - The List Price is the Vendor's suggested retail price and may be used in the export to QuoteWerks.
- Package Qty - Enter the multiple the part is purchased in - typically 1. If the part you are creating is always sold in multi-quantity packaging, then enter that value. The purchase cost would be the amount for the multi-quantity package. When you setup the cost of the part on the Warehouse form, you would enter the cost of each individual part within the package. When a purchase order is received for multi-quantity parts, the application explodes the quantity into the warehouse. If you are buying a multi-quantity part but you always issue the part from stock as a package, then enter the quantity of 1 into this field.
- Primary Vendor - If this is the Primary Vendor from whom the part is purchased, select this option.

Once all fields have been populated, click the Add button. To add additional Vendors, click the New button at the lower right of the form and fill out the appropriate information.

5. When finished entering all Vendors, navigate to the Alt. Parts form.

ALT Parts Form

6. You may create a list of Alternate Parts that may be used in the event this Part is unavailable or may have a long purchase lead-time. Alternate Parts may also be used to inform your Users that a part has been discontinued and a new Part should be used to take its place. If using this functionality to flag discontinued parts, it would be a good idea to change the description fields on the Part Information form to “DISCONTINUED see Alt. Parts”.
When finished entering a list of Alternate Parts continue on to the Warehouses form.

If your company is not using Stock Tracking, the Warehouse form is not displayed; continue on to the Custom Fields form.

Warehouse Form

An unlimited number of Warehouses may be linked to a Part. The Warehouses feature only applies when the Stock Tracking feature has been activated in SedonaSetup. If Stock Tracking is not being used, one Main Warehouse is automatically created for processing inventory transactions. A Warehouse may be a main stocking location or vehicles for service technicians or installers.

7. Multiple Warehouses may be linked to the Part record. The first Warehouse selected and saved will be considered the primary stocking location. Click the Add button after entering all information for the warehouse. To add additional Warehouses to the list, click the New button and repeat the process until all needed Warehouse records are added to the list.

When finished entering all Warehouses, continue on to the Custom Fields form.

Warehous Data Entry Fields

- Warehouse - Select a warehouse from the drop-down list.
- Min, Max - These two fields are used if your company wants to maintain minimum and maximum stock levels for the part. The values entered into these fields is used by the Suggest Purchase Order function to determine when parts need to be reordered. These fields are optional.
- Row, Shelf, Bin - These three fields are used to identify the stocking location of the part within the warehouse. Your may use one, or all of the stocking location fields. Values entered into these fields may be used as sorting selections when printing Physical Inventory Count Sheets. These fields are optional.
- Standard Cost - This field is only available if your company is using the Standard Costing Method. Enter the cost at which the part will be valued.
- Set All Warehouses - If the part is to be valued at the same Standard Cost in all warehouses linked to the part, select this option; highly recommended.

Custom Fields Form

8. Custom Fields are used to entered additional information related to the Part. If this form is grayed-out, your company has not setup this form and it will not be available for use. If the User does not see the Custom Fields form, this indicates permissions have not been granted to the User to use this option. If your company is using the Custom Fields, enter information according to your company policy and procedures.

When finished, click on the Documents tab.

Documents Form

The Documents form is used to attach existing documents or scan and attach documents to the Part record. This form is not available until the Part has been saved. After saving the Part, retrieve the Part record in Edit mode to add Documents.

Adding documents to a part is only available to SedonaOffice customers who have purchased the add-on module SedonaDocs.

Once all information has been entered on the Part Detail, Vendors, Alt Parts, Warehouses and Custom Fields, click the Save button located at the lower right of the Part Edit form to save the part setup information.