

Creating a code for a bought in item

1. Go to Product Information Management > Common > Released Products

Released products (Unsaved filter)

Item number	Product name	Coverage group	Created date and time	Production pool	Gross width
00130632	ESPA C/C Nozzle Kit	FGEU1	15/07/2021 10:54:09		0.00
01-19453	AquaJet 50 Bottom Housing		06/02/2018 14:14:59		0.00
0546NT	O Ring NT Size 343 for 5114-2C	PTO	29/07/2014 10:21:02		9.00
1000010423	Silen 100 Pump Body		27/01/2015 14:03:02		0.00
1040	Fan for Multipool Pump	FGUK2	07/04/2017 15:03:17		12.00
10433	Fan Cover for Multipool Pump	FGUK2	07/04/2017 15:06:00		14.00
1090100000000	10uf Capacitor for AG8/10/14 Pumps	FGEU1	20/02/2017 16:07:39		0.00
1090120000000	12.5uf Capacitor for AG16 & AV50/75/100 Single Phase Pump	FGEU1	20/02/2017 16:04:13		3.00
1090200000000	20uf Capacitor for AV150 Single Phase Pump	FGEU1	20/02/2017 15:48:16		3.00
1090250000000	25uf Capacitor for AV200/250 Single Phase Pump	FGEU1	20/02/2017 16:00:13		3.00
110-0120	3/8in Clear Vinyl Tubing (per M only)	FGEU1	31/10/2012 17:03:40		0.00

00130632 : ESPA C/C Nozzle Kit
 Product: 00130632
 Description: ESPA C/C Nozzle Kit
 Product dimension group: WHLOC
 Storage dimension group: WHLOC
 Tracking dimension group: NONSER

2. Click on Product

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 Description: ESPA C/C Nozzle Kit
 Product dimension group: WHLOC
 Storage dimension group: WHLOC
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3. Enter in the product details
 - i. Item Number
 - ii. Item Description
 - iii. Item Model Group = STDSTK
 - iv. Item Group = RELAX or RELAXSPA or RAWMAT
 - v. Storage Dimension Group = WHLOC
 - vi. Tracking Dimension Group = BATNO
 - vii. Unit of Measurements, if item is sold in box quantities = Box, if sold singly = Item, if the item is a raw material there are units of measures for kg's, litre's etc.
 - viii. VAT Groups – Purchase = 1 (non UK) 2 (UK Vat Supplier) Sales = 6

Click OK once finished

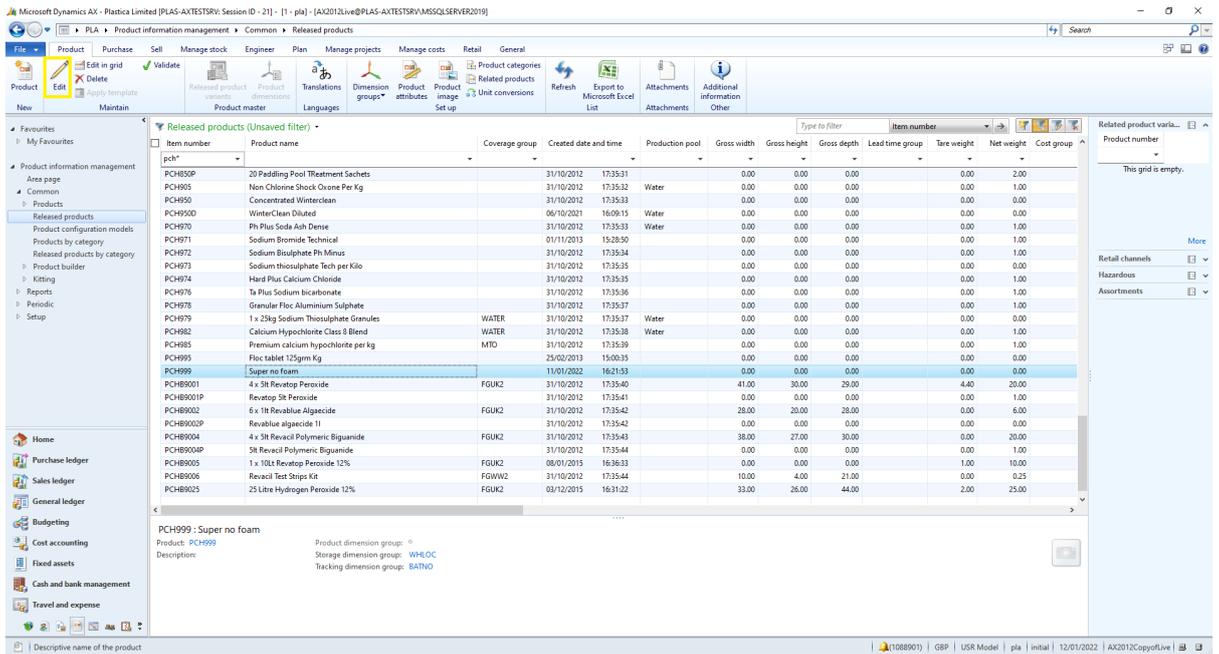
 New Released product (1) ✕

Create product

Product type:	<input type="text" value="Item"/>		
Product subtype:	<input type="text" value="Product"/>		
Identification		Company-specific identification	
Product number:	<input type="text" value="PCH998"/> ✓	Item number:	<input type="text" value="PCH99"/> ✓
Product name:	<input type="text" value="Super no foam"/>	Search name:	<input type="text" value="PCH999"/>
Search name:	<input type="text" value="PCH999"/>		
Reference groups		Units of measurements	
Item model group:	<input type="text" value="STDSTK"/>	Stock unit:	<input type="text" value="Ltr"/>
Item group:	<input type="text" value="RAWMAT"/>	Purchase unit:	<input type="text" value="Ltr"/>
Storage dimension group:	<input type="text" value="WHLOC"/>	Sales unit:	<input type="text" value="Ltr"/>
Tracking dimension group:	<input type="text" value="BATNO"/>	BOM unit:	<input type="text" value="Ltr"/>
Purchase taxation		Sales taxation	
Item VAT group:	<input type="text" value="2"/>	Item VAT group:	<input type="text" value="6"/>
Calculate withholding tax:	<input type="checkbox"/>	Calculate withholding tax:	<input checked="" type="checkbox"/>
Item withholding vat group:	<input type="text"/>	Item withholding vat group:	<input type="text"/>

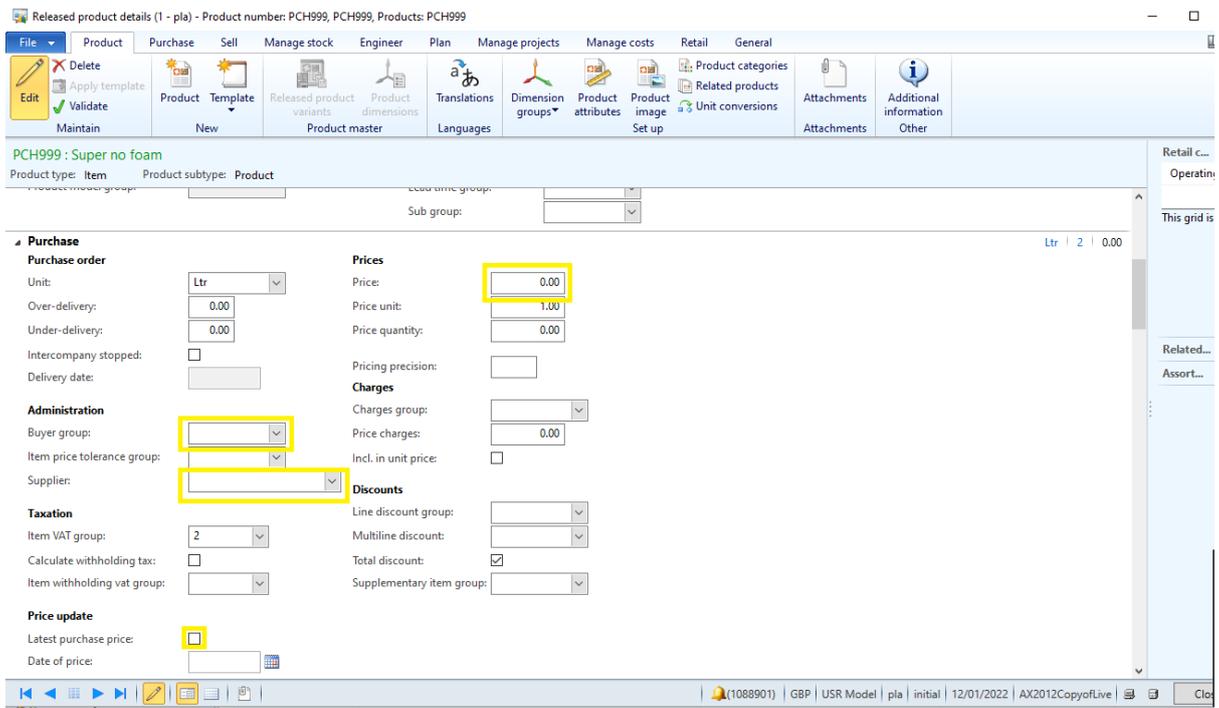
 Show fewer fields
OK
Cancel

4. Now select your newly created code from the list and click Edit



5. Scroll down to the purchase section and populate

- i. Buyer Group – FG = Factored goods (the item will be sold) WT = WT Raw Material (used in the production of another item)
- ii. Supplier
- iii. Tick Latest purchase price (this will update the last price paid each time an invoice is posted)
- iv. Price (the current purchase price)



6. If the item is also to be sold scroll down to the sale section and populate
 - i. Sales Price
 - ii. Charges Group (this is for when we are applying surcharges to products)
 - iii. Line discount group

Released product details (1 - pla) - Product number: RSPAKit99, RSPAKit99, Products: RSPAKit99

Product type: Item Product subtype: Product

Sell

Unit: Box

Over-delivery: 0.00

Under-delivery: 0.00

Intercompany stopped:

Administration

Commission group:

Taxation

Item VAT group: 6

Calculate withholding tax:

Item withholding vat group:

Price update

Sales price model: None

Base price: Purchase price

Contribution ratio: 0.00

Charges percentage: 0.00

Date of price:

Base sales price

Price: 0.00

Price unit: 1.00

Charges

Charges group:

Price charges: 0.00

Incl. in unit price:

Discounts

Line discount group:

Multiline discount:

Total discount:

Supplementary item group:

Alternative product

When to use: Never

Alternative item number:

Configuration:

Size:

Colour:

Style:

Warranty

Print Warranty Info on Documents: No

Warranty:

7. Scroll down to Foreign Trade and populate
 - i. Commodity Code
 - ii. Country of origin

Released product details (1 - pla) - Product number: RSPAKit99, RSPAKit99, Products: RSPAKit99

Product type: Item Product subtype: Product

Foreign trade

Intrastat

Commodity: 28362000

Additional units: 0.000

Charges percentage: 0.00

Origin

Country/region: CHN

State/province:

8. Scroll down to Manage Stock and populate
 - i. Net Weight
 - ii. Tare Weight (if packaged Factored Goods or Raw Material like a box or bottle populate this field instead of Net Weight)
 - iii. Gross depth (if Factored Goods)
 - iv. Gross width (if Factored Goods)
 - v. Gross height (if Factored Goods)
 - vi. Volume (if Factored Goods)
 - vii. Batch number group (Leave blank if the supplier labels their product with a batch number or select WAT_PO to use the purchase order number)

Released product details (1 - pla) - Product number: PCH999, PCH999, Products: PCH999

Product type: Item Product subtype: Product

Intrastat
 Commodity:
 Additional units: 0.000
 Charges percentage: 0.00

Origin
 Country/region:
 State/province:

Manage stock

Weight measurements

Net weight:	0.00
Tare weight:	0.00
Gross weight:	0.00

Physical dimensions

Gross depth:	0.00
Gross width:	0.00
Gross height:	0.00
Volume:	0.00

Tracking

Batch number group:

Serial number group:

Over-delivery: 0.00

Stock
 Counting group:
 Unit: Ltr

Shipping and receiving
 Arrival handling time: 00:00
 Sort code: 0

Potency
 Base attribute:
 Target:
 Record the attribute value: Receipt entry

Packaging
 Packing group:
 Packing quantity: 0.00
 Package handling time: 00:00:00

Group that determines how a requirement is calculated for the item. (1088901) | GBP | USR.Model | pla | initial | 12/01/2022 | AX2012CopyofLive | Close

9. Scroll down to Engineer and populate
 - i. Shelf life (this is the product life in days)

Released product details (1 - pla) - Product number: PCH999, PCH999, Products: PCH999

Product type: Item Product subtype: Product

Transfer orders

Packing quantity: 0.00
 Over-delivery: 0.00 Package handling time: 00:00:00
 Under-delivery: 0.00
 Yield
 Yield percent: 0.00

Engineer

Measurement

Height:
 Width:
 Depth:
 Density:

Bill of materials

BOM unit: Ltr
 Constant scrap:
 Variable scrap:
 Level: 0
 Phantom:
 Auto approve BOM:
 Auto-report as finished:
 Max Report as Finished:
 Last updated Date / Time: 00:00:00

Production

Production pool:
 Production group:
 Property:
 Arrival:
 Flushing principle: Start
 Shelf Life (days): 1825

Product Builder

Modelling enabled:
 Hide dialogue box:
 Hide approval dialogue:
 Autostart configuration:
 Mandatory configuration:

Formula planning

Production type: BOM

Identification of the buyer group.

10. Scroll down to Plan and populate the Cover Group

Released product details (1 - pla) - Product number: PCH999, PCH999, Products: PCH999

Product type: Item Product subtype: Product

Max Report as Finished:
 Last updated Date / Time: 00:00:00

Formula planning

Production type: BOM
 Planning formula:

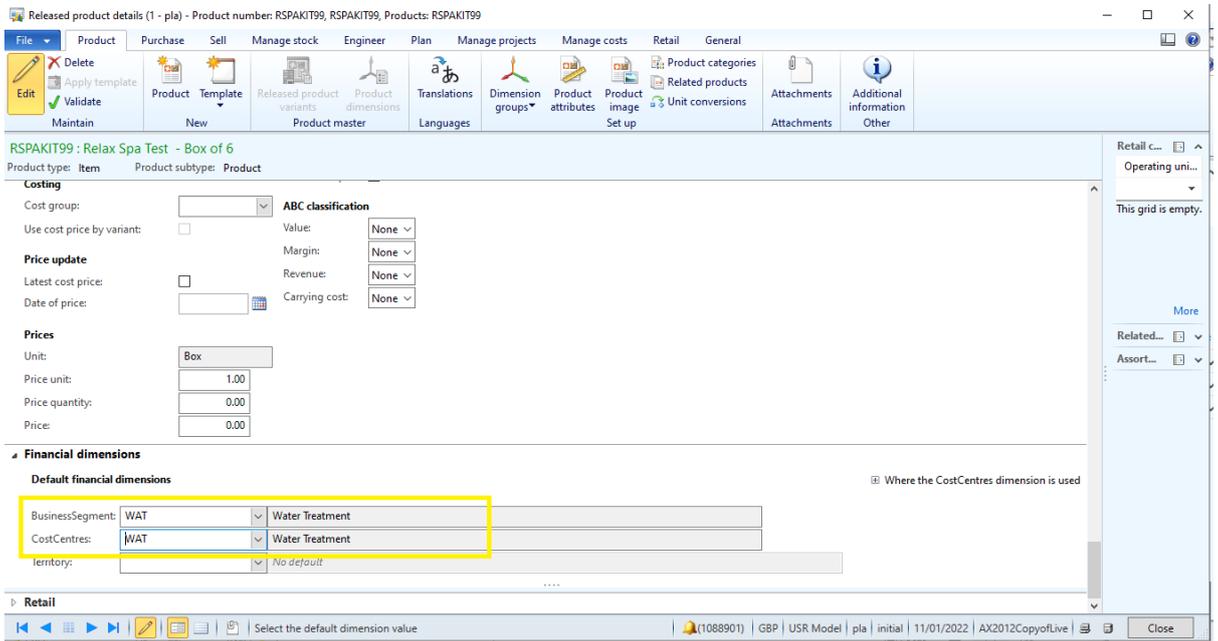
Calculation

Calculation group:

Plan

Coverage group: FGEU1
 Forecasting group:

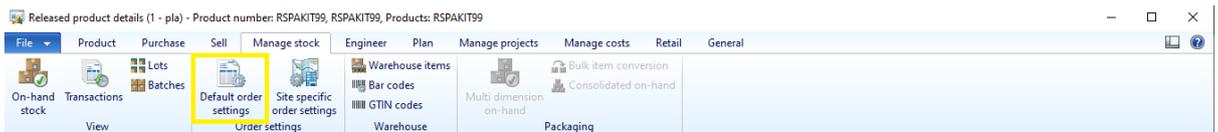
11. Scroll down to Financial dimensions and populate
 - i. Business Segment = WAT
 - ii. Cost Centre = WAT



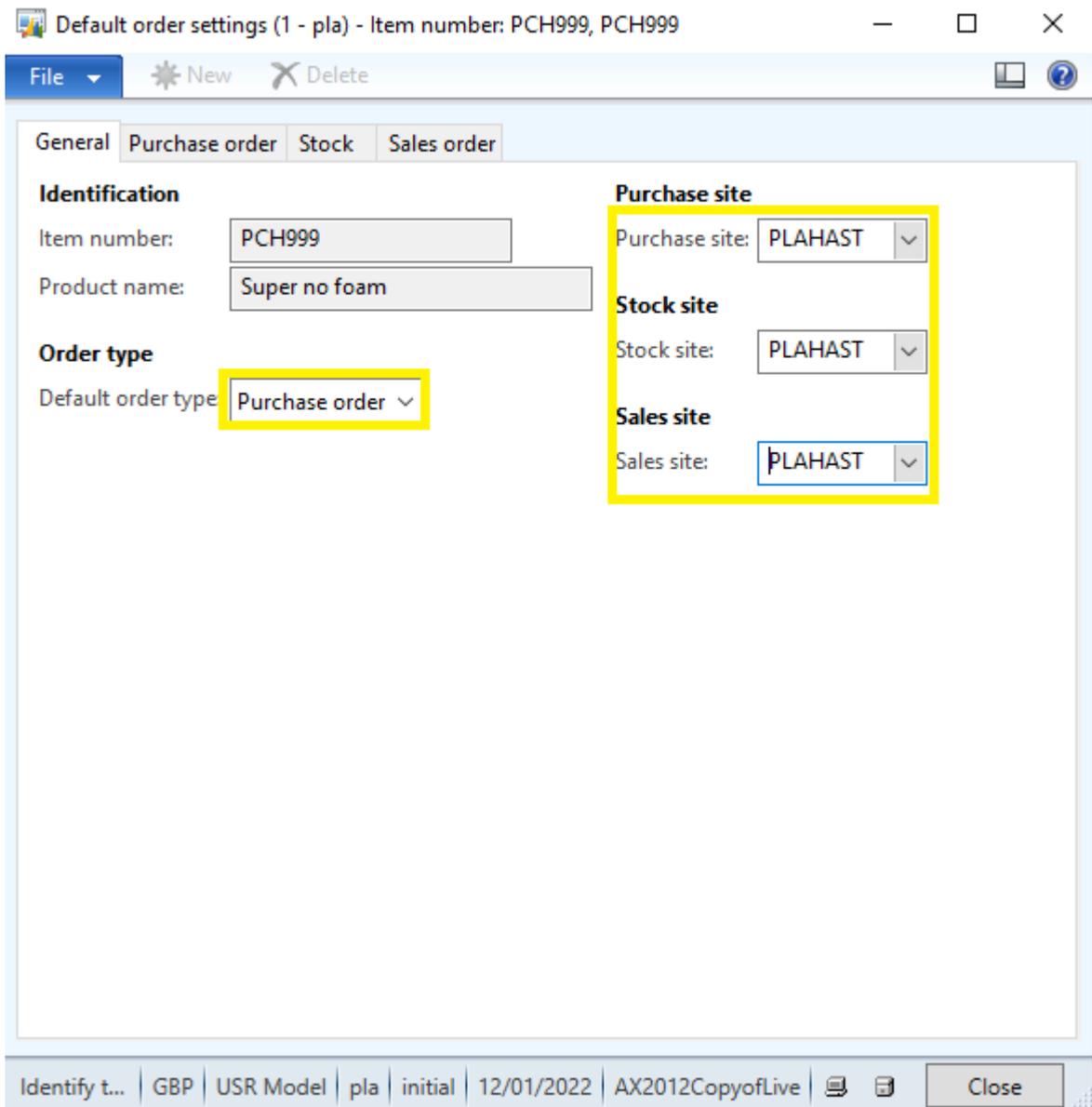
12. On the top navigation ribbon click on Manage Stock



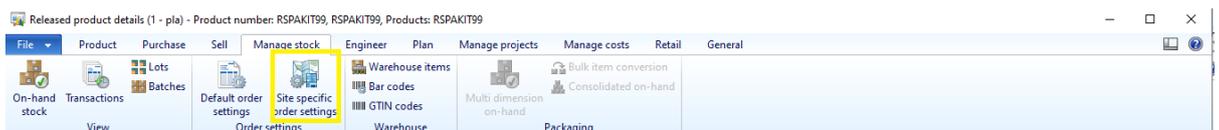
13. Click on Default order settings



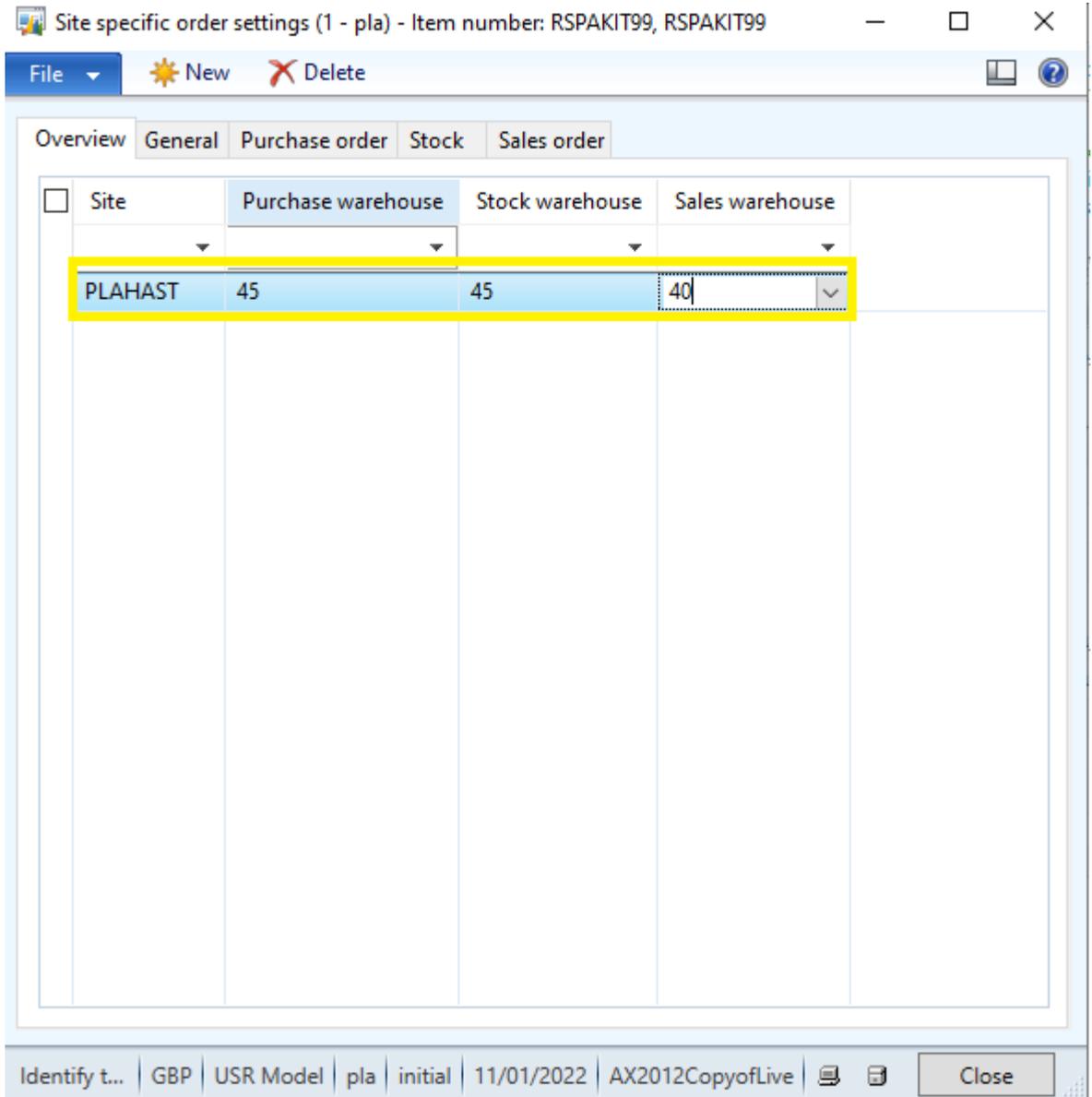
14. Populate the following
- i. Default order type to Purchase order
 - ii. Set Purchase, Stock and Sales sites to PLAHAST
 - iii. Close window



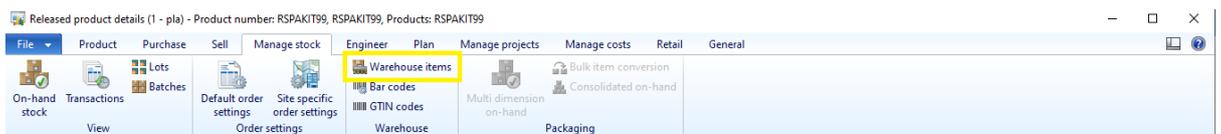
15. Click on Site specific settings



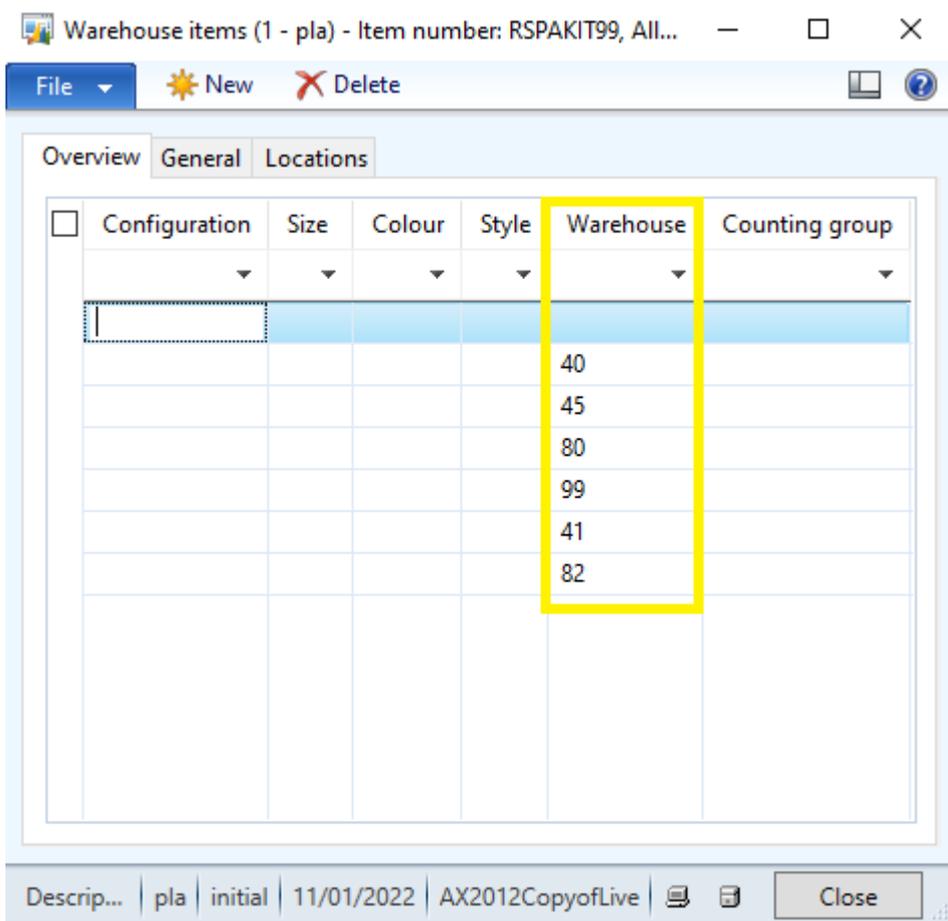
16. Populate the following fields
 - i. Site to PLAHAST
 - ii. Purchase warehouse to either 45, 80 or 82
 - iii. Stock warehouse to either 40, 45 or 82
 - iv. Sales warehouse to 40



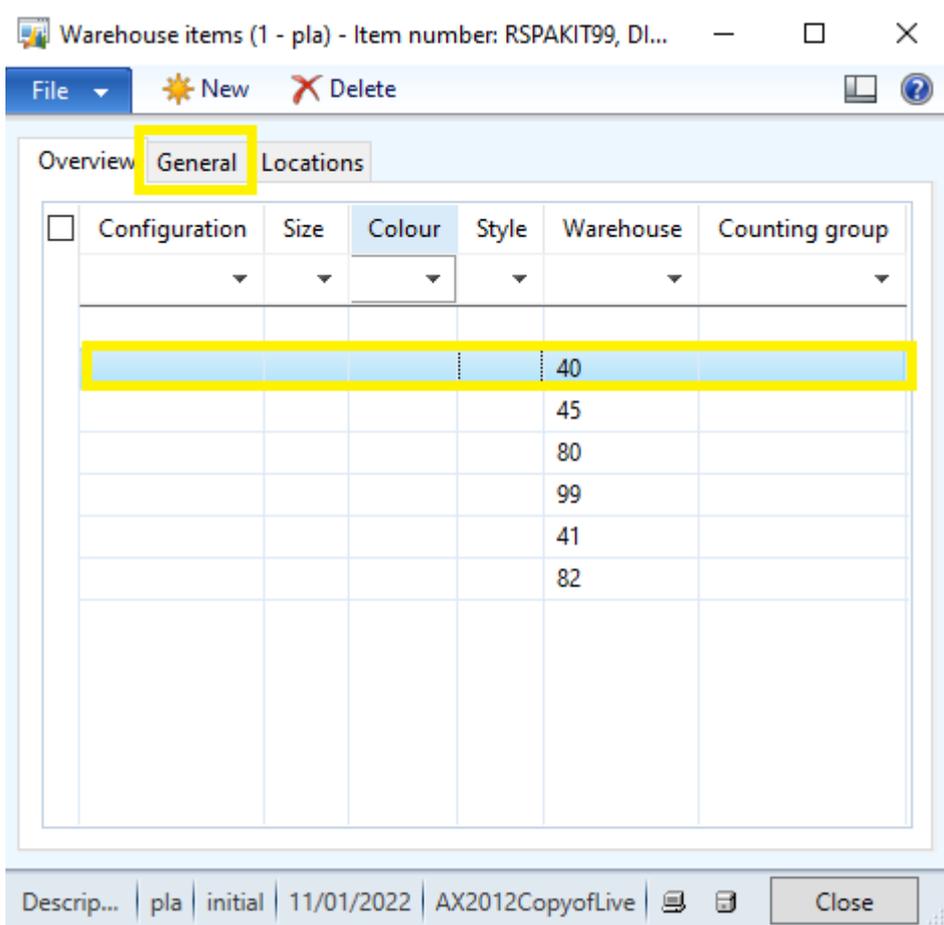
17. Click on Warehouse items



18. Add all the warehouses this item will be purchased in to, manufactured, stock and sold/returned. To do this click on New and then populate the warehouse field, below is a screenshot of a typical setup required for a water treatment product. You may also need to add warehouse 11 if the item could be used in subcontracting



19. Now default receipt and issue locations need to be added, to do this select a warehouse and click on general tab



20. Populate the fields as below
- a. For warehouse 40
 - i. Store zone = General
 - ii. Default receipt location = WATER (stock item) or CUST (made to order item)
 - iii. Picking location = CUST (made to order item) DO NOT populate if item is to be stocked in the warehouse

Warehouse items (1 - pla) - Item number: RSPAKIT99, DI...

File New Delete

Overview General Locations

Warehouse management

Store zone: General

Default receipt location: CUST

Default issue location: CUST

Use consolidated picking method: According to warehouse setup

Picking locations

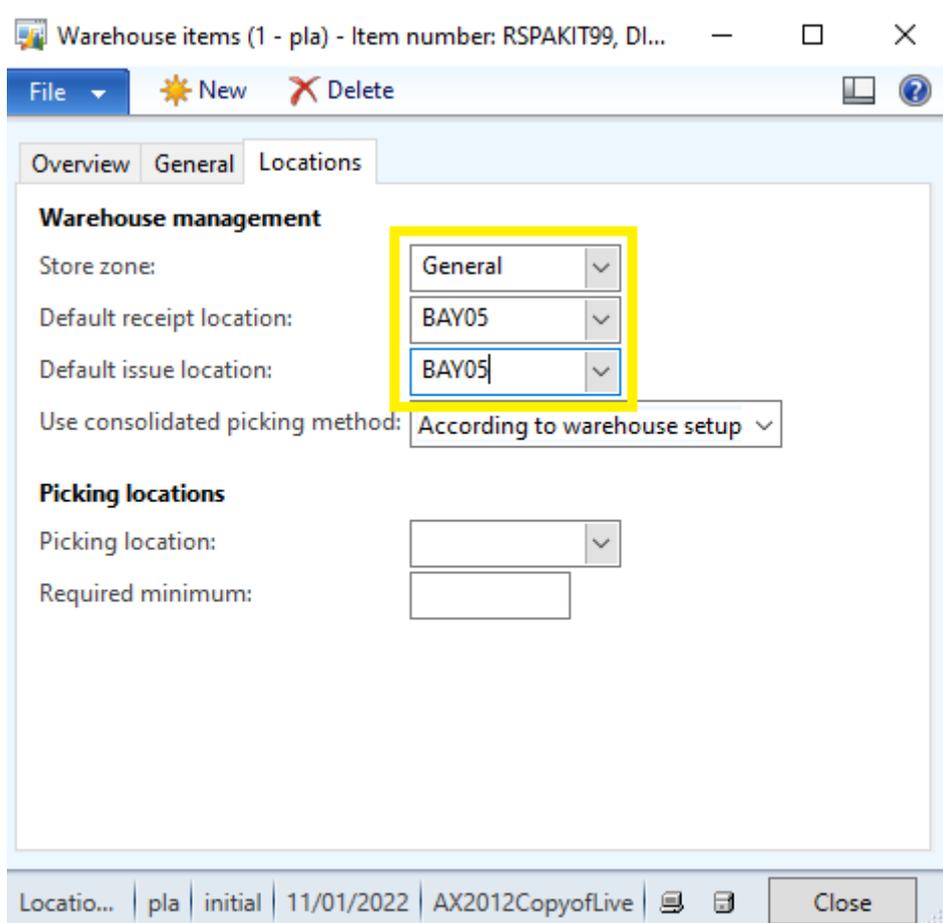
Picking location: CUST

Required minimum:

Locatio... pla initial 11/01/2022 AX2012CopyofLive Close

- b. For manufacturing warehouses, Goods In and returns populate as below
 - i. Store zone = General
 - ii. Default receipt location for WH41 = 21
 - WH45 = Location most likely to be stored (this can be changed at works order receipt time)
 - WH80 = GI0000
 - WH82 = 82
 - WH99 = RTNS
 - iii. Default receipt location for WH41 = 21
 - WH45 = Location most likely to be consumed from
 - WH80 = GI0000
 - WH82 = 82
 - WH99 = RTNS

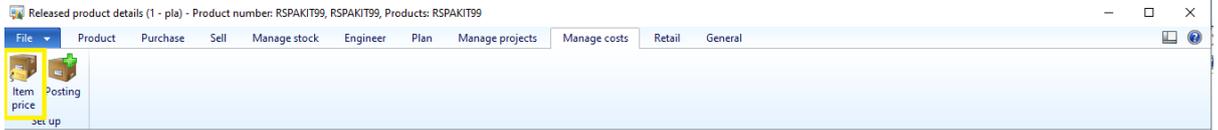
Repeat this for every warehouse the has been added, close the window when finished



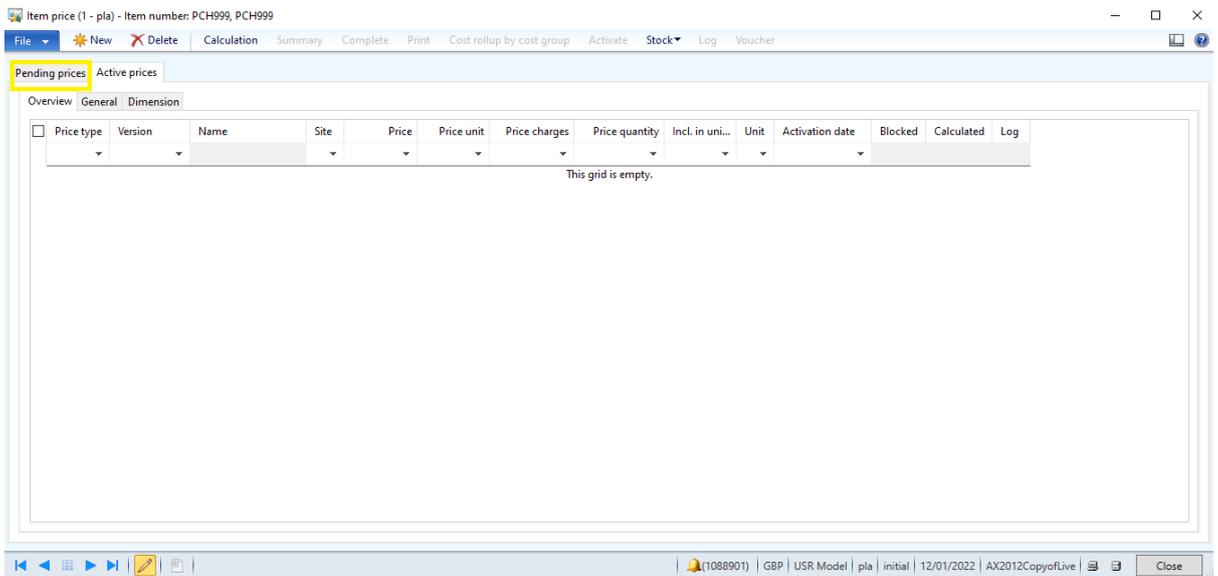
- 21. Click on the Manage Costs tab on the navigation ribbon



22. Click on Item price



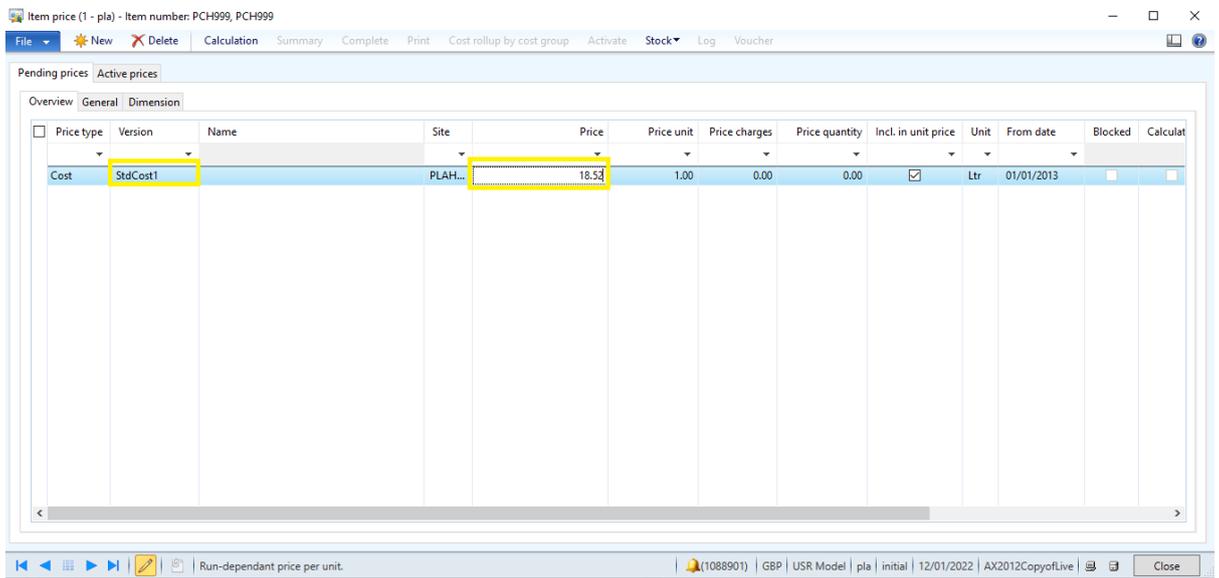
23. Click on Pending prices



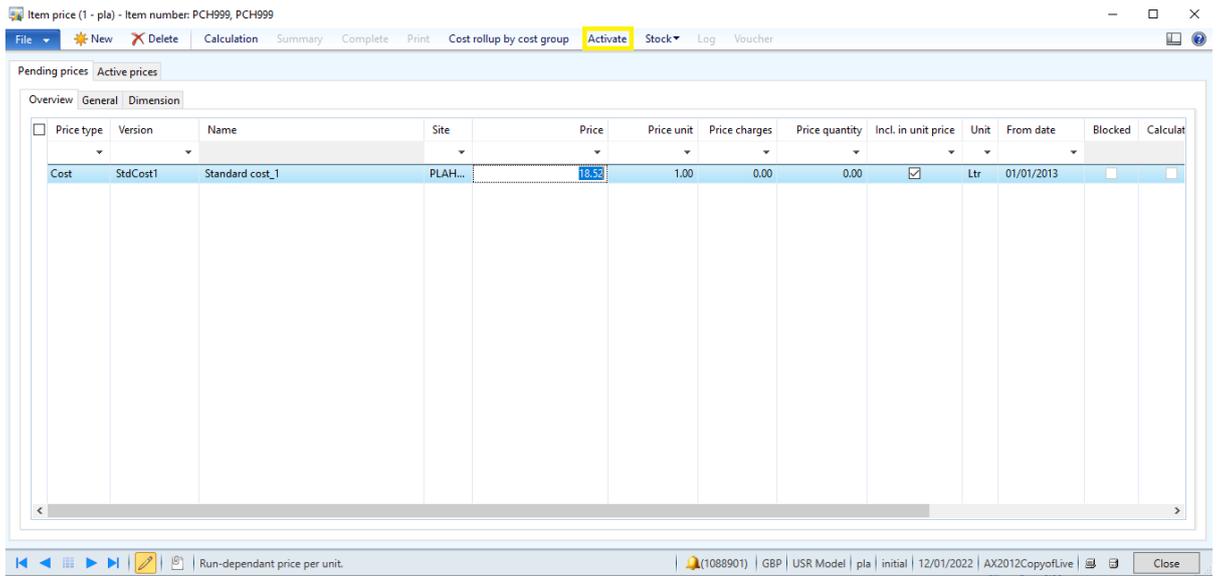
24. Populate the following
- i. Select StdCost1 in the Version dropdown field
 - ii. Enter the cost price in the Price field

Then press Ctrl+S to save

Note:- You should only activate the item price the first time a code is setup, the finance department will then update the active standard cost once a year unless there is a big change in raw material costs causing the price to go up or down considerably. In which case you should notify the finance department so they can update it.



25. Click Activate



26. A popup message will appear saying the prices has been activated as the current system date and the price will appear on the Active prices tab. Click Close

