

Creating a code for a manufactured item

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

The screenshot shows the Microsoft Dynamics AX interface for Product Information Management. The breadcrumb navigation is 'Product information management > Common > Released products'. The main area displays a table of released products with columns for Item number, Product name, Coverage group, Created date and time, Production pool, and Gross width. The product '00130632 : ESPA C/C Nozzle Kit' is selected, and its details are shown below the table, including Product dimension group (WHLOC) and Tracking dimension group (NONSER).

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
109010000000	10uf Capacitor for AG8/10/14 Pumps	FGEU1	20/02/2017 16:07:39		0.00
109012000000	12.5uf Capacitor for AG16 & AV50/75/100 Single Phase Pump	FGEU1	20/02/2017 16:04:13		3.00
109020000000	20uf Capacitor for AV150 Single Phase Pump	FGEU1	20/02/2017 15:48:16		3.00
109025000000	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

2. Click on Product

This screenshot is identical to the one above, but with the 'Product' button in the top ribbon highlighted in yellow, indicating the next step in the process.

3. Enter in the product details
 - i. Item Number
 - ii. Item Description
 - iii. Item Model Group = STDSTK
 - iv. Item Group = RELAX or RELAXSPA or OWNLAB
 - 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
 - viii. VAT Groups – Purchase = 2 Sales = 6

Click OK once finished

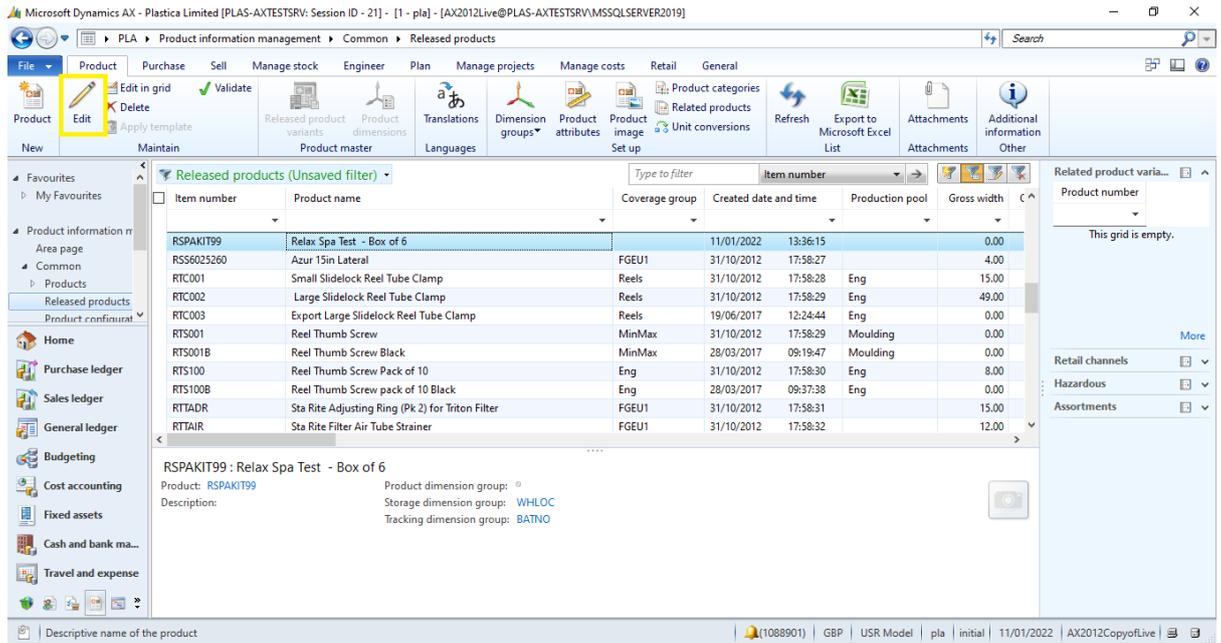
New Released product (1)
✕

Create product

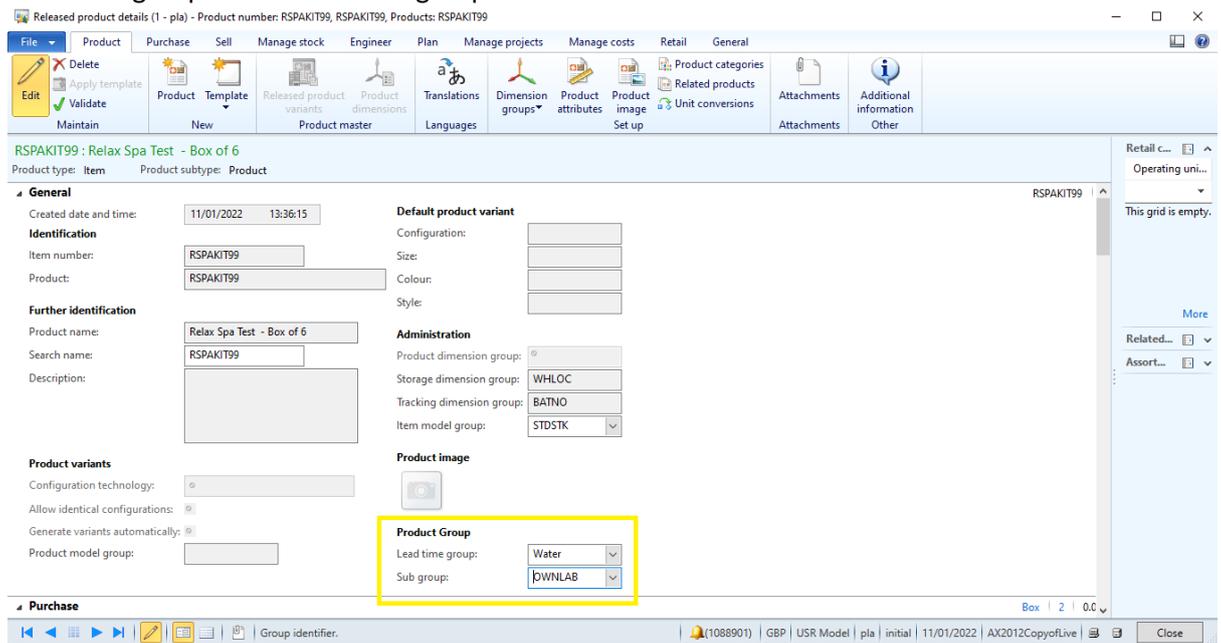
Product type:	<input type="text" value="Item"/>		
Product subtype:	<input type="text" value="Product"/>		
Identification		Company-specific identification	
Product number:	<input type="text" value="RSPAKIT99"/> ✓	Item number:	<input type="text" value="RSPAKIT99"/> ✓
Product name:	<input type="text" value="Relax Spa Test - Box of 6"/>	Search name:	<input type="text" value="RSPAKIT99"/>
Search name:	<input type="text" value="RSPAKIT99"/>		
Reference groups		Units of measurements	
Item model group:	<input type="text" value="STDSTK"/>	Stock unit:	<input type="text" value="Box"/>
Item group:	<input type="text" value="RELAXSPA"/>	Purchase unit:	<input type="text" value="Box"/>
Storage dimension group:	<input type="text" value="WHLOC"/>	Sales unit:	<input type="text" value="Box"/>
Tracking dimension group:	<input type="text" value="BATNO"/>	BOM unit:	<input type="text" value="Box"/>
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 type="checkbox"/>
Item withholding vat group:	<input type="text"/>	Item withholding vat group:	<input type="text"/>

Show fewer fields

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



5. If the item is made to order, for example own label populate the leadtime fields with Lead time group = Water and Sub group = OWNLAB



6. Scroll down to the sell 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:

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:

Basic sales price

Price: 0.00

Price unit: 1.00

7. Scroll down to Foreign Trade and populate
 - i. Commodity Code
 - ii. Country of origin (most WT products are only repackaged by Plastica so country of origin should be where the raw material comes from)

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 - kg
 - ii. Tare Weight - kg
 - iii. Gross depth - cm
 - iv. Gross width - cm
 - v. Gross height - cm
 - vi. Volume = depth x width x height
 - vii. Batch number group – this will depend on how the product is made, if you are making it from scratch then select WT_BAT if the item is being made from a blank stock item leave blank to use batch number already on item.

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

Product type: Item Product subtype: Product

Intrastat
 Commodity: Country/region:
 Additional units: State/province:
 Charges percentage:

Manage stock

Weight measurements
 Net weight:
 Tare weight:
 Gross weight:

Physical dimensions
 Gross depth:
 Gross width:
 Gross height:
 Volume:

Tracking
 Batch number group:
 Serial number group:

Transfer orders
 Over-delivery:

Stock
 Counting group:
 Unit:

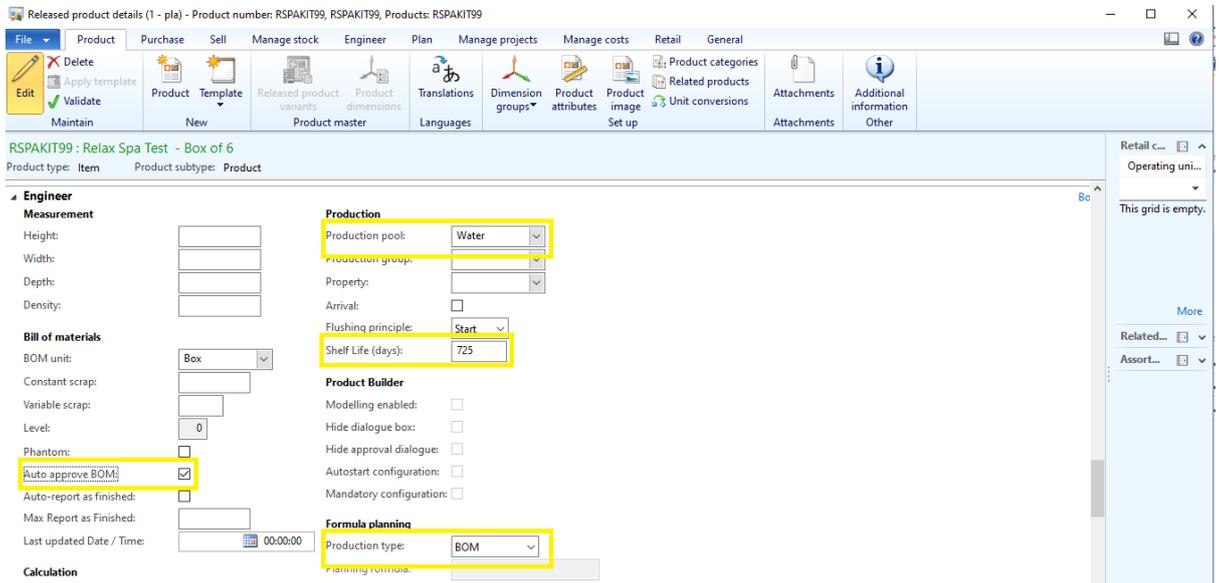
Shipping and receiving
 Arrival handling time:
 Sort code:

Potency
 Base attribute:
 Target:
 Record the attribute value:

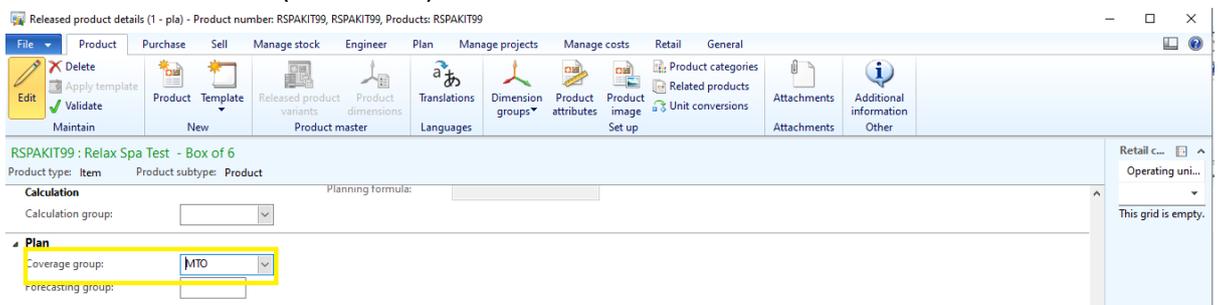
Packaging
 Packing group:
 Packing quantity:
 Package handling time:

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

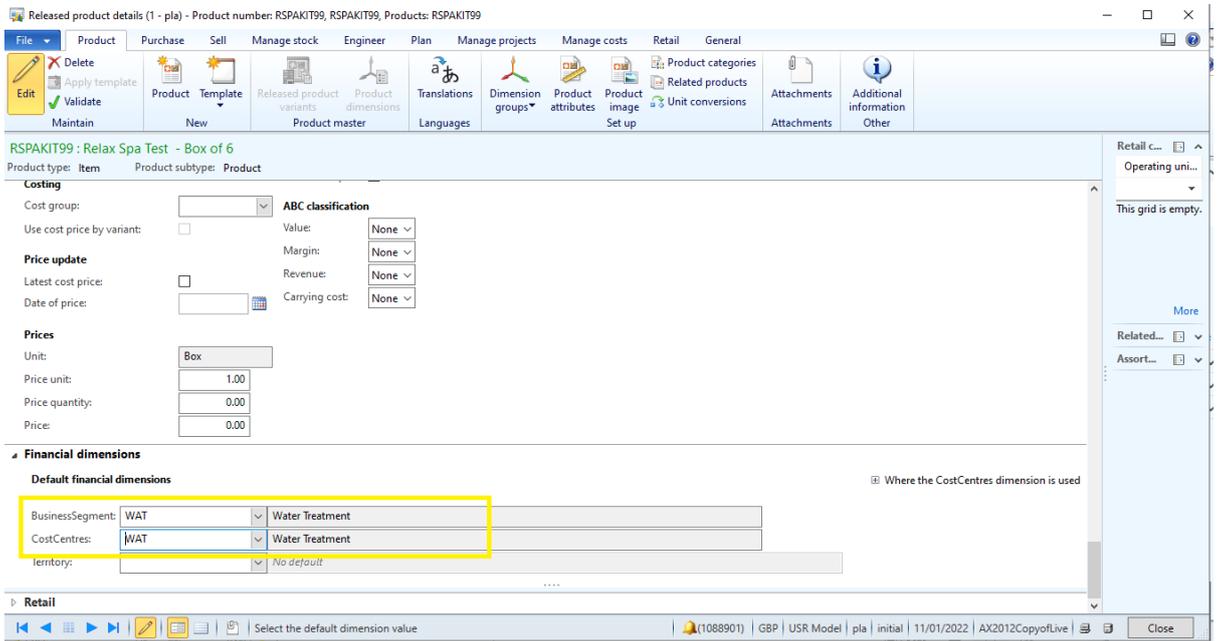
9. Scroll down to Engineer and populate
 - i. Production Pool = Water
 - ii. Shelf life (this is the product life in days)
 - iii. Tick Auto approve BOM
 - iv. Make sure production type is set to BOM



10. Scroll down to Plan and populate the Coverage group
 - i. MTO (made to order) or
 - ii. Water (stock items)



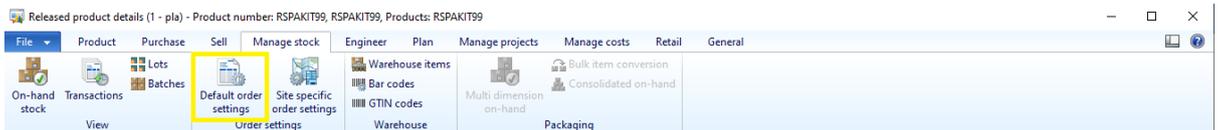
11. Scroll down to Financial dimensions and populate
 - i. Business Segment = WAT
 - ii. Cost Centre = WAT



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 production
 - ii. Set Purchase, Stock and Sales sites to PLAHAST
 - iii. Close window

Default order settings (1 - pla) - Item number: RSPAKIT99, RSPAKIT99

File New Delete

General Purchase order Stock Sales order

Identification

Item number: RSPAKIT99

Product name: Relax Spa Test - Box of 6

Order type

Default order type: Production

Purchase site

Purchase site: PLAHAST

Stock site

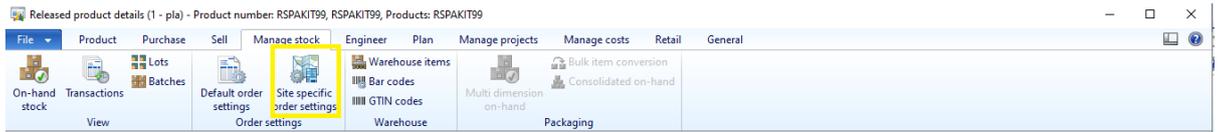
Stock site: PLAHAST

Sales site

Sales site: PLAHAST

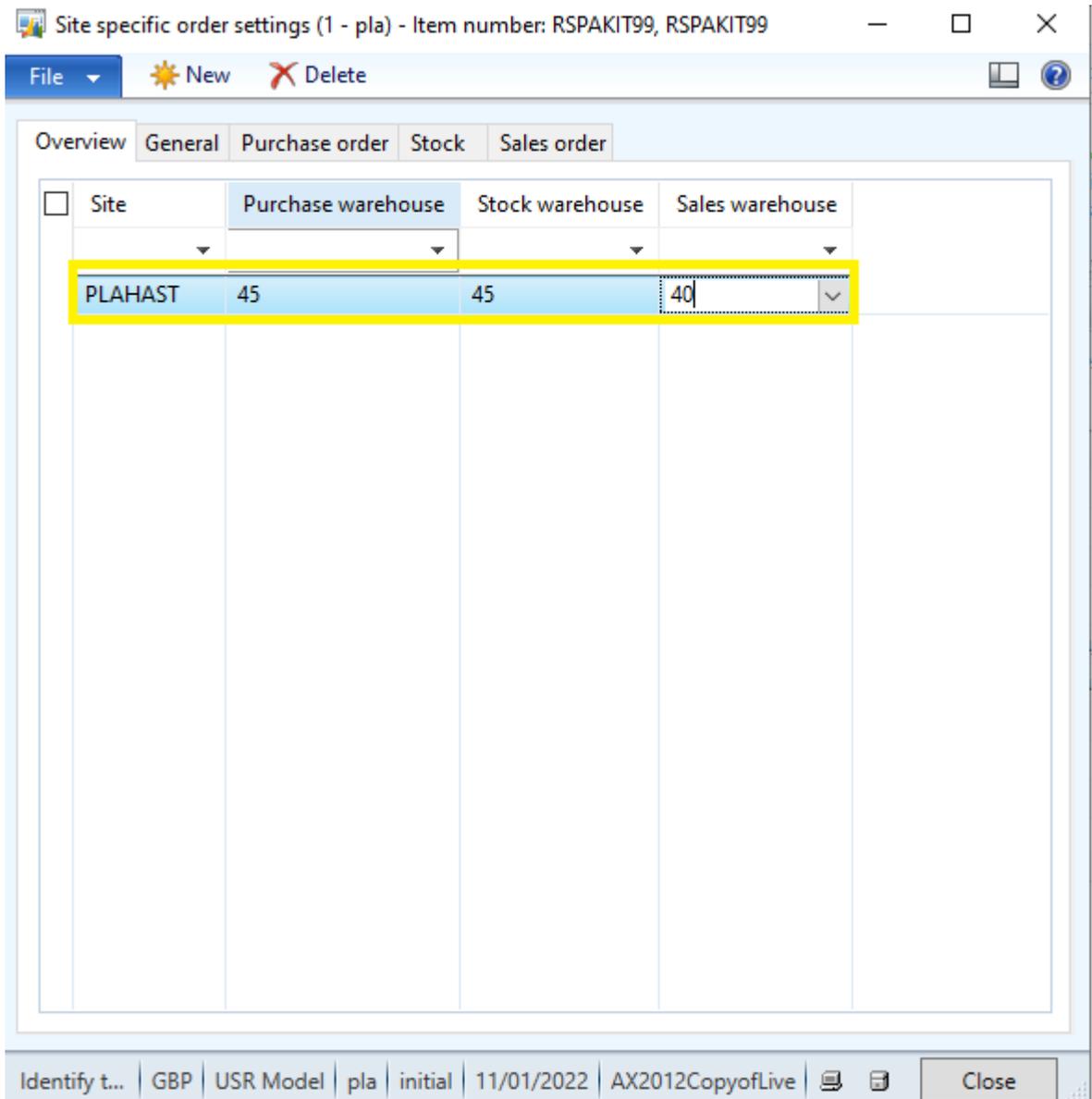
Identify i... GBP USR Model pla initial 11/01/2022 AX2012CopyofLive Close

15. Click on Site specific settings

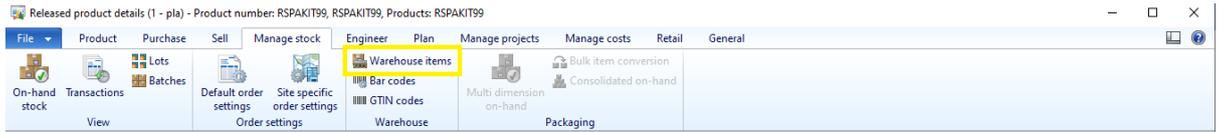


16. Populate the following fields

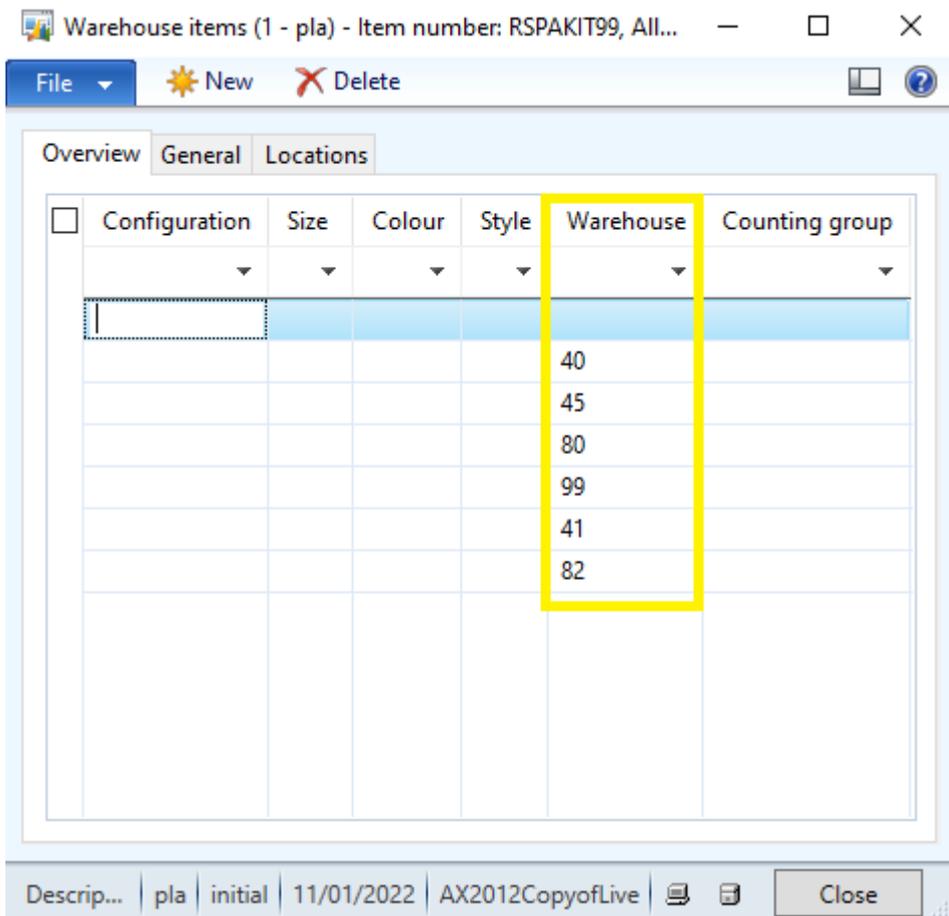
- i. Site to PLAHAST
- ii. Purchase (Production) Warehouse to either 45 or 82
- iii. Stock Warehouse to either 40, 45 or 82
- iv. Sales Warehouse to 40



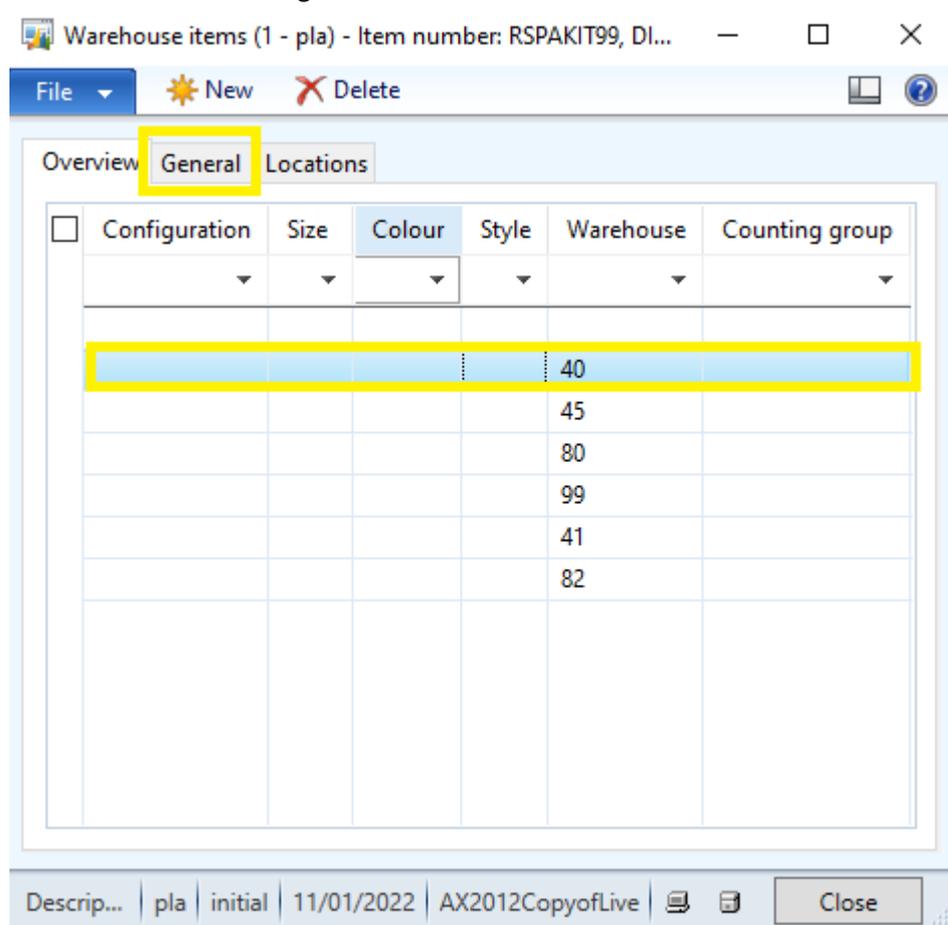
17. Click on Warehouse items



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

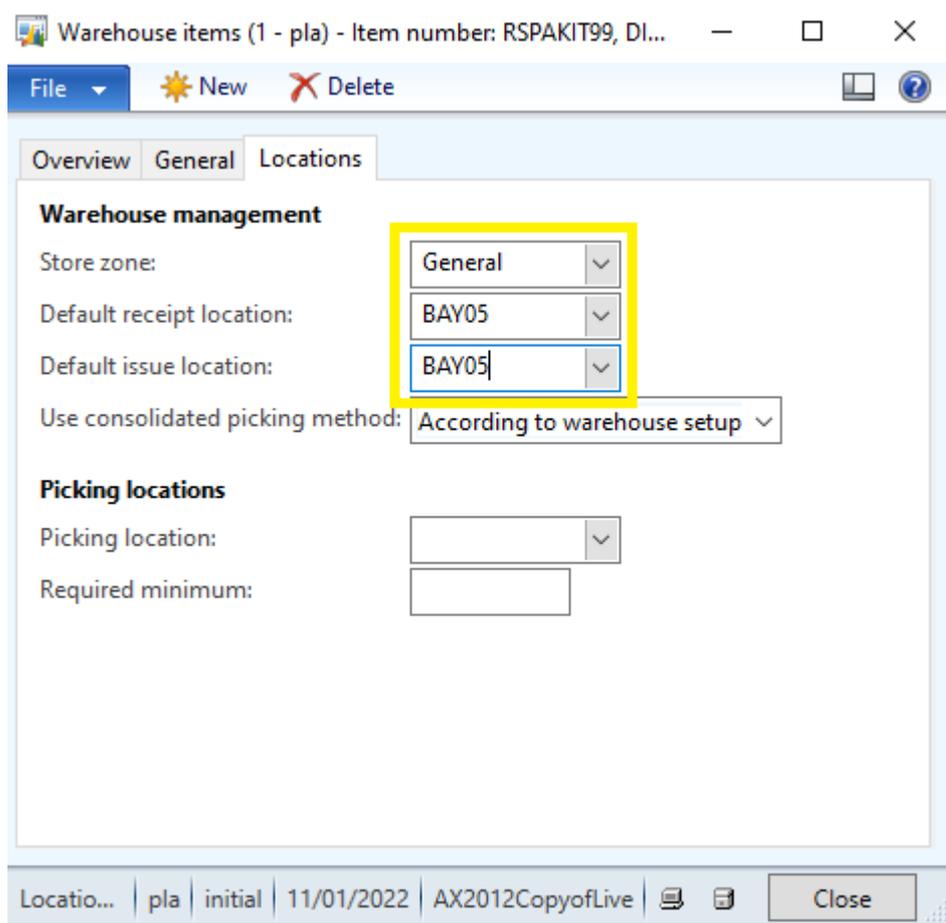
Picking location: CUST

Required minimum:

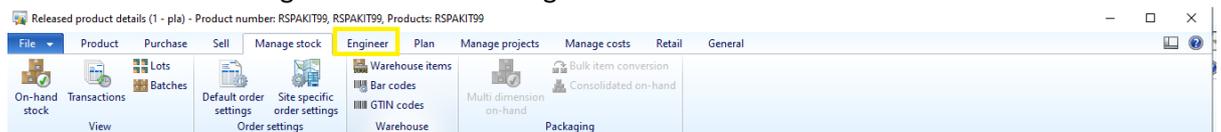
Locatio... | pla | initial | 11/01/2022 | AX2012CopyofLive | Close

- b. For manufacturing warehouses, Goods In and returns populate as below
 - i. Store zone = General
 - ii. Default receipt location for WH41 = 22
 - WH45 = Location most likely to be stored (this can be changed at works order receipt time)
 - WH82 = 82
 - WH99 = RTNS
 - iii. Default receipt location for WH41 = 22
 - WH45 = Location most likely to be consumed from
 - WH82 = 82
 - WH99 = RTNS

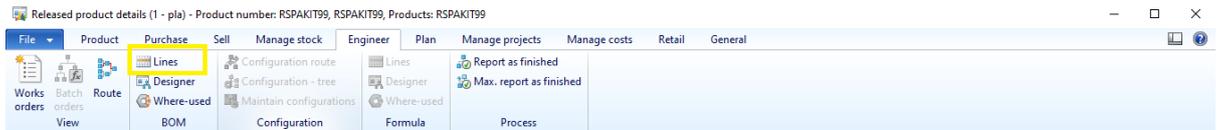
Repeat this for every warehouse the has been added, close the window when finished



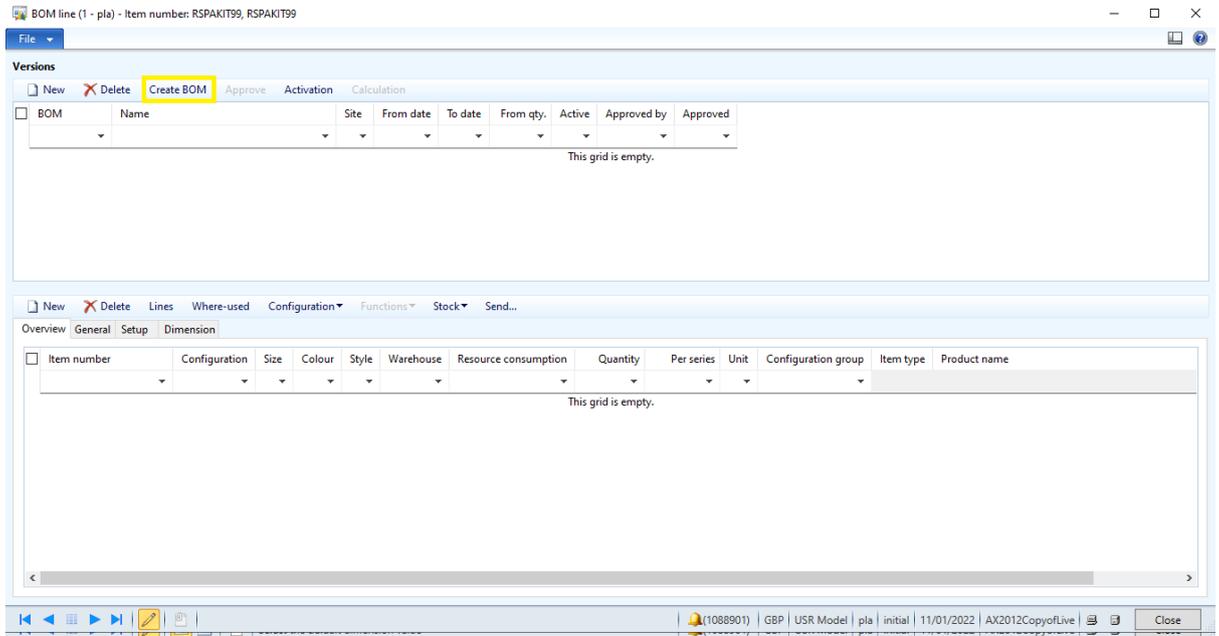
21. Click on the Engineer tab on the navigation ribbon



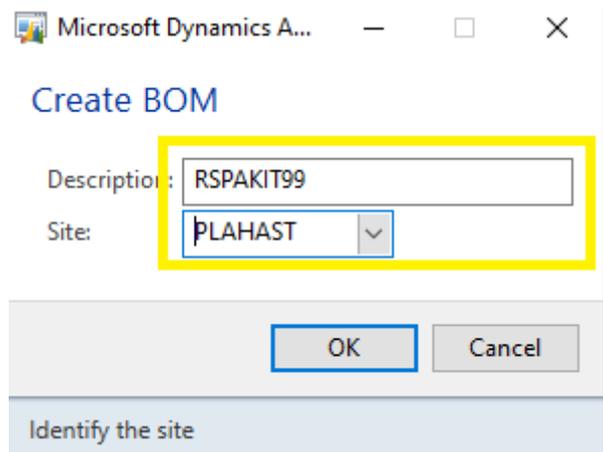
22. Click on Lines



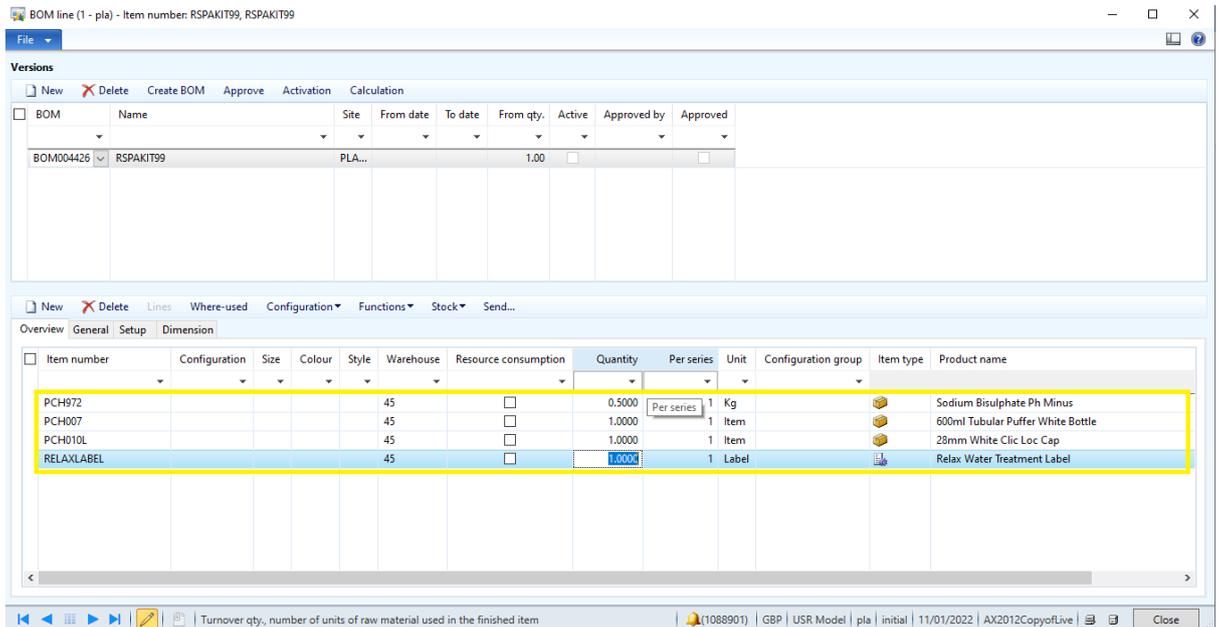
23. Click Create BOM



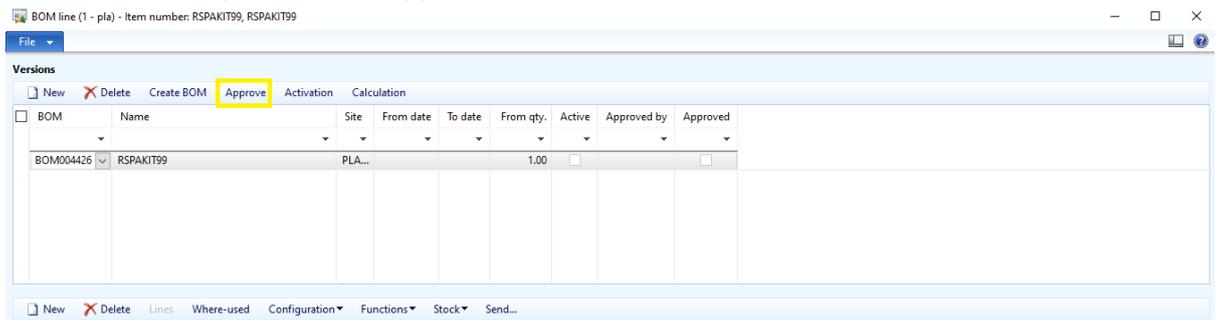
24. In the popup window enter the item number in description and set site to PLAHAST, then click OK



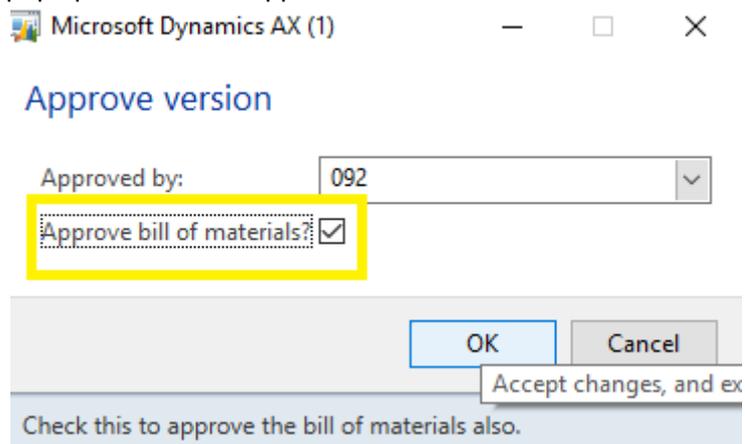
25. Enter the BOM contents in the lower box



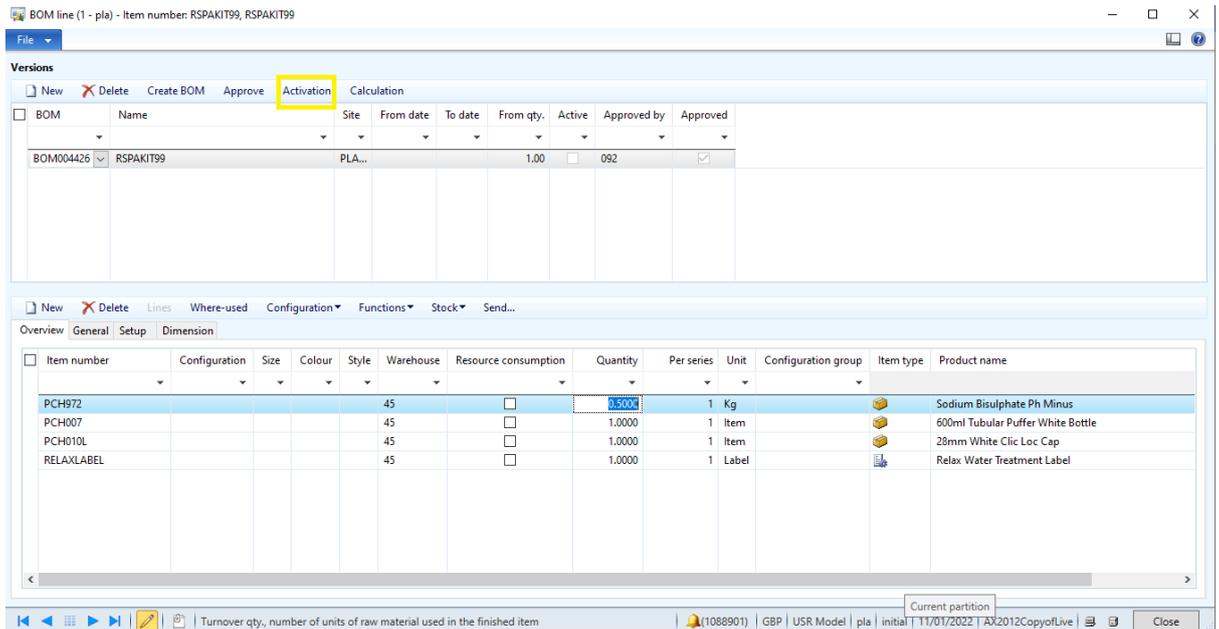
26. Once complete click on Approve



27. On the pop up window tick Approve bill of materials and then OK



28. Next click on Activation



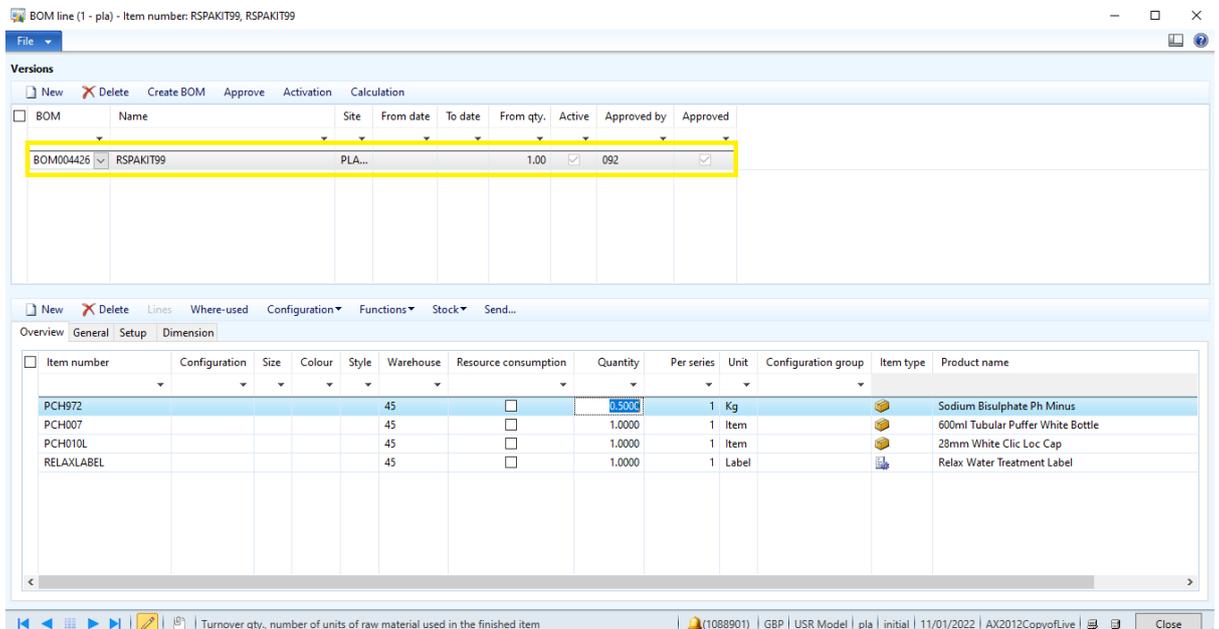
The screenshot shows the SAP BOM line activation process. The 'Versions' table has the 'Active' checkbox checked for BOM004426. The 'Activation' button in the menu bar is highlighted with a yellow box. The 'Dimension' table below shows the components of the BOM.

BOM	Name	Site	From date	To date	From qty.	Active	Approved by	Approved
BOM004426	RSPAKIT99	PLA...			1.00	<input checked="" type="checkbox"/>	092	<input checked="" type="checkbox"/>

Item number	Configuration	Size	Colour	Style	Warehouse	Resource consumption	Quantity	Per series	Unit	Configuration group	Item type	Product name
PCH972					45	<input type="checkbox"/>	0.5000	1	Kg			Sodium Bisulphate Ph Minus
PCH007					45	<input type="checkbox"/>	1.0000	1	Item			600ml Tubular Puffer White Bottle
PCH010L					45	<input type="checkbox"/>	1.0000	1	Item			28mm White Clic Loc Cap
RELAXLABEL					45	<input type="checkbox"/>	1.0000	1	Label			Relax Water Treatment Label

29. Now your BOM should have a tick in both the Active and Approved boxes, click Close

Note:- you can have multiple BOM's setup on an item but only one can be active at any one time. You will need to deactivate a BOM before activating the one you wish to use. To do this select the BOM and click the Activation button, the tick will then be removed from the active box and the new BOM can be activated.

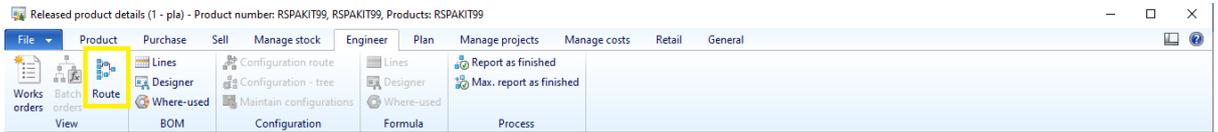


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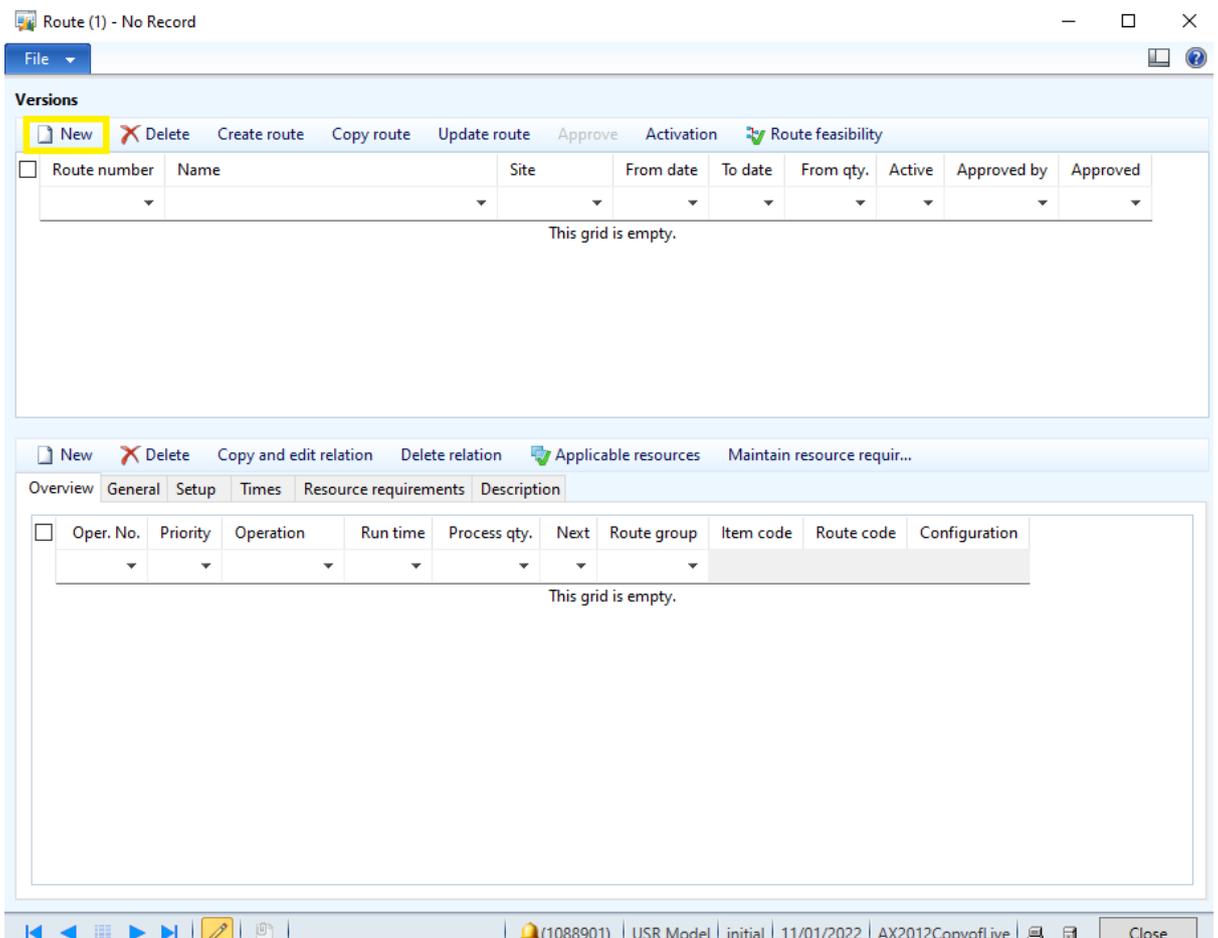
BOM	Name	Site	From date	To date	From qty.	Active	Approved by	Approved
BOM004426	RSPAKIT99	PLA...			1.00	<input checked="" type="checkbox"/>	092	<input checked="" type="checkbox"/>

Item number	Configuration	Size	Colour	Style	Warehouse	Resource consumption	Quantity	Per series	Unit	Configuration group	Item type	Product name
PCH972					45	<input type="checkbox"/>	0.5000	1	Kg			Sodium Bisulphate Ph Minus
PCH007					45	<input type="checkbox"/>	1.0000	1	Item			600ml Tubular Puffer White Bottle
PCH010L					45	<input type="checkbox"/>	1.0000	1	Item			28mm White Clic Loc Cap
RELAXLABEL					45	<input type="checkbox"/>	1.0000	1	Label			Relax Water Treatment Label

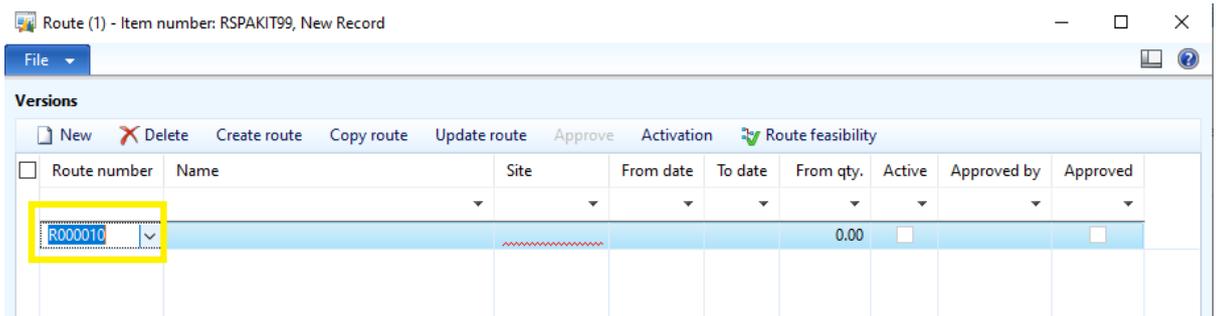
30. Click on Route



31. Click on New



32. Select the route for water treatment which is R0000010



33. Populate the site field with PLAHAST

Route (1) - Item number: RSPAKIT99, New Record

File

Versions

New Delete Create route Copy route Update route Approve Activation Route feasibility

Route number	Name	Site	From date	To date	From qty.	Active	Approved by	Approved
R000010		PLAHAST			0.00	<input type="checkbox"/>		<input type="checkbox"/>

34. Click on the lower box on the form

Route (1) - Item number: RSPAKIT99, Water Treatment, Item number: RSPAKIT99

File

Versions

New Delete Create route Copy route Update route Approve Activation Route feasibility

Route number	Name	Site	From date	To date	From qty.	Active	Approved by	Approved
R000010	Water Treatment	PLAHAST			0.00	<input type="checkbox"/>		<input type="checkbox"/>

New Delete Copy and edit relation Delete relation Applicable resources Maintain resource requir...

Overview General Setup Times Resource requirements Description

Oper. No.	Priority	Operation	Run time	Process qty.	Next	Route group	Item code	Route code	Configuration
10	Primary	WT		1.00	0	RG	All	All	

Number for determining s... (1088901) USR Model initial 11/01/2022 AX2012CopyofLive Close

35. In the Run time field enter the number of minutes it takes to make

Oper. No.	Priority	Operation	Run time	Process qty.	Next	Route group	Item code	Route code	Configuration
10	Primary	WT		1.00	0	RG	All	All	

36. Next at the top of the form click Approve

Route (1) - Item number: RSPAKIT99, Water Treatment, Item number: RSPAKIT99

File

Versions

New Delete Create route Copy route Update route Approve Activation Route feasibility

Route number	Name	Site	From date	To date	From qty.	Active	Approved by	Approved
R000010	Water Treatment	PLAHAST			0.00	<input type="checkbox"/>		<input type="checkbox"/>

New Delete Copy and edit relation Delete relation Applicable resources Maintain resource requir...

Overview General Setup Times Resource requirements Description

Oper. No.	Priority	Operation	Run time	Process qty.	Next	Route group	Item code	Route code	Configuration
10	Primary	WT	5.00	1.00	0	RG	Table	Route	

37. Click OK on the popup window

Microsoft Dynamics AX (1)

Approve version

Approved by: 092

OK Cancel

Worker who approved the record.

38. Click Activation

Route (1) - Item number: RSPAKIT99, Water Treatment, Item number: RSPAKIT99

File

Versions

New Delete Create route Copy route Update route Approve **Activation** Route feasibility

Route number	Name	Site	From date	To date	From qty.	Active	Approved by	Approved
R000010	Water Treatment	PLAHAST			0.00	<input type="checkbox"/>	092	<input checked="" type="checkbox"/>

New Delete Copy and edit relation Delete relation Applicable resources Maintain resource requir...

Overview General Setup Times Resource requirements Description

Oper. No.	Priority	Operation	Run time	Process qty.	Next	Route group	Item code	Route code	Configuration
10	Primary	WT	5.00	1.00	0	RG	Table	Route	

39. Both the Active and Approved boxes should now be ticked, Close the form

Route (1) - Item number: RSPAKIT99, Water Treatment, Item number: RSPAKIT99

File

Versions

New Delete Create route Copy route Update route Approve Activation Route feasibility

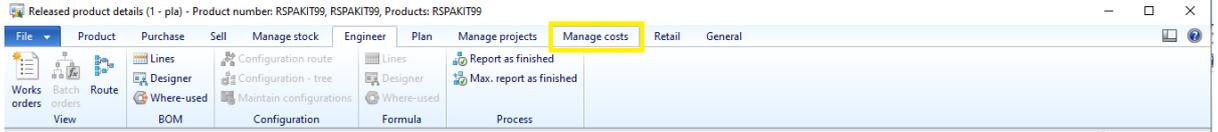
Route number	Name	Site	From date	To date	From qty.	Active	Approved by	Approved
R000010	Water Treatment	PLAHAST			0.00	<input checked="" type="checkbox"/>	092	<input checked="" type="checkbox"/>

New Delete Copy and edit relation Delete relation Applicable resources Maintain resource requir...

Overview General Setup Times Resource requirements Description

Oper. No.	Priority	Operation	Run time	Process qty.	Next	Route group	Item code	Route code	Configuration
10	Primary	WT	5.00	1.00	0	RG	Table	Route	

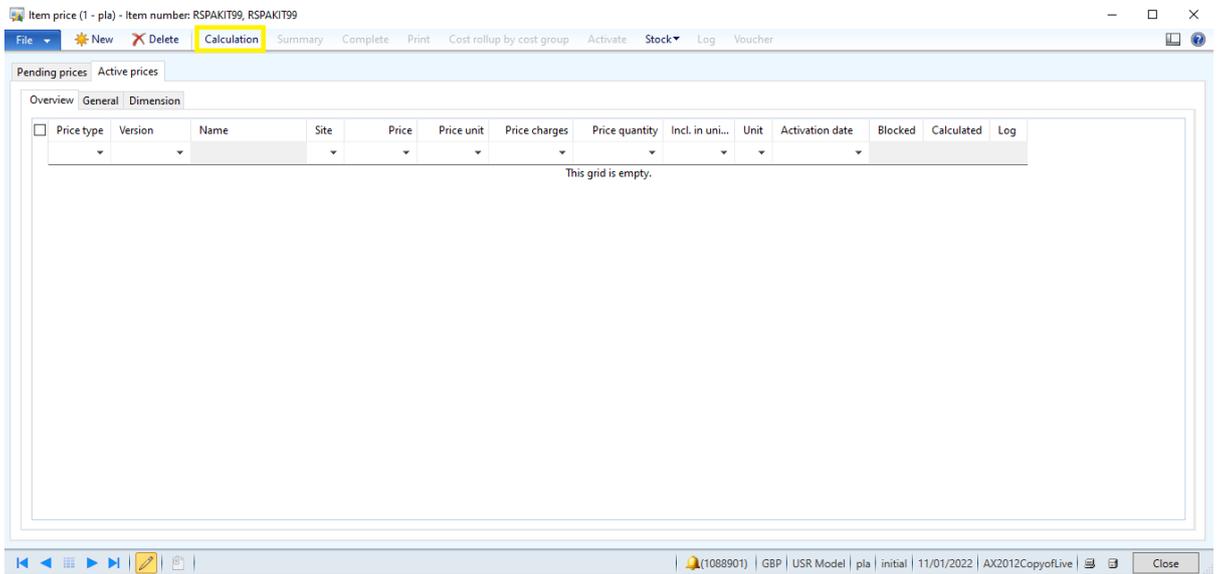
40. Click on the Manage costs tab on the navigation ribbon



41. Click on Item price



42. Click on Calculation



43. Select StdCost1 from the costing version dropdown, then click OK

Calculation for an item (1 - pla)

General Price recording in version Warnings Batch

Item number: RSPAKIT99

General

Costing version: StdCost1

Site: PLAHAST

Calculation date: 01/01/2013

BOM: BOM004426

Item procured using

Item procured using

Works order

Production flow

Purchase order

Route number: R000010

Production flow:

Quantity: 1.00

Profit-setting: Standard

Update/insert calculated prices: Overwrite

Calculation type

Cost price model: Version cost price

Purchase price model: Item purchase price

Explosion mode: Single level

Fallback

Fallback principle: Active

Fallback costing version:

OK Cancel

Costing version name.

44. The system will then calculate the cost the manufacture, now click Activate

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.

Item price (1 - pla) - Item number: RSPAKIT99, RSPAKIT99

File New Delete Calculation Summary Complete Print Cost rollup by cost group Activate Stock Log Voucher

Pending prices Active prices

Overview General Dimension

Price type	Version	Name	Site	Price	Price unit	Price charges	Price quantity	Incl. in unit price	Unit	From date	Blocked	Calculat
Cost	StdCost1	Standard cost_1	PLAH...	2.52	1.00	0.00	1.00	<input checked="" type="checkbox"/>	Box	01/01/2013	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Identification of the price type. (1088901) GBP USR Model pla initial 11/01/2022 AX2012CopyofLive Close

45. 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

