

ADDING AND EDITING PARTS



Add a part

Parts are items that are manufactured or processed by your company. You can add them using the **Parts** screen.

1. Access the **Parts** screen.
2. On the **Action Bar**, click **Add**.
3. On the **Add Part** screen, for **Part No**, type a short identifier for the part to be displayed throughout the system.
 - Use characters A-Z, numbers 0-9, dash (-), underscore (_), and spaces. Other symbols may cause issues. Do not use question marks (?), or the ampersand (&).
4. Specify the **Part Type**.
5. Specify the **Part Status**.
6. If necessary, [specify additional details](#) for the part.
7. Click **Ok**.

▼ Configuration requirements

Edit a part

You can edit the information associated with your parts.

1. Access the **Parts** screen.
2. Adjust the filters, and click **Search**.
3. In the grid, click the **Part No** link.
4. Click **Part Info** from the side tab panel.
5. On the **Part Detail** screen, modify the part information as necessary.
6. Click **Ok**.

NOTE:

If **Ok** is not displayed, you do not have the access required to perform part edits. Some fields on the **Part Detail** screen are also controlled by access security and you may not be able to update them.

Edit multiple parts

There are two ways you can edit multiple parts at once.

Mass Update

1. Access the **Parts** screen.

2. Adjust the filters, and click **Search**.
3. In the grid, select the check box for each part that you want to edit.
4. On the **Action Bar**, click **Mass Update**.
5. In the **Mass Update Part Detail** dialog box, adjust values as necessary.
6. Click **Ok**.

All of the selected parts are updated with the new values.

Uploads

You can edit multiple existing parts by uploading a file. The uploaded part information overwrites the existing parts.

1. Access the **Parts** screen.
2. On the **Action Bar**, click **Uploads**, and then click **Select Part Upload File**.
3. Upload the file that contains the new part information.

Make a part inactive

1. Access the **Parts** screen.
2. Adjust the filters, and click **Search**.
3. In the grid, click the **Part No** link.
4. Click **Part Info** from the side tab panel.
5. In the **Part Detail** screen, for **Part Status**, select a part status that is not flagged as active.
6. Click **Ok**.

NOTE:

When making a part inactive, carefully consider the financial, costing, quality, production, and engineering impact. The **Active and Used Parts** report may be helpful in determining if you should make a part number inactive.