SOP

Identify parts and search availability

Purpose

To provide you with an understanding of how to identify parts and their availability in NAXT.

Videos have been added to this SOP!
Find them by clicking on **blue underlined words**

If you require a price for a customer you must create a quote, at this point NAXT will apply any agreed discounts to the part. See *(SOP)Create and Manage Sales Quotations*.

This procedure is linked to the following business processes:

- PRT_2.3(SOP)Create and Update a Sales order
- FAR_2.9(SOP)Apply a customer Prepayment
- PRT_5.4(SOP)Recover Freight

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Terminology

NPR	Numerical Parts Record

Use of icons

Business rule	**Key point / Tips**	**Information**

Task 1. Identify a part in released products grid

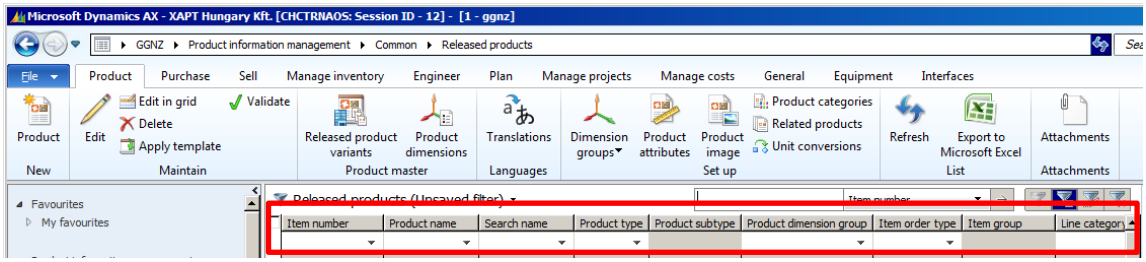
1. Navigate to and open the Released products screen:

   GGNZ > Product information management > Released products

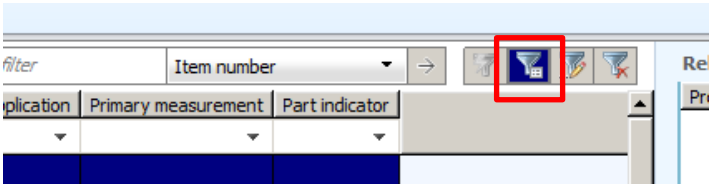
Pressing CTRL + G on your keyboard will open keyable filtering fields

You can either Tab between fields or use your mouse

2. Use filters to help find the correct part.

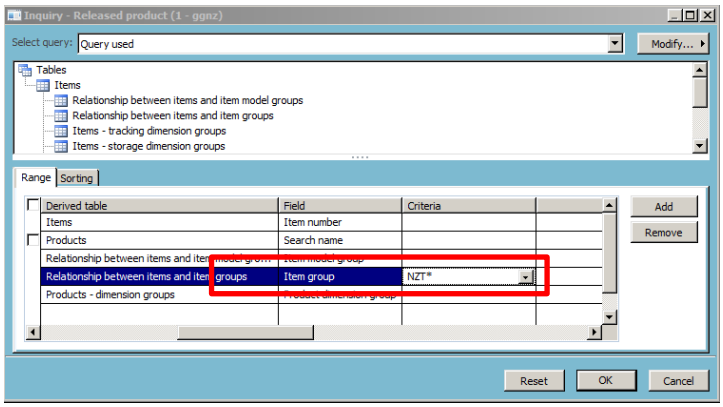


3. To search on item group, click on the advanced filter icon



4. Select the **Criteria** field, filter to relevant product group e.g. NZT*, PTS*

   Select required group from the drop-down menu.



Task 2. Check stock on-hand

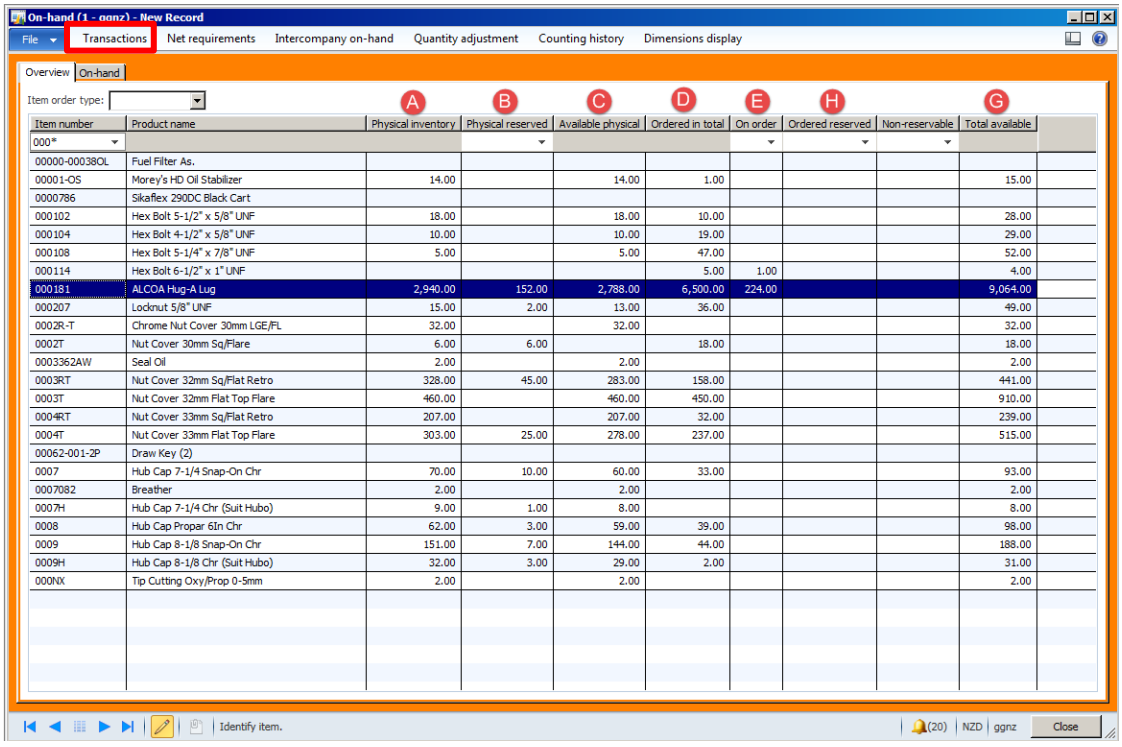
5. Navigate to **GGNZ > Inventory and warehouse management > Inquiries > On-hand**

   This opens the On-hand window

This screen may not have warehouse and locations columns populated – if that is the case quantities shown will relate to **all warehouses combined**

a. **Physical inventory**: How many are on-hand (on the shelf)
b. **Physical reserved**: Quantity of parts on transactions going out linked to stock on hand (e.g. sales order lines)
c. **Available physical**: A – B = C
d. **Ordered**: Quantity of parts on transactions coming in (e.g. purchase orders, transfers)
e. **On order in total**: Quantity of parts on transactions going out not reserved (e.g sales order lines no ship quantity)
f. **Available for reservation**: C + D = F (not shown)
g. **Total available**: F – E = G
h. **Ordered reserved**: Quantity of parts on transactions going out linked to transactions coming in (e.g. Sales order lines linked to incoming transfers or purchase orders)

6. Select the item you would like more information about then select **Transactions**



You can use this screen;

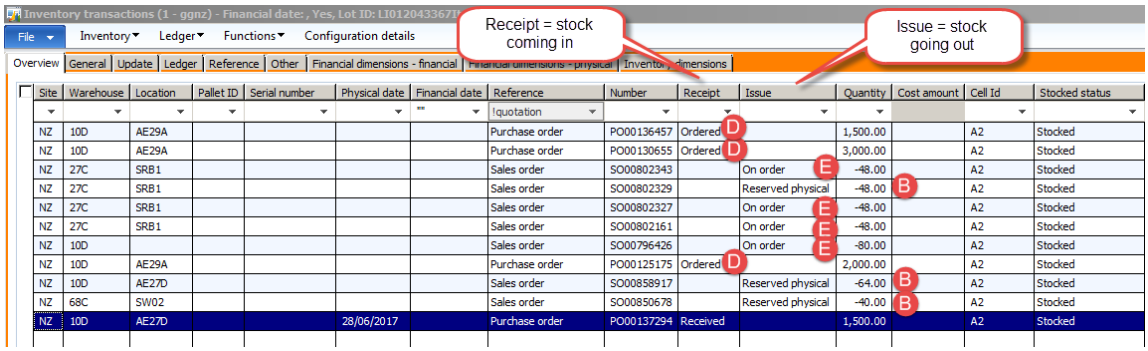
- What purchase orders the parts are ordered on
- See current warehouse location of part

- To work out estimated arrival date of ordered stock

b. **Physical reserved**: Quantity of parts on transactions going out linked to stock on hand (e.g. sales order lines)

d. **Ordered**: Quantity of parts on transactions coming in (e.g. purchase orders, transfers)

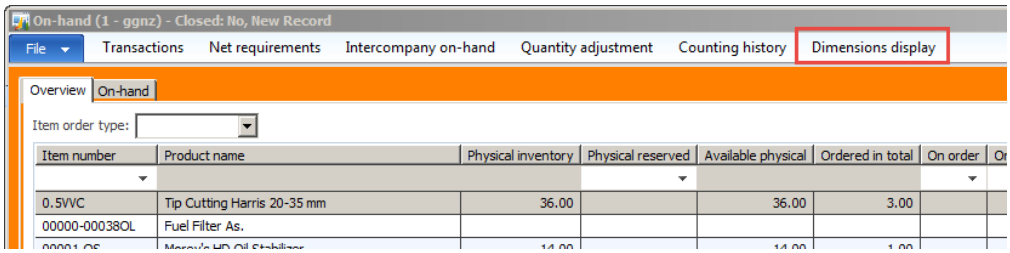
e. **On order in total**: Quantity of parts on transactions going out not reserved (e.g sales order lines no ship quantity)



7. Change the display columns (e.g. to add columns that display warehouse and location information)

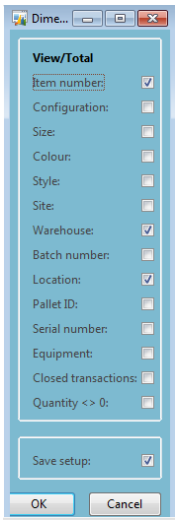
   Select **Dimensions Display**

   The dimension display window opens



8. From the options select column headings you want to display

   Select **Save setup** then
   Select **OK**



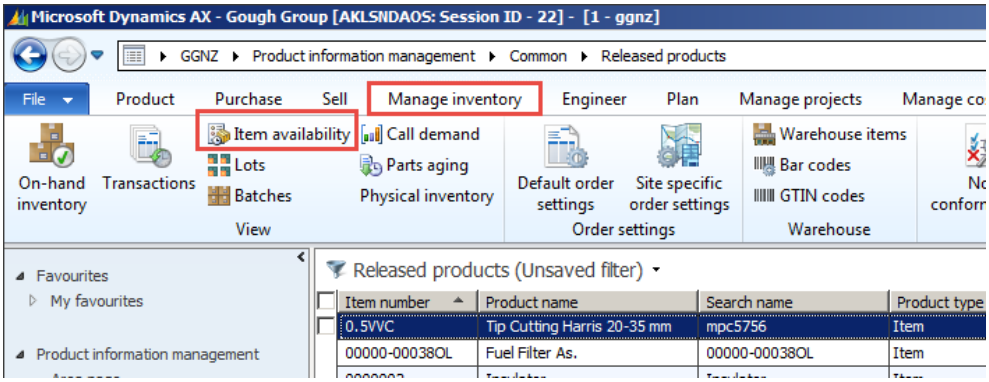
You will be able to use the additional columns for searching and filtering

Task 3. Find item availability – from a released product

9. Navigate to

GGNZ >> Product information >> Common >> Released products

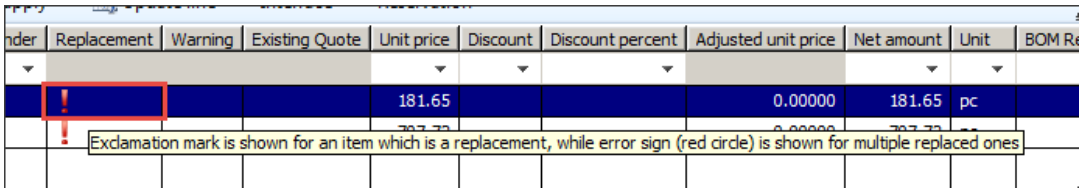
a. Select the part line
b. Select **Manage inventory**
c. Select **Item availability**



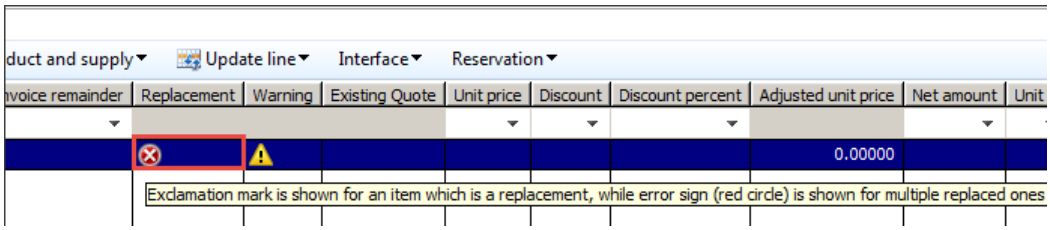
Task 4. Sales order symbols

Symbols in a sales order can be hovered over to display further information. Most of the time they are used to indicate replacement parts or warnings.

This symbol indicates that a **replacement** item is being used, replacement items are usually the newest model of the part.

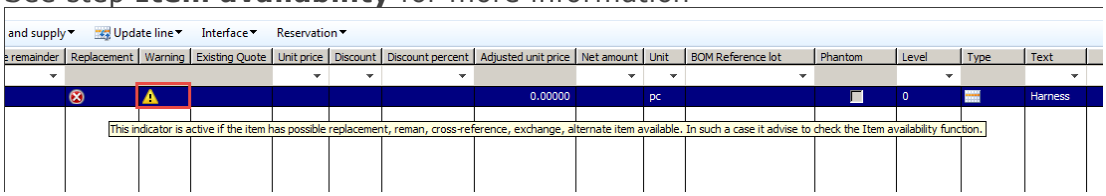


This symbol indicates that **multiple items** (red circle with white cross), are being replaced.



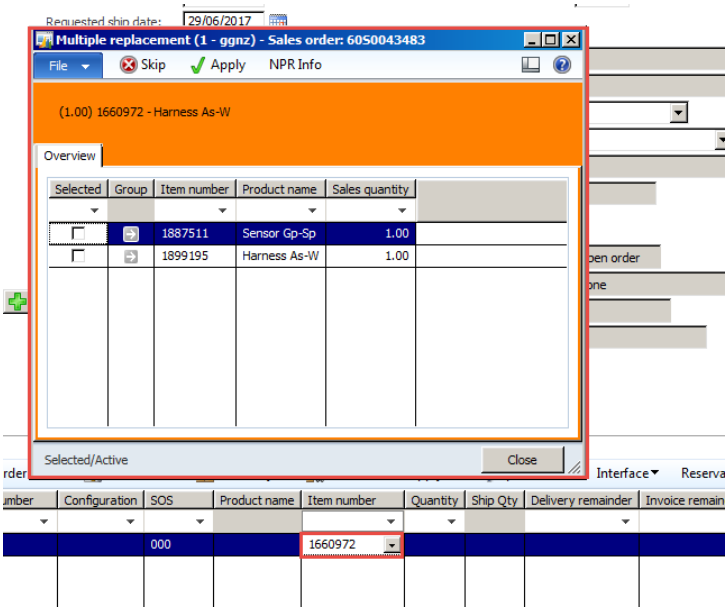
This symbol indicates that the system has found lots of different options, it could mean a possible replacement item, reman, cross-reference, exchange, or alternate item available.

See step **Item availability** for more information

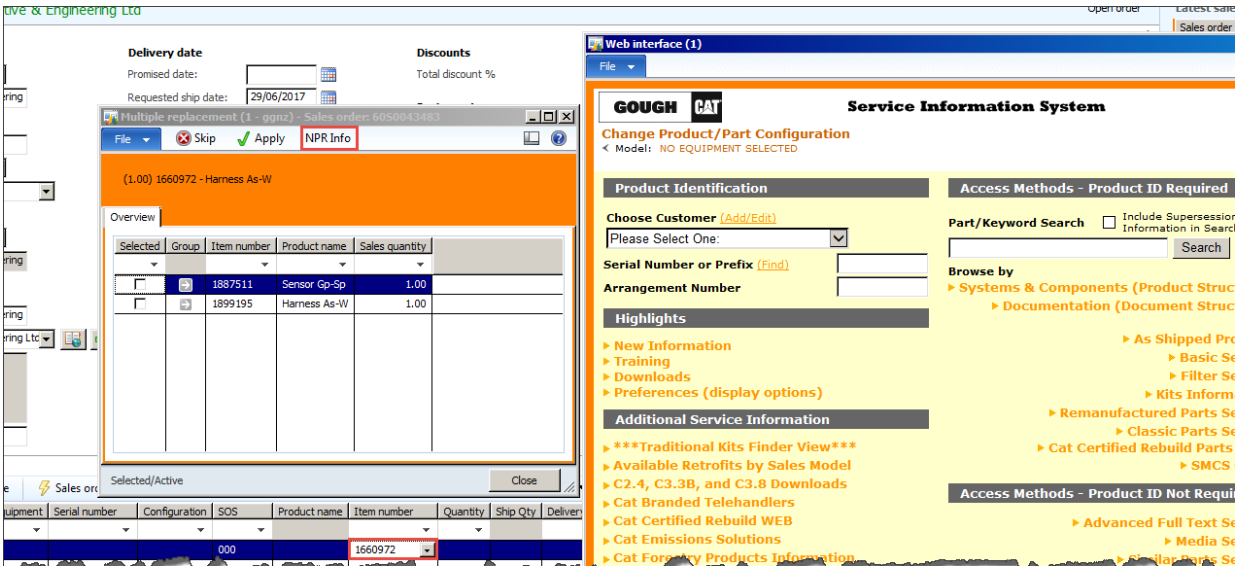


Task 5. Adding replacement parts to sales order lines – multiple replacement

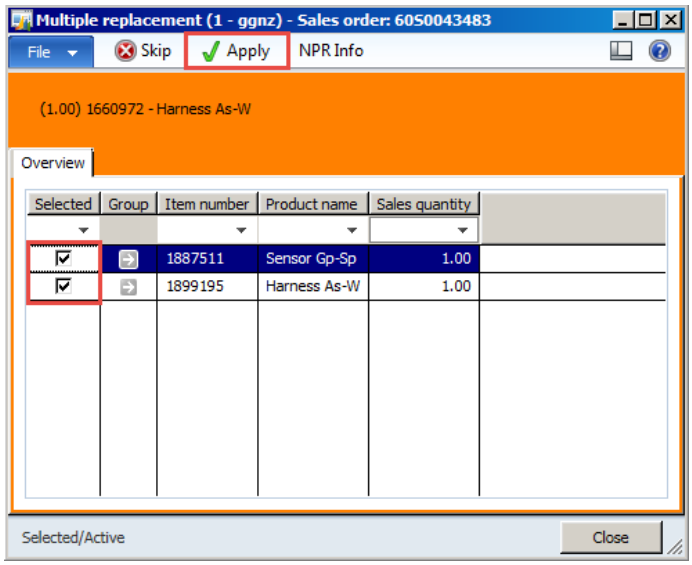
10. If the item you add to your sales order lines and it is not on hand, the **Multiple replacements** window will appear



11. For more information about each part select **NPR info** to open SIS (or open it in a browser)

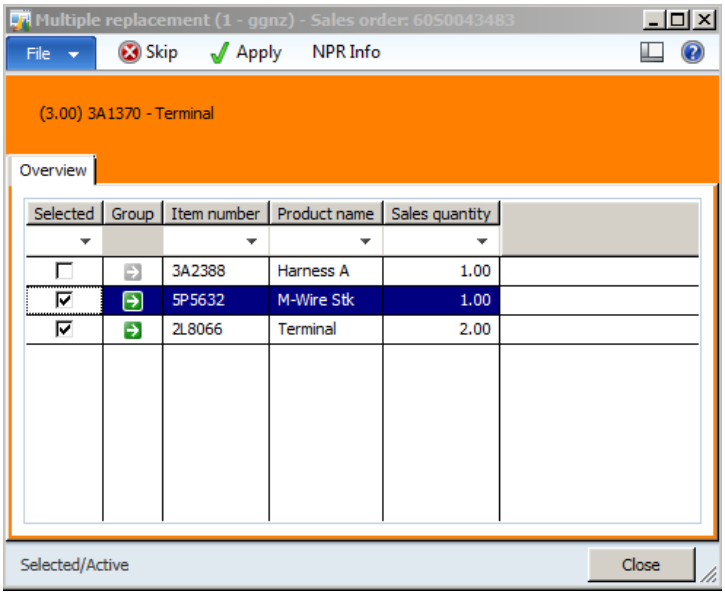


12. Tick the box and select **Apply**



Either or replacements will force you to choose either

- the part(s) to the right of the grey arrow(s)
- or part(s) to the right of the green arrow(s)



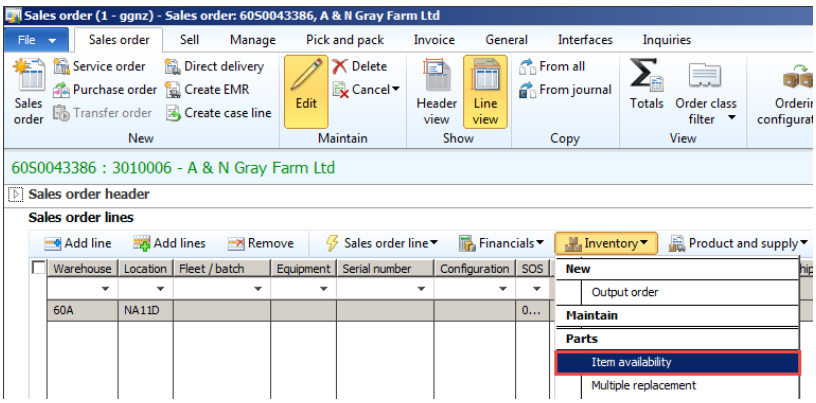
13. The parts will appear in your sales order and an Infolog will appear

Select **Close**

Task 6. Find item availability – from a sales order

14. From the Sales order lines fast tab

    Select **Inventory > Item availability**



Task 7. Item availability – replacement cross reference, alternate, lines

15. Navigate to **GGNZ > Product information management > Common > Item availability**

16. If accessed from a sales order **Item number** and **Customer account** will already be populated, otherwise, select or enter:

    - Item number
    - Customer account

17. Review the part availability information:

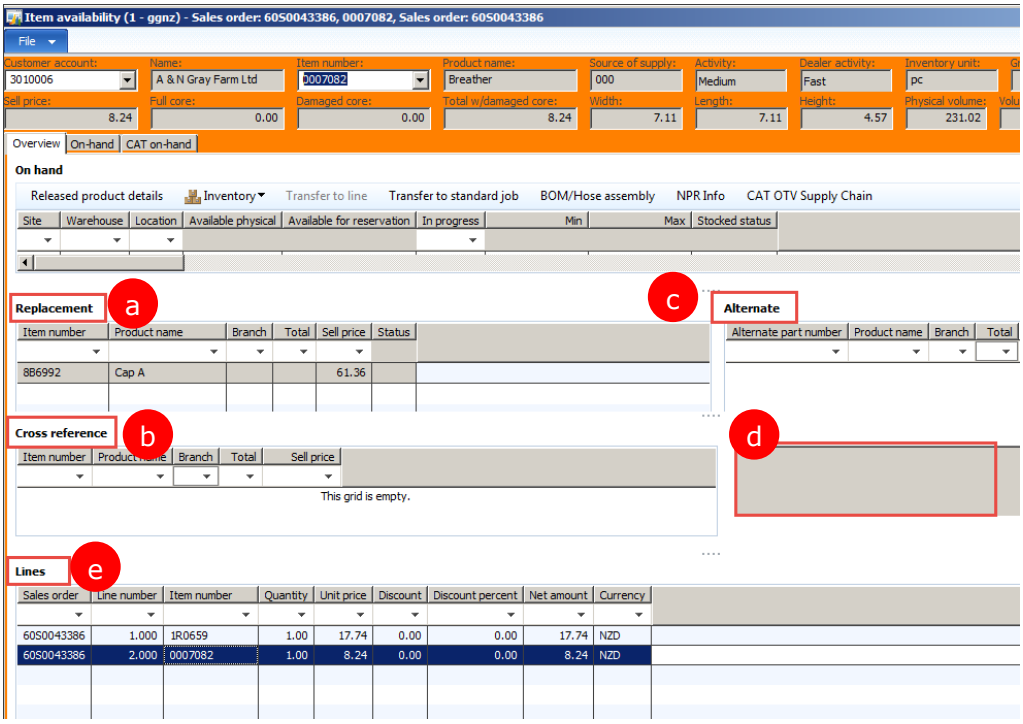
    a. **Replacement** if a part is obsolete and is being replaced with a new part(s)

    b. **Cross reference** where there is a two way relationship, i.e. item A can be replaced by item B, or vice versa, in other words, is referenced both ways. This is mainly used for reman, when you sell a part, but you can instead sell a remanufactured item

    c. **Alternates** is a one way situation, you can sell B instead of A, but you won't see the reference the other way

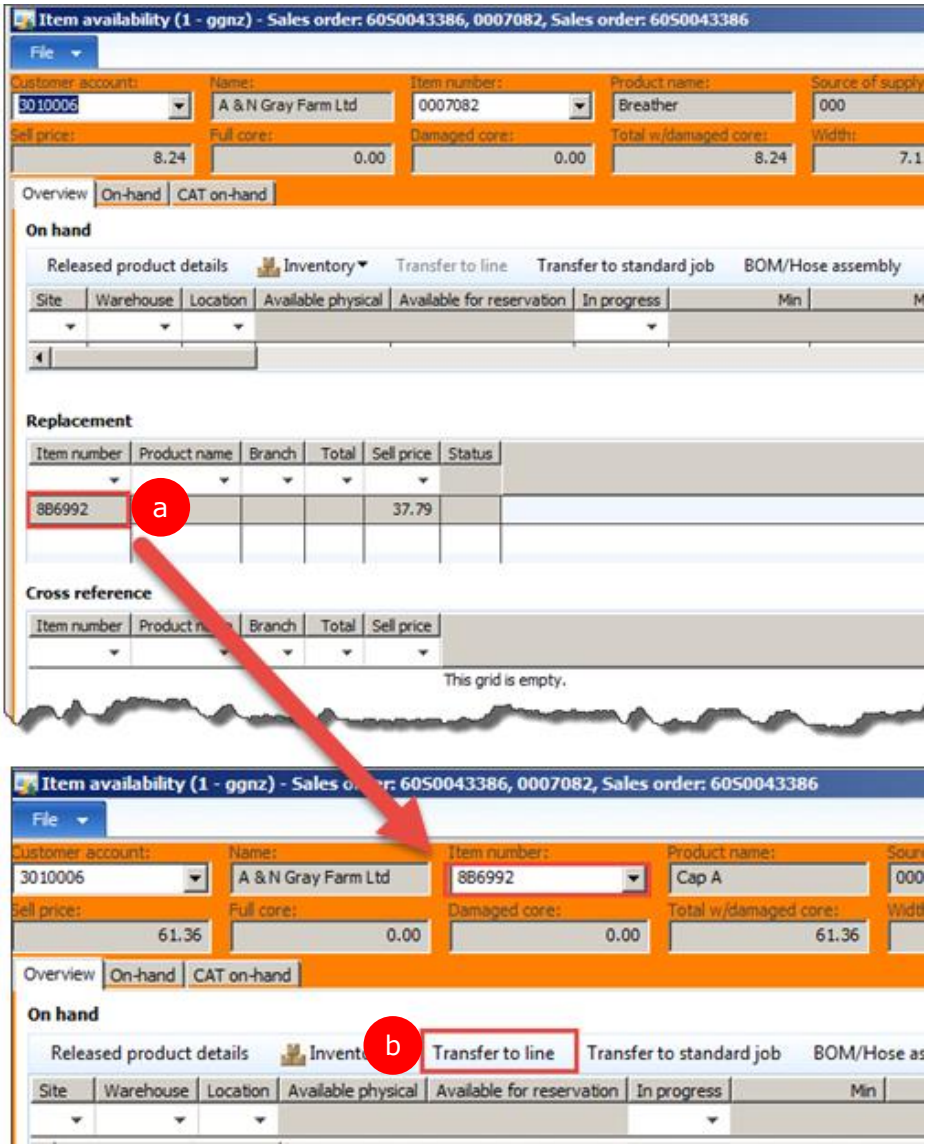
    d. **Note** there may be notes if the part is discontinued, is a dangerous item, or about how to order and when to use the item

    e. **Lines** this shows all parts in your sales order (if opened from a sales order)



18. To replace an item in your sales order with an alternative item

    a. Select the item number (this moves it to the top of the Item availability form)
    b. Select **Transfer to line**

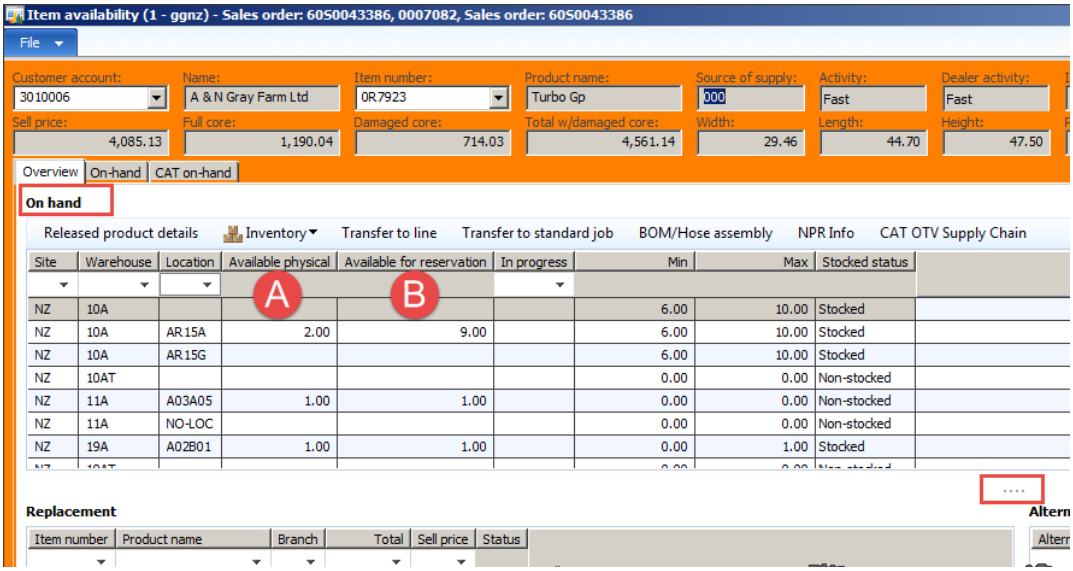


Task 8. Item availability – on hand overview

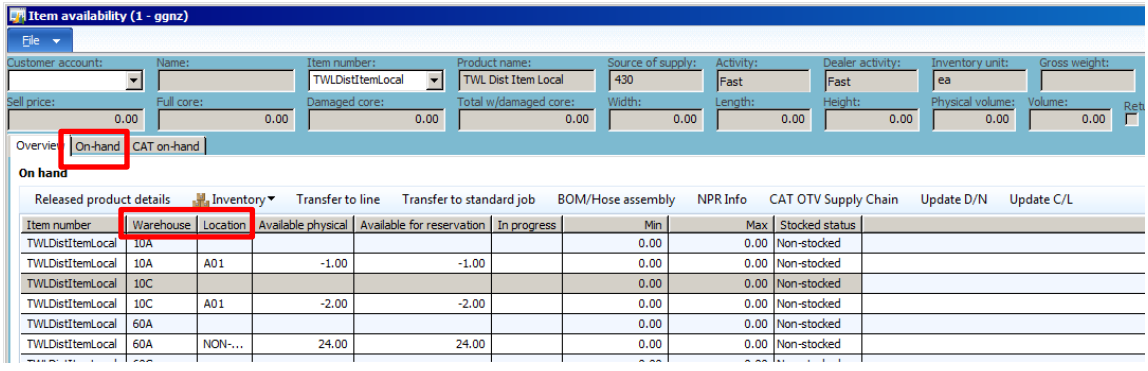
To see **On hand** information for all warehouses here you may need to open up the form by dragging downwards on the **four dots**

a. **Available physical**: Physical inventory minus any sales order reservations (or journal reservations where stock is going out)

b. **Available for reservation**: Available physical + Quantity on purchase orders or Transfer orders (or journal reservations where stock is going in)

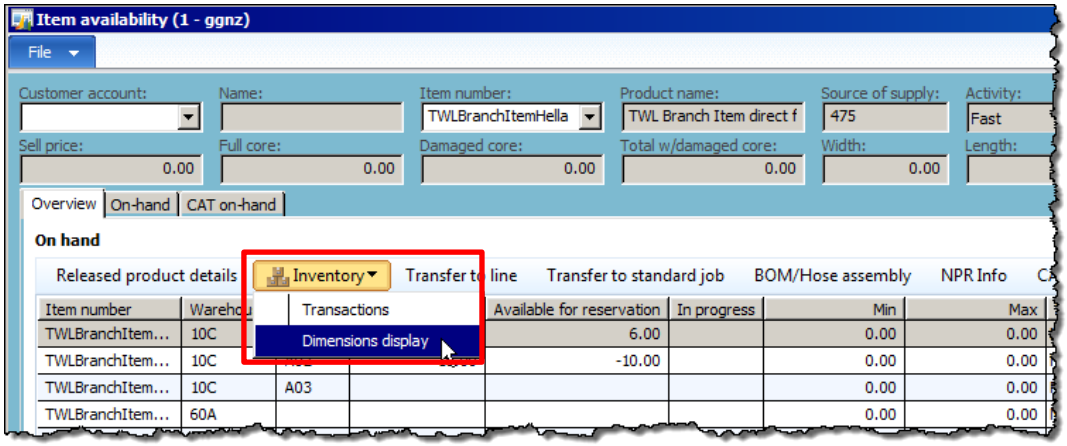


19. The On-hand tab displays information relating to availability information, including Warehouse and Location details



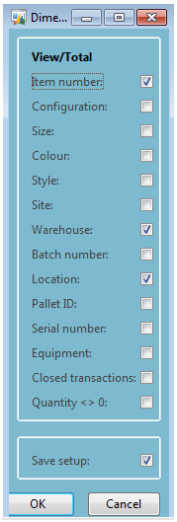
20. If required columns are missing, e.g. Warehouse or Location:

    Select **Inventory > Dimensions display**



21. From the options select column headings you want to display

    Select **Save setup** then
    Select **OK**

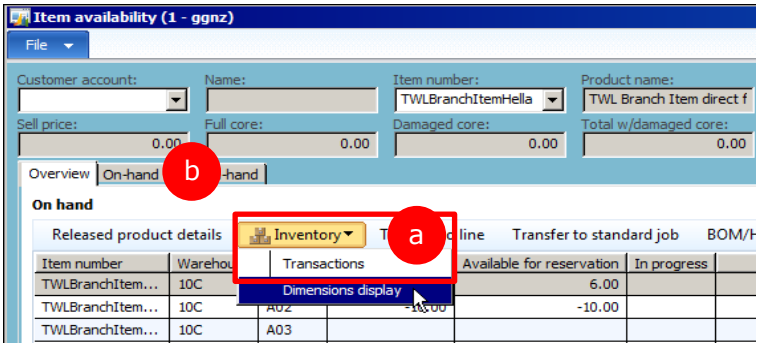


If the **Stocked status** of an item is **Non-stocked**, it means the item is not regularly stocked. The item may be in stock.

Task 9. Item availability – on hand detail

22. To see a detailed list of on-hand information

    a. Select **Inventory > Transactions**
    b. Select **On-hand**



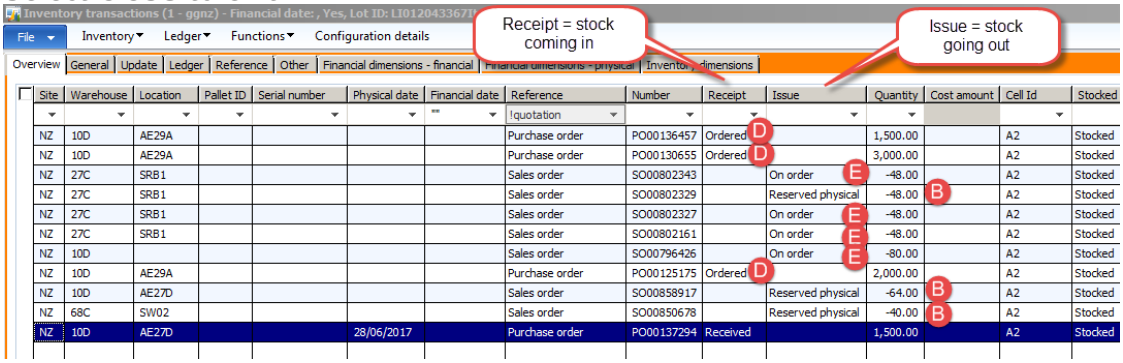
23. To see details relating to one warehouse at a time, add the warehouse column on the **Overview** tab.

You can use this screen;

- What purchase orders the parts are ordered on
- See current warehouse location of part
- To work out estimated arrival date of ordered stock

a. **Physical reserved**: Quantity of parts on transactions going out linked to stock on hand (e.g. sales order lines)
b. **Ordered**: Quantity of parts on transactions coming in (e.g. purchase orders, transfers)
c. **On order in total**: Quantity of parts on transactions going out not reserved (e.g sales order lines no ship quantity)

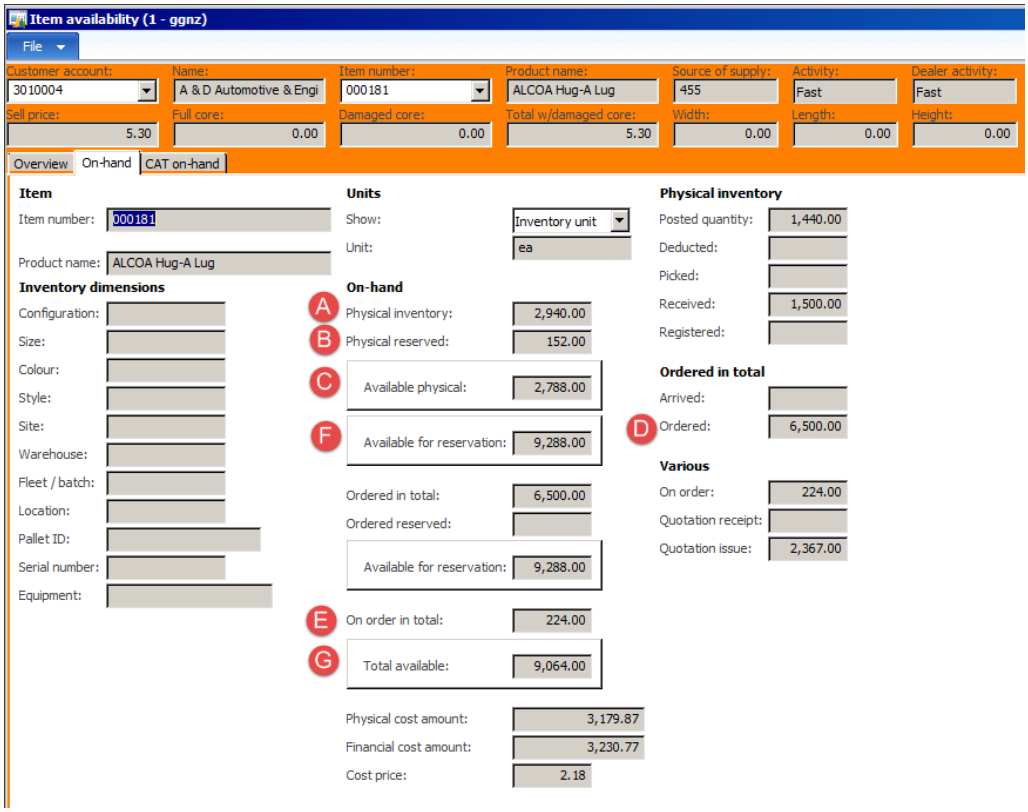
24. Select **close** to exit



25. Enter the following details

a. **Physical inventory:** How many are on-hand (on the shelf)
b. **Physical reserved:** Quantity of parts on transactions going out linked to stock on hand (e.g. sales order lines)
c. **Available physical:** A – B = C
d. **Ordered:** Quantity of parts on transactions coming in (e.g. purchase orders, transfers)
e. **On order in total:** Quantity of parts on transactions going out not reserved (e.g sales order lines no ship quantity)
f. **Available for reservation:** C + D = F
g. **Total available:** F – E = G

26. Select **close** to exit

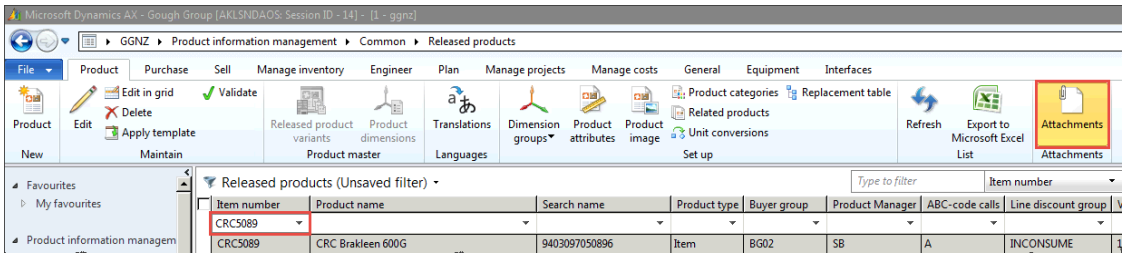


Task 10. Find product information

27. Go to:

GGNZ > Product information management > Common > Released products

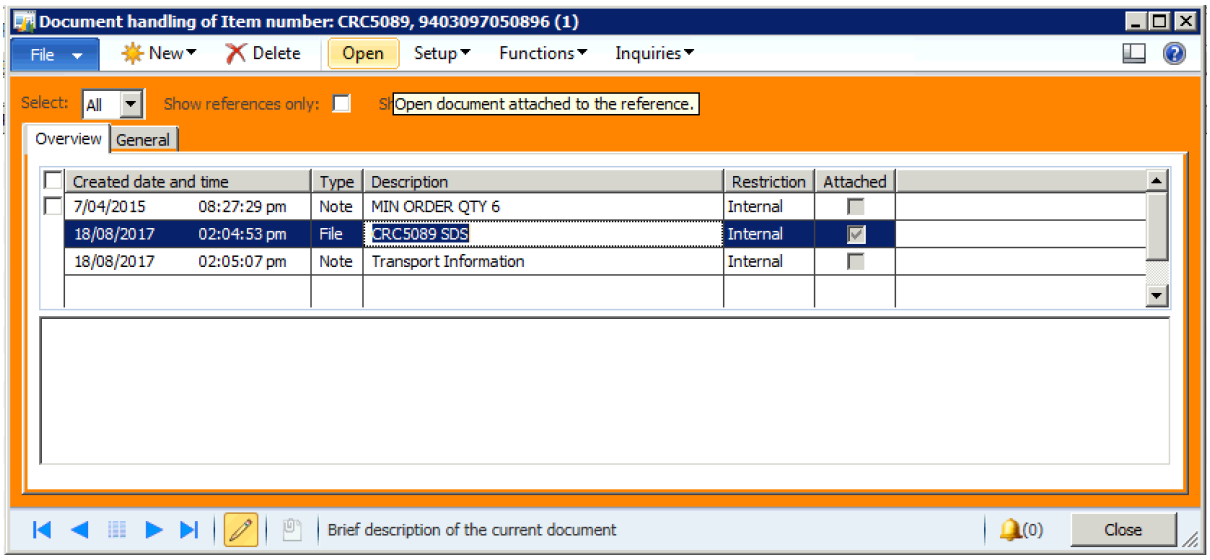
Filter for part with CTRL+G
Select the part to highlight it
On the Product tab > **Attachments**



28. Review relevant attachment

- **Note type = File**: select note then select open to view attachments
- **Note type = note**: select line to highlight, information appears in description box

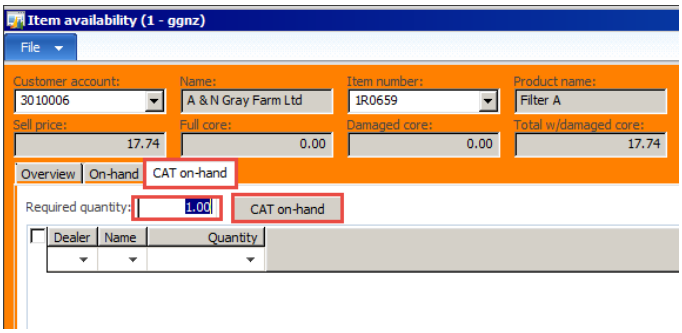
Select **Close**



Task 11. Item availability – CAT on-hand

29. From the item availability window navigate select the CAT on-hand tab,

    a. Adjust the **Required quantity**, by default it will be populated with 1 or the quantity from your sales order
    b. Then select the **CAT on-hand** button.



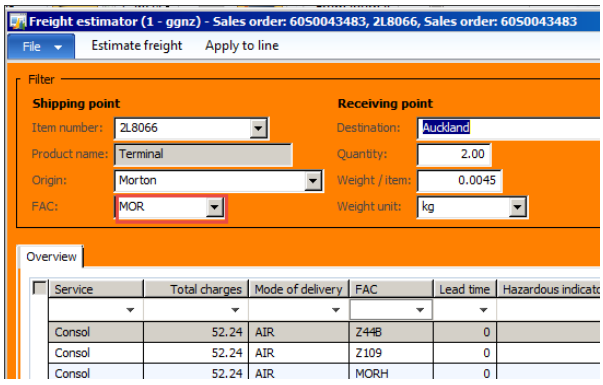
30. The Dealer, Name and Quantity will be populated or a message will appear letting you know that CAT has no availability

Although displayed in the list, we cannot receive CAT parts from RUS (Russia), SHB (Shanghai), DUB (Dubai) and AFR (Africa), Y303 (Rio), Y304 (not known)

31. With the Dealer code above, known as a FAC (facility) code in NAXT you can then use the Freight Estimator to estimate a freight price for the customer

    Sales order lines > Financials > Charges > **Freight estimator**

    See **PRT_5.4(SOP)Recover Freight**



32. If the item is not available from any CAT supply point, an Infolog displaying 'no on hand quantity found…'

    Select **Close**

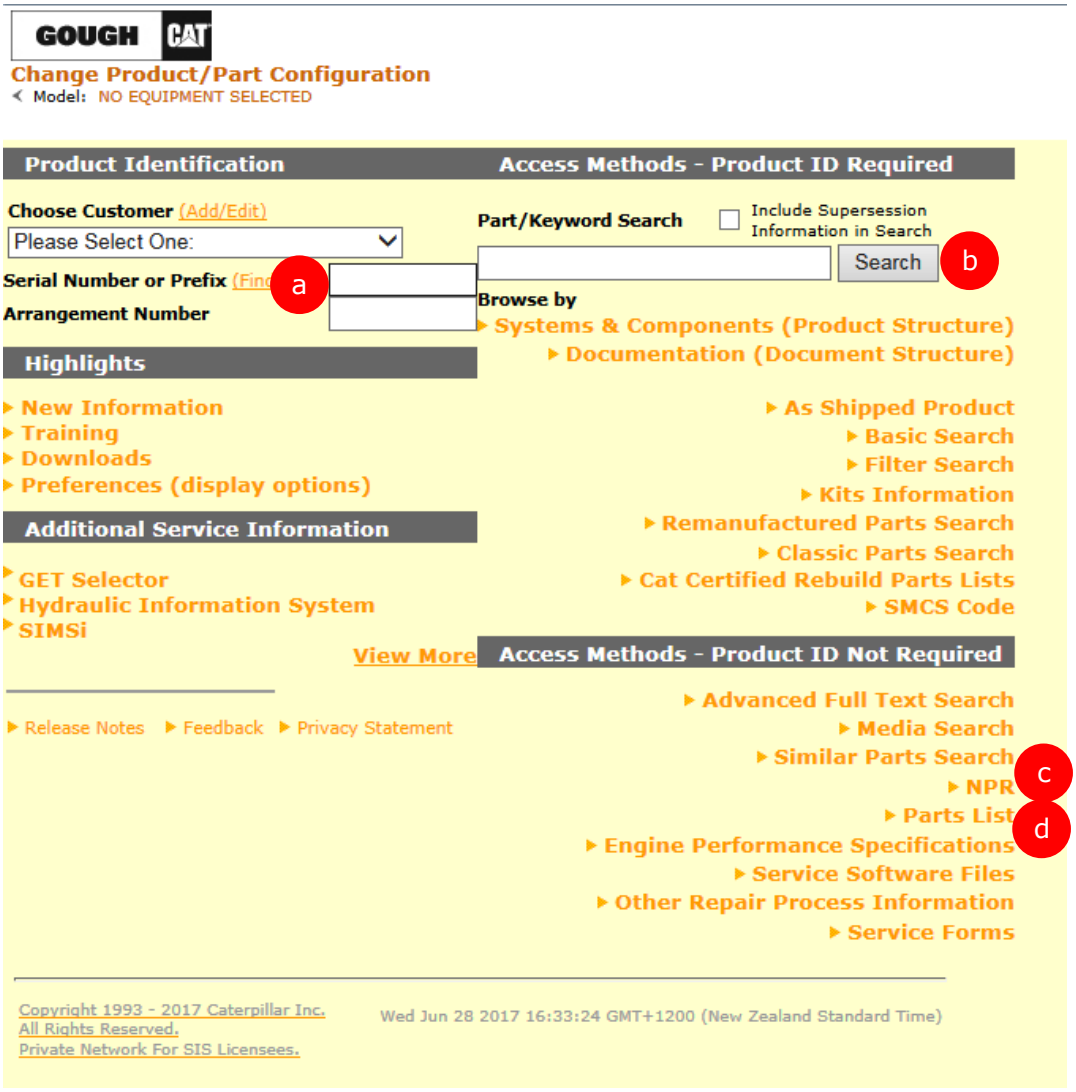
Task 12. Item availability – (SIS)

33. Open the www.SISWeb.cat.com
https://sisweb.cat.com/sisweb/servlet/cat.cis.sis.PController.CSSISMainServlet

    Enter your **CWS** logon and **password**

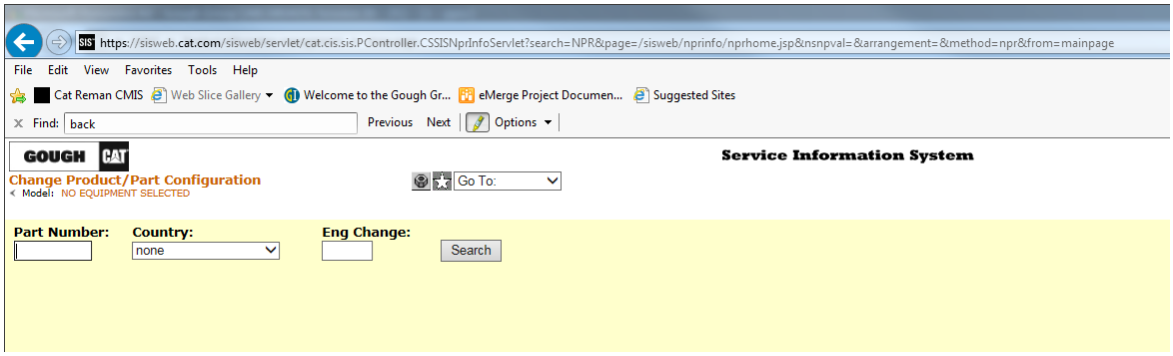
34. Use any of the links on this page to find the information you need, common helpful links include

    a. Find product information by serial number or prefix
    b. Part/keyword search
    c. NPR look up information re parts
    d. Parts lists here relating to models,

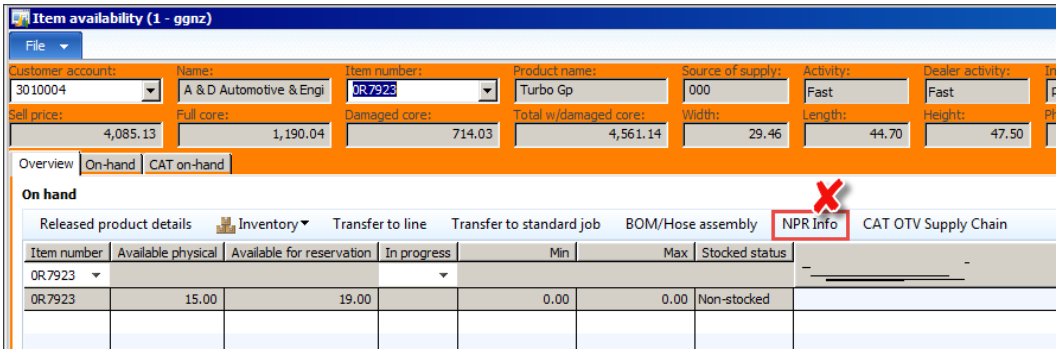


35. Use your CAT part number to search for further information about the part,

Access Methods – Product ID Not Required > NPR

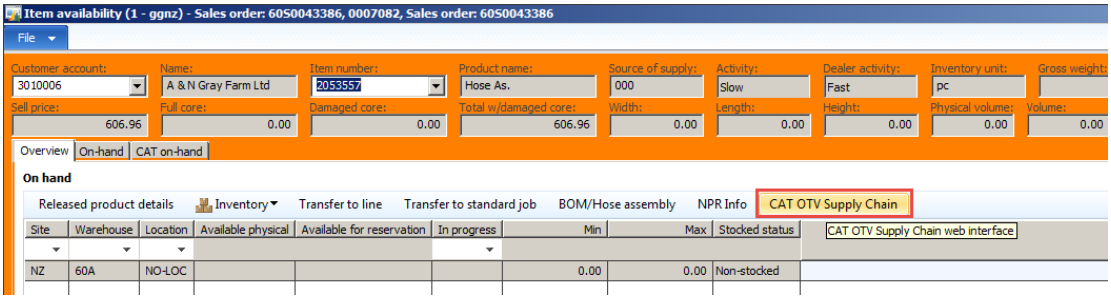


Do not access SIS Web using the NPR button in NAXT you will not be able to navigate backwards and forwards in the window that opens



Task 13. Item availability – CAT OTV supply chain

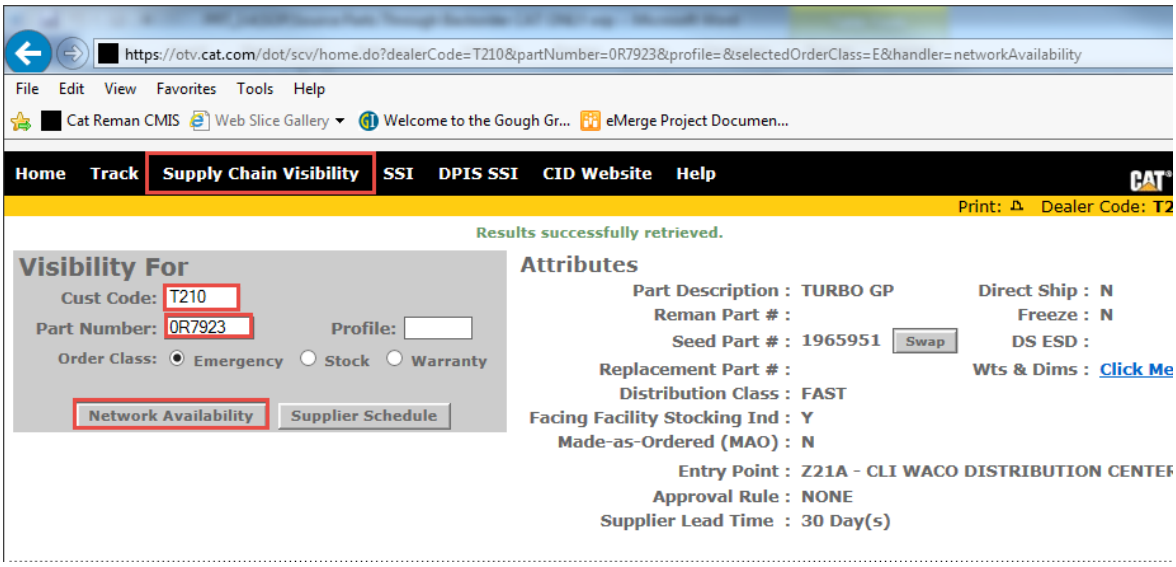
36. Click CAT OTV Supply Chain



37. Enter your CWS logon and Password

38. On the supply chain visibility tab enter the following details

- Cust Code = **T210**
- Part number e.g. **0R7923**
- Select **Network Availability**



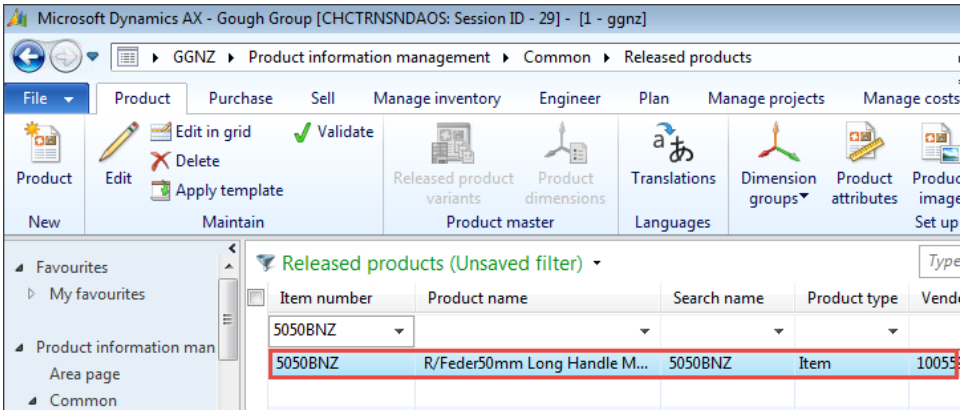
Although displayed in the list, we cannot receive CAT parts from RUS (Russia), SHB (Shanghai), DUB (Dubai) and AFR (Africa)

Task 14. Find purchase orders for parts

39. Open the release products area in NAXT

GGNZ > Product information management > Common > Released products

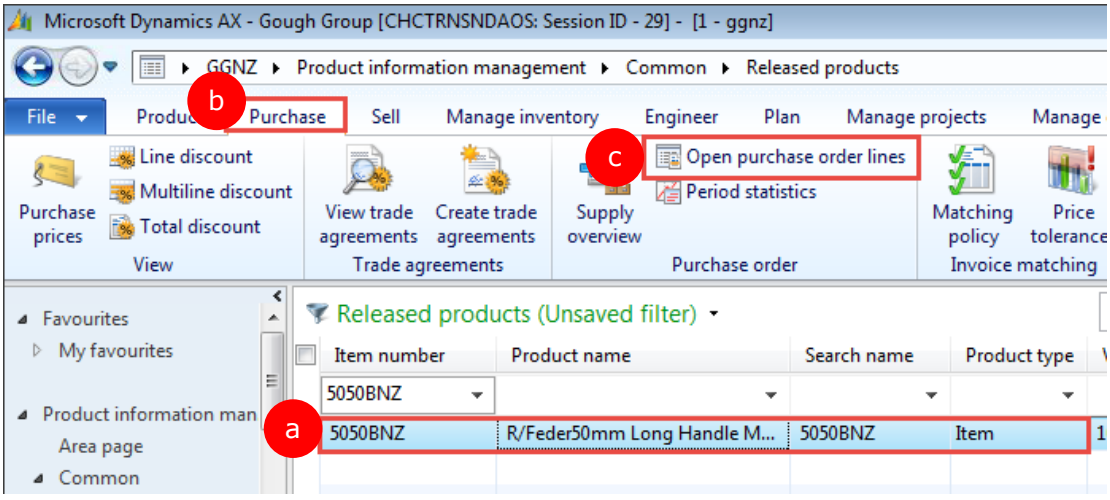
40. Locate the part using filters



41. To open the purchase order lines window

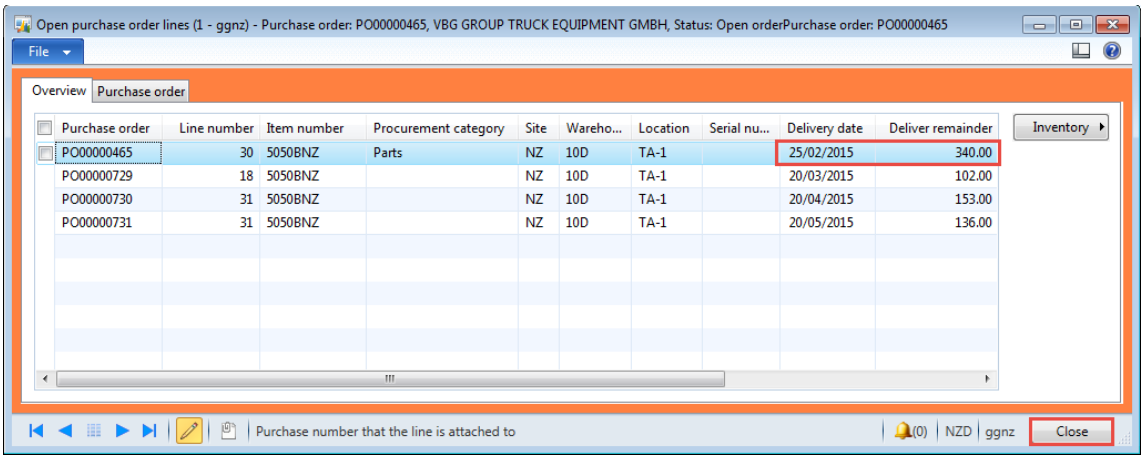
a. Select the part to highlight it
b. Select Purchase then
c. Select Open purchase order lines

You will now be able to review any current purchase orders that the part is ordered on



42. You can see the due date (Delivery date) and amount available (Delivery remainder) for each purchase order

    Select **Close**



What next?

PRT_1.2(SOP)Parts: Create and Manage a Sales Quote