CREATE PARTS

## Introduction

This Standard Operating Procedure (SOP) has been developed to provide you with an understanding of how to create ad-hoc parts in the NAXT system, sometimes referred to as ‘Parts creation on the fly’.

This procedure is linked to the following business processes:

* PRT 3.15

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## Prerequisite

None

## Terminology and Icons

|  |  |
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|  | Important / Note |
|  | Business rule |
| NSL | Non Stock Line or Procured item |
| D/N Price | Dealer Net Price = cost price |
| C/L Price | Consumer List Price = sell price |

## Steps

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| SET UP A NEW PART | |
|  | Open the sales order or sales quote screen   * **GGNZ >** **Sales and marketing > Common > Sales orders > All sales orders**   OR   * **GGNZ >** **Sales and marketing > Common > Sales quotations > All sales quotations** |
|  | Click **New > Sales order**  OR  Click **New > Sales quotation** |
|  | Select **Customer** and click **OK**    Complete any mandatory fields (e.g: Customer reference, Need by date) as required. |
|  | *The* ***Sales order*** *or* ***Sales quotation*** *window will display*  Select Source of Supply (**SOS**)  For CAT parts, enter **130** in the **SOS** field  For NZTS parts, enter:   * **582** for a Heavy Transport item * **583** for a Light Trailer item * **584** for an Automotive item * **590** for an Engineering item * **591** for an Electrical item   If unsure, choose the closest match  For Palfinger parts, enter **399** |
|  | Enter new **Item number**  This will be the same as the vendor item number, where possible. |
|  | *Pop-up window appears to ask if you want to create a new item*  Click **Yes** |
|  | *The* ***New Released product*** *window will display*  Complete the following fields, in this order:   * **Part –** ensure checkbox is ticked * **Apply template**   For **NZTS**, select a template from the following list, dependent on Item SOS:   |  |  | | --- | --- | | **NZTProcuredHT** | SOS 582 | | **NZTProcuredLT** | SOS 583 | | **NZTProcuredEng** | SOS 590 | | **NZTProcuredElec** | SOS 591 | | **NZTProcuredA&C** | SOS 584 |   For **CAT**,select **CATNSITEM Template**  For **Palfinger**, select **PAL NSL Template**  A Suffix according to business rule (NSL for NZTS, TP for CAT) will apply automatically to the Product when the template has been selected. e.g. 12345 will become 12345NSL.   * **Product name** - this is the Description of the item. Use proper case and enter detailed information. E.g: “Claw Hammer, Steel Shank, Left Handed” instead of “hammer”. * **D/N Price** - this is the cost price, excl GST and freight. * **C/L Price** - this is the sell price you wish to charge to the customer, excl GST and freight. Apply appropriate markup as per business policy. For NZTS refer to ***GT202 – NSL Procurement and Sale.*** * **Vendor -** The vendor account you wish to purchase the item from.   Product number and Item number must be the same.  Do not change Product name until template has been selected.  Do not change Units of measurements. If this needs to be different contact Masterfile Maintainers to correct the Released Product after the NSL is created.  Search name fields are unused for NSL’s.  Select **OK** |
|  | Click **OK**  *The* ***Sales order/quote*** *window will display with the* ***Sales order/quote line*** *updated to include the new item information* |
|  | Continue processing the backorder as normal. For more information, see *PRT\_3.4(SOP)Source Parts through Backorder* |

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| WHERE TO NEXT? | |
| Automatically produce a purchase order | *PRT\_3.4(SOP)Source Parts through Backorder* |
| Receive the part into stock | *PRT\_5.3(SOP)Receive Parts into Stock* |