



PENTAGON 2000 SOFTWARE

Creating a New Part Master Record

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TITLE:	Creating a New Part Master Record						
Part:	Material Management						
MODULE:	Inventory						
RESPONSIBILITY:	Procedures Specialist, Pentagon 2000	REVISION:	0				
APPROVED BY:	Vice President, Operations, Pentagon 2000	EFFECTIVE DATE:	05/25/2012				

Overview

This procedure outlines the steps for creating a new part master record.

Required Modules

Inventory

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Procedure

- 1. **Open the Inventory Module:**
 - a. From the main menu screen, left-click the **Inventory** button.



NOTE: Inventory may also be accessed from the toolbar. Left-click the **Inventory** item from the toolbar and then left-click **Parts List** from the menu options



b. The **Partnumber** search screen will appear. Left-click the **Add** button.

💣 Partnumber									23
Search On P A		X-Bef Sertt	BOM Cap Evt		MFG :	All			All
					Category :	All			All
Start With :			<u></u>		P/N Type :	All			All
					Fligibility	A.0			0.11
					Eligibility :	All New Council			AI
						Max Search	n Hesu	It Lines : 50	-
Drag a column header h		roun hy that cr							
	1	1	1	1					
Partnumber	SubP	Rev	Description	NSN	MIL	MFG	Bų G	(ty in Stock	UMIC
#1 KLX-135 GPS/CON	1		INTERFACED INTO	120719			Bu	1,142	EA F
#2 KLX-135 GPS/CON	1		STAND ALONE, INI				Bu	2	EA F
0-132-002700000	1		TOGGLE	5294-98-098-0980	MS21443	08903	Bu	22,076	EA N
0-132-002700000	2		Fastener				Bu	1	EA N
0-737×1-01241B8	1		SEAL			F6137	Bu	1,618	EA N
00-12695-01	1		CORE			0040	Bu	5	EA N
00-12700-01	1		CORE	8010122-1212	11-22-33	13636	Bu	3	EA N
00-200-1462	1		WASHER			7158	Bu	27,371	EA N
00-200-1462P	1		WASHER-PLATED				Bu	110	EA N
00-200-1472	1		FILTER			F6137	Bu	1,173	EA N
00-200-415	1		TAPE	8010-21-331-1313	DJ1004	F6137	Bu	136	EA N
00-6759	1		CAPSULE	8080-80-808-0800		F5341	Bu	2,175	EA N
000102002	4		24		1		n	2	E & 15
]						_ •
Add						I ≫ ✓ ○	K	X Can	cel

- 2. Complete the applicable portions of the Header:
 - a. The [New] Partnumber window will appear. Enter the header information as applicable:



🍠 [New] Partnumber			
Add Edit Del Prev	→ III 🛣 🖾 Next Hist XRef W/H	Ordr BOM Opt S	rch <u>C</u> ncl O <u>K</u> Close
P/N : Desc :	/ 1 Rev :	Alt 1 :	
Stock General Sell Prices	Costs Exchanges Measures	Extended Info Eligibility	Image Stock Levels Min Qiy :
MFG : ···· Stock UM : EA ··· Conc	Cert :	Alert ✓ Note ♀ Obsolete : ✓ Note ♀ Warranty : ✓ Note ♀	Max Qty : Opt Qty :
Out Bound Stock	Physical Stock	Qty Available	In Bound Stock
Beserved	Internal Use	ToSell: 0	Upen P.U.
Booked	Consigned	Uncommitted P.O.	OH/Repair
Claims	QA/Inspc	Consumption Analysis	Open RMA
Cores Due	Transport	Memo 1 Q	Cores Due
	Quarantine	Memo 2 Q	
	Sub Part Number field]	

NOTE: If the **Partnumber** window is open (another part master record is being viewed), the process for creating a new part master record can also be initiated by left-clicking the Add button on the **Partnumber** window toolbar.



- i. **P/N** field Enter the part number for the item. This field is mandatory and can never be changed once the record is created. [30-character limit]
- ii. **Sub Part Number** field the Sub Part Number is used to distinguish between two items having the same part number.

NOTE: The **Sub Part Number** field is not visible unless the system is set up to allow duplicate part numbers within the Company Setup. To enable use of the **Sub Part Number**, left-click **Administration** from the tool bar, go to **System Setup**, then left-click on **System General Defaults**. The Company Setup window will appear. If the **Allow Duplicate P/N** checkbox is marked as "checked" on the **Setup** tab, then the Sub Part Number field will appear.



💣 Company Setup	? <mark>×</mark>
Cancel OK Option	
Modules Limits System Alerts	General Settings Document Settings W0/MNT Settings Memo Convert
Accounting Settings Printing Setti	ngs Stock W/H Settings Mandatory Fields S0/P0 Line changes settings
Consolidator Settings PMR	Aircraft Ext Flight Log Ext Hide Line Types Publications Ext. Info
General Defaults Setup Cus	tomer Docs Vendor Docs Taxes Charges Convert P/N Ext Counters
Add Misc to Stock Cost	Stock Default
Shipping : 🔽 Parts : 🔽	Std Condition : NE Additional Defaults
Air Frt : 🔽	Std Unit Measure : EA
Ocean Frt : 🔽 Labor : 🗸	Stock Std Type : STK ···
Insurance : 🔽 🛛 Lot Charge : 🔽	Base Currency : USD ···
Hand Charge : ✔ Cap Cost : ✔ HazMat : ✔	User Price Label : MSLP
	Incoterms Label : F.O.B. Auto Create P/N from lines into stock
Stock Default W/H & Location	Incoterms Default : ORG ···· Allow Duplicate P/N : V
W/H No : 0001	Publish Stock Parts : 🔽
Location : B-65-98 ····	

The default value for this field is "1". If this field is visible, then it is also mandatory and can never be changed once the record is created. [5-character limit]

NOTE: The **P/N** + **Sub Part Number** combination must be unique in the parts master.

- iii. Desc field Enter the description of the item. [50-character limit]
- iv. Rev field Enter the revision suffix of the item (if applicable). [5-character limit]

NOTE: This revision number is simply an attribute of the part master record. If you have items with the same part number but different revision suffixes, you have three options:

1. Create a unique part master record for each revision suffix by including the revision suffix in the *P/N* field; then leave the *Rev* field null.

2. Create a unique part master record for each revision suffix by using a unique *P/N* + *Sub Part Number* combination for each revision suffix; then enter the revision suffix in the *Rev* field.

3. Create a single part master record and track the revision suffix at the UID (see definitions) level.

- v. Alt 1 field Enter an alternate part number (if applicable). [30-character limit]
- vi. Alt 2 field Enter an alternate part number (if applicable). [30-character limit]

NOTE: The **Rev**, **Alt 1** and **Alt 2** field labels may be modified in the **Company Setup**. A common label for one of the alternate part number fields is "NSN". To modify the labels for these fields, left-click **Administration** from the tool bar, go to **System Setup**, then left-click on **System General Defaults**. The Company Setup window will appear. Labels may be identified on the **General** tab.

ne L	e Label : Line Ref#			P/N Rev Label : Rev
١	P/N A Alt 1:	lternate Alt 1	Mask :	
l	Alt 2:	Alt 2	Mask :	

If modified, the labels will change both on screen and on all forms and reports where these fields are referenced.



- 3. Select unit of measure and save the part master record:
 - a. Complete the **Stock UM** field on the **Stock** tab. This field is mandatory and can never be changed once the record is created.

[Editing] Partnumber : [P230-123] WIDGET	
Add Edit Del Prev Net Hist XRd W/H	Ordr BOM Opt Srch Cncl OK Close
P/N : P230-123 / 1 Rev : A	AR 1 : 24-5646-332
Desc : WIDGET	Alt 2 : 1560-00-238-4531
📴 P/N : Not Superseded 💌 👘 🖓	Hold Note Q Min Qty: 0
MFG : Cert :	Alert Note Q Max Qty: 0
Stock UM : EA ··· Cond : NE ··· Class : ···	Obsolete : Note Q Warranty : Note Q Opt Qty : 0
Out Bound Stock Physical Stock	Qty Available In Bound Stock

NOTE: To complete the **Stock UM** field, the appropriate unit of measure must be listed in the **UM List**. To access this table, left-click **Administration** from the tool bar, go to **Stock Tables List by Code**, and left-click **Unit Measure (UM)**.

NOTE: The default value for the **Stock UM** field is managed within the Company Setup. To set up the default **Stock UM**, left-click **Administration** from the tool bar, go to **System Setup**, then left-click on **System General Defaults**. The Company Setup window will appear. Default **Stock UM** may be identified on the **Setup** tab.

💣 Company Setup	ନ <mark>- x</mark> -
X ✓ 폐 Cancel OK Option	
Modules Limits System	Alerts General Settings Document Settings W0/MNT Settings Memo Convert
Accounting Settings Print	ting Settings Stock W/H Settings Mandatory Fields SO/PO Line changes settings
Consolidator Settings	PMR Aircraft Ext Flight Log Ext Hide Line Types Publications Ext. Info
General Defaults Setup	Customer Docs Vendor Docs Taxes Charges Convert P/N Ext Counters
Add Misc to Stock Cost	Stock Default
Shipping 🔽 🛛 📭	Std Condition : NE ···· Additional Defaults
Air Frt: 🔽	Std Unit Measure : EA
Ocean Ert : 🔽 Lab	101: V Stock Std Tupe / STV

i. The **Stock UM** field should identify the unit of measure in which the item is stocked, counted, and issued.

NOTE: The item may be purchased or sold in a unit of measure that is different than the unit of measure in which it is stocked. The **UM List** contains standard factors that convert quantities from the standard unit of measure (identified within the **Company Setup**) to all other units of measure.

If the standard factors do not apply to the item being created, unit of measure conversions will need to be set up for the part master record. Steps to set up a unit of measure conversion may be found in the procedure "Creating Unit of Measure Conversions" within the Material Management section of this manual.

If a unit of measure conversion exists for the part master record, the factor associated with the unit of measure conversion will override the standard factor in sales transactions.

If the default Stock UM is not correct, left-click the Stock UM field.



ii. The **UM List** window will appear.

NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.

🖌 UM Gat		
	and the second second second second second second	
Start With :		
		Max Search Result Lines : 50 🚔
		· · · · · · · · · · · · · · · · · · ·
Drag a column header here		
Code	Name	Factor
▶ 1IN	INCH	1.00
AA	TWO HUNDERD & FIFTY	250.00
AM	AMPOULE	1.00
AT	ASSORTMENT	1.00
AX	TWENTY	20.00
AY	ASSEMBLY	1.00
BA	BALE	1.00
BB	BOBBIN	1.00
BC	BLOCK	1.00
BF	BOARD FOOT	1.00
BG	BAG	1.00
BK	BOOK	1.00
BL	BARREL/DRUM/KEG	1.00
BO	BOLT	1.00
BR	BAR	1.00
BU	BUSHEL	1.00
BX	BOX	1.00
🛃 🔁	🔌 Edit 🖉 Delete	🔟 🔀 🔀

- iii. Select the UM (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- b. Left-click the **OK** button.

WARNING: When the OK button is selected, the parts master record will be created and the **P/N** and **Sub Part Number** fields will be locked. The **Stock UM** field will be modifiable until either (1) a unit is created in the warehouse or (2) a transaction is created using the part number, at which point the **Stock UM** will be locked.



4. Edit the parts master record:

a. Left-click the Edit button.

🕖 Part	number	: [P230	-123] V	VIDGET								[• 🗙
	≷ <u>E</u> dit	<mark>∐</mark> el	Prev	⇒ <u>N</u> ext	Hist	<mark>≩</mark> <u>X</u> Ref	<u>С</u> <u>w</u> /н	Ordr	₽ ОМ	回 Op <u>t</u>	<u>S</u> rch	X <u>C</u> ncl	√ O <u>K</u>	C <u>l</u> ose
P/N :	P230-12	3				/ <mark>1</mark> R	lev : 🗛	_	Alt 1 :	24-5646	-332			
Desc :	WIDGET								Alt 2 :	1560-00	1-238-453	31		
Stock	l.c	Lean		c)	F			l num	J. J 1. C.	l metato	a.)			



b. The **Partnumber** window will enter edit mode and will display **[Editing] Partnumber** at the top of the window and all editable fields in the window will become active.



5. **Complete the applicable portions of the Stock tab:**

a. Complete the supersede information for the item:



NOTE: To complete the supersede information, a part master record must exist for the related item. It is recommended that all part master records be created and then all supersede information be loaded as another step in the process.

- i. If the item has not been superseded, no action is necessary; "Not Superseded" is the default value for this field.
- ii. If the item supersedes another item, select "Superseded From" from the drop down menu and left-click the **Supersede Part Number** field.
- iii. If the item has been superseded by another item, select "Superseded To" from the drop down menu and left-click the **Supersede Part Number** field.

NOTE: Supersede information must be created for both the superseded item and the superseding item. The system does not create a two-way relationship automatically.



iv. If the Supersede Part Number field was selected, the Partnumber search window will appear.

1	Partnumber													
Γ	Search On : Day	Loo	V Pot Cor#			MFG :	All			All	ה			
						Category :	All			All	ıl			
	Start With :					P/N Type :	All			All	il			
						Eligibility	AU			0.11	1			
						Engionity.	May Casada	. D		AII	4			
	Max Search Result Lines : 50													
	Drag a column header here to group by that column													
F	Partnumber	CULD	Pau	Description	Alt 1	All 2	MEG	D]	Obuin Stook	ны				
h	H1 KLX-135 GPS/COM	1	nev	INTERFACED INTO	AICT 120719	All 2	mru	Bu	1 1/2	EA	E			
F	#2 KLX-135 GPS/COM	1		STAND ALONE. INI	120110			Bu	2	FA	Ē			
F	0-132-002700000	1		TOGGLE	5294-98-098-0980	MS21443	08903	Bu	22.076	EA	Ŕ.			
F	0-132-002700000	2		Fastener				Bu	1	EA	Ň			
F	00-12695-01	1		CORE			0040	Bu	5	EA	Ň			
F	00-12700-01	1		CORE	8010122-1212	11-22-33	13636	Bu	3	ΕA	N			
F	00-200-1462	1		WASHER			7158	Bu	27,371	ΕA	N			
F	00-200-1462P	1		WASHER-PLATED				Bų	110	ΕA	N			
F	00-200-1472	1		FILTER			F6137	Bu	1,173	ΕA	Ν			
	00-200-415	1		TAPE	8010-21-331-1313	DJ1004	F6137	Bų	136	ΕA	N			
	00-6759	1		CAPSULE	8080-80-808-0800		F5341	Bų	2,175	ΕA	Ν			
	000102003	1		3A				Bų	3	ΕA	F			
	000405010.0040	4		HOLE				n						
						X	× 🗸	K	X Can	cel	Ī			

v. Select the related item (left-click the line within the search screen and left-click **OK**; or doubleclick the line within the search screen)

TIP: You may left-click on the P/N button to view the part master record for the part number in the Supersede Part Number field

b. Complete the manufacturer information for the item (Optional):

🕒 MFG : 😶 Cert : 😶

NOTE: To complete the manufacturer information for the item, the manufacturer must be loaded in the system as a vendor. Steps for loading a vendor may be found in the procedure "Creating a Vendor" within the Purchasing section of this manual.

i. Left-click the **MFG** field.



ii. The Vendor List search window will appear.

💣 Vendors List										x
Search On : Vendor Contact	Misc	Cap	A Acc Acc Capa	ccount Typ count Ratin pount Priorit Regio Categor bility for P/I	e: Al g: Al y: Al n: Al y: Al N: Al	I I I I I M	lax Sear	ch Resul	: Lines : 50	
Drag a column header here to group by	that column	Our Code	Sub	Cust/Vend	Tune	Begion	Bating	Priority	Approved	Hole
▶ 3 - B SALES	7158	P2000×L	1	Vendor	A-MOI	WST	005	н	Yes	No
3 BIVERS DISTRIBUTING, INC.	AIKO		1	Vendor	SB				Yes	No
A & E AIRCRAFT, INC.	3097		1	Vendor	SB				Yes	No
A & L LABS	AK4P		1	Vendor	SB				Yes	No
A & P BEARINGS, INC.	6967		1	Vendor	SB				Yes	No
A & S INT'L SUPPLY, INC.	AJ2T		1	Vendor	SB				Yes	No
A J WALTER (AVIATION) LTD	1927		1	Vendor	SB				Yes	No
A'S AIRCRAFT SERVICES, INC.	5334		1	Vendor					Yes	No
A. B. PERS CORP.	AJWS		1	Vendor					Yes	No
A. BIEDERMAN, INC.	AK1B		1	Vendor					Yes	No
Acct <u>Financials</u>					1	*	 Image: A start of the start of	0 <u>K</u>	X Cano	el

- iii. Select the manufacturer (left-click the line within the search screen and left-click **OK**; or doubleclick the line within the search screen).
- iv. The **Cert** field identifies the type of certificate that would most likely come from the vendor with the part. The value in this field will be linked to the receiver document when the item is received from this vendor.



Purchasing section of this manual.

Left-click the **Cert** field.



v. The Certificate List window will appear.

NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.

1	Certificate List	And a state of the state	
Γ	Start With :		
			Max Search Result Lines : 50 👤
(
	Code	Description	
Þ	COC	CERTIFICATE OF CONFORMANCE	
	FAA	FAA 8130 CERTIFICATE	
			🖾 🔅 🗸 OK 🗶 Cancel
L			

- vi. Select the certificate (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- c. Complete the default condition for the item:

Stock UM : EA Cond : NE ··· Class : ···

The identified default condition will be linked to manual additions to the warehouse and manual parts/material requisitions.

NOTE: To complete the **Cond** field, the appropriate unit of measure must be listed in the **Condition List**. To access this table, left-click **Administration** from the tool bar, go to **Stock Tables List by Code**, and left-click **Item Condition**.

NOTE: The default value for the **Cond** field is managed within the Company Setup. To set up the default Stock UM, left-click **Administration** from the tool bar, go to **System Setup**, then left-click on **System General Defaults**. The Company Setup window will appear. Default **Cond** may be identified on the **Setup** tab.



1	🖉 Company Setup	9 <mark>- x</mark>
	Cancel OK Op	Dion
	Modules Limits	System Alerts General Settings Document Settings WO/MNT Settings Memo Convert
	Accounting Settings	s Printing Settings Stock W/H Settings Mandatory Fields S0/P0 Line changes settings
	Consolidator Settin	ngsPMR Aircraft Ext Flight Log Ext Hide Line Types Publications Ext. Info
	General Defaults	Setup CustomerDocs VendorDocs Taxes Charges Convert P/NExt Counters
F	Add Misc to Stock	Cost Stock Default
	Shipping : 🔽	Parts : V Std Condition : NE ···· Additional Defaults
	Air Frt : 🔽	Std Unit Measure : EA ····
	Ocean Frt : 🔽	Labor: IV Stock Std Type : STK ····
	Insurance : 🔽	Lot Charge : Page Currency LICD

- i. Left-click the **Cond** field.
- ii. The **Condition List** window will appear.

NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.

€ Condition List	-		- 0 <u>X</u>
Start With :			
,		Max Search Re	sult Lines : 50 🜻
Drag a column header here to group			
Code	Name		
▶_	NO CONDITION		
AI	AS IS		
AR	AS REMOVED		
CR	CONDITION PROVIDED ON REQUEST		
FN	FACTORY NEW		
NE	NEW		
NS	NEW SURPLUS		
NU	NEW		
OH	OVERHAULED		
RE	REEL		
RF	REFURBISHED		
RP	REPAIRABLE		
SP	SURPLUS		
ST	STOLEN/MISSING		
SV	SERVICEABLE		
US	USED/SERVICEABLE		
		💌 ጽ 🗸 o <u>k</u>	X Cancel

- iii. Select the condition (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- d. Identify the inventory classification for the item (optional):

Stock UM : EA Cond : NE ···· Class : ····

The inventory classification is useful in creating ordering policies and cycle count procedures.

NOTE: To complete the **Class** field, the appropriate classification must be listed in the **P/N Class List**. To access this table, left-click **Administration** from the tool bar, go to **Stock Tables List by Code**, and left-click **Stock Class Code**.

- i. Left-click the **Class** field.
- ii. The **P/N Class List** window will appear.



NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.

6	P/N Class List							• ×
	Start With -	And and a second se						
	Start With .					Max	Search Besult L	ines : 🗐 💻
						Piga	Sedierritesak	
	Class Code	Name	Consumption %	Cycle Counts	Min(Months)	Max(Months)	Opt(Months)	
Þ	A	A Class - High Usage	18.00	4	0.5	1	0.75	
	В	B Class - Medium Usage	3.00	2	0	1	0.75	
	С	C Class - Low Usage	79.00	1	3	6	4	
					2	× .	<u>√ 0K</u>	X Cancel

- iii. Select the inventory classification (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- e. Identify the appropriate active notifications for the item:



NOTE: If the checkbox is marked as "checked" for any of these notification fields, the system will notify the user when added to a Parts / Material Requisition, Sales Order, Purchase Order, Work Order, and Maintenance part tab. However, the system will not prevent the user from continuing during these processes.

- i. Hold Notification
 - 1. Left-click the Hold checkbox to mark it as "checked."

Hold 🔽	Note 💡
Alert 🗌	Note 💡
Obsolete : 🗖	Note 💡
Warranty : 🗖	Note 💡

NOTE: If the **Hold** checkbox is marked as "checked," the system will not allow for the item to be received (Sales or Purchasing), picked (Sales), shipped (Purchasing), or reserved (Work Order or Maintenance).



- If there are specific details related to the item being identified as on hold (i.e. reasons, individual who placed the item on hold), those details can be noted in the parts master record. Left-click the Note button next to the Hold checkbox.
- 3. The **Memo Editor** window will appear. Left-click the **Edit** button to add notes related to the Hold checkbox.



4. Left-click the **OK** button to save the message

ſ	🖉 [Update] Memo Editor	×
	✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓	
	Type your message here	*
		-

- 5. When a note field is not blank, the light bulb on that button 😵 will be highlighted in yellow.
- ii. Alert Notification
 - 1. Left-click the Alert checkbox to mark it as "checked."





- 2. If there are specific details related to the alert, those details can be noted in the parts master record. Left-click the **Note** button next to the **Hold** checkbox.
- 3. The **Memo Editor** window will appear. Left-click the **Edit** button to add notes related to the Hold checkbox.



4. Left-click the **OK** button to save the message

💣 [Update] Memo Editor	surface (1997-8)	Carlor State And and		101.0	×
Edit Clear	☐ ∰ Msg <u>S</u> pell	Print History A	All History List Wrapping	X √ Cancel OK	L Close
Type your message here					A
					T

- 5. When a note field is not blank, the light bulb on that button 😵 will be highlighted in yellow.
- iii. Obsolete Notification
 - 1. Left-click the **Obsolete** checkbox to mark it as "checked."





- 2. If there are specific details related to the obsolescence of the item, those details can be noted in the parts master record. Left-click the **Note** button next to the **Hold** checkbox.
- 3. The **Memo Editor** window will appear. Left-click the **Edit** button to add notes related to the Hold checkbox.

🗩 Memo Editor	X
Cear Mor Strell Print History All History	List Wrapping Cancel OK Close
	^ ^
4	

4. Left-click the **OK** button to save the message

🔮 [Update] Memo Editor	survive (1997) I	NAME AND ADDRESS OF			×
Edit Clear	Msg Spell	Print Histor)	oing <u>C</u> ancel	OK Close
Type your message here					
					Ŧ

- 5. When a note field is not blank, the light bulb on that button 😵 will be highlighted in yellow.
- iv. Warranty Notification

NOTE: The **Warranty** notification does not work in Build 8.5.54.70 and earlier.

1. Left-click the Warranty checkbox to mark it as "checked."

Hold 🗌	Note 💡
Alert 🗌	Note 💡
Obsolete : 🗖	Note 💡
Warranty : 🔽	Note 💡



- 2. If there are specific details related to warranty on the item, those details can be noted in the parts master record. Left-click the **Note** button next to the **Hold** checkbox.
- 3. The **Memo Editor** window will appear. Left-click the **Edit** button to add notes related to the Hold checkbox.



4. Left-click the **OK** button to save the message

🍠 [Update] M	emo Editor	-	carries as	-						×
<u>E</u> dit	⊆ Clea <u>r</u>	🛄 <u>M</u> sg	Spell	 <u>P</u> rint ∕	III History <u>A</u> ll	I history List	Wrapping	X Cancel	 ✓ ✓ 	Close
Type your mess	sage here									*
										T

- 5. When a note field is not blank, the light bulb on that button 😵 will be highlighted in yellow.
- f. Identify company-level stock control information for the item (optional):

Stock Levels				
Min Qty :	0			
Max Qty :	0			
Opt Qty :	0			

NOTE: The **Stock Levels** identified on the **Stock** tab are applied at the company level (meaning all warehouses within the company).



Warehouse specific stock levels are managed in the part master record Options. Steps may be found in the procedure "Managing Warehouse-Level Stock Controls" within the Material Management section of this manual.

- i. **Min Qty** field Enter the minimum quantity of the item that should be available in all warehouses combined.
- ii. **Max Qty** field Enter the maximum quantity of the item that should be available in all warehouses combined.
- iii. **Opt Qty** field Enter the optimal quantity of the item that should be available in all warehouses combined.

NOTE: Stock Levels are used in automatic purchasing calculations and for reporting purposes.

Steps for automatic purchasing may be found in the procedure "Automatic Purchasing" within the Purchasing section of this manual.

g. Complete the memo fields for the part master record (optional):

Memo 1	្
Memo 2	Ŷ

- i. Left-click the **Memo 1** or **Memo 2** button.
- ii. The **Memo Editor** window will appear. Left-click the **Edit** button to add notes related to the Hold checkbox.





iii. Left-click the **OK** button to save the message

🔮 [Update] Memo Editor	×
Edit Clea <u>r</u> Msg Spell Print History All History List Wrappin	ng <u>C</u> ancel O <u>K</u> Close
Type your message here	<u>ــــــــــــــــــــــــــــــــــــ</u>
	•

- iv. When a memo field is not blank, the light bulb on that button 😵 will be highlighted in yellow.
- h. The remainder of the fields located on the **Stock** tab are informational.

Stock General Sell Prices Costs Exchanges Measures Extended Info Eligibility Image

P/N Not Superse	ded 💌			Hold Note Q	Stock Levels
				Alort Note Q	Min Qty : 0
🕒 MFG : 🛛 🗛 🕂	A JE LA	BS	Cert : FAA ···	Alert Note Q	Max Qty : 0
Stock LIM : FA	Cond	NE ····	Class:	Warrantu V Note 0	Opt Qty : 0
Out Bound Stock		-Phusical St	ock	Otu Available	In Bound Stock
		T hysical St		aty Ataliable	III Boand Stock
Upen SU/WU	U	In Stock	j u	Stock: 0	Open P.O. 0
Reserved	0	Internal Use	0	ToSell: 0	Prcss/MFG 0
Booked	0	Consigned	0	Uncommitted P.O.	OH/Repair 0
Claims	0	QA/Inspc	0	Consumption Analysis	Open RMA 0
Cores Due	0	Transport	0	Memol 🛛	Cores Due 0
		Quarantine	0	Memo 2 💡	

NOTE: A description of these fields may be found in the procedure "Managing Inventory" within the Material Management section of this manual.

- 6. **Complete the applicable portions of the General tab:**
 - a. Left-click the General tab



🕖 [Editing] Partnumber : [P23	80-123] WIDGET MFG:[A	K4P] A & L LABS
Add Edit Del Prev	→ III Z G Next Hist XRef W/	HOrdr BOM Opt Srch Cncl OK Close
P/N : P230-123	/ 1 Rev :	A Alt 1 : 24-5646-332
Desc : WIDGET		Alt 2 : 1560-00-238-4531
Stock General Sell Prices	Costs Exchanges Measur	es Extended Info Eligibility Image P/N Indicators Electrostatic :
P/N Type : STK	• STOCK ITEMS	Haz Mat : Rotable (Core) : Kime Control : Repairable : Stolen : Airworthiness : ITAR :
Sales Line Type : 01 💌 01 - I	nventory Item	RoHS Compliance :
P.O. Line Type : 01 💌 01 - I	nventory Item	ATA Chapter :
Asset Type	Tracing	Publications
Stock Item	• Lot Trace	Operations Operati
C Tools	C Serialized - Multi	Q Bulletins Q Directives
C Equip/Machine	C Serialized - Unique	Part of a Match Set Code : Non
	Serials	Desc : Non

b. Identify a category for the item (optional):

Category :

The **Category** field is one of two fields that help to group similar items (the other is the **P/N Type** field). Categorizing items assists in searching and reporting.

NOTE: The **Category** field has more functionality within Pentagon reports than does the **P/N Type** field and should be considered when determining what values (if any) will be stored within each.

The category may also be used to enhance the functionality of the AutoSource module.

EXAMPLE: If a demand for an item exists, the AutoSource module can create requests for quote to all vendors where the category assigned to the part master record is also assigned to the vendor.

NOTE: Instructions on the use of the AutoSource module may be found in the procedure "AutoSource Module" within the Material Management section of this manual.

NOTE: To complete the **Category** field, the appropriate category must be listed in the **Inventory Category List**. To access this table, left-click **Administration** from the tool bar, go to **Stock Tables List by Code**, and left-click **Inventory Category**.

- i. Left-click the **Category** field.
- ii. The Inventory Category List window will appear.

NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.



Inventory Cate	gory List		
Start With :	<u></u>		
			Max Search Result Lines : 50
Drag a column hea	der here to group by that column		
Category	Name	Responsible	Schedule B
727-LG	727 LANDING GEARS	001	
737-LG-LH	737 SERIES - LANDING GEARS-LH		
747-300-W	WHEEL ASSY - 747-300		
777-LG-L	777 SERIES - LANDING GEARS-LEFT		
AC-PRTS	AC-UNITS - GENERAL		
ACCUM	ACCUMULTORS		
AIRCRAFT	AIRCRAFT PARTS		
AVIO	AVIONICS INSTRUMENTS		
B 767	B Check 767		
C 767	C Check 767		
СНЕМ	CHEMICAL-GENERAL		
CHEMICALS	CHEMICALS & PAINTS		
CONNECTORS	CONNECTORS		
CRJ100	CRJ 100		
CRJ200	CRJ 200		
DIO	DIODES		
DIODE	DIODES		
		* 🗵	· ✓ O <u>K</u> X <u>C</u> ancel

- iii. Select the category (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- c. Identify a part number type for the item (optional):



The **P/N Type** field is one of two fields that help to group similar items (the other is the **Category** field). Identifying a part number type for items assists in searching and reporting.

NOTE: The **Category** field has more functionality within Pentagon reports than does the **P/N Type** field and should be considered when determining what values (if any) will be stored within each.

NOTE: To complete the **Category** field, the appropriate category must be listed in the **P/N Type List**. To access this table, left-click **Administration** from the tool bar, go to **Stock Tables List by Code**, and left-click **P/N Type**.

NOTE: The default value for the **P/N Type** field is managed within the Company Setup. To set up the default **P/N Type**, left-click **Administration** from the tool bar, go to **System Setup**, then left-click on **System General Defaults**. The Company Setup window will appear. Default **P/N Type** may be identified on the **Setup** tab.

💣 Company Setup		ନ ଜୁନ
Cancel OK Optio	n //	
Modules Limits	System Alerts	General Settings Document Settings W0/MNT Settings Memo Convert
Accounting Settings	Printing Setting	gs Stock W/H Settings Mandatory Fields SO/PO Line changes settings
Consolidator Settings	PMB	Aircraft Ext Flight Log Ext Hide Line Types Publications Ext. Info
General Defaults	Setup Cust	omerDocs VendorDocs Taxes Charges Convert P/NExt Counters
Add Misc to Stock Co	st	Stock Default
Shipping : 🔽	Parts : 📈	Std Condition : NE ···· Additional Defaults
Air Frt : 🔽		Std Unit Measure : EA ····
Ocean Frt : 🔽	Labor : I	Stock Std Type : STK ····
Insurance : 🔽	Lot Charge : 🔽 👘	Page Currence: UCD

i. Left-click the **P/N Type** field.



ii. The **P/N Type List** window will appear.

NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.

9	P/N Type List		- • ×
	Start With :		
	,	 Max Search Ri	esult Lines : 50 🔶
	Drag a column header here to group by		
	Code	Name	
þ	6061	Alloy	
	6063	Alloy	
E	CON	CONSUMABLES	
	disk	Engine Disks	
	DRS	DRIESSEN	
Г	ENG	ENGINES	
Г	ETOP	ETOP Parts	
Γ	EXP	EXPENDABLES	1
Г	FLD	FLUIDS	
	FXD	FIXED ASSETS	1
F	GD	GOLD	
F	GO	GO ITEM	1
F	IDE	IDE	
F	LG	LANDING GEAR	
	MIL	MILITARY PARTS ONLY	
	NG	NO GO ITEM	
	OFF	OFFICE SUPPLIES	
		🔀 🔀 🗸 OK	X Cancel

- iii. Select the part number type (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- d. Set the default sales line type for the item:

Sales Line Type : 01 💌 01 - Inventory Item

The **Sales Line Type** field identifies the line type that will be associated with the item by default in sales transactions. The line type within the transaction may always be changed.

NOTE: Line types are defined by the system and may not be modified. Additional line types cannot be added.

Definitions for line types may be found in the procedure "Line Type Definitions" within the General System section of this manual.

NOTE: The default value for the **Sales Line Type** field is managed within the Company Setup. To set up the default **Sales Line Type**, left-click **Administration** from the tool bar, go to **System Setup**, then left-click on **System General Defaults**. The Company Setup window will appear.

Left-click the **Setup** tab. Within the **Stock Default** group box, left-click the **Additional Defaults** button. The **Stock SetUp** window will appear. Default **Sales Line Type** may be identified within the **Sales Line Type** field on this window.



💣 Company Setup	8 23
Cancel OK Option	
Modules Limits System	n Alerts General Settings Document Settings W0/MNT Settings Memo Convert
Accounting Settings Pr	nting Settings Stock W/H Settings Mandatory Fields SD/PO Line changes settings
Consolidator Settings	
General Defaults Setur	Customer Docs Vendor Docs Taxes Charges Convert P/N Ext Counters
Add Mise to Stock Lost Shipping : V F Air Fri: V L Doean Fri: V L Insurance : V Lot Ch Iand Charge : V Cap HazMat : V Stock Default W/H & Loca W/H No : 0001 Location : B-65-98 Part CrossRef Found Alert C No Alert C Alert and Load List C Alert and Load List C Alert and Load List for X_Par C No Alert + Auto Change in P	Stock Verault NE Additional Defaults Std Condition : NE Additional Defaults Std Unit Measure: FA Ines into stock Stock SetUp Ines into stock P/N Indicators Electrostatic : Expendable : P/N Indicators For the stock into stock Duplicate P/N : Repairable : Stock Stolen : Airworthiness : Ines into stock

AMC NOTE: When using the Advance Multi Company module, the default value for the **Sales Line Type** field is managed within the Company/Div/Dept Setup. To set up the default **Sales Line Type**, left-click **Administration** from the tool bar, go to **System Setup**, then left-click on **Company/Div/Dept Setup**. The Company List window will appear.

Select the company (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

Left-click the **Optn** button. Left-click **2.** Stock Setup. The Stock SetUp window will appear. Default Sales Line Type may be identified within the Sales Line Type field on this window.

e. Set the default purchasing line type for the item:

Sales Line Type : 01 💌 01 - Inventory Item

The **P.O. Line Type** field identifies the line type that will be associated with the item by default in purchase transactions. The line type within the transaction may always be changed.

NOTE: Line types are defined by the system and may not be modified. Additional line types cannot be added.

Definitions for line types may be found in the procedure "Line Type Definitions" within the General System section of this manual.

NOTE: The default value for the **P.O. Line Type** field is managed within the Company Setup. To set up the default **P.O. Line Type**, left-click **Administration** from the tool bar, go to **System Setup**, then left-click on **System General Defaults**. The Company Setup window will appear.

Left-click the **Setup** tab. Within the **Stock Default** group box, left-click the **Additional Defaults** button. The **Stock SetUp** window will appear. Default **P.O. Line Type** may be identified within the **P.O. Line Type** field on this window.



💣 Company Setup			8 23
X √ III Cancel OK Optic	n		
Modules Limits	System Alerts	General Settings Document Settings WD/MNT Settings N	ferno Convert
Accounting Settings	Printing Set	ttings Stock W/H Settings Mandatory Fields SO/PO Line chan	iges settings
Consolidator Settings	PMR	Aircraft Ext Flight Log Ext Hide Line Types Publicatio	ns Ext. Info
General Defaults	Setup Cu	ustomer Docs Vendor Docs Taxes Charges Convert P/N Ext	Counters
Shipping : Air Frt : Ocean Frt : Insurance : HazMat : Stock Default W/H & W/H No : 0001 Location : B-65-98 Part CrossRef Found Aler C No Alert C Alert and Load List C Alert and Load List C Alert and Load List C No Alert + Auto Chan	Parts : V State Lot Ch Cap Local P/h Ek F t Sale P.C Rou Con	Std Condition : NE Additional Defaults Std Unit Measure : FA Concellent of the set of	

AMC NOTE: When using the Advance Multi Company module, the default value for the **P.O. Line Type** field is managed within the Company/Div/Dept Setup. To set up the default **P.O. Line Type**, left-click **Administration** from the tool bar, go to **System Setup**, then left-click on **Company/Div/Dept Setup**. The Company List window will appear.

Select the company (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

Left-click the **Optn** button. Left-click **2.** Stock Setup. The Stock SetUp window will appear. Default **P.O.** Line Type may be identified within the **P.O.** Line Type field on this window.

f. Identify the Asset Type for the item:

Asset Type
Stock Item
C Tools
C Equip/Machine

Left-click the radio button next to the selection that describes the item.

i. **Stock Item** - Select this type if the item is stocked to be consumed in work order, maintenance, or sales transactions.

Asset Type
Stock Item
C Tools
C Equip/Machine

NOTE: Stock Item is the default value for all new part master records.



ii. **Tools** - Items identified as a tool will enable the following functionality:

Asset Type
C Stock Item
Tools
C Equip/Machine

1. Enable testing and calibration tracking of the item in the Tooling module.

NOTE: In order to enable visibility of units in the Tooling module, the **Time Control** part number indicator must be marked as "Checked" (an additional tab labeled **Time Control** will appear in the window)

Desc . WIDGE I	Alt 2 : [1060-00-238-4031
Stock General Sell Prices Costs Exchanges Measu	res Extended Info Time Control Eligibility Image
Category :	P/N Indicators Electrostatic : Expendable : Publish : Haz Mat : Rotable (Core) : Time Control :
P/N Type:	Repairable : Stolen : Airworthiness : ITAR :
Sales Line Tupe : 01 💌 01 - Inventoru Item	BoHS Compliance

<u>AND</u> a numeric value must be entered in the left-most field in the **Calibrate Every** line on the **Time Control** tab along with the associated unit of measure

Desc : WIDGE I			Alt 2	: 1560-	00-238-4531	
Stock General Sell	Prices Costs Excha	nges Measures	Extended In	nfo Tim	e Control Eli	gibility Image
Time Control			Fact	ors/For	mulas	
Shelf Life :			କୁ St	andard	Scopes	
Sales Warranty :			OR		•	
OH/Repair Warranty :	_	Tolerance	OR		•	Tolerance
Calibrate Every :			🔹 OR		-	
Overhaul Every :	-		🔻 OR		•	
Betirement/HardTime	The second secon		🖵 OR 🛛		-	

2. Enable issue and return of the item to Work Orders and Maintenance to track use (on the **Tools** tab within the Work Order and Maintenance modules).

iii. Equip/Machine

Asset Type	-
C Stock Item	
C Tools	
Equip/Machine	

Items identified as equipment or a machine will enable testing and calibration tracking of the item in the Tooling module.

NOTE: In order to enable visibility of units in the Tooling module, the **Time Control** part number indicator must be marked as "Checked" (an additional tab labeled **Time Control** will appear in the window)



			All 2 . [1	J60-00-236-4031										
Stock General Sell Prices (osts Exchanges	Measures	Extended Info	Time Control Elig	ibility Image									
		P	VN Indicators			-1								
Category :		E	lectrostatic : 🕅	Expendable :	Publish :	二								
			Haz Mat : 📃	Rotable (Core) :	Time Control :									
P/N Tupe	ł		Repairable : 🗌	Stolen :	Airworthiness :									
	1		HAB :											
Color Line Tune (01 01 - I)	unstau Itan	P.	US Compliance											
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i me Control tab	ulong wit	h the a	ssociate	d unit of	measure			- 1	,					
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Stock General Sell Prices	osts Exchanges	h the as	Allt 2 : [15 Extended Info	d unit of 560-00-238-4531 Time Control Elig	measure									
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ime Control tab (Desc : [WIDGE] Stock General Sell Prices (Time Control Type :	osts Exchanges	h the as	SSOCIATE Alt 2 : 11 Extended Info Factors/I	d unit of 060-00-238-4531 Time Control Elig Formulas	bility Image			-1						
ime Control tab Desc : WildEr Stock General Sell Prices (Time Control Type : Shelf Life :	osts Exchanges	h the as	SSOCIATE Alt 2 : 115 Extended Info Factors/I § Standa	d unit of 560-00-238-4531 Time Control Elig Formulas rd Scopes	measure			-,						
ime Control tab Uesc: WIDGE1 Stock General Sell Prices 0 -Time Control Type: Shelf Life: Sales Varranbu	osts Exchanges	h the as	Alt 2 : 115 Extended Info Factors/I Standa	d unit of b60-00-238-4531 Time Control Elig Formulas ard Scopes	measure			-,						
ime Control tab of Desc: WIDGE I Stock General Sell Prices 0 Time Control Type: ↓ Shelf Life : Sales Warranty :	osts Exchanges	h the as	SSOCIATE Alt 2 : 1t Extended Info Factors/I © Standa	d unit of bbU-UU-238-4531 Time Control Elig Formulas ard Scopes	measure			-,						
Time Control tab Vesc : WIDGE Stock General Sell Prices (Time Control Type : Shelf Life : Sales Warranty : OH/Repair Warranty :	osts Exchanges	h the as Measures 	SSOCIATE Alt 2 : 115 Extended Info Factors/I © Standa OR OR	d unit of 560-00-238-4531 Time Control Elig Formulas ard Scopes	measure bility Image Tolerance			-,						
Time Control tab Desc : WIDGE [Stock General Sell Prices G Time Control Type : Shelf Life : Sales Warranty : UH/Repair Warranty : Inspection Every :	osts Exchanges	h the as Measures	SSOCIATE	d unit of b60-00-238-4531 Time Control Elig Formulas ard Scopes	measure bility Image Tolerance	-		- ,						
Time Control tab Desc : WIDGE (Stock General Sell Prices 0 Time Control Type : Shelf Life : Sales Warranty : OH/Repair Warranty : Inspection Every : Dyschaul Every :	osts Exchanges	h the as	Alt 2 : 11: Alt 2 : 11: Extended Info Standa OR OR OR	d unit of 600-00-238-4531 Time Control Elig Formulas rid Scopes V V V	Tolerance	-		- ,						
Time Control tab Vesc : WIDGET Stock General Sell Prices (Type : Shelf Life : Sales Warranty : OH/Repair Warranty : Inspection Every : Overhaul Every :	osts Exchanges	h the as	SSOCIATE Alt 2 : 11: Extended Info Standa OR OR OR OR OR	d unit of Guild Control Elig Formulas rd Scopes	Tolerance	•		- ,						

g. Identify how the item is tracked:

Tracing
 Lot Trace
C Serialized - Multi
C Serialized - Unique
Serials

Left-click the radio button next to the selection that describes the item.

NOTE: The default value for the **Tracing** field is managed within the Company Setup. To set up the default **Tracing** value, left-click **Administration** from the tool bar, go to **System Setup**, then left-click on **System General Defaults**. The Company Setup window will appear. The default **Tracing** value may be identified on the **Defaults** tab.



Company Setup
Modules Limits System Alerts General Settings Document Settings WO/MNT Settings Memo Convert
Accounting Settings Printing Settings Stock W/H Settings Mandatory Fields SO/PO Line changes settings
Consolidator Settings PMH Alforant Ext Filght Log Ext Hide Line Types Publications Ext. Info
Lead Time Rase Measures Docs Setup
Quotes Valid for: 30 Day(s)
Vendor Bids Due Within : 1 Day(s) Weight : LB ···· User Line Numbering :
S.O. Ship from Stock Within : 0 Day(s) Sales GL Account by Line :
Add to Vendor Lead Time : 0 Day(s)
S.O. to P.O. Deduct : 0 Day(s) Post W/O to GL Account WIP : 🔽
Copy Ship and Due On from Quote to RFQ
Lead Time Calculation : 🔽 Record Order change - Always 🗌
Exch Sell Cond Search Parameters Price / Qty Decimals
1. NE Advanced Load Alet if P/N Unit Price : 2-
2. OH ···· Quantity : 0.€
3. NS
Sell Cond
1. NE ···· S.O./WO : V V F Tracing Only
2. OH P.O. : 🔽 🔽 C Serialized - Multi
3. NS ···· C Serialized - Unique

i. Lot Trace - Select this option if units are not serialized.

Tracing
C Lot Trace
C Serialized - Multi
C Serialized - Unique
Serials

NOTE: When the "Lot Trace" selection is made, units are tracked through the system from cradle to grave by UID.

ii. Serialized - Multi - Select this option if the item is received and stocked in matched sets of any quantity. All units of the matched set will have identical line information (including UID and SSN) except each unit will have a unique serial number. The units will appear in the warehouse on a single line. Serial numbers for each unit within the matched set will be identified on a Serials tab when the line is selected. Each unit may be used or sold separately just as any other part; however, an additional step to identify the particular serial number used or sold will be required.

Tracing
C Lot Trace
Serialized - Multi
C Serialized - Unique
Serials

<mark>NOTE:</mark>

iii. Serialized - Unique - Select this option if the item has a unique serial number per individual unit.



Tracing		
C Lot Trace		
C Serialized - Multi		
 Serialized - Unique 		
Serials		

h. Identify system defined characteristics within the **P/N Indicator** group box (Left-click the checkbox to the right of each label to mark the field as "checked"):

Haz Mat : Rotable (Core) : Time Control : Repairable : Stolen : Airworthiness : ITAR :		P/N Indicators Electrostatic : Haz Mat : Repairable : ITAR :	Expendable : 🗖 Rotable (Core) : 🗖 Stolen : 🗖	Publish : Time Control : Airworthiness :
---	--	--	--	--

NOTE: The default value for P/N Indicators is managed within the Company Setup. To set up the default P/N Indicators, left-click **Administration** from the tool bar, go to **System Setup**, then left-click on **System General Defaults**. The Company Setup window will appear.

Left-click the **Setup** tab. Within the **Stock Default** group box, left-click the **Additional Defaults** button. The **Stock SetUp** window will appear. Default P/N Indicators may be identified within the P/N Indicator group box on this window.

🕖 Company Setup		22 S
X √ Cancel OK Optio		
Modules Limits	iystem Alerts General Settings	Document Settings W0/MNT Settings Memo Convert
Accounting Settings	Printing Settings Stock W/H Settin	ngs Mandatory Fields SO/PO Line changes settings
Consolidator Settings	PMR Aircraft Ext Fligh	t Log Ext Hide Line Types Publications Ext. Info
General Defaults	Setup Customer Docs Vendor D	ocs Taxes Charges Convert P/NExt Counters
Add Misc to Stock Co	Stock Default	Additional Defaults
Air Frt :	Parts : V Std Upit Measure : Fo	
Ocean Frt :	Stock SetUp	Warranty
Insurance : 🗸		1 Years 👻
land Charge : 🔽	X	6 Months -
HazMat : 🔽	Cancel O <u>K</u>	
	P/N Indicators	from lines into stock
Stock Default W/H &	Electrostatic Expendable :	Publish : Allow Duplicate P/N : 🔽
W/H No :	Haz Mat : 🗖 Rotable (Core) : 🛙	Time Control : Publish Stock Parts : 🔽
Logation :	Repairable : 🗌 Stolen : Г	Airworthiness :
	ITAR : 🗹	
Part CrossRef Found Aler		
O No Alert	Sales Line Type : UT - Inventory Item	
C Alert Only		
Alert and Load List	P.U. Line Type : 01 - Inventory Item	
Alert and Load List for No Alert + Auto Chan	Round Qty	
S NO AICI C + Auto Chan	C Up C Down	C None

AMC NOTE: When using the Advance Multi Company module, the default value for P/N Indicators is managed within the Company/Div/Dept Setup. To set up the default P/N Indicators, left-click **Administration** from the tool bar, go to **System Setup**, then left-click on **Company/Div/Dept Setup**. The Company List window will appear.

Select the company (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

Left-click the **Optn** *button. Left-click* **2.** *Stock Setup. The Stock SetUp window will appear. Default P/N Indicators may be identified within the P/N Indicators group box on this window.*



i. **Electrostatic** - Mark this checkbox as "checked" to identify that the item is sensitive to electrostatic discharge.

NOTE: If the **Electrostatic** checkbox is marked as "checked", a note will be printed on receiving, shipping, and warehouse transfer documents that may be used to remind material handlers that the item is sensitive to electrostatic discharge.

ii. **Haz Mat** - Mark this checkbox as "checked" to identify that the item is classified as hazardous material.

NOTE: If the **Haz Mat** checkbox is marked as "checked", a note will be printed on receiving, shipping, and warehouse transfer documents that may be used to remind material handlers that the item is classified as hazardous material.

When the **Haz Mat** checkbox is marked as "checked" an additional tab labeled **HazMat** will appear in the window. Instructions for completing the **HazMat** tab are outlined later in this procedure.

- iii. **Repairable** Mark this checkbox as "checked" to identify that it is possible to repair the item.
- iv. **ITAR** Mark this checkbox as "checked" to identify that the item is affected by the International Traffic in Arms Regulations (ITAR).

NOTE: If the **ITAR** checkbox is marked as "checked", a note will be printed on receiving, shipping, and warehouse transfer documents that may be used to remind material handlers that the item is affected by ITAR.

v. **Expendable** - Mark this checkbox as "checked" to identify that the item is discarded at the end of its useful life and either is not economically repairable or cannot be repaired or overhauled due to its construction.

NOTE: An item should not be identified as both **Expendable** and as **Repairable** or **Rotable (Core)**. However, in Build 8.5.54.82 and earlier, the system will allow both indicators to be marked

- vi. **Rotable (Core)** Mark this checkbox as "checked" to identify that the item is generally removed from the aircraft after a specific period of use, overhauled to new or near-new specifications, and returned to service.
- vii. **Stolen** Mark this checkbox as "checked" to identify that your organization has received notification that a particular unit of the item has been stolen.
- viii. **Publish** Mark this checkbox as "checked" to identify that your organization would like to include the item when exporting to logistics databases (i.e. ILS, PartsBase)
- ix. **Time Control** Mark this checkbox as "checked" if the time of the item must be tracked for any reason (including: shelf life, warranty, test, inspection, calibration, overhaul, or retirement).



When the **Time Control** checkbox is marked as "checked" an additional tab labeled **Time Control** will appear in the window.

- x. **Airworthiness** Mark this checkbox as "checked" to identify that the item is necessary to the safety of flight of the aircraft.
- i. Identify Restriction of Hazardous Substances (RoHS) information for the item (if applicable):

Ro	HS Compliance :		
----	-----------------	--	--

NOTE: RoHS information may not be required unless the item is being shipped to or received from the European Union (EU).

NOTE: To complete the **RoHS Compliance** field, the appropriate code must be listed in the **RoHS Compliance List**. To access this table, left-click **Administration** from the tool bar, go to **Stock Tables List by Code**, and left-click **RoHS Compliance**.

- i. Left-click the **RoHS Compliance** field.
- ii. The **RoHS Compliance List** window will appear.

NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.

€ RoHS Compliance List		- • ×
Start With :		
	Max Search R	esult Lines : 50 ෫
Drag a column header here to group by		
Code	Name	
▶ LC	Contains Lead	
LF	Lead Free	
NC	None Conformance	

- iii. Select the appropriate RoHS code (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- j. Identify the Air Transportation Association (ATA) Chapter that covers the item.

ATA Chapter :

The **ATA Chapter** will be copied to the aircraft when the item is installed on the aircraft.



NOTE: Steps for installing items on an aircraft may be found in the procedure "Performing an Install Procedure" within the Quality Assurance section of this manual.

NOTE: To complete the **ATA Chapter** field, the appropriate code must be listed in the **ATA List**. To access this table, left-click **Administration** from the tool bar, go to **Heavy Maintenance-XL Tables List**, and left-click **ATA Code**.

- i. Left-click the **ATA Chapter** field.
- ii. The **ATA List** window will appear.

NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.

The **ATA List** accommodates up to a 10-character code; the table within this procedure includes only the Chapter level of the ATA Code. The Section level of the ATA Code (along with any other levels desired) may be entered into the table as well. Dashes and spaces are allowed, but included in the 10-character length limit.

ø	ATA List		_ D _ X _
	Start With :		
		Max Search Re	sult Lines : 50 🌩
)rag a column header here to group by	that column	
	Code	Name	
Þ	11	PLACARDS AND MARKING	
	21	AIR CONDITIONING	
	22	AUTO FLIGHT	
	23	COMMUNICATIONS	
	24	ELECTRICAL POWER	
	25	EQUIPMENT/FURNISHING	
	26	FIRE PROTECTION	
Γ	27	FLIGHT CONTROLS	
	28	FUEL	
	29	HYDRAULIC POWER	
	30	ICE AND RAIN PROTECTION	
	31	INDICATING/RECORDING SYSTEMS	
	32	LANDING GEAR	
	33	LIGHTS	
	34	NAVIGATION	
	35	OXYGEN	
	36	PNEUMATIC	
			X Cancel

iii. Select the appropriate ATA Code (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

k. Link publications that are applicable to the item within the **Publications** group box (optional):

Publications		
ଦ୍ଧ Applications	ତୁ Manuals	ଦ୍ଧୁ Drawings
ଦ୍ଧ Bulletins	ଦ୍ଧ Directives	

NOTE: If the Publication Management module is being used, links to all publications are made from the Publications Management module. This procedure describes the steps for linking publications without the Publications Management module



NOTE: Instructions for linking items to publications from the Publications Management module may be found in the procedure "Publication Management Module" within the General System section of this manual.

i. Identify applicability of the part (optional):

NOTE: Applicability identified within the **Applications** window simply lists end items on which the item can be used. If bills of materials and aircraft eligibilities are identified, it is recommended that applicability be ignored. The applicability is for reference and custom reporting only.

1. Left-click the **Applications** button.

P Applications

2. The **Application List** window will appear. Left-click the **Add** button.

Application List	1000 MILLION 100 - 100		23
Add View/Edit Close		577	
Application	Subject	Revision No.	Revision Date
	<no data="" display="" to=""></no>		

3. The Application window will appear.

[Add] Application Partnumber: [P230-123]
Edit: Delete Cancel OK Close
Info Reviewed By
Application :
Description :
Date :
Revision No :
Revision Date :
Message O Memo Copy

4. Complete the applicable fields on the **Info** tab:



- Application a code for the end item on which the item may be installed (i.e. "JT8").
 [25-character limit]
- b. **Description** a description of the end item on which the item may be installed.
- c. **Date** the date that the applicability was entered.
- d. **Revision No** the revision number of the most recent publication identifying the applicability of the item to the end item.
- e. **Revision Date** the date of the most recent publication identifying the applicability of the item to the end item.
- f. **Message** button information that may be shared both internally and externally to the organization
 - i. Left-click the Message button.
 - ii. The **Memo Editor** window will appear. Left-click the **Edit** button to add notes.



iii. Left-click the OK button to save the message

ſ	🍠 [Update]	Memo Editor								×
l	Edit	Clea <u>r</u>	☐ <u>M</u> sg	Spell	Print 7	III History <u>A</u> ll	istory List	Wrapping	X Cancel	 [] Close
l	Type your me	ssage here								*
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- iv. When the **Message** field is not blank, the light bulb on that button $\mathbf{\hat{v}}$ will be highlighted in yellow.
- g. Memo button information that should be shared only internally to the organization
 - i. Left-click the **Memo** button.
 - ii. The **Memo Editor** window will appear. Left-click the **Edit** button to add notes.



iii. Left-click the **OK** button to save the memo.



iv. When the **Memo** field is not blank, the light bulb 😵 on that button will be highlighted in yellow.

h. Copy button - UNK

5. Complete the applicable fields on the **Reviewed By** tab:



[Add] Application Partnumber: [P230-123]	- 22
Edit Delete Cancel OK Close	
Info Reviewed By	
Reviewed By: Last Reviewed : Date Verified : Note : Complied : Applied By : Applied On :	

a. **Reviewed By** - the individual that last reviewed the applicability information.

NOTE: To complete the **Reviewed By** field, the appropriate user must be listed in the **Users List**. To access this table, left-click **Administration** from the tool bar, go to **Pentagon Users and Groups**, and left-click **User List**.

Steps for creating a user may be found in the procedure "Creating a User" within the System Administration section of this manual.

- i. Left-click the **Reviewed By** field.
- ii. The **Users List** window will appear.

NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.

Start With	ı :				
				Max Sear	ch Result Lines : 50 📑
Drag a colum	n header	here to group by that col	umn		1015-2750
User Code	Mr/Ms	First Name	Last Name	Workmail	Title
001	Mr.	James	Webster	James@Pentagon2000.com	VP R&D
002	Mr.	Jean-Pierre	Guyeu	jean@hotmail.com	ENGINEERING
003	Mr.	Michael	Canale		CUSTOMER SERVIC
004	Mr.	Jim	Johnson		MECHANIC
005	Mr.	Cosmo	Kramer		li .
006	Mr.	James	Baket		
007	Mrs	Julia	Louis		0
008	Mr.	George	Costanza	george@hotmail.com	
009	Mr.	AI	Pachino		1
010	Mr.	George	Barnes		
011	Mrs	Mary	Lopez		
012	Mr.	Nathan	Lee		
013	Mr.	Louis	Morel		
014	Mrs	Iris	Smith		1
015	Mr.	Allan	Green		
016	Mr.	Pierre	Pinot		
4	1	1.2039.000.0	Transfer of		10

- iii. Select the appropriate User (left-click the line within the search screen and leftclick **OK**; or double-click the line within the search screen).
- b. Last Reviewed the date that the applicability information was last reviewed.



c. **Date Verified** - the date that the applicability information was verified as accurate.

NOTE: For some organizations, the **Date Verified** and **Last Reviewed** may refer to the same date. If so, it is suggested that only one field be used in order to eliminate duplicate entry. However, proper planning should be made so that reporting is accurate.

- d. **Note** this field may be used to record information regarding the last review of the applicability. [255-character limit]
- e. **Complied** checkbox this field should be checked once the applicability has been fully reviewed and verified.

NOTE: The **Complied** checkbox must be marked as "checked" manually. For some organizations, it may be acceptable to ignore the **Complied** checkbox in order to eliminate duplicate entry. For example, custom reporting could assume that if there is a date in the **Last Reviewed** or **Date Verified**, then the quality assurance related to the applicability is complied with.

f. Applied By -

NOTE: To complete the **Applied By** field, the appropriate user must be listed in the **Users List**. To access this table, left-click **Administration** from the tool bar, go to **Pentagon Users and Groups**, and left-click **User List**.

Steps for creating a user may be found in the procedure "Creating a User" within the System Administration section of this manual.

- i. Left-click the **Applied By** field.
- ii. The Users List window will appear.

NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.


Start With	n :		<u></u>	Max Sear	ch Result Lines : 150 🛁
Drag a colum	in header	here to group by that col	imn		<u>]"</u>
User Code	Mr/Ms	First Name	Last Name	Workmail	Title
001	Mr.	James	Webster	James@Pentagon2000.com	VP R&D
002	Mr.	Jean-Pierre	Guyeu	jean@hotmail.com	ENGINEERING
003	Mr.	Michael	Canale		CUSTOMER SERVI
004	Mr.	Jim	Johnson		MECHANIC
005	Mr.	Cosmo	Kramer	<u>.</u>	
006	Mr.	James	Baket		
007	Mrs	Julia	Louis		
008	Mr.	George	Costanza	george@hotmail.com	
009	Mr.	AI	Pachino		
010	Mr.	George	Barnes		
011	Mrs	Mary	Lopez		
012	Mr.	Nathan	Lee		
013	Mr.	Louis	Morel		
014	Mrs	Iris	Smith		
015	Mr.	Allan	Green		
016	Mr.	Pierre	Pinot		

iii. Select the appropriate User (left-click the line within the search screen and leftclick **OK**; or double-click the line within the search screen).

g. Applied On -

- 6. Left-click the **OK** button to exit edit mode in the **Application** window.
- 7. Left-click the **Close** button to close the **Application** window.
- 8. Left-click the **Close** button to close the **Application List** window.
- 9. When at least one applicability is identified, the light bulb 😵 on the **Applications** button will be highlighted in yellow.
- ii. Identify manuals associated with the item (optional):

NOTE: A manual is defined as a publication that contains information and instructions about the operation of an item or how to maintain, repair, or overhaul an item.

1. Left-click the **Manuals** button.

ତ୍ମ Manuals

2. The **Manuals List** window will appear. Left-click the **Add** button.



🕖 Manuals List	1000 LOL 100107 1000			2	x
Add View/E	idit C <u>l</u> ose		-577	7	
Title	Subject		Revision No.	Revision Date	
1	1 2 40 1001				
		<no data="" display="" to=""></no>			

3. The Manuals window will appear.

🖉 [Add] Manuals Partnumber: [P230-123]	X
A B A A A A A A A A A A A A A A A A A A	
Info Reviewed By	
Title :	
Description :	
Manual Date :	
Revision No :	
Revision Date :	
Company/Agency :	
Location :	
Total Pages : 0+	
V Message V Memo	

- 4. Complete the applicable fields on the **Info** tab:
 - a. Title the manual number. [25-character limit]

NOTE: If the manual does not have a manual number, the title of the manual may be used in this field

- b. **Description** a description of the manual.
- c. Manual Date the date that the manual was originally published.
- d. **Revision No** the most recent revision number of the manual being used.
- e. **Revision Date** the date of the most recent revision of the manual being used.
- f. **Company/Agency** the entity responsible for the information found within the manual.



- g. **Location** the address of the entity responsible for the information found within the manual.
- h. **Total Pages** the number of pages in the manual.
- i. **Message** button information that may be shared both internally and externally to the organization.
 - i. Left-click the Message button.
 - ii. The Memo Editor window will appear. Left-click the Edit button to add notes.



iii. Left-click the **OK** button to save the message.



- iv. When the **Message** field is not blank, the light bulb on that button 😵 will be highlighted in yellow.
- j. Memo button information that should be shared only internally to the organization
 - i. Left-click the **Memo** button.



ii. The **Memo Editor** window will appear. Left-click the **Edit** button to add notes.



iii. Left-click the **OK** button to save the memo.

۶.	[Update] M	emo Editor	-	Charles of a	-						×
	<u>E</u> dit:	Glea <u>r</u>	🛄 <u>M</u> sg	Spell	<u>P</u> rint	II History <u>A</u> ll	I Listory List	Wrapping	X Cancel	 ✓ ✓ O<u>K</u> 	Close
Тур	e your mess	age here									*
L											Ψ.

iv. When the **Memo** field is not blank, the light bulb 😵 on that button will be highlighted in yellow.

k. Copy button - UNK

5. Complete the applicable fields on the **Reviewed By** tab:



(Add] Manuals Partnumber: [P230-123]
Edit Delete Images Docs Cancel OK Close
Info Reviewed By
Beviewed By:
Last Reviewed :
Date Verified :
Note :
Curreni 🗌 Until :

a. **Reviewed By** - the individual that last reviewed the manual information.

NOTE: To complete the **Reviewed By** field, the appropriate user must be listed in the **Users List**. To access this table, left-click **Administration** from the tool bar, go to **Pentagon Users and Groups**, and left-click **User List**.

Steps for creating a user may be found in the procedure "Creating a User" within the System Administration section of this manual.

- i. Left-click the **Reviewed By** field.
- ii. The **Users List** window will appear.

NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.

Start With	n :				2 56 3850
				Max Sear	ch Result Lines : 50
Drag a colum	n header	here to group by that col	umn	la venti a	Tale
User Lode	MIZMS	First Name	Last Name	Workmail	VDDAD
001	Mr.	James James	Webster	Jamest@Pentagon2000.com	VP R&U
002	Mr.	Jean-Fierre	Causta	lean@notmail.com	
003	Mr.	Michael	Lanale		LUSTUMER SERVIC
004	Mr.	JIM	Jonnson		MECHANIC
005	Mr.	Losmo	Nramer		
005	Mr.	James	Baket		
007	Mrs	Julia			0
008	Mr.	George	Lostanza	george@hotmail.com	
009	Mr.	AI	Pachino		
010	Mr.	George	Barnes		
011	Mrs	Mary	Lopez		
012	Mr.	Nathan	Lee		
013	Mr.	Louis	Morel		
014	Mrs	Iris	Smith		
015	Mr.	Allan	Green		
016	Mr.	Pierre	Pinot		
•					1

iii. Select the appropriate User (left-click the line within the search screen and leftclick **OK**; or double-click the line within the search screen).



- b. Last Reviewed the date that the manual information was last reviewed.
- c. **Date Verified** the date that the manual information was verified as accurate.

NOTE: For some organizations, the **Date Verified** and **Last Reviewed** may refer to the same date. If so, it is suggested that only one field be used in order to eliminate duplicate entry. However, proper planning should be made so that reporting is accurate.

- d. **Note** this field may be used to record information regarding the last review of the manual. [255-character limit]
- e. **Current** checkbox this field should be checked if the manual is not obsolete or out of review.

NOTE: The **Current** checkbox must be marked as "checked" manually.

NOTE: When creating a work order for an item linked to a manual, the system will not allow the work order to be created if the **Current** checkbox is unchecked.

f. Until - the date on which the manual is considered to be out of date.

NOTE: Many organizations use the **Until** date to prompt a quality assurance review of the manual.

NOTE: When creating a work order for an item linked to a manual, the system will not allow the work order to be created if the date in the **Until** field refers to a date in the past.

- 6. Left-click the **OK** button to exit edit mode in the **Manuals** window.
- 7. Link applicable documents for ease of access (optional):

NOTE: Documents of any type may be linked to publications as long as the appropriate reader software is installed.

a. Left-click the **Docs** button.

🙍 Manuals Partnumber: [P230-1	23]			×
♦ <u>E</u> dit <u>D</u> elete Images	Doc <u>s</u>	X <u>C</u> ancel	<u>oĸ</u>	C <u>l</u> ose	
Info Reviewed By					
Title : TM 1-2	234-5678	}			

b. The Manuals [Document List] window will appear. Left-click the Add button.



Manuals [Documents List] :P230-123	THE K	×
Add Edit Delete	1 View Close	
Search For :		
Title	Image Co	ode Attached on date
	<no data="" display="" to=""></no>	

c. The **Record View** window will appear. Complete the applicable fields.

🖉 Record Vie	w	23
X Cancel O	K)	
Title :		-
Image Code:		••
File Name :		•
Date :	7/4/2012 2:55:34 PM	-
	-	_

- i. **Title** the title of the document being linked to the manual.
- ii. **Image Code** the classification of the image being linked to the manual.

NOTE: To complete the **Image Code** field, it is recommended that the appropriate code be listed in the **Image Type List**. To access this table, left-click **Administration** from the tool bar, go to **Stock Tables List by Code**, and left-click **Image Types**.

- 1. Left-click the ellipses $\overline{\square}$ in the **Image Code** field.
- 2. The Image Type List window will appear.

NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.



🍠 Image Type List			
Start With :			
		Max Sea	rch Result Lines : 50 🗦
Drag a column header here	to group by that column		
Code	Name	Print In Maintenance	Print In Work Order
▶ 001	8130 FORM	No	No
002	CERTS	No	No
003	TEST RESULTS	No	No
004	PACKING LIST	No	No
005	ATA 106	No	No
006	DRAWING	Yes	Yes
007	Picture	No	No
008	C.O.C.	No	No
009	Test Results	No	No
010	Service Tag	No	No
		× 🗴	OK Cancel

3. Select the appropriate image type (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

NOTE: The type of image may also be typed into the **Image Code** field by left-clicking into the **Image Code** field and typing the appropriate characters. However, this is not the best practice.

- iii. File Name the path to the document being linked to the manual.
 - 1. Left-click the ellipses $\overline{\blacksquare}$ in the **File Name** field.
 - 2. The **Open** window will appear.

🍠 Open					8
Look in:	Documents		•	+ 🗈 💣 📰 -	
C.	Name	*		Date modified	Туре 🔺
Recent Places	7f1004.avi 7f2043.avi 13.mov 7f7in.mov 000003181.t 8130-3.pdf ADVISE0000 Air To Air Fi ATA106.pdf	if 0000PENT001010001_1.pdf 0000PENT001010001_2.pdf ght (Falcon AF) pain-shut you	Jr	8/2/2010 9:10 PM 3/26/2008 1:04 AM 12/25/2008 5:58 PM 10/21/2010 12:21 9/2/2007 2:32 PM 3/29/2010 4:31 PM 4/11/2011 4:58 PM 4/11/2011 4:59 PM 12/2/2008 5:52 AM 3/26/2010 7:21 PM	Video Quick1 Quick1 Quick1 TIFF In Adobe Adobe FLV Fil Adobe
Network	Autosource	.doc III		12/30/2003 12:25	Micros 👻
	File name:			•	Open
	Files of type:	All Files		•	Cancel
					Help

3. Navigate to the document being linked to the manual. Select the appropriate file (left-click the file within the explorer screen and left-click the **Open** button; or double-click the file within the explorer screen).



iv. Date - the date and time that the document was linked to the manual.

NOTE: The system defaults to the date and time when the **Record View** window is opened.

- d. Left-click the **OK** button to close the **Record View** window.
- e. Left-click the Close button to close the Manuals [Document List] window.
- 8. Link applicable images for ease of access (optional):

NOTE: Adobe Acrobat (.pdf), Microsoft Office (Word, Excel, PowerPoint), and video files may all be attached as images. However, the practice of attaching those types of files as images is burdensome and will result in a noticeable slowing of the system. The best practice is to attach all files that are not images as documents.

a. Left-click the Images button.



- b. The Pentagon 2000 IMAGEination will appear.
- c. Left-click File from the tool bar and left-click Attach New Image (Single).
- d. The Load Dialog window will appear.



e. Navigate to the document being linked to the manual. Select the appropriate file (left-click the file within the explorer screen and left-click the **Open** button; or double-click the file within the explorer screen).



NOTE: The instructions above describe a single function of Pentagon 2000 IMAGEination. Complete instructions for Pentagon 2000 IMAGEination may be found in the procedure "Pentagon 2000 IMAGEination" within the General System section of this manual.

- f. Left-click the Close button I from the toolbar to close the **Pentagon 2000 IMAGEination** window
- 9. Left-click the **Close** button to close the **Manuals** window.
- 10. Left-click the **Close** button to close the **Manuals List** window.
- 11. When at least one manual is identified, the light bulb 😵 on the **Manuals** button will be highlighted in yellow.
- iii. Identify drawings and technical orders associated with the item (optional):

NOTE: A drawing is defined as a publication that uses illustrations, diagrams, or photographs to visually reference the way an assembly has been constructed or the precise dimensions of an item. A technical order is defined as a publication that provides the minimum performance standard for an item.

1. Left-click the **Drawings** button.

စ္စ Drawings

2. The **Drawings/Technical Orders List** window will appear. Left-click the **Add** button.



3. The **Drawings/Technical Orders** window will appear.



🖸 [Add] Drawings/Technical Orders Partnumber: [P230-123]
Edit Delete Images Doc <u>s C</u> ancel O <u>K</u> Close
Info Reviewed By
Drawing/Tech Order :
Description :
Drawing Date :
Revision No :
Revision Date :
Company/Agency :
Location :
Total Pages : 0 🗘
Message O Memo Copy

- 4. Complete the applicable fields on the **Info** tab:
 - a. **Drawing/Tech Order** the drawing or technical order number. [25-character limit]

NOTE: If a drawing/technical order does not have a drawing/technical order number, the title of the drawing/technical order may be used in this field.

- b. **Description** a description of the drawing/technical order.
- c. **Drawing Date** the date that the drawing/technical order was originally published.
- d. **Revision No** the most recent revision number of the drawing/technical order being used.
- e. **Revision Date** the date of the most recent revision of the drawing/technical order being used.
- f. **Company/Agency** the entity responsible for the information found within the drawing/technical order.
- g. **Location** the address of the entity responsible for the information found within the drawing/technical order.
- h. Total Pages the number of pages in the drawing/technical order.
- i. **Message** button information that may be shared both internally and externally to the organization.
 - i. Left-click the **Message** button.
 - ii. The Memo Editor window will appear. Left-click the Edit button to add notes.



Memo Editor	×
A Image: Speal and the second se	C <u>l</u> ose
	*
(The second secon

iii. Left-click the **OK** button to save the message.

💓 [Update] Memo Editor	X
Edit Clea <u>r M</u> sg <u>S</u> pell <u>Print</u> History <u>All History List</u> <u>Wrapping</u> <u>C</u>	ancel
Type your message here	A
	-

- iv. When the **Message** field is not blank, the light bulb on that button 😵 will be highlighted in yellow.
- j. **Memo** button information that should be shared only internally to the organization.
 - i. Left-click the **Memo** button.
 - ii. The **Memo Editor** window will appear. Left-click the **Edit** button to add notes.



Memo Editor	NAMES OF ADDRESS OF TAXABLE	1.0007.1.0.001.0000	Carl #	×
Edit Clear	D E E	nt History <u>A</u> ll <u>H</u> istory List	Wrapping Cancel OK	C <u>l</u> ose
				*
				-
•				► a

iii. Left-click the **OK** button to save the memo.

🍠 [Update] M	emo Editor		-	-				1.00		×
i North State Sta	Clea <u>r</u>	© Msg	E Spell	 Print ∕	II History <u>A</u> ll	III History List	Wrapping	X Cancel	<u>ок</u>	Close
Type your mess	sage here									*

iv. When the **Memo** field is not blank, the light bulb 😵 on that button will be highlighted in yellow.

k. Copy button - UNK

5. Complete the applicable fields on the **Reviewed By** tab:



🍠 [Ad	d] Drawings	/Technical Or	ders Partn	umber: [P230-	123]	X
edit	j ⊡_elete	Images Do	Z X c <u>e C</u> ancel] DSE	
Info	Reviewed	Ву				
•	Reviewed E	iy:	•			
	Last Reviewe	:d :		-	I	
	Date Verifie	:d :		-		
	No	te :				
	Complie	:d : 🗖			_	
	Applied E	ly:	··			
	Applied C	n :		-	1	

a. **Reviewed By** - the individual that last reviewed the drawing/technical order information.

NOTE: To complete the **Reviewed By** field, the appropriate user must be listed in the **Users List**. To access this table, left-click **Administration** from the tool bar, go to **Pentagon Users and Groups**, and left-click **User List**.

Steps for creating a user may be found in the procedure "Creating a User" within the System Administration section of this manual.

- i. Left-click the **Reviewed By** field.
- ii. The Users List window will appear.

NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.

Start With					
Juit mi	•.1			Max Sear	ch Result Lines : 50 -
Drag a colum	n header	here to group by that col	umn		
User Code	Mr/Ms	First Name	Last Name	Workmail	Title
001	Mr.	James	Webster	James@Pentagon2000.com	VP R&D
002	Mr.	Jean-Pierre	Guyeu	jean@hotmail.com	ENGINEERING
003	Mr.	Michael	Canale		CUSTOMER SERVI
004	Mr.	Jim	Johnson		MECHANIC
005	Mr.	Cosmo	Kramer		
006	Mr.	James	Baket	1	
007	Mrs	Julia	Louis		
008	Mr.	George	Costanza	george@hotmail.com	
009	Mr.	AI	Pachino		
010	Mr.	George	Barnes		
011	Mrs	Mary	Lopez		
012	Mr.	Nathan	Lee		
013	Mr.	Louis	Morel	j.	
014	Mrs	Iris	Smith		
015	Mr.	Allan	Green		
016	Mr.	Pierre	Pinot		
•					



- iii. Select the appropriate User (left-click the line within the search screen and leftclick **OK**; or double-click the line within the search screen).
- b. **Last Reviewed** the date that the drawing/technical order information was last reviewed.
- c. **Date Verified** the date that the drawing/technical order information was verified as accurate.

NOTE: For some organizations, the **Date Verified** and **Last Reviewed** may refer to the same date. If so, it is suggested that only one field be used in order to eliminate duplicate entry. However, proper planning should be made so that reporting is accurate.

- d. **Note** this field may be used to record information regarding the last review of the drawing/technical order. [255-character limit]
- e. **Complied** checkbox this field should be checked once the drawing/technical order has been fully reviewed and verified.

NOTE: The **Complied** checkbox must be marked as "checked" manually. For some organizations, it may be acceptable to ignore the **Complied** checkbox in order to eliminate duplicate entry. For example, custom reporting could assume that if there is a date in the **Last Reviewed** or **Date Verified**, then the quality assurance related to the drawing/technical order is complied with.

f. Applied By -

NOTE: To complete the **Applied By** field, the appropriate user must be listed in the **Users List**. To access this table, left-click **Administration** from the tool bar, go to **Pentagon Users and Groups**, and left-click **User List**.

Steps for creating a user may be found in the procedure "Creating a User" within the System Administration section of this manual.

- i. Left-click the **Applied By** field.
- ii. The **Users List** window will appear.

NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.



Start With	n :			May Sear	ch Besult Lines : 50 🚅
Drag a colum	in header	here to group by that col	umn	inda ocar	
User Code	Mr/Ms	First Name	Last Name	Workmail	Title
001	Mr.	James	Webster	James@Pentagon2000.com	VP R&D
002	Mr.	Jean-Pierre	Guyeu	jean@hotmail.com	ENGINEERING
003	Mr.	Michael	Canale		CUSTOMER SERVI
004	Mr.	Jim	Johnson		MECHANIC
005	Mr.	Cosmo	Kramer	<u>.</u>	
006	Mr.	James	Baket	<u>j</u>	
007	Mrs	Julia	Louis		
008	Mr.	George	Costanza	george@hotmail.com	
009	Mr.	AI	Pachino		
010	Mr.	George	Barnes		
011	Mrs	Mary	Lopez		
012	Mr.	Nathan	Lee		
013	Mr.	Louis	Morel		
014	Mrs	Iris	Smith		
015	Mr.	Allan	Green		
016	Mr.	Pierre	Pinot		
4					

iii. Select the appropriate User (left-click the line within the search screen and leftclick **OK**; or double-click the line within the search screen).

g. Applied On -

- 6. Left-click the **OK** button to exit edit mode in the **Drawings/Technical Orders** window.
- 7. Link applicable documents for ease of access (optional):

NOTE: Documents of any type may be linked to publications as long as the appropriate reader software is installed.

a. Left-click the **Docs** button.



b. The Drawings/Technical Orders [Document List] window will appear. Left-click the Add button.



w Close	Attached on date
Image Code	Attached on date
No data to display>	

c. The **Record View** window will appear. Complete the applicable fields.

Record View	v	23
X v Cancel O		5-n.
Title :		
Image Code:		
File Name :		
Date :	7/4/2012 2:55:34 PM	-

- i. **Title** the title of the document being linked to the drawing/technical order.
- ii. **Image Code** the classification of the image being linked to the drawing/technical order.

NOTE: To complete the **Image Code** field, it is recommended that the appropriate code be listed in the **Image Type List**. To access this table, left-click **Administration** from the tool bar, go to **Stock Tables List by Code**, and left-click **Image Types**.

- 1. Left-click the ellipses $\boxed{-}$ in the **Image Code** field.
- 2. The **Image Type List** window will appear.

NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.



🏈 Image Type List			- • ×
Start With :			
		Max Sea	ch Result Lines : 50 🍦
Drag a column header here	to group by that column		
Code	Name	Print In Maintenance	Print In Work Order
▶ 001	8130 FORM	No	No
002	CERTS	No	No
003	TEST RESULTS	No	No
004	PACKING LIST	No	No
005	ATA 106	No	No
006	DRAWING	Yes	Yes
007	Picture	No	No
008	C.O.C.	No	No
009	Test Results	No	No
010	Service Tag	No	No
		× <	O <u>K</u> X Cancel

3. Select the appropriate image type (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

NOTE: The type of image may also be typed into the **Image Code** field by left-clicking into the **Image Code** field and typing the appropriate characters. However, this is not the best practice.

- iii. **File Name** the path to the document being linked to the drawing/technical order.
 - 1. Left-click the ellipses $\overline{\underline{\ }}$ in the **File Name** field.
 - 2. The **Open** window will appear.





- Navigate to the document being linked to the drawing/technical order. Select the appropriate file (left-click the file within the explorer screen and left-click the **Open** button; or double-click the file within the explorer screen).
- iv. **Date** the date and time that the document was linked to the drawing/technical order.

NOTE: The system defaults to the date and time when the **Record View** window is opened.

- d. Left-click the **OK** button to close the **Record View** window.
- e. Left-click the **Close** button to close the **Drawings/Technical Orders** [Document List] window.
- 8. Link applicable images for ease of access (optional):

NOTE: Adobe Acrobat (.pdf), Microsoft Office (Word, Excel, PowerPoint), and video files may all be attached as images. However, the practice of attaching those types of files as images is burdensome and will result in a noticeable slowing of the system. The best practice is to attach all files that are not images as documents.

a. Left-click the **Images** button.



- b. The Pentagon 2000 IMAGEination will appear.
- c. Left-click File from the tool bar and left-click Attach New Image (Single).
- d. The Load Dialog window will appear.





e. Navigate to the document being linked to the drawing/technical order. Select the appropriate file (left-click the file within the explorer screen and left-click the **Open** button; or double-click the file within the explorer screen).

NOTE: The instructions above describe a single function of Pentagon 2000 IMAGEination. Complete instructions for Pentagon 2000 IMAGEination may be found in the procedure "Pentagon 2000 IMAGEination" within the General System section of this manual.

- f. Left-click the Close button from the toolbar to close the **Pentagon 2000 IMAGEination** window
- 9. Left-click the **Close** button to close the **Drawings/Technical Orders** window.
- 10. Left-click the **Close** button to close the **Drawings/Technical Orders List** window.
- 11. When at least one drawing/technical order is identified, the light bulb 😵 on the **Drawings** button will be highlighted in yellow.
- iv. Identify service bulletins associated with the item (optional):

NOTE: A service bulletin is defined as a publication issued by the aircraft manufacturer that recommends a certain type of inspection, replacing certain components, performing maintenance in a specific manner or limiting operations under specified conditions.

1. Left-click the **Bulletins** button.

မှု Bulletins

2. The **Bulletins List** window will appear. Left-click the **Add** button.

💣 Bulletins List				8
Add View/Edit Close		17 g	7	
				_
Ref No.	Subject	Revision No.	Revision Date	
	<no data="" display="" to=""></no>			

3. The **Bulletins** window will appear.



(Add] Bulletins Partnumber: [P230-123]	23
Image: Image:	
Info General Reviewed By	
Ref No. :	
Description :	
Date :	
Revision No :	
Revision Date :	
Company/Agency :	
Location :	
Total Pages : 0 🜩	
Message & Memo Copy	

- 4. Complete the applicable fields on the **Info** tab:
 - a. **Ref No** the service bulletin number. [25-character limit]

NOTE: If a service bulletin does not have a service bulletin number, the title of the service bulletin may be used in this field.

- b. **Description** a description of the service bulletin.
- c. **Date** the date that the service bulletin was originally published.
- d. **Revision No** the most recent revision number of the service bulletin being used.
- e. **Revision Date** the date of the most recent revision of the service bulletin being used.
- f. **Company/Agency** the entity responsible for the information found within the service bulletin.
- g. **Location** the address of the entity responsible for the information found within the service bulletin.
- h. **Total Pages** the number of pages in the service bulletin.
- i. **Message** button information that may be shared both internally and externally to the organization.
 - i. Left-click the **Message** button.
 - ii. The **Memo Editor** window will appear. Left-click the **Edit** button to add notes.



Memo Editor	×
A Image: Speal and the second se	C <u>l</u> ose
	*
(The second secon

iii. Left-click the **OK** button to save the message.

🕖 [Update] Memo Editor	×
Image: Spell I	✓ Close
Type your message here	*
	-

- iv. When the **Message** field is not blank, the light bulb on that button **v** will be highlighted in yellow.
- j. **Memo** button information that should be shared only internally to the organization.
 - i. Left-click the **Memo** button.
 - ii. The **Memo Editor** window will appear. Left-click the **Edit** button to add notes.



Memo Editor	×
A Image: Speal and the second se	C <u>l</u> ose
	*
(The second secon

iii. Left-click the **OK** button to save the memo.

🍯 [Update] M	emo Editor	sardier (12	en al cuertos	Marcol and Pro-				×
≷. <u>E</u> dit	Clea <u>r</u>	☐ Msg		III History <u>A</u> ll	History List Wra	pping Cance	el <u>V</u>) Close
Type your mess	age here							

iv. When the **Memo** field is not blank, the light bulb 😵 on that button will be highlighted in yellow.

k. Copy button - UNK

5. Complete the applicable fields on the **General** tab:



[Add] Bulletins Partnumber: [P230-123]	8
Edit Delete Images Docs Cancel OK Close	
Info General Reviewed By	
□ N/A	
Type of SB :	
Type of Bulletin :	
Track by other:	-
Link Bulletin :]
Complied within : 0 🔹 🔍	
Recurring intervals : 0 🔹	

- a. **N/A** checkbox this field is marked as "checked" if the service bulletin is not applicable to the item.
- b. **Type of SB** the classification of the service bulletin (optional).

NOTE: To complete the **Type of SB** field, the appropriate user must be listed in the **Type of SB List**. To access this table, left-click **Administration** from the tool bar, go to **Stock Tables List by Code**, and left-click **Type of SB**.

- i. Left-click the **Type of SB** field.
- ii. The **Type of SB List** window will appear.

NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.

Type of SB List		
Start With :	<u></u>	
		Max Search Result Lines : 50 🚖
Code	Name	
▶ 001	Recurring	
002	One Time	
003	Link Bulletin	
004	Out of Service	
005	FAA Requirement	
		🖾 😵 🗸 OK 🗙 Cancel

iii. Select the appropriate type (left-click the line within the search screen and leftclick **OK**; or double-click the line within the search screen).



c. **Type of Bulletin** - the classification of the bulletin (optional).

NOTE: To complete the **Type of Bulletin** field, the appropriate user must be listed in the **Type of Bulletin List**. To access this table, left-click **Administration** from the tool bar, go to **Stock Tables List by Code**, and left-click **Type of Bulletin**.

- i. Left-click the **Type of Bulletin** field.
- ii. The **Type of Bulletin List** window will appear.

NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.

Type of Bulletin List		
Start With :		
		Max Search Result Lines : 50
Code	Name	
001	Service Bulletin	
002	Technical Bulletin	
003	Reference Bulletin	

iii. Select the appropriate type (left-click the line within the search screen and leftclick **OK**; or double-click the line within the search screen).

d. Track by other -

e. **Link Bulletin** - provides the ability to link the service bulletin to one other service bulletin (if applicable).

NOTE: It is recommended that a service bulletin be linked to the service bulletin that supersedes it.

- i. Left-click the Link Bulletin field.
- ii. The **Bulletins List** window will appear.



g Bulletins Lis			×
Cancel OK	View/Edit	7 7 7	
I			
Ref No.	Subject	Revision No.	Revision Date
▶ SB 12-34567	Modification of Widget	31	7/4/2012 3:36:34 PM

- iii. Select the appropriate service bulletin (left-click the line within the search screen and left-click **OK**).
- f. **Complied within** the interval in which the service bulletin indicates the initial action initiated by the service bulletin is to occur (optional).
 - i. Left-click the drop down box and select the unit of measure in which the **Complied within** interval is measured.
 - ii. Left-click the cursor into the field to the right of the Complied with label. Enter the numeric value associated with the Complied with interval. You may also use the spinner arrows to adjust the Complied with interval in whole number increments.
- g. **Recurring intervals** the interval in which the service bulletin indicates a recurring action must be performed after the initial action is completed (optional).
 - i. Left-click the drop down box and select the unit of measure in which the **Recurring intervals** is measured.
 - ii. Left-click the cursor into the field to the right of the Recurring intervals label.
 Enter the numeric value associated with the Recurring intervals. You may also use the spinner arrows to adjust the Recurring intervals in whole number increments.
- 6. Complete the applicable fields on the **Reviewed By** tab:



[Add] Bulletins Partnumber: [P230-123]	X
Edit Delete Images Docs Cancel OK Close	
Info General Reviewed By	
Previewed By :	
Last Reviewed :	
Date Verified :	
Note :	
Complied :	
Applied By :	
Applied On :	

a. **Reviewed By** - the individual that last reviewed the service bulletin information.

NOTE: To complete the **Reviewed By** field, the appropriate user must be listed in the **Users List**. To access this table, left-click **Administration** from the tool bar, go to **Pentagon Users and Groups**, and left-click **User List**.

Steps for creating a user may be found in the procedure "Creating a User" within the System Administration section of this manual.

- i. Left-click the **Reviewed By** field.
- ii. The **Users List** window will appear.

NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.

Users List	_				
Start With	n header	here to group by that col	umn	Max Sear	ch Result Lines : 50 📑
User Code	Mr/Ms	First Name	Last Name	Workmail	Title
001	Mr.	James	Webster	James@Pentagon2000.com	VP R&D
002	Mr.	Jean-Pierre	Guyeu	jean@hotmail.com	ENGINEERING
003	Mr.	Michael	Canale		CUSTOMER SERVI
004	Mr.	Jim	Johnson		MECHANIC
005	Mr.	Cosmo	Kramer		
006	Mr.	James	Baket	1	
007	Mrs	Julia	Louis		
008	Mr.	George	Costanza	george@hotmail.com	
009	Mr.	AI	Pachino		
010	Mr.	George	Barnes		
011	Mrs	Mary	Lopez		
012	Mr.	Nathan	Lee		
013	Mr.	Louis	Morel		
014	Mrs	Iris	Smith		
015	Mr.	Allan	Green		
016	Mr.	Pierre	Pinot		
1					0
				× ×	O <u>K</u> X Cancel

iii. Select the appropriate User (left-click the line within the search screen and leftclick **OK**; or double-click the line within the search screen).



- b. Last Reviewed the date that the service bulletin information was last reviewed.
- c. **Date Verified** the date that the service bulletin information was verified as accurate.

NOTE: For some organizations, the **Date Verified** and **Last Reviewed** may refer to the same date. If so, it is suggested that only one field be used in order to eliminate duplicate entry. However, proper planning should be made so that reporting is accurate.

- d. **Note** this field may be used to record information regarding the last review of the service bulletin. [255-character limit]
- e. **Complied** checkbox this field should be checked once the service bulletin has been fully reviewed and verified.

NOTE: The **Complied** checkbox must be marked as "checked" manually. For some organizations, it may be acceptable to ignore the **Complied** checkbox in order to eliminate duplicate entry. For example, custom reporting could assume that if there is a date in the **Last Reviewed** or **Date Verified**, then the quality assurance related to the service bulletin is complied with.

f. Applied By -

NOTE: To complete the **Applied By** field, the appropriate user must be listed in the **Users List**. To access this table, left-click **Administration** from the tool bar, go to **Pentagon Users and Groups**, and left-click **User List**.

Steps for creating a user may be found in the procedure "Creating a User" within the System Administration section of this manual.

- i. Left-click the **Applied By** field.
- ii. The Users List window will appear.

NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.



Start With	1:			Max Sear	ch Result Lines : 50
Drag a colum	n header	here to group by that col	เสาท		1
User Code	Mr/Ms	First Name	Last Name	Workmail	Title
001	Mr.	James	Webster	James@Pentagon2000.com	VP R&D
002	Mr.	Jean-Pierre	Guyeu	jean@hotmail.com	ENGINEERING
003	Mr.	Michael	Canale		CUSTOMER SERV
004	Mr.	Jim	Johnson		MECHANIC
005	Mr.	Cosmo	Kramer		
006	Mr.	James	Baket		
007	Mrs	Julia	Louis		Q.
008	Mr.	George	Costanza	george@hotmail.com	
009	Mr.	AI	Pachino	7	1
010	Mr.	George	Barnes		
011	Mrs	Mary	Lopez		
012	Mr.	Nathan	Lee		
013	Mr.	Louis	Morel		1
014	Mrs	Iris	Smith		
015	Mr.	Allan	Green		
016	Mr.	Pierre	Pinot		

iii. Select the appropriate User (left-click the line within the search screen and leftclick **OK**; or double-click the line within the search screen).

g. Applied On -

- 7. Left-click the **OK** button to exit edit mode in the **Bulletins** window.
- 8. Link applicable documents for ease of access (optional):

NOTE: Documents of any type may be linked to publications as long as the appropriate reader software is installed.

a. Left-click the **Docs** button.



b. The **Bulletins [Document List]** window will appear. Left-click the **Add** button.



Bulletins [Documents List] :P230-123	1777 ×		X
Add Edit Delete	1 View Clo	se	9.559.7
Title		Image Code	Attached on date
	<no data="" displ<="" td="" to=""><th>зу></th><td></td></no>	зу>	

c. The **Record View** window will appear. Complete the applicable fields.

Record Vie	w w
X Cancel O	K)
Title :	
Image Code:	
File Name :	· · · · · · · · · · · · · · · · · · ·
Date :	7/4/2012 2:55:34 PM
	-

- i. **Title** the title of the document being linked to the service bulletin.
- ii. Image Code the classification of the image being linked to the service bulletin.

NOTE: To complete the **Image Code** field, it is recommended that the appropriate code be listed in the **Image Type List**. To access this table, left-click **Administration** from the tool bar, go to **Stock Tables List by Code**, and left-click **Image Types**.

- 1. Left-click the ellipses in the Image Code field.
- 2. The **Image Type List** window will appear.

NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.



🍠 Image Type List			
Start With :			
		Max Sea	rch Result Lines : 50 🗦
Drag a column header here	to group by that column		
Code	Name	Print In Maintenance	Print In Work Order
▶ 001	8130 FORM	No	No
002	CERTS	No	No
003	TEST RESULTS	No	No
004	PACKING LIST	No	No
005	ATA 106	No	No
006	DRAWING	Yes	Yes
007	Picture	No	No
008	C.O.C.	No	No
009	Test Results	No	No
010	Service Tag	No	No
		× 🗴	OK Cancel

3. Select the appropriate image type (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

NOTE: The type of image may also be typed into the **Image Code** field by left-clicking into the **Image Code** field and typing the appropriate characters. However, this is not the best practice.

- iii. File Name the path to the document being linked to the service bulletin.
 - 1. Left-click the ellipses $\overline{\blacksquare}$ in the **File Name** field.
 - 2. The **Open** window will appear.

🍯 Open			22
Look in:	Documents 🗨	← 🗈 💣 📰▼	
Ca.	Name	Date modified	Туре 🔺
Recent Places	 ➡ 7f1004.avi ➡ 7f2043.avi ➡ 13.mov 	8/2/2010 9:10 PM 3/26/2008 1:04 AM 12/25/2008 5:58 PM 10/21/2010 12:21 9/2/2007 2:32 PM 3/29/2010 4:31 PM	Video (Video (Quick]
Desktop	1777in.mov 000003181.tif 130-3.pdf		Quick1 TIFF In Adobe
Libraries	ADVISE00000000PENT001010001_1.pdf ADVISE00000000PENT001010001_2.pdf Air To Air Fight (Falcon AF) pain-shut your	4/11/2011 4:58 PM 4/11/2011 4:59 PM 12/2/2008 5:52 AM	Adobe Adobe FLV Fil
	ATA106.pdf Autosource.doc	3/26/2010 7:21 PM 12/30/2003 12:25	Adobe Micros 🚽
Network	File name:	•	Open
	Files of type: All Files	•	Cancel
			Help

3. Navigate to the document being linked to the service bulletin. Select the appropriate file (left-click the file within the explorer screen and left-click the **Open** button; or double-click the file within the explorer screen).



iv. **Date** - the date and time that the document was linked to the service bulletin.

NOTE: The system defaults to the date and time when the **Record View** window is opened.

- d. Left-click the **OK** button to close the **Record View** window.
- e. Left-click the Close button to close the Bulletins [Document List] window.
- 9. Link applicable images for ease of access (optional):

NOTE: Adobe Acrobat (.pdf), Microsoft Office (Word, Excel, PowerPoint), and video files may all be attached as images. However, the practice of attaching those types of files as images is burdensome and will result in a noticeable slowing of the system. The best practice is to attach all files that are not images as documents.

a. Left-click the Images button.



- b. The Pentagon 2000 IMAGEination will appear.
- c. Left-click File from the tool bar and left-click Attach New Image (Single).
- d. The Load Dialog window will appear.



e. Navigate to the document being linked to the bulletins. Select the appropriate file (left-click the file within the explorer screen and left-click the **Open** button; or double-click the file within the explorer screen).



NOTE: The instructions above describe a single function of Pentagon 2000 IMAGEination. Complete instructions for Pentagon 2000 IMAGEination may be found in the procedure "Pentagon 2000 IMAGEination" within the General System section of this manual.

- f. Left-click the Close button from the toolbar to close the **Pentagon 2000 IMAGEination** window
- 10. Left-click the **Close** button to close the **Bulletins** window.
- 11. Left-click the Close button to close the Bulletins List window.
- 12. When at least one service bulletin is identified, the light bulb 🕺 on the **Bulletins** button will be highlighted in yellow.
- v. Identify directives associated with the item (optional):

NOTE: A directive is defined as a publication issued by a civil aviation regulatory agency (i.e. FAA, EASA) that mandates a certain type of inspection, replacing certain components, performing maintenance in a specific manner or limiting operations under specified conditions.

A directive could also be defined as an organizational response to a service bulletin(s) that mandates a certain type of inspection, replacing certain components, performing maintenance in a specific manner or limiting operations under specified conditions.

1. Left-click the **Directives** button.

Q Directives

2. The **Directives List** window will appear. Left-click the **Add** button.

🙍 Directives List	the state with the same			1.00	8
Add View/Edit	C <u>l</u> ose	-	777		2
Ref No.	Subject		Revision No.	Revision Date	
		<no data="" display="" to=""></no>			

3. The **Directives** window will appear.



[Add] Directives Partnumber: [P230-123]
Edit Delete Images Doc <u>s</u> Cancel O <u>K</u> Close
Info General Reviewed By
Ref No. :
Description : S/B
Date :
Revision No :
Revision Date :
Company/Agency :
Location :
Total Pages : 0
Message @ Memo Copy

- 4. Complete the applicable fields on the **Info** tab:
 - a. Ref No the directive number. [25-character limit]

NOTE: If a directive does not have a directive number, the title of the directive may be used in this field.

- b. **Description** a description of the directive.
- c. **S/B** button provides the ability to link the directive to service bulletins (optional).

NOTE: It is recommended that all service bulletins related to the directive be linked to the directive.

- i. Left-click the **S/B** button.
- ii. The **Bulletins For Ref No** window will appear. Left-click the **Add** button.

Start With :			
1	,	_	Max Search Result Lines : 50
Ref No	Subject		
		<no data="" display="" to=""></no>	
		<no data="" display="" to=""></no>	
		<no data="" display="" to=""></no>	
		<no data="" display="" to=""></no>	
		<no data="" display="" to=""></no>	
		<no data="" display="" to=""></no>	

iii. The **Bulletins List** window will appear.



NOTE: The service bulletin(s) related to

ø	Bulletins List			X
	Cancel OK View/Edit			the state of the
Ī				
ŕ	Ref No.	Subject	Revision No.	Revision Date
Þ	B 12-34567	Modification of Widget	31	7/4/2012 3:36:34 PM

iv. Select the appropriate service bulletin (left-click the line within the search screen and left-click **OK**).

NOTE: Only one service bulletin may be linked at a time (multi-select is not enabled). To link additional service bulletins, left-click the **Add** button in the **Bulletins For Ref No** window.

- d. **Date** the date that the directive was originally published.
- e. **Revision No** the most recent revision number of the directive being used.
- f. **Revision Date** the date of the most recent revision of the directive being used.
- g. **Company/Agency** the entity responsible for the information found within the directive.
- h. **Location** the address of the entity responsible for the information found within the directive.
- i. Total Pages the number of pages in the directive.
- j. **Message** button information that may be shared both internally and externally to the organization.
 - i. Left-click the Message button.
 - ii. The Memo Editor window will appear. Left-click the Edit button to add notes.



ſ	🍠 Memo E	ditor		CHEVE N	er (and a second	-		1. A. S. M.	×
	<mark>∕∢</mark> <u>E</u> dit	j⊑ Clea <u>r</u>	⊡ <u>M</u> sg	E7 Spell	Print History All	回 <u>H</u> istory List	₩rapping <u>C</u>	ancel O <u>K</u>	C <u>l</u> ose
									*
Į									► a

iii. Left-click the **OK** button to save the message.

🕖 [Update] Mem	o Editor	CONTRACTOR NO.	BACK AND		(m) #	×
Edit C	J 🔲 lea <u>r M</u> sg	Spell Print	History <u>All</u> <u>H</u> istor	y List Wrapping	Cancel OK	Cjose
Type your message	e here					*
						Ŧ

- iv. When the **Message** field is not blank, the light bulb on that button **v** will be highlighted in yellow.
- k. **Memo** button information that should be shared only internally to the organization.
 - i. Left-click the **Memo** button.
 - ii. The **Memo Editor** window will appear. Left-click the **Edit** button to add notes.


Memo Editor	×
A Image: Speal and the story All History List Wrapping Gancel OK	C <u>l</u> ose
	*
(The second secon

iii. Left-click the **OK** button to save the memo.

🍠 [Update] M	emo Editor		n a narma	Beer Landson			100.00	×
Ì⊄. <u>E</u> dit	Clea <u>r</u>	© Msg ∕ S	pell <u>P</u> rint	III History <u>A</u> ll	I History List W	rapping <u>C</u> ar	< ocel O <u>K</u>	Cjose
Type your mess	age here							

iv. When the **Memo** field is not blank, the light bulb 😵 on that button will be highlighted in yellow.

I. Copy button - UNK

5. Complete the applicable fields on the **General** tab:



[Add] Directives Partnumber: [P230-123]	X
Edit Delete Images Doc <u>s</u> Cancel OK Close	
Info General Reviewed By	
Complied within : 0 🛨 🔍	

- a. **Complied within** the interval in which the directive indicates the initial action initiated by the directive is to occur (optional).
 - i. Left-click the drop down box and select the unit of measure in which the **Complied within** interval is measured.
 - ii. Left-click the cursor into the field to the right of the Complied with label. Enter the numeric value associated with the Complied with interval. You may also use the spinner arrows to adjust the Complied with interval in whole number increments.
- b. **Recurring intervals** the interval in which the directive indicates a recurring action must be performed after the initial action is completed (optional).
 - i. Left-click the drop down box and select the unit of measure in which the **Recurring intervals** is measured.
 - ii. Left-click the cursor into the field to the right of the Recurring intervals label.
 Enter the numeric value associated with the Recurring intervals. You may also use the spinner arrows to adjust the Recurring intervals in whole number increments.
- 6. Complete the applicable fields on the **Reviewed By** tab:



[Add] Directives Partnumber: [P230-123]	X
Image: Image:	
Info General Reviewed By	
Reviewed By :	
Last Reviewed :	
Date Verified :	
Note :	
Complied :	
Applied By :	
Applied On :	

a. **Reviewed By** - the individual that last reviewed the directive information.

NOTE: To complete the **Reviewed By** field, the appropriate user must be listed in the **Users List**. To access this table, left-click **Administration** from the tool bar, go to **Pentagon Users and Groups**, and left-click **User List**.

Steps for creating a user may be found in the procedure "Creating a User" within the System Administration section of this manual.

- i. Left-click the **Reviewed By** field.
- ii. The Users List window will appear.

NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.

🖉 Users List	_			2	
Start With	n header	here to group by that col	umn	Max Sear	ch Result Lines : 50 📑
User Code	Mr/Ms	First Name	Last Name	Workmail	Title
001	Mr.	James	Webster	James@Pentagon2000.com	VP R&D
002	Mr.	Jean-Pierre	Guyeu	jean@hotmail.com	ENGINEERING
003	Mr.	Michael	Canale		CUSTOMER SERVI
004	Mr.	Jim	Johnson		MECHANIC
005	Mr.	Cosmo	Kramer		
006	Mr.	James	Baket		
007	Mrs	Julia	Louis		
008	Mr.	George	Costanza	george@hotmail.com	
009	Mr.	AI	Pachino	5	
010	Mr.	George	Barnes		
011	Mrs	Mary	Lopez		
012	Mr.	Nathan	Lee		
013	Mr.	Louis	Morel		
014	Mrs	Iris	Smith		
015	Mr.	Allan	Green		
016	Mr.	Pierre	Pinot		
•					<u>0</u>
				× ×	OK X Cancel

iii. Select the appropriate User (left-click the line within the search screen and leftclick **OK**; or double-click the line within the search screen).



- b. Last Reviewed the date that directive information was last reviewed.
- c. **Date Verified** the date that the directive information was verified as accurate.

NOTE: For some organizations, the **Date Verified** and **Last Reviewed** may refer to the same date. If so, it is suggested that only one field be used in order to eliminate duplicate entry. However, proper planning should be made so that reporting is accurate.

- d. **Note** this field may be used to record information regarding the last review of the directive. [255-character limit]
- e. **Complied** checkbox this field should be checked once the directive has been fully reviewed and verified.

NOTE: The **Complied** checkbox must be marked as "checked" manually. For some organizations, it may be acceptable to ignore the **Complied** checkbox in order to eliminate duplicate entry. For example, custom reporting could assume that if there is a date in the **Last Reviewed** or **Date Verified**, then the quality assurance related to the directive is complied with.

f. Applied By -

NOTE: To complete the **Applied By** field, the appropriate user must be listed in the **Users List**. To access this table, left-click **Administration** from the tool bar, go to **Pentagon Users and Groups**, and left-click **User List**.

Steps for creating a user may be found in the procedure "Creating a User" within the System Administration section of this manual.

- i. Left-click the Applied By field.
- ii. The Users List window will appear.



Start With	1:			Max Sear	ch Result Lines : 50
Drag a colum	n header	here to group by that col	เสาท		1
User Code	Mr/Ms	First Name	Last Name	Workmail	Title
001	Mr.	James	Webster	James@Pentagon2000.com	VP R&D
002	Mr.	Jean-Pierre	Guyeu	jean@hotmail.com	ENGINEERING
003	Mr.	Michael	Canale		CUSTOMER SERV
004	Mr.	Jim	Johnson		MECHANIC
005	Mr.	Cosmo	Kramer		
006	Mr.	James	Baket		
007	Mrs	Julia	Louis		Q.
008	Mr.	George	Costanza	george@hotmail.com	
009	Mr.	AI	Pachino	7	1
010	Mr.	George	Barnes		
011	Mrs	Mary	Lopez		
012	Mr.	Nathan	Lee		
013	Mr.	Louis	Morel		1
014	Mrs	Iris	Smith		
015	Mr.	Allan	Green		
016	Mr.	Pierre	Pinot		

iii. Select the appropriate User (left-click the line within the search screen and leftclick **OK**; or double-click the line within the search screen).

g. Applied On -

- 7. Left-click the **OK** button to exit edit mode in the **Directive** window.
- 8. Link applicable documents for ease of access (optional):

NOTE: Documents of any type may be linked to publications as long as the appropriate reader software is installed.

a. Left-click the **Docs** button.



b. The **Directives [Document List]** window will appear. Left-click the **Add** button.



Add Edit Delete View Close Search For :	×
Title Image Code Attach	
<no data="" display="" to=""></no>	hed on date

c. The **Record View** window will appear. Complete the applicable fields.

Record Vie	w III
X Cancel 0	K)
Title :	
Image Code:	
File Name :	
Date :	7/4/2012 2:55:34 PM

- i. **Title** the title of the document being linked to the directive.
- ii. Image Code the classification of the image being linked to the directive.

NOTE: To complete the **Image Code** field, it is recommended that the appropriate code be listed in the **Image Type List**. To access this table, left-click **Administration** from the tool bar, go to **Stock Tables List by Code**, and left-click **Image Types**.

- 1. Left-click the ellipses in the Image Code field.
- 2. The Image Type List window will appear.



🍠 Image Type List			
Start With :			
		Max Sea	rch Result Lines : 50 🗦
Drag a column header here	to group by that column		
Code	Name	Print In Maintenance	Print In Work Order
▶ 001	8130 FORM	No	No
002	CERTS	No	No
003	TEST RESULTS	No	No
004	PACKING LIST	No	No
005	ATA 106	No	No
006	DRAWING	Yes	Yes
007	Picture	No	No
008	C.O.C.	No	No
009	Test Results	No	No
010	Service Tag	No	No
		× 💉	OK Cancel

3. Select the appropriate image type (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

NOTE: The type of image may also be typed into the **Image Code** field by left-clicking into the **Image Code** field and typing the appropriate characters. However, this is not the best practice.

- iii. File Name the path to the document being linked to the directive.
 - 1. Left-click the ellipses $\overline{\blacksquare}$ in the **File Name** field.
 - 2. The **Open** window will appear.

🍠 Open					8
Look in:	Documents		•	+ 🗈 💣 📰 -	
C.	Name	*		Date modified	Туре 🔺
Recent Places	7f1004.avi 7f2043.avi 13.mov 777in.mov 000003181.t 8130-3.pdf ADVISE0000 Air To Air Fi ATA106.pdf	if 0000PENT001010001_1.pdf 0000PENT001010001_2.pdf ght (Falcon AF) pain-shut you	Jr	8/2/2010 9:10 PM 3/26/2008 1:04 AM 12/25/2008 5:58 PM 10/21/2010 12:21 9/2/2007 2:32 PM 3/29/2010 4:31 PM 4/11/2011 4:58 PM 4/11/2011 4:59 PM 12/2/2008 5:52 AM 3/26/2010 7:21 PM	Video Quick1 Quick1 Quick1 TIFF In Adobe Adobe FLV Fil Adobe
Network	Autosource	.doc III		12/30/2003 12:25	Micros 👻
	File name:			•	Open
	Files of type:	All Files		•	Cancel
					Help

3. Navigate to the document being linked to the directive. Select the appropriate file (left-click the file within the explorer screen and left-click the **Open** button; or double-click the file within the explorer screen).



iv. Date - the date and time that the document was linked to the directive.

NOTE: The system defaults to the date and time when the **Record View** window is opened.

- d. Left-click the **OK** button to close the **Record View** window.
- e. Left-click the Close button to close the Directives [Document List] window.
- 9. Link applicable images for ease of access (optional):

NOTE: Adobe Acrobat (.pdf), Microsoft Office (Word, Excel, PowerPoint), and video files may all be attached as images. However, the practice of attaching those types of files as images is burdensome and will result in a noticeable slowing of the system. The best practice is to attach all files that are not images as documents.

a. Left-click the Images button.



- b. The Pentagon 2000 IMAGEination will appear.
- c. Left-click File from the tool bar and left-click Attach New Image (Single).
- d. The Load Dialog window will appear.



e. Navigate to the document being linked to the directive. Select the appropriate file (left-click the file within the explorer screen and left-click the **Open** button; or double-click the file within the explorer screen).



NOTE: The instructions above describe a single function of Pentagon 2000 IMAGEination. Complete instructions for Pentagon 2000 IMAGEination may be found in the procedure "Pentagon 2000 IMAGEination" within the General System section of this manual.

- f. Left-click the Close button from the toolbar to close the **Pentagon 2000 IMAGEination** window
- 10. Left-click the **Close** button to close the **Directives** window.
- 11. Left-click the **Close** button to close the **Directives List** window.
- 12. When at least one service bulletin is identified, the light bulb 😵 on the **Directives** button will be highlighted in yellow.
- I. The fields located in the **Part of a Match Set** group box on the **General** tab are informational.

Part of a Match Set	
Code : Non	
Desc: Non	

NOTE: Steps for creating part number sets may be found in the procedure "Creating a Part Number Set" within the Material Management section of this manual.

NOTE: To create a part number set, a part master record must exist for all items in the set. It is recommended that all part master records be created and then part number sets be created as another step in the process.

7. If the item is sold to customers on Sales Orders, complete the applicable portions of the Sell Prices tab:

NOTE: If the item is not sold (i.e. only purchased for use in work orders or maintenance), the fields on this tab may be ignored.

a. Left-click the **Sell Prices** tab:



💓 [Editing] Partnumber : [P230-123] WIDGET MFG : [AK4P]	A & L LABS
Add Edit Del Prev Next Hist XRef W/H O	Irdr BOM Opt Srch <u>Cncl</u> OK Close
P/N : P230-123 / 1 Rev : A	Alt 1 : 24-5646-332
Desc : WIDGET	Alt 2 : 1560-00-238-4531
Stock General Sell Prices Costs Exchanges Measures E: Outright Sell Prices Effective date Sell [AA]: 0.00 EA Sell [BB]: 0.00 EA Sell [CC]: 0.00 EA MSLP: 0.00 EA	xtended Info HazMat Time Control Eligibility

b. Identify the sales prices of the item:

Outright Sell Prices		Effective date
Sell [AA] :	0.00 \$	EA 💌
Sell [BB] :	0.00 \$	EA 💌
Sell [CC] :	0.00 \$	EA 🔻

NOTE: A sales price can be set for up to three different condition codes.

NOTE: The condition codes for which prices may be set for sales is managed within the Company Setup. To select the three sales condition codes for which prices may be set, left-click **Administration** from the tool bar, go to **System Setup**, then left-click on **System General Defaults**. The Company Setup window will appear. The three sales condition codes for which prices may be set may be identified on the **Defaults** tab.



🍯 Company Setup		<u>ि ×</u>
X √ ₪ Cancel OK Option		
Modules Limits Syst Accounting Settings F Consolidator Settings General Defaults Set	em Alerts General Settings Document S rinting Settings Stock W/H Settings M PMR Aircraft Ext Flight Log Ext up Customer Docs Vendor Docs Tax	ettings W0/MNT Settings Memo Convert Aandatory Fields S0/P0 Line changes settings Hide Line Types Publications Ext. Info xes Charges Convert P/N Ext Counters
	Base Measures	Docs Setun
Quotes Valid for	: 30 Day(s)	Print COND on Docs : 🔽
Vendor Bids Due Within	: 1 Day(s) Weight : LB ····	User Line Numbering :
S.O. Ship from Stock Within	: 0 Day(s)	Sales GL Account by Line :
Add to Vendor Lead Time	: 0 Day(s) Length : IN ····	Purch GL Account by Line : 🗍
S.O. to P.O. Deduct	0 Day(s)	Post W/O to GL Account WIP : 🔽
Copy Ship and Due On from Q	uote to RFQ	Auto Convert S.O. to Quote
Lead Time	Calculation : 🔽	Record Order change - Always 🗔
Exch Sell Cond	Search Parameters	Price / Qty Decimals
1. AA ····	Advanced Load Alert if P/N Search Price Not on File	Unit Price : 2 🜩
2. BB		Quantity : 🗾 🗘 🜩
3. CC		Shrink qty decimal zeros on printing 🔽
Sell Cond		P/N Tracing
1. AA ····	S.U./WU : 🔽 🔽	Tracing Only
2 BB	P.O. : 🔽 🔽	C Serialized - Multi

NOTE: To complete the fields within the **Sell Cond** group box, the appropriate units of measure must be listed in the **UM List**. To access this table, left-click **Administration** from the tool bar, go to **Stock Tables List by Code**, and left-click **Unit Measure (UM)**.

i. Identify the price for which the item will be sold if the item is in the first condition:

Outright Sell	Prices		Effective date
Sell [AA] :	0.00 \$	EA ···	•

NOTE: In this procedure, the first condition is identified as "AA". The condition code is identified within the label inside brackets ([]). Common condition codes for items being sold are "NE" (new) and "OH" (overhauled).

NOTE: The first condition (**Sell [AA]**) is used to calculate customs and insurance values on packing slips regardless of the actual condition of the item.

Steps for setting customs and insurance values on packing slips may be found in the following procedures: "Sales Packing Slip" within the Sales section of this manual, "Repair Packing Slip" within the Purchasing section of this manual, and "Claims Packing Slip" and "Warehouse Transfer Packing Slip" within the Material Management section of this manual.

- 1. Left-click the cursor into the field to the right of the **Sell [AA]** label. Enter the price for which the item will sold when the item is in an AA condition.
- 2. Verify the unit of measure in which the item will be sold when the item is in an AA condition.



NOTE: To complete the unit of measure field, the appropriate unit of measure must be listed in the **UM List**. To access this table, left-click **Administration** from the tool bar, go to **Stock Tables List by Code**, and left-click **Unit Measure (UM)**.

NOTE: The unit of measure will default to the unit of measure previously identified in the **Stock UM** field on the **Stock** tab.

a. If the item is sold in a unit of measure different than the unit of measure identified in the **Stock UM** field on the **Stock** tab, left-click the next field to the right (the one containing an ellipses ...).

NOTE: The **UM List** contains standard factors that convert quantities from the standard unit of measure (identified within the **Company Setup**) to all other units of measure.

If the unit of measure identified in the **Stock UM** field on the **Stock** tab is different from the standard unit of measure (identified within the **Company Setup**) OR *if the standard factors do not apply to the item, unit of measure conversions will need to be set up for the part master record. Steps to set up a unit of measure conversion may be found in the procedure "Creating Unit of Measure Conversions" within the Material Management section of this manual.*

If a unit of measure conversion exists for the part master record, the factor associated with the unit of measure conversion will override the standard factor in sales transactions.

b. The **UM List** window will appear.



🍯 UM List		
Start With :	<u></u>	
		Max Search Result Lines : 50 🚔
Drag a column header here	to group by that column	
Code	Name	Factor
▶ 1IN	INCH	1.00
AA	TWO HUNDERD & FIFTY	250.00
AM	AMPOULE	1.00
AT	ASSORTMENT	1.00
AX	TWENTY	20.00
AY	ASSEMBLY	1.00
BA	BALE	1.00
BB	BOBBIN	1.00
BC	BLOCK	1.00
BF	BOARD FOOT	1.00
BG	BAG	1.00
BK	BOOK	1.00
BL	BARREL/DRUM/KEG	1.00
BO	BOLT	1.00
BR	BAR	1.00
BU	BUSHEL	1.00
BX	BOX	1.00
		🔀 🛠 🗸 OK 🗙 Cancel

- c. Select the appropriate unit of measure (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- 3. Identify the date for which the price was effective for an item sold in an AA condition.

NOTE: The **Effective Date** is for reference and custom reporting only. Historical price changes by date are not kept in the system.

- a. Left-click on the arrow inside the field to the right of the unit of measure and below the **Effective Date** column label.
- b. A calendar/clock widget will appear.



- c. Select the date and left-click the **OK** button.
- ii. Identify the price for which the item will be sold if the item is in a second condition (if applicable):

Sell [BB]: 0.00 \$ EA ...

NOTE: In this procedure, the second condition is identified as "BB".

1. Left-click the cursor into the field to the right of the **Sell [BB]** label. Enter the price for which the item will sold when the item is in a BB condition.



2. Verify the unit of measure in which the item will be sold when the item is in a BB condition.

NOTE: To complete the unit of measure field, the appropriate unit of measure must be listed in the **UM List**. To access this table, left-click **Administration** from the tool bar, go to **Stock Tables List by Code**, and left-click **Unit Measure (UM)**.

NOTE: The unit of measure will default to the unit of measure previously identified in the **Stock UM** field on the **Stock** tab.

a. If the item is sold in a unit of measure different than the unit of measure identified in the **Stock UM** field on the **Stock** tab, left-click the next field to the right (the one containing an ellipses ...).

NOTE: The **UM List** contains standard factors that convert quantities from the standard unit of measure (identified within the **Company Setup**) to all other units of measure.

If the unit of measure identified in the **Stock UM** field on the **Stock** tab is different from the standard unit of measure (identified within the **Company Setup**) OR *if the standard factors do not apply to the item, unit of measure conversions will need to be set up for the part master record. Steps to set up a unit of measure conversion may be found in the procedure "Creating Unit of Measure Conversions" within the Material Management section of this manual.*

If a unit of measure conversion exists for the part master record, the factor associated with the unit of measure conversion will override the standard factor in sales transactions.

b. The **UM List** window will appear.



🍯 UM List		
Start With :	<u></u>	
		Max Search Result Lines : 50 🚔
Drag a column header here	to group by that column	
Code	Name	Factor
▶ 1IN	INCH	1.00
AA	TWO HUNDERD & FIFTY	250.00
AM	AMPOULE	1.00
AT	ASSORTMENT	1.00
AX	TWENTY	20.00
AY	ASSEMBLY	1.00
BA	BALE	1.00
BB	BOBBIN	1.00
BC	BLOCK	1.00
BF	BOARD FOOT	1.00
BG	BAG	1.00
BK	BOOK	1.00
BL	BARREL/DRUM/KEG	1.00
BO	BOLT	1.00
BR	BAR	1.00
BU	BUSHEL	1.00
BX	BOX	1.00
		🔀 🛠 🗸 OK 🗙 Cancel

- c. Select the appropriate unit of measure (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- 3. Identify the date for which the price was effective for an item sold in a BB condition.

NOTE: The **Effective Date** is for reference and custom reporting only. Historical price changes by date are not kept in the system.

- a. Left-click on the arrow inside the field to the right of the unit of measure and below the **Effective Date** column label.
- b. A calendar/clock widget will appear.



- c. Select the date and left-click the **OK** button.
- iii. Identify the price for which the item will be sold if the item is in a third condition (if applicable):

Sell [CC] : 0.00 \$ EA

NOTE: In this procedure, the third condition is identified as "CC".

1. Left-click the cursor into the field to the right of the **Sell [CC]** label. Enter the price for which the item will sold when the item is in a CC condition.



2. Verify the unit of measure in which the item will be sold when the item is in a CC condition.

NOTE: To complete the unit of measure field, the appropriate unit of measure must be listed in the **UM List**. To access this table, left-click **Administration** from the tool bar, go to **Stock Tables List by Code**, and left-click **Unit Measure (UM)**.

NOTE: The unit of measure will default to the unit of measure previously identified in the **Stock UM** field on the **Stock** tab.

a. If the item is sold in a unit of measure different than the unit of measure identified in the **Stock UM** field on the **Stock** tab, left-click the next field to the right (the one containing an ellipses ...).

NOTE: The **UM List** contains standard factors that convert quantities from the standard unit of measure (identified within the **Company Setup**) to all other units of measure.

If the unit of measure identified in the **Stock UM** field on the **Stock** tab is different from the standard unit of measure (identified within the **Company Setup**) OR *if the standard factors do not apply to the item, unit of measure conversions will need to be set up for the part master record. Steps to set up a unit of measure conversion may be found in the procedure "Creating Unit of Measure Conversions" within the Material Management section of this manual.*

If a unit of measure conversion exists for the part master record, the factor associated with the unit of measure conversion will override the standard factor in sales transactions.

b. The **UM List** window will appear.



🍯 UM List		
Start With :	<u></u>	
		Max Search Result Lines : 50 🚔
Drag a column header here	to group by that column	
Code	Name	Factor
▶ 1IN	INCH	1.00
AA	TWO HUNDERD & FIFTY	250.00
AM	AMPOULE	1.00
AT	ASSORTMENT	1.00
AX	TWENTY	20.00
AY	ASSEMBLY	1.00
BA	BALE	1.00
BB	BOBBIN	1.00
BC	BLOCK	1.00
BF	BOARD FOOT	1.00
BG	BAG	1.00
BK	BOOK	1.00
BL	BARREL/DRUM/KEG	1.00
BO	BOLT	1.00
BR	BAR	1.00
BU	BUSHEL	1.00
BX	BOX	1.00
		📓 🛠 🗸 OK 🗙 Cancel

- c. Select the appropriate unit of measure (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- 3. Identify the date for which the price was effective for an item sold in a CC condition.

NOTE: The **Effective Date** is for reference and custom reporting only. Historical price changes by date are not kept in the system.

- a. Left-click on the arrow inside the field to the right of the unit of measure and below the **Effective Date** column label.
- b. A calendar/clock widget will appear.

	Effective date 2 12:00:00 PM Tax A : Tay R : Tay R :											
- H					/4/	201	212	UU:	UU PM			
	◀ July ▶ ◀ 2012 ▶											
	S	м	Т	W	Т	F	S		•			.
	24	25	26	27	28	29	30					
1	1	2	3	- 4	5	6	7		•	1	· · ·	•
4	8	9	10	11	12	13	14		•			•
	15	16	17	18	19	20	21			÷ .		
	22	23	24	25	26	27	28		- R		0. DV	<u>.</u>
1	29	30	31	1	2	3	4			2:00:0	UPM	
ĺ	Now Clear OK											

- c. Select the date and left-click the **OK** button.
- iv. Identify the information related to the user price:

MSLP:



NOTE: The user price field label may be modified in the **Company Setup**. In this procedure, the field is labeled "MSLP" (Manufacturer's Suggested List Price). To modify the label for this field, left-click **Administration** from the tool bar, go to **System Setup**, then left-click on **System General Defaults**. The **Company Setup** window will appear. Label name may be identified on the **Setup** tab.

ſ	🏈 Company Setup	e Con Spinning		-		
1	Cancel OK Op	o <u>t</u> ion		- 7	5	
Ш	Limits System Aler	ts 📔 General Settin	gs	Document Settings	Men	
Ш	Stock W/H Settings	Mandatory Fields	S0/	'PO Line changes s	ettings	
Ш	General Defaults	Setup Customer	Docs	Vendor Docs	Taxes	
Ш	Add Misc to Stock	Cost	Stoc	k Default		
Ш	Shipping : 🔽	Parte : 🗔	Sti	d Condition : NE	•••	
Ш	Air Frt : 🔽	i dits.je	Std Unit Measure : EA			
Ш	Ocean Frt : 🔽	Labor : 💌	Stoc	k Std Type : STK		
н	Insurance : 🔽	Lot Charge : 🔽	Bas	e Currencu : USD		
	land Charge : 🔽 HazMat : 🔽	Cap Cost : 🔽	User	Price Label : MSLP		
			lun a she	second second second second		

If modified, the label will change both on screen and on all forms and reports where these fields are referenced.

- 1. Left-click the cursor into the field to the right of the user price label. Enter the user price for the item.
- 2. Verify the unit of measure in which the user price is listed.

NOTE: To complete the unit of measure field, the appropriate unit of measure must be listed in the **UM List**. To access this table, left-click **Administration** from the tool bar, go to **Stock Tables List by Code**, and left-click **Unit Measure (UM)**.

NOTE: The unit of measure will default to the unit of measure previously identified in the **Stock UM** field on the **Stock** tab.

a. If the user price is listed in a unit of measure different than the unit of measure identified in the **Stock UM** field on the **Stock** tab, left-click the next field to the right (the one containing an ellipses ...).

NOTE: The **UM List** contains standard factors that convert quantities from the standard unit of measure (identified within the **Company Setup**) to all other units of measure.

If the unit of measure identified in the **Stock UM** field on the **Stock** tab is different from the standard unit of measure (identified within the **Company Setup**) OR *if the standard factors do not apply to the item, unit of measure conversions will need to be set up for the part master record. Steps to set up a unit of measure conversion may be found in the procedure "Creating Unit of Measure Conversions" within the Material Management section of this manual.*



If a unit of measure conversion exists for the part master record, the factor associated with the unit of measure conversion will override the standard factor in sales transactions.

b. The **UM List** window will appear.

NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.

🍠 UM List	territori della constanza della const	
Start With :		
		Max Search Result Lines : 50 🚔
Drag a column header her	e to group by that column	
Code	Name	Factor
▶ 1IN	INCH	1.00
AA	TWO HUNDERD & FIFTY	250.00
AM	AMPOULE	1.00
AT	ASSORTMENT	1.00
AX	TWENTY	20.00
AY	ASSEMBLY	1.00
BA	BALE	1.00
BB	BOBBIN	1.00
BC	BLOCK	1.00
BF	BOARD FOOT	1.00
BG	BAG	1.00
BK	BOOK	1.00
BL	BARREL/DRUM/KEG	1.00
BO	BOLT	1.00
BR	BAR	1.00
BU	BUSHEL	1.00
BX	BOX	1.00
		📓 🛠 🗸 OK 🗙 Cancel

- c. Select the appropriate unit of measure (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- 3. Identify the date for which the user price was effective for the item.

NOTE: The **Effective Date** is for reference and custom reporting only. Historical price changes by date are not kept in the system.

- a. Left-click on the arrow inside the field to the right of the unit of measure and below the **Effective Date** column label.
- b. A calendar/clock widget will appear.

Eff 1	ecti 2:00	ve c :00	late PM	-	74/	Tax Tax Tav 201	abie A : <u>R ·</u> 2.12		00 P	'n				
4 July & 4 2012 k														
_	S	M	T	W	Т	F	S		Ι.				•	
	24	25	26	27	28	29	30					1		
	1	2	3	- 4	5	6	7		•					
	8	9	10	11	12	13	14		•					
	15	16	17	18	19	20	21							
	22	23	24	25	26	27	28			40			-	
	29	30	31	1	2	3	4			12	::00	:00	РМ	-
Now Clear OK														



c. Select the date and left-click the **OK** button.

c. Identify the taxes that are applicable when the item is sold:

—T au abla	
I axable	_
Tax A :	
Tax B :	
Tax C :	

NOTE: The tax field labels (**Tax A**, **Tax B**, and **Tax C**) may be modified in the **Company Setup**. In this procedure, the field is labeled "Tax". To modify the labels for these fields, left-click **Administration** from the tool bar, go to **System Setup**, then left-click on **System General Defaults**. The **Company Setup** window will appear. The label name may be identified on the **Taxes** tab.

Company Setup	<u></u> ,	-5 -, -	Stree -	·5
Limits System Alerts Stock W/H Settings Ceneral Defaults	General Settings Mandatory Fields Setup Customer Do	Document Settings SO/PO Line changes set cs Vendor Docs	MemoConvert tingsAircraftExt axesCharges	Acco Hide Convert
	Tax Title : Tax	uul Add to T		

If modified, the label will change both on screen and on all forms and reports where these fields are referenced.

NOTE: The taxes that are applied (and how those taxes are applied) when an item is purchased or sold are determined by a number of settings. Steps to set up taxes may be found in the procedure "Taxes Setup" within the Accounting section of this manual.

- i. Left-click the Tax A checkbox to mark it as "checked."
- ii. Left-click the Tax B checkbox to mark it as "checked."
- iii. Left-click the Tax C checkbox to mark it as "checked."
- d. Identify the method for calculating the restocking fee when the item is returned from a customer (optional):

Restocking Fee	
% of Sell price	0.00
C Fixed price	

NOTE: In Build 8.5.54.82 and earlier, the restocking fee information is for reference and custom reporting only.

- i. Left-clicking the radio button next to the appropriate option:
 - 1. **% of Sell Price** will calculate the restocking fee as a percentage of the sales price for the item on the line of the invoice to the customer.
 - 2. **Fixed Price** will identify the restocking fee as a flat fee.
- ii. If the restocking fee is to be calculated as a percentage of the sales price:



- 1. Left-click the radio button to the right of the **% of Sell Price** label.
- 2. Left-click the cursor into the field to the right of the radio button selections and type the percentage to be used in the calculation of the restocking fee.

NOTE: Be sure to enter the percentage as a whole number (i.e. 2% should be entered as 2.0 rather than .02).

- iii. If the restocking fee is a fixed price:
 - 1. Left-click the radio button to the right of the **Fixed Price** label.
 - 2. Left-click the cursor into the field to the right of the radio button selections and type the fixed price of the restocking fee.
- e. Identify the sales limits for the item (optional):

Min/Max To Se	ell	
Min Sell :	0.00	Min Ohu -
Max Sell :	0.00	min uty : j

i. Identify the minimum unit price at which the item should be sold. Left-click the cursor into the field to the right of the **Min Sell** label and type the minimum unit price.

NOTE: The unit of measure associated with the minimum unit price is the unit of measure identified in the **Stock UM** field on the **Stock** tab.

WARNING: In Build 8.5.54.82 and earlier, the system will compare the minimum unit price to the value within the **Unit Price** field on the line of a sales quote or sales order with no consideration to the units of measure associated with those two fields.

NOTE: When the unit price on the sales quote or sales order is less than the minimum unit price, the system will notify the user and will restrict the user from selling the item at a price that is less than the minimum unit price.

NOTE: To allow a user to sell items at a unit price less than the minimum unit price, left-click **Administration** from the tool bar, go to **Pentagon Users & Groups**, then left-click on **User List**. The **User List** window will appear.



Start With	:				
				Max Se	arch Result Lines : 50 🌩
User Code	Mr/Ms	First Name	Last Name	Workmail	Title
001	Mr.	James	Webster	James@Pentagon2000.com	VP R&D
002	Mr.	Jean-Pierre	Guyeu	jean@hotmail.com	ENGINEERING
003	Mr.	Michael	Canale		CUSTOMER SERVICE
004	Mr.	Jim	Johnson		MECHANIC
005	Mr.	Cosmo	Kramer		
006	Mr.	James	Baket		
007	Mrs	Julia	Louis		
008	Mr.	George	Costanza	george@hotmail.com	
009	Mr.	Al	Pachino		
010	Mr.	George	Barnes		
011	Mrs	Mary	Lopez		
012	Mr.	Nathan	Lee		
013	Mr.	Louis	Morel		
014	Mrs	Iris	Smith		
015	Mr.	Allan	Green		
016	Mr.	Pierre	Pinot		
•			-		•

Select the appropriate user (left-click the line within the search screen and left-click **OK**; or doubleclick the line within the search screen). The **User/Employee Information** window will appear. Left-click the **Doc Security** tab. If the checkbox to the right of the **Sell Below Min Price in S.O./Quotes** label is marked as checked, the user will be allowed to sell items at a unit price that is less than the minimum unit price identified in the parts master record. Left-click the **Edit** button in order to modify the record.

🖉 User/Employee Information
Add Image Image Image Image Image Add Edit Del Prev Next Training Options Image Search Cancel OK Close
User Code: 001 Mr/Ms : Mr. First Name : James Middle Name :
Last Name : Webster Second Name :
Personal Info Login Security Doc Security Approvals Salary Lic/Certificates Working Site Info Contact Preferences Web Access Skills
Sales Override Hold Customers Purchasing Allow to Hold Sales Documents/WO/MH : Verride Hold Vendors Verride Credit Limit Allow to Hold Customers Allow to Hold Customers Allow to Hold Vendors Verride Credit Limit Allow to Hold Customers Allow to Hold Vendors Verride Credit Limit Show W.O MNT charges - P.R.v values : Verride Credit Limit Allow to Quote Customers on Hold or Not Approved. On Hold Porchasing From Vendors On Hold Porchasing From Vendors Sell Below Min Price in S.O./Quotes : On Kot Approved. Allow to P.O. from S.O. Only Buy Below Min Price in P.O. / RFQ : Verride Share Vendor : Other View Commissions : Verride Share Vendor : Occument Visibility C Perconal Documents Only
Hide Customer/Vendor in History Show prices in inventory search screen Disable Interdivision W/H Transfer Updates
Customer/Vendor Account Security
C Accounts with security group list which the user belongs to
C Accounts with security group list which the user belongs to + Accounts without security assigned
© All accounts
DashBoard Keep DashBoard Settings : 🔽

WARNING: Modification of this user security setting will affect the user's ability to sell all items below the minimum unit price identified on all parts master records.



ii. Identify the maximum unit price at which the item should be sold. Left-click the cursor into the field to the right of the **Max Sell** label and type the minimum unit price.

NOTE: The unit of measure associated with the maximum unit price is the unit of measure identified in the **Stock UM** field on the **Stock** tab.

In Build 8.5.54.82 and earlier, the system will compare the maximum unit price to the value within the **Unit Price** field on the line of a sales quote or sales order with no consideration to the units of measure associated with those two fields.

NOTE: In Build 8.5.54.82 and earlier, when the unit price on the sales quote or sales order exceeds the maximum unit price, the system will notify the user; however, the system will not restrict any user from selling the item at a price that exceeds the maximum unit price identified in the parts master record.

iii. Identify the minimum quantity of the item that must be sold

NOTE: When the quantity on the sales quote or sales order is less than the minimum quantity, the system will notify the user and will restrict the user from selling less than the minimum quantity of the item.

The system will compare the minimum quantity to the quantity on the line of a sales quote or sales order. Unit of measure conversions will be considered in the comparison of these two fields. Steps to set up a unit of measure conversion may be found in the procedure "Creating Unit of Measure Conversions" within the Material Management section of this manual.

8. Complete the applicable portions of the Costs tab:

[Editing] Partnumber : [P230-123] WIDGET MFG :	[AK4P] A & L LABS	
▲ ▲ ↓ ↓ ↓ ↓ ↓ Add Edit Del Prev Next Hist XRef		Close
P/N : [P230-123 / 1 Re Desc : [WIDGET	x : A Alt 1 : 24-5646-332 Alt 2 : 1560-00-238-4531	
Stock General Sell Prices Costs Exchanges Mea	isures Extended Info HazMat Time Control Elig	gibility Image
Avg Inventory Cost : 0.00 EA	Vendor More	e Vendors
Standard Cost : 0.00 EA ···· BER Cost Point : 0.00	City : State Lead Time : Price : Price :	9:
Yield (%) : 0.0000 - 0.00000 0.0000 - 0.0000 - 0.0000 - 0.0000 0.0000 0.00000 0.0000	C None C Up to Optimal	spection * Yes * No
	Purchasing Responsibility Responsible : .	

a. Note the fields associated with the average inventory cost:



Avg Inventory Cost : 0.00 EA

i. The field directly to the right of the **Avg Inventory Cost** label displays the average cost of all items located within all warehouses that have been marked to be included in average costing. The system sums the line cost of all items in stock and then divides that value by the number of items in stock.

NOTE: Stock will only be considered if the items reside in a warehouse that is setup to include in average costing. Left-click **Administration** from the tool bar, go to **Warehouses/Locations**, then left-click on **W/H List**. The **W/H List** window will appear.

1	Warehous	e/Address List							۲
	Start With :								
		,	_				Max Search	Besult Lines : 50	
									-
	WH Code	Туре	Name	Address 1	Address 2	Address 3	City Code	City	St
►	0001	Stock	WipAire, Inc.	15 West 34 Street	5th Floor			New York	Ν'n
	0002	Quarantine	Non Conforming Parts - Q						
	001	Stock	Dassault FalconJet-Engi	7301 S. Peoria St.	Denver/Centennia			Englewood	CC
	002	Stock	Dassault FalconJet - Com	400 West 59th Ave	JFK Int'l Airport	Hangar #51		New York	Ν'n
	003	Stock	Dassault FalconJet - Rota						
	005	Stock	Aveos - Consumable part						Nγ
	006	Stock	Dassault FalconJet -Expa						
	01	Stock	Aveos - JFK Airport Facili						
	02	Stock	Aveos - Surplus Parts WH						\square
	020	Repair	Aveos Stock Performanc	Redstone Arsenal				Chicago	IL
	03	Stock	Aveos - Completions						\square
	050	Lot	Bell 206L1 N1123						
	06	Stock	Parts reserved for an airp						
	24	Stock	Rafael - Toronto						
	25	Stock	Rafael - United Kingdom						Г
	26	Stock	Rafael - Italy						
1									►
	📑 🔁					24	🛠 🗸 Oj	🖌 🔀 Cance	3
Ľ									

Select the appropriate warehouse (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen). The **W/H Information** window will appear. Left-click the **Warehouses** tab. If the checkbox to the left of the **Include in P/N Average Cost** label is marked as "checked", the items stocked within this warehouse will be included in average cost calculations; if the checkbox is not marked as "checked", the items stocked as "checked", the items stocked within this warehouse will not be included in average cost calculations. Left-click the **Edit** button in order to modify the record.



W/H No. :	0001 Type Stock	Owner	
Name :	WipAire, Inc.		
🔥 Address1 :	15 West 34 Street		
Address2 :	5th Floor		
Address3 :			
City :	New York State : NY		
Zip :	10001		
County :			
Country :	Region :		
Code :	City Code :	Width 0	
Attention :			
Tel:			
Fax :		UM.J	
Global Position Latitude	Internal use Io	I Average Cost From Parts only (W/O & Transfers) essage ♀ Memo	

- ii. The unit of measure associated with the average inventory cost is the unit of measure identified in the **Stock UM** filed on the **Stock** tab. This unit of measure cannot be modified.
- iii. The green button (1) to the right of the unit of measure field provides access to information about the average cost of current stock and the average cost of all items purchased.

NOTE: A description of these functions may be found in the procedure "Managing Inventory" within the Material Management section of this manual.

b. Identify the standard cost of the item (optional).

Standard Cost : 0.00 EA ···

The standard cost is the price that is most likely to be paid for an item regardless of condition.

NOTE: This field must be updated manually or through an inventory import function (steps to import standard cost data may be found in the procedure "Importing Data" within the Material Management section of this manual).

NOTE: When new sales order and work order lines are created, the system will either load the average cost or the standard cost from the parts master record. The system default is to load the average cost. However, the system may be setup to load standard cost instead of average cost.

The system allows each organization to determine which value is loaded, left-click Administration from the tool bar, go to System Setup, then left-click on System General Defaults. The Company Setup window will appear. Left-click the General Settings tab. Find setting ID:0229, if the checkbox is marked as "checked", the standard cost will be loaded for new sales order and work order lines.





NOTE: This cost is related to the sales order or work order only until the line is picked. When the line is picked, the average or standard cost is replaced by the actual cost of the particular item picked.

- i. Left-click the cursor into the field to the right of the **Standard Cost** label. Enter the cost for which the item will most likely be purchased.
- ii. Verify the unit of measure for the standard cost.

NOTE: To complete the unit of measure field, the appropriate unit of measure must be listed in the **UM List**. To access this table, left-click **Administration** from the tool bar, go to **Stock Tables List by Code**, and left-click **Unit Measure (UM)**.

NOTE: The unit of measure will default to the unit of measure previously identified in the **Stock UM** field on the **Stock** tab.

If the standard cost is expressed in a unit of measure different than the unit of measure identified in the **Stock UM** field on the **Stock** tab, left-click the next field to the right (the one containing an ellipses ...).

NOTE: The **UM List** contains standard factors that convert quantities from the standard unit of measure (identified within the **Company Setup**) to all other units of measure.

If the unit of measure identified in the **Stock UM** field on the **Stock** tab is different from the standard unit of measure (identified within the **Company Setup**) OR *if the standard factors do not apply to the item, unit of measure conversions will need to be set up for the part master record. Steps to set up a unit of measure conversion may be found in the procedure "Creating Unit of Measure Conversions" within the Material Management section of this manual.*

If a unit of measure conversion exists for the part master record, the factor associated with the unit of measure conversion will override the standard factor in sales and work order transactions.

1. The **UM List** window will appear.



NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.

🍠 UM List		
Start With :		
		Max Search Result Lines : 50 🚔
Drag a column header here	e to group by that column	
Code	Name	Factor
▶ 1IN	INCH	1.00
AA	TWO HUNDERD & FIFTY	250.00
AM	AMPOULE	1.00
AT	ASSORTMENT	1.00
AX	TWENTY	20.00
AY	ASSEMBLY	1.00
BA	BALE	1.00
BB	BOBBIN	1.00
BC	BLOCK	1.00
BF	BOARD FOOT	1.00
BG	BAG	1.00
ВК	BOOK	1.00
BL	BARREL/DRUM/KEG	1.00
BO	BOLT	1.00
BR	BAR	1.00
BU	BUSHEL	1.00
BX	BOX	1.00
		X Cancel

- 2. Select the appropriate unit of measure (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- c. Identify the beyond economic repair (BER) cost point (optional)

BER Cost Point : 0.00 \$

Left-click the cursor into the field to the right of the **BER Cost Point** label. Enter the threshold cost at which (if exceeded) it is no longer economical to repair the item.

NOTE: When a work order is created to overhaul, repair, or teardown the item (work orders with the **Type** identified as **Overhaul**, **Repair**, **Process**, or **TearDown**), the threshold identified in the **BER Cost Point** field will be displayed in the header section of the work order. The system will also display the percentage of cost used in the header section of the work order. This value is for reference and custom reporting purposes only and will not restrict a work order from being completed.

NOTE: The BER cost point should be identified only for items which are repaired by the organization.

d. Identify the default cost formula (optional):

Cost Formula :

The identified default cost formula will be associated with each UID in the warehouse as each UID is created. The cost formula is most often used by sales representatives to determine acceptable sales prices, particularly when items in inventory are aged or obsolete.



NOTE: To complete the **Cost Formula** field, the appropriate cost formula must be listed in the **Formulated Cost List**. To access this table, left-click **Administration** from the tool bar, go to **Stock Tables List by Code**, and left-click **Formulated Cost - Formula**.

NOTE: Steps for setting up formulated costs may be found in the procedure "Formulated Costs" within the Material Management section of this manual.

NOTE: The formulated cost may be changed at any time at the UID level.

- i. Left-click the **Cost Formula** field.
- ii. The Formulated Cost List window will appear.

NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.

۲	Formulated Cost List		
	Start With :		
		Max Search F	Result Lines : 50 🚔
C	rag a column header here to group by	that column	
	Code	Name	
Þ	001	Rotables Formula	
	002	Consumables Formula	
	003	Expandables Formula	
	004	Parts with no activity more than 5 years	
		🖂 😣 🗸 ок	X Cancel
L			

- iii. Select the appropriate formula (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- e. If the Multi-Currency module is enabled then a field will appear identifying the currency in which costs are expressed for the item.

Currency : USD

NOTE: Instructions on the use of the Multi-Currency module may be found in the procedure "Multi-Currency Module" within the General System section of this manual.

f. Identify the yield (optional):

Yield (%) : 0.0000 🜩



The yield is defined as the percentage of the quantity being manufactured or kitted that meet all quality standards of the organization at the completion of the manufacturing or kitting process.

EXAMPLE: If a particular part master record indicates that the yield is 95%, then it may be assumed that for every 100 items (of that part number) manufactured or kitted by the organization, 95 of those items will pass the quality standards of the organization and 5 of those items will not pass the quality standards of the organization. Therefore, 95 of those items will be available for sale or use, while 5 of those items will be discarded.

NOTE: If an item is not manufactured or kitted by the organization, then the yield should be ignored.

NOTE: A yield of "0.0000" is treated as NULL and the system will assume that since no yield is identified, the yield is actually 100%.

Left-click the cursor into the field to the right of the **Yield (%)** label. Enter the yield associated with the item in terms of a percentage. You may also use the spinner arrows to adjust the weight in whole number increments.

NOTE: Be sure to enter the percentage as a whole number (i.e. 2% should be entered as 2.0 rather than .02).

NOTE: Yield is one of two values considered to accurately calculate the necessary quantity of bill of material components on a manufacturing or kitting work order to produce the required number of items. The system uses both the item yield value (in terms of a percentage) and the bill of material component scrap value (in terms of a percentage) to calculate the quantity of components required on each manufacturing or kitting work order.

EXAMPLE: If an item that is to be manufactured or kitted by the organization has a failure rate of 20%, then the yield is 80% (yield EQUALS 1 MINUS failure rate). A yield of 80% indicates that for every 100 items that are to be manufactured or kitted, 80 of the end product will pass and 20 of the end product will fail. The system will allocate enough bill of material components to manufacture or kit the required number of items meeting the organizations quality standards when the work order is closed.

Therefore, if a manufacturing or kitting work order is created for a quantity of 100 of an item that has a yield of 80%, the system will assume that 20% of the manufactured or kitted items will not meet the quality standards of the organization. When the bill of materials is created for the work order, the system will calculate an adjusted quantity by DIVIDING the quantity of items to be manufactured or kitted by the work order by the yield identified in the parts master record for the item to be manufactured or kitted (100 DIVIDED BY .80 equals 125). In this example, the work order would allocate enough bill of material components to manufacture or kit 125 items while the quantity of items on the work order would remain at 100.



In addition, the system uses a scrap value identified for each bill of material component (in terms of a percentage) to further determine the actual quantity of bill of material components needed to produce the required number if items. If a bill of material component has a scrap value of 10%, then the system assumes that for every 100 of that bill of material component needed for manufacturing or kitting the item, another 10 of that bill of material components will be scrapped during the manufacturing or kitting process (100 MULTIPLIED BY 10% EQUALS 10). Note that the scrap value does NOT represent the percentage of the bill of materials components that will be scrapped, but instead a percentage of excess components that are required to manufacture or kit the item.

When considering scrap, if a manufacturing or kitting work order is created for a quantity of 100 items and the yield is 80%, then the system will allocate enough bill of material components to manufacture or kit 125 items. If each item requires 100 of a particular bill of material component and the bill of material component scrap value is 10%, then the system will calculate the additional quantity of that bill of material component needed for each item by MULTIPLYING the quantity of the bill of material component required for a single item by the scrap value (100 MULTIPLIED BY .10 EQUALS 10). The quantity of scrap bill of material components will be added to the required quantity of bill of material components (100 PLUS 10 EQUALS 110). The total number of bill of material components will be MULTIPLIED BY the adjusted quantity of items being produced to give the total required quantity of the bill of material component for the work order (110 MULTIPLIED BY 125 EQUALS 13,750).

NOTE: Steps for creating and configuring a bill of materials for an item may be found in the procedure "Creating Bills of Material" within the Material Management section of this manual.

g. If the MRP II Automation module is enabled, a group box will appear where it may be identified whether the item is purchased or made and, if made, how the item is made.

Buy/Make © Buy © Make		
Buy/Make C Buy @ Make	Make Capability Kitting 💽	

NOTE: Instructions on the use of the MRP II Automation module may be found in the procedure "MRP II Automation Module" within the Material Management section of this manual.

i. If the item is to be purchased when the MRP II Automation module is used, left-click the radio button to the left of the **Buy** label.

NOTE: The **Buy** selection indicates to the system that a purchase order should be created when the item is automatically procured.

ii. If the item is to be made when the MRP II Automation module is used, left-click the radio button to the left of the **Make** label. When the **Make** radio button is selected, additional fields appear.



NOTE: The **Make** selection indicates to the system that a work order should be created when the item is automatically procured.

1. Identify how the item is made:

Buy/Make	1	
C Buy		Make Capability
Make	Kitting 👻	
	Kitting	<u> </u>
	Process	
	Manufacturing	

- a. Left-click on the drop down arrow vithin the field that contains it (to the left of the **Make Capability** field).
- b. Left-click the appropriate selection.
- 2. Identify the capability code that must be applicable to the organization that will be making the item when the item is automatically procured.

NOTE: To complete the **Make Capability** field, the appropriate capability code must be listed in the **Capability List**. To access this table, left-click **Administration** from the tool bar, go to **Stock Tables List By Code**, and left-click **Capability Codes**.

a. Left-click in the field just below the Make Capability label.

🏈 Capability List		
Start With .		
Start With 1		May Sastah Basult Lines - To
Drag a column header here i		
Code	Name	P.O. Type Hide
▶ CRT	CERTIFY	Repair Order (P.O.)
DSN	DESIGN	Work Order [P.O.]
ENG	ENGINEER	Work Order [P.O.]
MFG	MANUFACTURE	Work Order [P.0.]
OH	OVERHAUL	Repair Order [P.O.]
RC	Re Chrome	Repair Order (P.O.) No
RPR	REPAIR	Repair Order (P.O.)
TC	Tool Calibration	Repair Order (P.O.) No
TST	TEST	Repair Order (P.O.)
		🔀 🔆 OK 🗡 Cancel

b. The **Capability List** window will appear.

- c. Select the appropriate capability code (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- h. Identify the recommended vendor(s) for the item (optional):



Recommended Vendor /Auto Purchasing								
🕒 Vendor		More Vendors						
City :		State :						
Lead Time :		-						
Min Order Qty :	0 Price :	0.00						
	Currency :							
Auto PO/Mat Reg	Qty to Purchase	Inspection						
Mat Req	O Up to Min	C Yes						
C PO	C Up to Max							
C None	Op to Optimal	(No						

Designating recommended vendors enables a more simplified purchasing process. When converting a parts/material requisition to a purchase order, the purchasing agent may filter the vendor list to only those who are recommended vendors.

NOTE: If the MRP II Automation module is used and the system is setup to create purchase orders for the item, the purchase order will be created for the recommended vendor that is displayed on the **Costs** tab.

Instructions on the use of the MRP II Automation module may be found in the procedure "MRP II Automation Module" within the Material Management section of this manual.

i. Identify the primary recommended vendor:

NOTE: To identify the primary recommended vendor for the item, the vendor must be loaded in the system as a vendor. Steps for loading a vendor may be found in the procedure "Creating a Vendor" within the Purchasing section of this manual.

- 1. Left-click the **Vendor** field.
- 2. The **Vendor List** will appear



🔮 Vendors List				_						x			
Search On : Vendor Contact Misc Cap				Account Type : All									
			Acc	Account Rating : All									
Start With :			Acco	Account Priority: All									
				Regio									
				Categor	y. M								
			Capa	bility for P/I	N: AI					All			
						М	lax Sear	ch Result	Lines : 50	÷			
Drag a column header here to group by	Drag a column header here to group by that column												
Name	Account #.	Our Code	Sub	Cust/Vend	Туре	Region	Rating	Priority	Approved	Hold			
► 3 - R SALES	7158	P2000KL	1	Vendor	A-MUI	WST	005	н	Yes	No			
3 RIVERS DISTRIBUTING, INC.	AIKU		1	Vendor	SB				Yes	No			
A & E AIRCHAFT, INC.	3097		1	Vendor	SB				Yes	No			
A & L LABS	AK4P		1	Vendor	SB				Yes	No			
A & P BEARINGS, INC.	6967			Vendor	58				Yes	NO			
A & S IN LE SUPPLY, INC.	AJ21		1	Vendor	SB				Yes	No			
A J WALTER (AVIATION) LTD	1927		1	Vendor	SB				Yes	No			
A'S AIRCRAFT SERVICES, INC.	5334		1	Vendor					Yes	No			
A. B. PERS CORP.	AJWS		1	Vendor					Yes	No			
A. BIEDERMAN, INC.	AK1B		1	Vendor					Yes	No			
1													
Acct <u>Financials</u>					2	*	- 🗸	0 <u>K</u>	X Cano	;el			

3. Select the vendor (left-click the line within the search screen and left-click **OK**; or doubleclick the line within the search screen).

NOTE: After the primary recommended vendor is selected, the vendor file associated with that vendor may be accessed by left-clicking the **Vendor** label button.

🗈 Vendor

ii. Identify the lead time for the primary recommended vendor:

Lead Time :

NOTE: The lead time is included in the following logic:

- 1. Left-click the field that contains the drop down arrow and select the unit of measure in which the lead time is expressed.
- 2. Left-click the cursor into the field to the right of the **Lead Time** label and type the numeric value associated with lead time.
- iii. Identify the minimum quantity that the primary recommended vendor will sell in a single transaction (if applicable):

Min Order Qty : 0

If this value is greater than zero, then the value will be pushed to the quantity field on the line of purchase orders assigned to the recommended vendor when the item is ordered.



NOTE: If a purchase order assigned to a recommended vendor is created, a minimum quantity is identified in the parts master record for that recommended vendor, and the quantity is modified on a purchase order line for the item to be less than the minimum quantity, then the system will warn the purchasing agent that the quantity being ordered is less than the minimum quantity identified within the system. However, the system will not prevent the purchasing agent from ordering less than the minimum quantity.

iv. Identify the price at which the primary recommended vendor sells the item (optional):

Price : 0.00

If this value is greater than zero, then the value will be pushed to the price field (per unit of measure identified in the **Stock UM** field on the **Stock** tab) on the line of purchase orders assigned to the recommended vendor when the item is ordered.

v. Note the currency field in the Recommended Vendor group box. This field displays the currency that is associated to the vendor in the vendor file.

Currency : USD

vi. If the MRP II Automation module is enabled, the **Auto PO/Mat Req** group box will be active. This field determines what type of document is created when auto purchasing is used.

NOTE: Instructions on the use of the MRP II Automation module may be found in the procedure "MRP II Automation Module" within the Material Management section of this manual.

vii. If the MRP II Automation module is enabled, the **Qty to Purchase** group box will be active. This field determines how many of an item will be ordered when auto purchasing is used.

NOTE: Instructions on the use of the MRP II Automation module may be found in the procedure "MRP II Automation Module" within the Material Management section of this manual.

- viii. Identify whether a quality inspection is required on items supplied by the primary recommended vendor.
 - 1. If the item requires a quality inspection when supplied by the recommended vendor, leftclick the radio button to the left of the **Yes** label.
 - 2. If the item does not require a quality inspection when supplied by the recommended vendor, left-click the radio button to the left of the **No** label.
- ix. Identify additional recommended vendors (optional):
 - 1. Left click the **More Vendors** button:

More Vendors

2. The **Vendors List** window will appear.



🏈 Vendors List							
Start With :	·						
			М	ax Search Resu	ılt Lines : 50 🌻		
Drag a column header here to group by							
Name	Account #. Ty	pe Region Rating Priority Approv	ved Hold Cage Code	ILS Code	SITA		
<no data="" display="" to=""></no>							
•					•		
Add			× 🗵	✓ 0 <u>K</u>	X Cancel		

- 3. Left-click the **Add** button.
- 4. The Additional Recommended Vendors window will appear.

Add Edit Del	lete <u>C</u> ancel O <u>K</u> Close
Auto Purchasing	
🕒 Vendor	
Citu	State -
Lead Time :	State.
Min Order Qty :	Price :
,	Currency :
Inspection	
C Yes	

a. Identify the recommended vendor:

NOTE: To identify a recommended vendor for the item, the vendor must be loaded in the system as a vendor. Steps for loading a vendor may be found in the procedure "Creating a Vendor" within the Purchasing section of this manual.

- b. Left-click the Vendor field.
- c. The Vendor List will appear



🍯 Vendors List				_						x		
Search On : Vendor Contact Misc Cap				Account Type : All						AII		
			Acc	ount Ratin				All				
Start with :		<u></u>	Acco	Account Priority :			All					
				Regio								
		Regio										
				Category : All						All		
			Capal	bility for P/I	N: AI					A,II		
						М	lax Sear	ch Result	Lines : 50	Э		
Drag a column header here to group by	Drag a column header here to group by that column											
Name	Account #.	Our Code	Sub	Cust/Vend	Туре	Region	Rating	Priority	Approved	Holc		
▶ 3 - R SALES	7158	P2000XL	1	Vendor	A-MOI	WST	005	HI	Yes	No		
3 RIVERS DISTRIBUTING, INC.	AIKO		1	Vendor	SB				Yes	No		
A & E AIRCRAFT, INC.	3097		1	Vendor	SB				Yes	No		
A & L LABS	AK4P		1	Vendor	SB				Yes	No		
A & P BEARINGS, INC.	6967		1	Vendor	SB				Yes	No		
A & S INT'L SUPPLY, INC.	AJ2T		1	Vendor	SB				Yes	No		
A J WALTER (AVIATION) LTD	1927		1	Vendor	SB				Yes	No		
A'S AIRCRAFT SERVICES, INC.	5334		1	Vendor					Yes	No		
A. B. PERS CORP.	AJWS		1	Vendor					Yes	No		
A. BIEDERMAN, INC.	AK1B		1	Vendor					Yes	No		
L										▶		
Acct Financials X Cancel												

d. Select the vendor (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

NOTE: After the recommended vendor is selected, the vendor file associated with that vendor may be accessed by left-clicking the **Vendor** label button.

🕒 Vendor

5. Identify the lead time for the recommended vendor:

Lead Time :

NOTE: The lead time is included in the following logic:

- a. Left-click the field that contains the drop down arrow such and select the unit of measure in which the lead time is expressed.
- b. Left-click the cursor into the field to the right of the **Lead Time** label and type the numeric value associated with lead time.
- 6. Identify the minimum quantity that the recommended vendor will sell in a single transaction (if applicable):

Min Order Qty : 0

If this value is greater than zero, then the value will be pushed to the quantity field on the line of purchase orders assigned to the recommended vendor when the item is ordered.


NOTE: If a purchase order assigned to a recommended vendor is created, a minimum quantity is identified in the parts master record for that recommended vendor, and the quantity is modified on a purchase order line for the item to be less than the minimum quantity, then the system will warn the purchasing agent that the quantity being ordered is less than the minimum quantity identified within the system. However, the system will not prevent the purchasing agent from ordering less than the minimum quantity.

7. Identify the price at which the recommended vendor sells the item (optional):

Price : 0.00

If this value is greater than zero, then the value will be pushed to the price field (per unit of measure identified in the **Stock UM** field on the **Stock** tab) on the line of purchase orders assigned to the recommended vendor when the item is ordered.

8. Note the currency field in the Recommended Vendor group box. This field displays the currency that is associated to the vendor in the vendor file.

Currency : USD

- 9. Identify whether a quality inspection is required on items supplied by this recommended vendor.
 - a. If the item requires a quality inspection when supplied by the recommended vendor, left-click the radio button to the left of the **Yes** label.
 - b. If the item does not require a quality inspection when supplied by the recommended vendor, left-click the radio button to the left of the **No** label.
- i. Identify the individual primarily responsible for processing purchase/material requisitions for the item (optional):

Purchasing	Responsibility	
Responsible :	•••	

This field enables allocating responsibility for processing parts/material requisition among all purchasing agents by part number.

NOTE: Identifying a user in this field does not prevent any other user from processing a purchase/material requisition for the item. It simply allows users (specifically purchasing agents) to sort or filter the **Parts/Material Requisition** window by the **Responsible** field and view the requisitions they are responsible for in a more organized way.

NOTE: To complete the **Applied By** field, the appropriate user must be listed in the **Users List**. To access this table, left-click **Administration** from the tool bar, go to **Pentagon Users and Groups**, and left-click **User List**.

Steps for creating a user may be found in the procedure "Creating a User" within the System Administration section of this manual.



- i. Left-click the **Responsible** field.
- ii. The **Users List** window will appear.

NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.

Start With	n :		<u></u>		
				Max Sean	ch Result Lines : 50
Drag a colum	n header	here to group by that col	umn		1010-0000
User Code	Mr/Ms	First Name	Last Name	Workmail	Title
001	Mr.	James	Webster	James@Pentagon2000.com	VP R&D
002	Mr.	Jean-Pierre	Guyeu	jean@hotmail.com	ENGINEERING
003	Mr.	Michael	Canale		CUSTOMER SERVI
004	Mr.	Jim	Johnson		MECHANIC
005	Mr.	Cosmo	Kramer		ĺ.
006	Mr.	James	Baket		
007	Mrs	Julia	Louis		
008	Mr.	George	Costanza	george@hotmail.com	
009	Mr.	AI	Pachino		
010	Mr.	George	Barnes		
011	Mrs	Mary	Lopez		
012	Mr.	Nathan	Lee		
013	Mr.	Louis	Morel		
014	Mrs	Iris	Smith		
015	Mr.	Allan	Green		
016	Mr	Pierre	Pinot		
1	print.	1. 10110	l' mos		

iii. Select the appropriate User (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

9. Complete the applicable portions of the Exchanges tab:

NOTE: The values on the **Exchanges** tab are for reference only without the Exchanges Manager module. Instructions on the use of the Exchanges Manager module may be found in the procedure "Exchanges Manager Module" within the Material Management section of this manual.

a. Left-click the **Exchanges** tab:



🗭 [Editing] Partnumber : [P230-123] WIDGET MFG : [AK4P] A & L LABS	
Add Edit Del Prev Next Hist KRef W/H Ordr BOM Opt Srch Cncl OK Close	
P/N : P230-123 / 1 Rev : A Alt 1 : 24-5646-332	
Desc : WIDGET Alt 2 : 1560-00-238-4531	
Stock General Sell Prices Costs Exchanges Measures Extended Info HazMat Time Control Eligibility Image Costs	
Exch [AA] : 0.00 Exch [AA] : 0.00	
Exch (BB) : 0.00 Exch (BB) : 0.00	
Exch [CC] : 0.00 Exch [CC] : 0.00	
Loan/Rental : 0.00 Per : 💌 Loan/Rental : 0.00 Per : 💌	
Exchange Core Core Value : 0.00	
Core Cost : 0.00	

b. Identify the sales prices of the item when sold on exchange:

Sell Prices			
Exch [AA] :	0.00		
Exch [BB] :	0.00		
Exch [CC] :	0.00		
Loan/Rental :	0.00	Per :	-

NOTE: Exchange sales price can be set for up to three different condition codes.

NOTE: The condition codes for which exchange prices may be set for sales is managed within the Company Setup. To select the three sales condition codes for which exchange prices may be set, left-click **Administration** from the tool bar, go to **System Setup**, then left-click on **System General Defaults**. The Company Setup window will appear. The three sales condition codes for which prices may be set may be identified on the **Defaults** tab.



💣 Company Setup			<u>୧</u>	x
X √ Cancel OK Option	7-5-	7-5-	7	
Modules Limits System Alerts	General Settings	Document Settings Me	emo Convert Accounting Settings Printing Settin	igs 📔
Stock W/H Settings Mandatory F	Fields SO/PO Lin	e changes settings A	ircraft Ext Hide Line Types Publications Ext. In	fo
General WH/Doc Defaults	Setup Customer D	ocs Vendor Docs	Taxes Charges Convert P/N Ext Count	ers
Lead Time Quotes Valid for : 3	Day(s)	Aeasures	Docs Setup Print COND on Docs∶ ✔	
Vendor Bids Due Within :	1 Day(s) 🛛 🔍 🗸	eight : LB	User Line Numbering : 🗖	_ [
S.O. Ship from Stock Within :	Day(s)		Sales GL Account by Line : 🗖	
Add to Vendor Lead Time :	Day(s)	ngth: IN	Purch GL Account by Line :	- 1
S.O. to P.O. Deduct :	Day(s)		Post W/O to GL Account WIP : 🔽	
Copy Ship and Due On from Quote to	RFQ:	ume: CMT	Auto Convert S.O. to Quote :	
Lead Time Calcu	lation : 🔽		Record Order change - Always : 🗔	
Exch Sell Cond	Search Paramete	rs	Price / Qty Decimals	
1. AA ····	Advanced Lo	ad Alert if P/N	Unit Price : 2 🜩	
2. BB •••	Search Pr	ice Noton-He	Quantity : 0 🚖	
3. CC			Shrink qty decimal zeros on printing 🔽	
Sell Cond	n.r.ui•		P/N Tracing	
1 🗛 …	S.O./WO: ▼	~	Tracing Only	
2. BB ····	P.O. : 🔽 🔰	~	C Serialized - Multi	
3. CC ····			C Serialized - Unique	

NOTE: To complete the fields within the **Exch Sell Cond** group box, the appropriate units of measure must be listed in the **UM List**. To access this table, left-click **Administration** from the tool bar, go to **Stock Tables List by Code**, and left-click **Unit Measure (UM)**.

i. Identify the price for which the item will be sold as an exchange if the item is in the first condition:

Exch [AA] : 0.00

NOTE: In this procedure, the first condition is identified as "AA". The condition code is identified within the label inside brackets ([]). Common condition codes for items being sold are "NE" (new) and "OH" (overhauled).

Left-click the cursor into the field to the right of the **Exch [AA]** label. Enter the price for which the item will be sold as an exchange when the item is in an AA condition.

NOTE: The unit of measure will default to the unit of measure previously identified in the **Stock UM** field on the **Stock** tab.

ii. Identify the price for which the item will be sold as an exchange if the item is in a second condition (if applicable):

Exch [BB] : 0.00

NOTE: In this procedure, the second condition is identified as "BB".

Left-click the cursor into the field to the right of the **Exch [BB]** label. Enter the price for which the item will be sold as an exchange when the item is in a BB condition.



NOTE: The unit of measure will default to the unit of measure previously identified in the **Stock UM** field on the **Stock** tab.

iii. Identify the price for which the item will be sold as an exchange if the item is in a third condition (if applicable):

Exch [CC] : 0.00

NOTE: In this procedure, the third condition is identified as "CC".

Left-click the cursor into the field to the right of the **Exch [CC]** label. Enter the price for which the item will be sold as an exchange when the item is in a CC condition.

NOTE: The unit of measure will default to the unit of measure previously identified in the **Stock UM** field on the **Stock** tab.

iv. Identify the price for which the item may be loaned or rented to a customer (if applicable):

Loan/Rental : 0.00 Per : 🗨

- 1. Identify the unit of time for which the loan or rental rate applies:
 - a. Left-click the drop down arrow 🔽 in the **Per** field.
 - b. Left-click the unit of time for which the loan or rental rate applies.
- 2. Identify the loan or rental rate:
 - a. Left-click the cursor in the field to the right of the Loan/Rental label.
 - b. Type the loan or rental rate per the unit of time identified in the **Per** field.
- c. Identify the cost of the item when purchased on exchange:

Costs			
Exch [AA] :	0.00		
Exch [BB] :	0.00		
Exch [CC] :	0.00		
Loan/Rental:	0.00	Per :	•

NOTE: Exchange costs can be set for up to three different condition codes.

NOTE: The condition codes for which exchange costs may be set will be identical to the condition codes for which exchange prices were set.

i. Identify the average cost for which the item will be purchased as an exchange if the item is in the first condition:

Exch [AA] : 0.00

NOTE: In this procedure, the first condition is identified as "AA".



Left-click the cursor into the field to the right of the **Exch [AA]** label. Enter the average cost for which the item will be purchased as an exchange when the item is in an AA condition.

NOTE: The unit of measure will default to the unit of measure previously identified in the **Stock UM** field on the **Stock** tab.

ii. Identify the average cost for which the item will be purchased as an exchange if the item is in a second condition (if applicable):

Exch [BB] : 0.00

NOTE: In this procedure, the second condition is identified as "BB".

Left-click the cursor into the field to the right of the **Exch [BB]** label. Enter the average cost for which the item will be purchased as an exchange when the item is in a BB condition.

NOTE: The unit of measure will default to the unit of measure previously identified in the **Stock UM** field on the **Stock** tab.

iii. Identify the average cost for which the item will be purchased as an exchange if the item is in a third condition (if applicable):

Exch [CC] : 0.00

NOTE: In this procedure, the third condition is identified as "CC".

Left-click the cursor into the field to the right of the **Exch [CC]** label. Enter the average cost for which the item will be purchased as an exchange when the item is in a CC condition.

NOTE: The unit of measure will default to the unit of measure previously identified in the **Stock UM** field on the **Stock** tab.

iv. Identify the average cost for which the item may be loaned or rented from a vendor (if applicable):

Loan/Rental : 0.00 Per :

- 1. Identify the unit of time for which the loan or rental rate applies:
 - a. Left-click the drop down arrow 🔽 in the **Per** field.
 - b. Left-click the unit of time for which the loan or rental rate applies.
- 2. Identify the loan or rental rate:
 - a. Left-click the cursor in the field to the right of the Loan/Rental label.
 - b. Type the loan or rental rate per the unit of time identified in the **Per** field.
- d. Identify the value of the core received from a customer in an exchange transaction.

Core Value : 0.00



NOTE: This value is the amount that will be charged to the customer if a core is not received for the exchange transaction as promised.

e. Identify the average cost to purchase a core from a vendor.

Core Cost : 0.00

- 10. Complete the applicable portions of the Measures tab:
 - a. Left-click the Measures tab.

💽 [Editing] Partnumber : [P230-123] WIDGET MFG : [[AK4P] A & L LABS
Add Edit Del Prev Next Hist XRef V	∑ ▷ ≥ × ✓ □ VH Qrdr BOM Opt Srch Cncl OK Close
P/N : P230-123 / 1 Rev	Alt 1 : 24-5646-332
Desc : WIDGET	Alt 2 : 1560-00-238-4531
Stock General Sell Prices Costs Exchanges Meas	ures Extended Info HazMat Time Control Eligibility Image
Defaults	Packaging
	Package Type :
Bin Location :	Qty Prepack : 0 EA
Usage : CFrequency , A/B/C)	Net Weight : 0.000 LB
Other Locations	Gross Weight : 0.000 LB ···
	Volume : 0.000 CMT ····
	Schedule B :
Width : 0.000	HTS Code :
Height : 0.000	
Volume : 0.000 CM1	
Weight : 0.000 LB	

b. Identify default location information for the item (optional):

Defaults W/H No :		
Bin Location :	•••	
Usage :	(Frequency, A/B/C)	
	Other Locations	

NOTE: These defaults can be used to eliminate or reduce user selection when items are received on purchase receipts. The primary default warehouse and location will be loaded into the receiver automatically.

i. Identify the default warehouse for the item:

W/H No:

NOTE: To complete the **W/H No** field, the appropriate warehouse must be listed in the **Warehouse/Address List**. To access this table, left-click **Administration** from the tool bar, go to **Warehouses/Locations**, and left-click **W/H List**. Steps for creating a warehouse may be found in the procedure "Creating a Warehouse" within the Material Management section of this manual.



NOTE: The default value for the **W/H No** field (the value that will be loaded for new parts master records) is managed within the Company Setup. To set up the default **W/H No**, left-click **Administration** from the tool bar, go to **System Setup**, then left-click on **System General Defaults**. The Company Setup window will appear. Default **W/H No** may be identified on the **Setup** tab.

🖉 Company Setup				ନ୍ତି <mark>×</mark>
Cancel OK Opti] ion			
Counters Modules Accounting Settings	Limits System	Alerts General Settings gs Stock W/H Setting	Docu gs	ment Settings WO/MNT Settings Memo Convert Mandatory Fields SO/PO Line changes settings
Consolidator Settings General WH/Doc	s PMR Defaults Se	Aircraft Ext Flight I tup Customer Docs	Log Ext Vendo	Hide Line Types Publications Ext. Info r Docs Taxes Charges Convert P/N Ext
Add Misc to Stock C Shipping : Air Frt : Ocean Frt : Insurance : Iand Charge : HazMat :	Parts : 🔽 Labor : 🔽 Lot Charge : 🔽 Cap Cost : 🔽	Stock Default Std Condition : NE Std Unit Measure : EA Stock Std Type : STK Base Currency : USD User Price Label : MSLP Incoterms Label : F.O.B.	•••	Additional Defaults Our Standard Warranty Sales : 1 Years OH/Repair : 6 Months Auto Create P/N from lines into stock :
Stock Default W/H	Location	Incoterms Default : ORG		Allow Duplicate P/N : 🔽 Publish Stock Parts : 🔽
Elecation : Electronic		Days to clear sent faxes lis	st :	14

- 1. Left-click the **W/H No** field.
- 2. The Warehouse/Address List window will appear.

NOTE: The values shown in the table appearing in this procedure are standard values but are not an all-inclusive list of the values required by every organization.

🖉 Warehou	se/Address Lis	t						×
Start With	n :	•	•					
	,		_			Max Search	Besult Lines : 50	-
							199	÷
WH Code	Туре	Name	Address 1	Address 2	Address 3	City Code	City	
0001	Stock	WipAire, Inc.	15 West 34 Street	5th Floor			New York	
0002	Quarantine	Non Conforming Parts - Q						
001	Stock	Dassault FalconJet-Engi	7301 S. Peoria St.	Denver/Centennia			Englewood	
002	Stock	Dassault FalconJet - Com	400 West 59th Ave	JFK Int'l Airport	Hangar #51		New York	
003	Stock	Dassault FalconJet - Rota						
005	Stock	Aveos - Consumable part						
006	Stock	Dassault FalconJet -Expa						
01	Stock	Aveos - JFK Airport Facili						
02	Stock	Aveos - Surplus Parts WF						
020	Repair	Aveos Stock Performanc	Redstone Arsenal				Chicago	
03	Stock	Aveos - Completions						
050	Lot	Bell 206L1 N1123						
06	Stock	Parts reserved for an airp						1
24	Stock	Rafael - Toronto						
25	Stock	Rafael - United Kingdom						1
26	Stock	Rafael - Italy						
					-			
					52	43	K 🖌 Cano	
								2

- 3. Select the warehouse (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- ii. Identify the default bin location for the item:



Bin Location :

NOTE: The default value for the **Bin Location** field (the value that will be loaded for new parts master records) is managed within the Company Setup. To set up the default Bin Location, left-click **Administration** from the tool bar, go to **System Setup**, then left-click on **System General Defaults**. The Company Setup window will appear. Default **Bin Location** may be identified on the **Setup** tab.

🗲 Compan	iy Setup	· · · · ·						con a		? _ ×
Counters Accounti	OK Optio Modules ng Settings	Dimits Syst	tem Alerts ettings	Gene Stock	ral Settings W/H Setting	Doci	ument Settings Mandatory Fields	WO/MNT Sel	ttings I Line cha	Memo Conve nges settings
Consoli General	dator Settings WH/Doc	PMR Defaults	Airo Setup	craft Ext Custor	Flight L merDocs	.og Ext Vend	HideLine prDocs Tax	Types es Charges	Publicati	on s Ext. In fo ert P/N Ex
Add Misc Shippin Air Fr Ocean Fr Insurance Iand Charge HazMa	g:マ t:マ t:マ e:マ e:マ e:マ e:マ	Parts : I⊽ Labor : I⊽ Lot Charge : I⊽ Cap Cost : I⊽	Std I Std I Std I Use	Std Conditi Jnit Measu ock Std Ty ase Curren or Price Lal oterms Lab	une : NE ure : EA upe : STK ncy : USD bel : MSLP pel : F.O.B.	••	Add	tional Defaults d Warranty 1 Years 6 Month	•	
Stock De	fault W/H &	Location	Incol	erms Defa	ault : ORG		Auto Lreate P/N	A from lines into s Allow Duplicate Publish Stock F	P/N : 🔽 Parts : 🔽	
Location : Part CrossF	Ref Found Aler	•	Day	s to clear:	sent faxes list		14-]		a

1. Left-click the **Bin Location** field.

🕖 Locations Fo	r Warehouse: [00	01]		_	
Start With :			•••		
					Max Search Result Lines : 50 🔶
Bin Location	Height	Width	Length	HA	
000496				EA	
000537				EA	
000545				EA	
000546				EA	
000549				EA	
000560				EA	
000568				EA	
1				EA	
123-888				EA	
123456789012				EA	
A					
AEROSOURCE				EA	
B-65-98				EA	
B500-1				EA	
B500-2				EA	
B500-3				EA	
CHRIS				EA	
📑 🔁					📓 🛠 🗸 OK 🗶 Cancel

2. The Locations For Warehouse [] window will appear.

NOTE: Bin locations may be created at any time within the system. To add a location, leftclick the **Add** button in the lower left of the **Locations For Warehouse** [] window.

3. Select the location (left-click the line within the search screen and left-click **OK**; or doubleclick the line within the search screen).



iii. Identify the usage category for the item:

Usage : (Frequency , A/B/C...)

NOTE: The usage is not the same as the class identified on the Stock tab. While **Class** categorizes items by value (a higher class category indicates a higher priority on having that item in stock and accounted for), **Usage** categorizes items by movement (a higher usage category indicates a higher probability that the item will need to be picked from the bin).

Usage categories are useful to warehouse managers. Items with a higher usage category should be placed in bins more convenient than items with lower usage categories.

NOTE: The usage field is not table-driven. The usage field has a character limit of one character, which may be either a letter or number. Definitions of those codes should be communicated to users.

NOTE: The usage is for reference and for custom reporting only

1. Left-click the cursor into the **Usage** field.

NOTE: The **Usage** field is not table-driven. The usage field has a character limit of one character, which may be either a letter or number. Definitions of the codes used should be communicated to users.

- 2. Type the appropriate usage code.
- iv. Identify other default locations for the item. When additional default locations are identified, the users performing purchase receiving will have access to a **Default Locations** button which will list all the warehouse/location combinations that have been identified.

Other Locations

- 1. Left-click the **Other Locations** button.
- 2. The **Other Locations** window will appear. Left-click the **Add** button.

🍯 Other Locatio	Other Locations for W/H 0001				
Add Delete	Close				
W/H No.	Location				
	<no data="" display="" to=""></no>				

3. The **W/H Allocation** window will appear.



Allocation W/H No. :

- 4. Identify another default warehouse for the item.
 - a. Left-click the **W/H No** field.
 - b. The Warehouse/Address List window will appear.

NOTE: The values shown in the table appearing in this procedure are standard values but are not an all-inclusive list of the values required by every organization.

Warehouse/Address List								
Start With :								
WH Code	Туре	Name	Address 1	Address 2	Address 3	City Code	City	9
▶ 0001	Stock	WipAire, Inc.	15 West 34 Street	5th Floor			New York	١
0002	Quarantine	Non Conforming Parts - Q						
001	Stock	Dassault Falcon Jet-Engi	7301 S. Peoria St.	Denver/Centennia			Englewood	C
002	Stock	Dassault FalconJet - Corr	400 West 59th Ave	JFK Int'l Airport	Hangar #51		New York	٩
003	Stock	Dassault FalconJet - Rota						T
005	Stock	Aveos - Consumable part						٩
006	Stock	Dassault FalconJet -Expa						T
01	Stock	Aveos - JFK Airport Facili						T
02	Stock	Aveos - Surplus Parts WF						T
020	Repair	Aveos Stock Performanc	Redstone Arsenal				Chicago	T
03	Stock	Aveos - Completions						T
050	Lot	Bell 206L1 N1123						T
06	Stock	Parts reserved for an airp						T
24	Stock	Rafael - Toronto						T
25	Stock	Rafael - United Kingdom						T
26	Stock	Rafael - Italy						T
4								
📧 📯 🔽 🔀 Cancel								

- c. Select the warehouse (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- 5. Identify another default bin location for the item.
 - a. Left-click the **Bin Location** field.
 - b. The Locations For Warehouse [] window will appear.



1	Locations For Warehouse: [0001]					
	Start With :					
						Max Search Result Lines : 50 👻
	Bin Location	Height	Width	Length	HA	
Þ	000496				EA	
	000537				EA	
	000545				EA	
	000546				EA	
	000549				EA	
	000560				EA	
	000568				EA	
	1				EA	
	123-888				EA	
	123456789012				EA	
	A					
	AEROSOURCE				EA	
	B-65-98				EA	
	B500-1				EA	
	B500-2				EA	
	B500-3				EA	
	CHRIS				EA	
	🔰 🔁					📓 🔆 🗸 OK 🗶 Cancel

NOTE: Bin locations may be created at any time within the system. To add a location, left-click the **Add** button in the lower left of the **Locations For Warehouse []** window.

- c. Select the location (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- 6. Left-click the **OK** button in the **W/H Allocation** window. The additional default location will appear in the **Other Locations** window.
- 7. Left-click the **Close** button in the **Other Locations** window.
- c. Identify the unit measures for the item:

Init Manauroa	
Juit measures	
Length :	0.000 IN •••
Width :	0.000
Height :	0.000
Volume :	0.000 CM1
Weight :	0.000 LB

NOTE: These values will be copied to purchase shippers and packing slips.

i. Identify the length of a single unit of measure of the item:

Length: 0.000 IN

1. Select the unit of measure in which the length is measured:

NOTE: To complete the **Length** unit of measure field, the appropriate unit of measure must be listed in the **Length/Width/Height List**. To access this table, left-click **Administration** from the tool bar, go to **General Tables List by Code**, and left-click **Length/Width/Height**.



NOTE: The default value for the **Length** unit of measure is managed within the Company Setup. To set up the default Bin Location, left-click **Administration** from the tool bar, go to **System Setup**, then left-click on **System General Defaults**. The Company Setup window will appear. Default **Length** unit of measure may be identified on the **Defaults** tab.

Cancel OK Option Counters Modules Limits System Alerts General Settings Document Settings W0/MNT Settings Memo Convert Accounting Settings Printing Settings Stock W/H Settings Mandatory Fields SO/PO Line changes settings Consolidator Settings PMR Aicraft Ext Flight Log Ext Hide Line Types Publications Ext. Info General WH/Doc Defaults Setup Customer Docs Vendor Docs Taxes Charges Convert P/N Ext Lead Time Quotes Valid for: 30 Day(s) Sales Measures Weight: LB " User Line Numbering: Sales GL Account by Line : Publications Ext. Info S.O. Ship from Stock Within: D Day(s) Sol to P.0. Deduct : D Day(s) Length: N " Sales GL Account by Line : Pust With to GL Account WIP : Pint CON to GL Account WIP : Pint With to GL Account WIP : Pint With to GL Account WIP : T Copy Ship and Due On from Quote to RFQ: Lead Time Calculation : Icad Time Dosec Pint Pint Con Quote : Record Order change - Always : Record Order change - Always : Record Order change - Always :	🍯 Company Setup			? ×
Counters Modules Limits System Alerts General Settings Document Settings W0/MNT Settings Memo Convert Accounting Settings Printing Settings Stock W/H Settings Mandatory Fields SO/PO Line changes settings Consolidator Settings PMR Aircraft Ext Flight Log Ext Hide Line Types Publications Ext. Info General WH/Doc Defaults Setup Customer Docs Vendor Docs Charges Convert P/N Ext Lead Time Quotes Valid for: 30 Day(s) Vendor Bids Due Within: Day(s) Vendor Bids Due Within: Day(s) Veright : LB User Line Numbering : Sales GL Account by Line : Publications Ext. Info S.O. Ship from Stock Within: Day(s) Volume : CMT Volume : Pust Line Numbering : Sales GL Account by Line : Post W/O to GL Account WIP : Volume : CMT Auto Convert S.O. to Quote : Record Order change - Always : Record Order change - Always : Circle A Due Decimals Copy Ship and Due On from Quote to RFQ: Ead Time Calculation : For A Due Decimals Parameters Price / Due Decimals Price / Due Decimals Price / Due Decimals Price	Cancel OK Option	stry and	7-5-7-	
Accounting Settings Printing Settings Stock W/H Settings Mandatory Fields S0/P0 Line changes settings Consolidator Settings PMR Aicraft Ext Flight Log Ext Hide Line Types Publications Ext. Info General WH/Doc Defaults Setup Customer Docs Vendor Docs Taxes Charges Convert P/N Ext Lead Time Quotes Valid for: 30 Day(s) Base Measures Weight: LB User Line Numbering : Sales GL Account by Line : Purch GL Account by Line : Purch GL Account by Line : Sales GL Account by Line : Purch GL Account wile : Post W/O to GL Account WIP : Volume : CMT Muto Convert S.0. to Quote : Record Order change : Always : Exect Parameters Par	Counters Modules Limits System Alerts	General Settings Docum	ent Settings WO/MNT Settings	Memo Convert
Consolidator Settings PMR Aircraft Ext Flight Log Ext Hide Line Types Publications Ext. Info General WH/Doc Defaults Setup Customer Docs Vendor Docs Taxes Charges Convert P/N Ext Lead Time Quotes Valid for: 30 Day(s) Base Measures Weight: LB Docs Setup Print COND on Docs: IV Vendor Bids Due Within: 1 Day(s) S.O. Ship from Stock Within: 0 Day(s) Length: IN Sales GL Account by Line: Port GL Account by Line: Port GL Account WIP: Volume: CMT Auto Convert S.O. to Quote: Fort With Convert S.O. to Quote: Record Order change - Always: Fort Convert S.O. to Quote: Fort Convert S.O. Auto Convert S.O. to Quote: Fort Convert S.O. Port Convert S.O. Convert S.O	Accounting Settings Printing Settings	Stock W/H Settings M	andatory Fields SO/PO Line cha	anges settings
General WH/Doc Defaults Setup Customer Docs Yendor Docs Taxes Charges Convert P/N Ext Lead Time Quotes Valid for: 30 Day(s) Base Measures Print COND on Docs: Image: Convert P/N Ext Vendor Bids Due Within: 1 Day(s) Image: Convert Day(s) Solution Solution Image: Convert Pint COND on Docs: Image: Convert User Line Numbering: Image: Convert Solution Solution Image: Convert Solution Image: Convert Solution Image: Convert Solution Solution Image: Convert Solution Solution Image: Convert Solution Solution Image: Convert Solution Soluto	Consolidator Settings PMR Ai	rcraft Ext Flight Log Ext	Hide Line Types Publicat	ions Ext. Info
Lead Time Quotes Valid for: 30 Day(s) Vendor Bids Due Within: 1 Day(s) S.O. Ship from Stock Within: 0 Day(s) Add to Vendor Lead Time: 0 Day(s) S.O. Ship from Stock Within: 0 Day(s) Add to Vendor Lead Time: 0 Day(s) S.O. to P.O. Deduct: 0 Day(s) Copy Ship and Due On from Quote to RFQ: Volume: Lead Time Calculation: Volume: Cases Charameters Price / Oth Decimals	General WH/Doc Defaults Setup	Customer Docs Vendor I	Docs Taxes Charges Conv	ert P/NExt
Even Sell Cond	Lead Time Quotes Valid for: 30 Day(s) Vendor Bids Due Within: 1 Day(s) S.O. Ship from Stock Within: 0 Day(s) Add to Vendor Lead Time: 0 Day(s) S.O. to P.O. Deduct: 0 Day(s) Copy Ship and Due On from Quote to RFQ: Lead Time Calculation:	Base Measures Weight : LB ··· Length : IN ··· Volume : CMT ···	Docs Setup Print COND on Docs : I User Line Numbering : □ Sales GL Account by Line : □ Purch GL Account by Line : □ Post W/D to GL Account WIP : I Auto Convert S.O. to Quote : □ Becord Order change □	
	Exch Sell Cond Search F	arameters	Price / Qtv Decimals	

a. Left-click the field to the right of the **Length** label containing the ellipses .

b. The Length/Width/Height List window will appear.

NOTE: The values shown in the table appearing in this procedure are standard values but are not an all-inclusive list of the values required by every organization.

Length/Width/Height L	ist	
Start With :	<u></u>	
		Max Search Result Lines : 50 🜩
Drag a column header here t		
Code	Name	
► CM	CENTIMETER	
DC	DECIMETER	
FT	FEET	
IN	INCH	
MM	MILIMETER	
MT	METER	
YRD	YARD	
-		
		📓 🛠 🗸 OK 🗡 Cancel

- c. Select the appropriate unit of measure (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- Left-click the cursor into the Length field and type the value in terms of the of unit of measure identified for the length.



ii. Identify the width of a single unit of measure of the item:

Width : 0.000

1. Select the unit of measure in which the width is measured:

NOTE: To complete the **Width** unit of measure field, the appropriate unit of measure must be listed in the **Length/Width/Height List**. To access this table, left-click **Administration** from the tool bar, go to **General Tables List by Code**, and left-click **Length/Width/Height**.

- a. Left-click the field to the right of the **Width** label containing the ellipses
- b. The Length/Width/Height List window will appear.

NOTE: The values shown in the table appearing in this procedure are standard values but are not an all-inclusive list of the values required by every organization.

🖌 Length/Width/Height List				
Start With :				
		Max Search Result Lines : 50 🔶		
Drag a column header here i				
Code	Name			
► CM	CENTIMETER			
DC	DECIMETER			
FT	FEET			
IN	INCH			
MM	MILIMETER			
MT	METER			
YRD	YARD			
		X Cancel		

- c. Select the appropriate unit of measure (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- 2. Left-click the cursor into the **Width** field and type the value in terms of the of unit of measure identified for the width.
- iii. Identify the height of a single unit of measure of the item:

Height : 0.000

1. Select the unit of measure in which the height is measured:

NOTE: To complete the **Height** unit of measure field, the appropriate unit of measure must be listed in the **Length/Width/Height List**. To access this table, left-click **Administration** from the tool bar, go to **General Tables List by Code**, and left-click **Length/Width/Height**.



- a. Left-click the field to the right of the **Height** label containing the ellipses \square .
- b. The Length/Width/Height List window will appear.

NOTE: The values shown in the table appearing in this procedure are standard values but are not an all-inclusive list of the values required by every organization.

🔮 Length/Width/Height List				
Start With :	····			
		Max Search Result Lines : 50 🜩		
Drag a column he				
Code	Name			
► CM	CENTIMETER			
DC	DECIMETER			
FT	FEET			
IN	INCH			
MM	MILIMETER			
MT	METER			
YRD	YARD			
1				
		🔀 🛠 🗸 OK 🗙 Cancel		

- c. Select the appropriate unit of measure (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- 2. Left-click the cursor into the **Height** field and type the value in terms of the of unit of measure identified for the height.
- iv. Identify the volume of a single unit of measure of the item:

Volume : 0.000 CM1---

1. Select the unit of measure in which the volume is measured:

NOTE: To complete the **Volume** unit of measure field, the appropriate unit of measure must be listed in the **Volume List**. To access this table, left-click **Administration** from the tool bar, go to **General Tables List by Code**, and left-click **Volume**.

NOTE: The default value for the **Volume** unit of measure is managed within the Company Setup. To set up the default Bin Location, left-click **Administration** from the tool bar, go to **System Setup**, then left-click on **System General Defaults**. The Company Setup window will appear. Default **Volume** unit of measure may be identified on the **Defaults** tab.



🙍 Company Setup	<u>२</u> ×
X ✓ III Cancel O <u>K</u> Option	
Counters Modules Limits System Alerts General Se	ttings Document Settings W0/MNT Settings Memo Convert
Accounting Settings Printing Settings Stock W/H	Settings Mandatory Fields SO/PO Line changes settings
Consolidator Settings PMR Aircraft Ext	Flight Log Ext Hide Line Types Publications Ext. Info
General WH/Doc Defaults Setup Customer Defaults	ocs VendorDocs Taxes Charges Convert P/NExt
Lead Time Base Measu Quotes Valid for : 30 Day(s)	Print COND on Docs :
Vendor Bids Due Within : 1 Day(s) Weight :	User Line Numbering :
S.O. Ship from Stock Within : 0 Day(s)	Sales GL Account by Line :
Add to Vendor Lead Time : 0 Day(s)	Purch GL Account by Line :
S.O. to P.O. Deduct : 0 Day(s)	Post W/0 to GL Account WIP :
Copy Ship and Due On from Quote to RFQ:	Auto Convert S.O. to Quote :
Lead Time Calculation : 🔽	Record Order change - Always :
Exch Sell Cond Search Parameters	Price / Qty Decimals

- a. Left-click the field to the right of the **Volume** label containing the ellipses .
- b. The **Volume List** window will appear.

NOTE: The values shown in the table appearing in this procedure are standard values but are not an all-inclusive list of the values required by every organization.

🔮 Volume List		
Start With :		
		Max Search Result Lines : 50 🔷
Drag a column header h		
Code	Name	
► CCM	CUBIC CENTIMETER	
CFT	CUBIC FOOT	
CIN	CUBIC INCH	
CMM	CUBIC MILIMETER	
CMT	CUBIC METER	
		📧 🛠 🔽 🔀 🔀

- c. Select the appropriate unit of measure (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- 2. Left-click the cursor into the **Volume** field and type the value in terms of the of unit of measure identified for the volume.
- v. Identify the weight of a single unit of measure of the item:

Weight : 0.000 LB ...

1. Select the unit of measure in which the weight is measured:



NOTE: To complete the **Weight** unit of measure field, the appropriate unit of measure must be listed in the **Volume List**. To access this table, left-click **Administration** from the tool bar, go to **General Tables List by Code**, and left-click **Weight**.

NOTE: The default value for the **Weight** unit of measure is managed within the Company Setup. To set up the default Bin Location, left-click **Administration** from the tool bar, go to **System Setup**, then left-click on **System General Defaults**. The Company Setup window will appear. Default **Weight** unit of measure may be identified on the **Defaults** tab.



- a. Left-click the field to the right of the **Weight** label containing the ellipses
- b. The Weight List window will appear.

NOTE: The values shown in the table appearing in this procedure are standard values but are not an all-inclusive list of the values required by every organization.

1	Weight List	and and and a second	- • ×
	Start With :	<u> </u>	
		Max Search R	esult Lines : 50 🌩
	Code	Name	
Þ	GR	GRAM	
	KG	KILO	
L	LB	POUND	
	MT	METRIC TON	
L	00	OUNCE	
	PT	PINT	
	TN	TON	
L			
L			
1			
		🖂 📯 🗸 ok	X Cancel
L			

c. Select the appropriate unit of measure (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).



2. Left-click the cursor into the **Weight** field and type the value in terms of the of unit of measure identified for the weight.

vi.

11. Complete the applicable portions of the HazMat tab:

The United Nations or other hazardous material identification numbers and their characteristics may be identified on this tab (optional):

a. Left-click the **HazMat** tab.

	····-·
Stock General Sell F	rices Costs Exchanges Measures Extended Info HazMat Time Control Eligibility 💽 🕨
Hazardous Material	nformation
UN :	••• ID :
Proper Name 1 :	
Proper Name 2 :	
Class/Div. :	Packing instruction, Ltd Qty, Passenger & Cargo : 0
Pack Group :	Max Net Qty/Package, Ltd Qty, Passenger & Cargo : 0
Subs Risk :	UM - (For the above field), Ltd Qty, Passenger & Cargo :
Pack INST :	Packing instruction, Passenger & Cargo : 0
	Max Net Qty/Package, Passenger & Cargo : 0
	UM - (For the above field), Passenger & Cargo :
	Packing instruction, Cargo only :
	Max Net Qty/Package, Cargo only : 0
	UM - (For the above field), Cargo only :

- b. Identify the United Nations number for the item:
 - UN :

NOTE: To complete the **UN** field, the appropriate UN Code must be listed in the **Stock HazMat UN/ID Code List**. To access this table, left-click **Administration** from the tool bar, go to **Stock Tables List by Code**, and left-click **Stock HazMat UN/ID Code**.

- i. Left-Click the ellipses button 🛄 in the **UN** field.
- ii. The Stock HazMat UN/ID Code List window will appear.

NOTE: The values shown in the table appearing in this procedure are standard values but are not an all-inclusive list of the values required by every organization.



	🖉 Stock HazMat UN/ID Code List							
	Start \	With :						
						Max 9	Search Result Lines : 50	÷
٢								
	UN	ID	Proper Name 1	Proper Name 2	Class/Div	Pack Group	Subs Risk	Pa
Þ	1299	UN129	Turpentine		3	Ш		
	6845	NA684!	Hazardous Widget		2	I		
	90		Fuel					
1								
						× ×	🗸 0 <u>K</u> 🛛 🗙 <u>C</u> ance	el

- iii. Select the category (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- iv. The information from the **Stock HazMat UN/ID Code List** will be automatically populated on the **HazMat** tab.

Stock General Sell Prices Loss Exchanges Measures Extended into Proceed Time Control Eligit Hazardous Material Information UN : [5845] ID : [NA6845 Proper Name 1 : [Hazardous Widget	en fat 🖍		
Hazardous Material Information UN : 5845 ID : NA6845 Proper Name 1 : Hazardous Widget ID : NA6845	bility		
UN : 6845 ID : NA6845 Proper Name 1 : Hazardous Widget			
Proper Name 1 : Hazardous Widget			
Proper Name 2:			
Class/Div. : 2 Packing instruction, Ltd Qty, Passenger & Cargo :	0		
Pack Group : I Max Net Qty/Package, Ltd Qty, Passenger & Cargo :	4		
Subs Risk : UM - (For the above field), Ltd Qty, Passenger & Cargo : EA			
Pack INST : Packing instruction, Passenger & Cargo : 0			
Max Net Qty/Package, Passenger & Cargo : 60			
UM - (For the above field), Passenger & Cargo : EA	•••		
Packing instruction, Cargo only :	0		
Max Net Qty/Package, Cargo only :	200		
UM - (For the above field), Cargo only : EA			

- 12. Complete the applicable portions of the Time Control tab:
 - a. Left-click the **Time Control** tab.



🍠 [Editing] Partnumber : [P230-123] WIDGET MFG : [AK4P] A & L LABS							
Add Edit Del	↓ → III III III III Prev Next Hist XRef W/H Ord BOM Opt Srch Ond OK Close						
P/N : P230-123	/ 1 Rev : A Alt 1 : 24-5646-332						
Desc : WIDGET	Alt 2 : 1560-00-238-4531						
Stock General Sell P	Prices Costs Exchanges Measures Extended Info HazMa Time Control Eligibility Image						
Type:	▼ Factors/Formulas						
Shelf Life :	▼ ♀ Standard Scopes						
Sales Warranty :							
OH/Repair Warranty :	Tolerance OR	Tolerance					
Inspection Every :		_					
Overhaul Every :		•					
Retirement/HardTime :		_					
Test/Maint Every:		_					
Retirement/HardTime 0	On Condition : 🗖						
─Weight & Balance Weight : 0	Arm : 0 - Moment : 0 - W/O Disposition :						

b. Identify the **Type** and time control type for the item (optional):

Туре:

Left-click the drop down box and select the type that best describes the item when it is installed.



NOTE: The **Type** indicates the classification of the item when installed on the aircraft. In order for the **Type** to be linked properly from the parts master to the aircraft, the item must be installed properly.

i. Engine - The item will be shown on the **Engines/Assembly** tab in the **Aircraft** window and must be installed as an engine on the **Engines/Assembly** tab of the Install Procedure.

NOTE: Steps for installing items on an aircraft may be found in the procedure "Performing an Install Procedure" within the Quality Assurance section of this manual.

ii. Unit - The item will be shown on the **Units** tab in the **Aircraft** window and must be installed on the **Units** tab of the Install Procedure.

NOTE: In Build 8.5.54.82 and earlier, items installed as units do not have a **Type** identified.

iii. Eng/Cmp - The item will be shown on the Engine/Assembly Components tab in the Engine/Assembly window (opened by double-clicking an engine or assembly listed on the Engines/Assembly tab in the Aircraft window) and will be installed as an engine/assembly component on the Engines/Assembly tab of the Install Procedure.



- iv. MEL The item will be shown on the **MEL** tab in the **Aircraft** window and will be installed on the **MEL** tab of the Install Procedure.
- v. Req The item will be shown on the **Req List** tab in the **Aircraft** window and will be installed on the **Req List** tab in the **Aircraft** window.

NOTE: In Build 8.5.54.82 and earlier, items installed on the **Req List** tab do not have a **Type** identified.

NOTE: Steps for installing required items on an aircraft may be found in the procedure "Aircraft Records" within the Quality Assurance section of this manual.

c. Identify the factors and or formulas applicable to the item.

d. Identify the **Shelf Life** of the item (if applicable):

Shelf Life :

NOTE: If the **Shelf Life** fields are populated, shelf life information will be displayed for each UID in inventory.

In addition, when items are received from the vendor, the shelf life value will be populated in the receiving process and will be displayed in days.

Steps for receiving items purchased from vendors may be found in the procedure "Purchase Receiving" within the Purchasing section of this manual.

If the cure date is not entered in the receiving process, then the **Shelf Life** (in days) and **Good Till** fields may be entered manually within the warehouse for each UID.

Steps for modifying individual UID information may be found in the procedure "Manually Adding Units to Inventory" within the Material Management section of this manual.

- i. Left-click the drop down box and select the unit of measure in which the shelf life is measured.
- ii. Left-click the cursor into the field to the right of the **Shelf Life** label. Enter the numeric value associated with the shelf life.
- e. Identify the **Sales Warranty** of the item (if applicable):

Sales Warranty : OR V

NOTE: The sales warranty refers to the amount of time that an item in new condition will be warranted by the company to the customer.

NOTE: All warranty information on the **Time Control** tab is for reference only without the Automatic Warranty Processing module. Instructions on the use of the Automatic Warranty Processing module may be found in the procedure "Automatic Warranty Processing" within the Material Management section of this manual.



- i. Left-click the drop down box and select the unit of measure in which the sales warranty life is measured.
- ii. Left-click the cursor into the field to the right of the **Sales Warranty** label. Enter the numeric value associated with the sales warranty.
- iii. If the sales warranty is measured in two different units of measure, complete the fields to the right of the **OR** label.
 - 1. Left-click the drop down box and select the second unit of measure in which the sales warranty life is measured.
 - 2. Left-click the cursor into the field to the right of the **OR** label. Enter the numeric value associated with the second unit of measure in which the sales warranty is measured.
- f. Identify the **OH/Repair Warranty** of the item (if applicable):

OH/Repair Warranty : Tolerance OR

NOTE: The overhaul/repair warranty refers to the amount of time that an item that was submitted by a customer for overhaul or repair will be warranted by the company.

NOTE: All warranty information on the **Time Control** tab is for reference only without the Automatic Warranty Processing module. Instructions on the use of the Automatic Warranty Processing module may be found in the procedure "Automatic Warranty Processing Module" within the Material Management section of this manual.

- i. Left-click the drop down box and select the unit of measure in which the overhaul/repair warranty life is measured.
- ii. Left-click the cursor into the field to the right of the **OH/Repair Warranty** label. Enter the numeric value associated with the overhaul/repair warranty.
- iii. If the overhaul/repair warranty is measured in two different units of measure, complete the fields to the right of the **OR** label.
 - 1. Left-click the drop down box and select the second unit of measure in which the overhaul/repair warranty is measured.
 - 2. Left-click the cursor into the field to the right of the **OR** label. Enter the numeric value associated with the second unit of measure in which the overhaul/repair warranty is measured.
- g. Identify the inspection or calibration interval of the item (if applicable):

NOTE: If the item is identified as **Stock Item** or **Equip/Machine** in the **Asset Type** group box on the **General** tab, the label for these fields will be displayed as "Inspection Every".

OH/Repair Warranty :		Tolerance	OR	-	Tolerance
Inspection Every :	-	-	OR	-	-



NOTE: If the item is identified as **Tools** in the **Asset Type** group box on the **General** tab, the label for these fields will be displayed as "Calibrate Every".

OH/Repair Warranty :	_	Tolerance	JR 📃 💌	Tolerance
Calibrate Every :	•		JR 📃 💌	_

NOTE: All inspection information on the **Time Control** tab is for reference only without the Tooling module. Instructions on the use of the Tooling module may be found in the procedure "Calibrated Tool Module" within the Quality Assurance section of this manual.

- i. Identify the inspection/calibration interval :
 - 1. Left-click the drop down box and select the unit of measure in which the inspection/calibration is measured.
 - 2. Left-click the cursor into the field to the right of the **Inspection Every** or **Calibrate Every** label. Enter the numeric value associated with the inspection/calibration.
- ii. Identify the inspection/calibration tolerance (optional):

NOTE: The **Tolerance** is defined as the amount of variation that is allowed from the inspection/calibration interval.

NOTE: Tolerances are for reference and for custom reporting only

- 1. Left-click the drop down box and select the unit of measure in which the inspection/calibration tolerance is measured.
- Left-click the cursor into the field to the left of the unit of measure and below the Tolerance column label. Enter the numeric value associated with the inspection/calibration tolerance.
- iii. If the inspection/calibration interval is measured in two different units of measure, complete the fields to the right of the **OR** label (optional):
 - 1. Left-click the drop down box and select the second unit of measure in which the inspection/calibration is measured.
 - 2. Left-click the cursor into the field to the right of the **OR** label. Enter the numeric value associated with the second unit of measure in which the inspection/calibration is measured.
- iv. If the inspection/calibration interval is measured in two different units of measure, identify the inspection/calibration tolerance (optional):
 - 1. Left-click the drop down box and select the second unit of measure in which the inspection/calibration tolerance is measured.
 - Left-click the cursor into the field to the left of the unit of measure and below the Tolerance column label. Enter the numeric value associated with second unit of measure in which the inspection/calibration tolerance is measured.



h. Identify the overhaul requirements of the item (if applicable):



NOTE: All overhaul information on the **Time Control** tab is for reference and custom reporting only.

- i. Identify the overhaul interval :
 - 1. Left-click the drop down box and select the unit of measure in which the overhaul is measured.
 - 2. Left-click the cursor into the field to the right of the **Overhaul Every** label. Enter the numeric value associated with the overhaul.
- ii. Identify the overhaul tolerance (optional):

NOTE: The **Tolerance** is defined as the amount of variation that is allowed from the overhaul interval.

NOTE: Tolerances are for reference and for custom reporting only

- 1. Left-click the drop down box and select the unit of measure in which the overhaul tolerance is measured.
- Left-click the cursor into the field to the left of the unit of measure and below the Tolerance column label. Enter the numeric value associated with the overhaul tolerance.
- iii. If the overhaul interval is measured in two different units of measure, complete the fields to the right of the **OR** label (optional):
 - 1. Left-click the drop down box and select the second unit of measure in which the overhaul is measured.
 - 2. Left-click the cursor into the field to the right of the **OR** label. Enter the numeric value associated with the second unit of measure in which the overhaul is measured.
- iv. If the overhaul interval is measured in two different units of measure, identify the overhaul tolerance (optional):
 - 1. Left-click the drop down box and select the second unit of measure in which the overhaul tolerance is measured.
 - Left-click the cursor into the field to the left of the unit of measure and below the Tolerance column label. Enter the numeric value associated with second unit of measure in which the overhaul tolerance is measured.
- i. Identify the retirement requirements of the item (if applicable):



OH/Repair Warranty :	Ta Ta	olerance OR	To To	lerance
Calibrate Every :	_	▼ OR	_	-
Overhaul Every :	_	✓ OR	_	-
Retirement/HardTime :		▼ OR		-
Test/Maint Every:		▼ OR	_	-
	ter E			

Retirement point information will be copied to the aircraft when the item is installed on the aircraft.

NOTE: Steps for installing items on an aircraft may be found in the procedure "Performing an Install Procedure" within the Quality Assurance section of this manual.

NOTE: Retirement point information on the **Time Control** tab is for reference and custom reporting only.

- i. Identify the point at which the item is to be retired:
 - 1. Left-click the drop down box and select the unit of measure in which the retirement point is measured.
 - 2. Left-click the cursor into the field to the right of the **Retirement/HardTime** label. Enter the numeric value associated with the retirement point.
- ii. Identify the retirement point tolerance (optional):

NOTE: The **Tolerance** is defined as the amount of variation that is allowed from the retirement point.

NOTE: Tolerances are for reference and for custom reporting only

- 1. Left-click the drop down box and select the unit of measure in which the retirement point tolerance is measured.
- Left-click the cursor into the field to the left of the unit of measure and below the Tolerance column label. Enter the numeric value associated with the retirement point tolerance.
- iii. If the item is required to be retired based upon a second unit of measure, complete the fields to the right of the **OR** label (optional):
 - 1. Left-click the drop down box and select the second unit of measure in which the retirement point is measured.
 - 2. Left-click the cursor into the field to the right of the **OR** label. Enter the numeric value associated with the retirement point's second unit of measure.
- iv. If the retirement point is required to be retired based upon a second unit of measure, identify the retirement point tolerance (optional):
 - 1. Left-click the drop down box and select the second unit of measure in which the retirement point tolerance is measured.



- Left-click the cursor into the field to the left of the unit of measure and below the Tolerance column label. Enter the numeric value associated with the retirement point tolerance's second unit of measure
- v. If the item is retired based upon condition, mark the checkbox to the right of the **Retirement/HardTime On Condition** label as "checked" (optional).

NOTE: The **Retirement/HardTime On Condition** checkbox does not affect the logic within the system. If an item does not have an identified retirement point, then by default that item is retired based upon condition. Therefore, unless the **Retirement/HardTime On Condition** checkbox is considered in the logic for custom reporting, it can be ignored.

j. Identify the user defined time control value (we will refer to this field as "TC UDF") for the item (optional):

OH/Repair Warranty :	_	Tolerance	OR	▼	Tolerance
Calibrate Every :	_		OR	_	
Overhaul Every :	_		OR		
Retirement/HardTime :	_		OR		
Test/Maint Every:	•		OR	-	•

NOTE: The user defined time control value field label may be modified in the **Company Setup**. In this procedure, the field is labeled "Test/Maint". To modify the labels for this field, left-click **Administration** from the tool bar, go to **System Setup**, then left-click on **System General Defaults**. The **Company Setup** window will appear. Labels may be identified on the **General** tab.



If modified, the label will change both on screen and on all forms and reports where these fields are referenced.

NOTE: This TC UDF may be used for any event that must be performed periodically. Instructions for using this field may be found in the procedure "Utilizing the User Defined Time Control Field" within the Material Management section of this manual.

- i. Identify the TC UDF interval :
 - Left-click the drop down box and select the unit of measure in which the TC UDF is measured.
 - 2. Left-click the cursor into the field to the right of the **Test/Maint Every** label. Enter the numeric value associated with the TC UDF.
- ii. Identify the TC UDF tolerance (optional):

NOTE: The **Tolerance** is defined as the amount of variation that is allowed from the TC UDF interval.

NOTE: Tolerances are for reference and for custom reporting only.



- 1. Left-click the drop down box and select the unit of measure in which the TC UDF tolerance is measured.
- Left-click the cursor into the field to the left of the unit of measure and below the Tolerance column label. Enter the numeric value associated with the TC UDF tolerance.
- iii. If the TC UDF interval is measured in two different units of measure, complete the fields to the right of the **OR** label (optional):

NOTE: All TC UDF information relating to a second unit of measure is for reference and custom reporting only.

- 1. Left-click the drop down box and select the second unit of measure in which the TC UDF is measured.
- 2. Left-click the cursor into the field to the right of the **OR** label. Enter the numeric value associated with the second unit of measure in which the TC UDF is measured.
- iv. If the TC UDF interval is measured in two different units of measure, identify the TC UDF tolerance (optional):
 - 1. Left-click the drop down box and select the second unit of measure in which the TC UDF tolerance is measured.
 - Left-click the cursor into the field to the left of the unit of measure and below the Tolerance column label. Enter the numeric value associated with second unit of measure in which the TC UDF tolerance is measured.
- k. Identify the default weight and balance values for the item (optional):

Weight & Balance
Weight : 0 + Arm : 0 + Moment : 0 +

The identified default weight and balance values will be copied to the aircraft when the item is installed on the aircraft.

NOTE: Steps for installing items on an aircraft may be found in the procedure "Performing an Install Procedure" within the Quality Assurance section of this manual.

NOTE: The default values may be changed within the Install Procedure (refer to the procedure "Performing an Install Procedure" within the Quality Assurance section of this manual) or within the **Aircraft** window (refer to the procedure "Aircraft Records" within the Quality Assurance section of this manual).

- i. Identify the weight of the item when installed on the aircraft.
 - 1. Left-click the drop down box and select the unit of measure in which the weight is measured.



- 2. Left-click the cursor into the field to the right of the **Weight** label. Enter the numeric value associated with the weight of the item. You may also use the spinner arrows to adjust the weight in whole number increments.
- ii. Identify the arm of the item when installed on the aircraft. Left-click the cursor into the field to the right of the Arm label. Enter the numeric value associated with the arm of the item. You may also use the spinner arrows to adjust the weight in whole number increments.
- iii. Identify the moment of the item when installed on the aircraft. Left-click the cursor into the field to the right of the **Moment** label. Enter the numeric value associated with the moment of the item. You may also use the spinner arrows to adjust the weight in whole number increments.
- I. Identify the default disposition for the item (optional)

W/O Disposition :

The identified default disposition will be copied to the Maintenance part line (when the item is added to a Maintenance Card within Maintenance) and will be copied to the Work Order part line (when the item is added to the Work Order).

NOTE: To complete the **W/O Disposition** field, the appropriate disposition must be listed in the **Disposition List**. To access this table, left-click **Administration** from the tool bar, go to **Document Tables List by Code**, go to **Rejection/Reason** and left-click **Disposition**.

- i. Left-click the **W/O Disposition** field.
- ii. The **Disposition List** window will appear.

NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.

Disposition List	-		- • ×
Start With :			
		Max Search Re	sult Lines : 50 🚔
Drag a column header here to group b	y that column		
Code	Name		
▶ 100	100% KIT		
BE	BEYOND ECONOMICAL REPAIR		
CI	PULL FROM CUSTOMER INVENTORY		
CR	CALIBRATION REQUIRED		
ER	ESTIMATE REQUIRED		
EX	EXCHANGE UNIT - IN HOUSE		
EXOC	EXCHANGE UNIT - OTHER STOCK		
MD	MODIFICATION		
OH	OVERHAUL/HEAVY REPAIR		
PB	PARTIAL REPAIR		
RP	REPAIR - IN HOUSE		
RPOV	REPAIR -OUTSIDE VENDOR		
SA	SPECIAL AGREEMENT		
SL	SHELF LIFE RENEWAL		
TS	TEST		
UR	UNREPAIRABLE		
	·		
	* 📓	✓ 0 <u>K</u>	X Cancel



iii. Select the disposition (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

13.

14.

Definitions

1. *UID or Unique Identifier*: also referred to as "LOGNO"; a unique number that is assigned to a particular item (if serialized) or quantity of items when received or manually entered into a warehouse. The UID acts as a sort of lot number for the item(s) received. A particular item will receive a new UID each time it is received into a warehouse.

[i.e. "*Term*: definition as it relates to this procedure" The terms defined in this section should be *italicized* the first time they are used outside of the header]