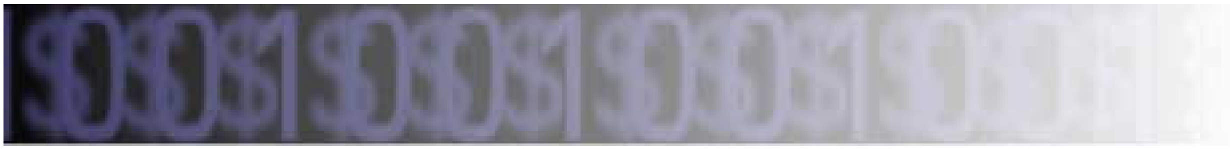

Core Information System

Inventory Control

Setup Guide

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1 Introduction

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Objectives

This guide covers the basic setup routines for enabling users to enter Inventory data.

After reading Chapter 1, you will have a better understanding about:

- The objectives of the other chapters.
- What you should know about the text.
- The document terms used throughout the guide.

Objectives of the Other Chapters

Chapter 2

Chapter 2, Overview, gives a brief description of this module and how the components work together.

After reading Chapter 2, you will have a better understanding about:

- The basic concepts and principles of the Inventory Control.
- Searching the Inventory Control Setup for records.
- Using the function keys.
- Using some of the other keys.

Chapter 3

The most requirements for setting up the Inventory Control database are covered in Chapter 3.

After reading Chapter 3, you will have a better understanding about:

- Setting up Unites of Measure
- Setting up Items
- Setting up Warehouse Types and Limitations
- Setting up Inventory Classes
- Setting Commodity Codes
- Setting up Transaction Types
- Setting up Preference Codes
- Setting up Location Types
- Setting up Item Attributes
- Setting up Work Centres
- Setting up Order Status Codes
- Working with Companies

What You Should Know About the Text

Text Formatting

To make the text easier to read, several formatting conventions have been used throughout the step-by-step instructions:

Bold

Aside from the headings, and the text highlighted in the displays, **bold** text is used to describe the use of keyboard keys. Example: Press **Enter**.

Italics

Italics are used in the "Display Pointers" which can be seen on the left side of each display figure in Chapter 3. Italics are also used in references. Example: See Table 3-7...

Bold Italics ***Bold Italics*** are used for anytime the user is meant to key in a stream of text. Whenever bold italics are used, the characters are meant to be keyed as shown, using the same capitals or lower case letters as written in the instruction. Example: Type ***ABC***...

Courier Font Courier New Font is used to describe text found in the displays. This font is used as a substitute for quotation marks because sometimes there can be some confusion as to whether the quotation marks are included as part of the example or not. Example: `Processing Print List....`

Document Terms

Display When used as a noun, it refers to *the full screen image*. When used as a verb, it means *to show*.

Functions The function keys listed at the bottom of the displays and windows. The functions are explained in Using the Function .

Notes Shared, brief comments, attached to data records, used to enhance workplace communications.

Options The horizontal menu options, these usually range from 1 to 9, and may include letters such as P for Posting.

Panel A bordered image that partially covers the full screen image.

2 Overview

Table of Contents

Objectives

After reading Chapter 2, you will have a better understanding about:

- The basic concepts and principles of setting the Inventory Control database
- Using the function keys.
- Using some of the other keys.
- Locating the Inventory Control Setup Menu

About Inventory Control

Overseeing and maintaining your Inventory and Assets

Inventory Control allows you to coordinate and supervise your inventory supply. Using the Inventory Control software also gives you the ability to oversee the storage and distribution and recording of materials to maintain adequate quantities for current needs. The data is easy to maintain, with the ability to locate items and assets easily. Also, users in different departments can have all the current information about your inventory.

Searching

Number Searches

When searching from a Number search field, such as Address Number, press **Field Exit**, then **Enter** to activate the search. Most of the Number search fields do not allow an **Enter** keystroke from within the field.

If the **Enter** key is pressed while the cursor is inside a Number search field, the message, `Enter key not allowed in field` appears. Press **Reset** to remove the message, then press **Field Exit**, and then **Enter**, to submit the search.

Scan Limit Reached

In searches made through large files, the search range is restricted to avoid system congestion. If the Scan Limit Reached message appears in the bottom left, it means that the search target was not found within the immediate search range, and, the search range did not cover the entire file. Press the **Page Down** key to search the next file portion.

If the search target does not exist in the file, the message, `No data to display` appears.

Using the Function Buttons

Function Buttons

This is a discussion of some of the function buttons and their uses.

Table 2-1: Common Function Buttons

Button	Function	Description
	OK	 allows you to continue onto the next display.
	Exit	 always lets the user exit out the current display.  is used at the User Application Menu, to sign off.
	Add	 brings the user to the Add display screens, which allows the user to add new data.
	Search	 Allows the user to Search for Specific data.
	Print List	 Allows the user to print an entire Account List or an Account List specified by parameter.

Using The Function Keys

Function Keys This is a discussion of some of the function keys and their uses. If the users have older terminal, the function keys may be labeled as **Cmd** such as **Cmd1** or **Cmd3**. In most cases they are labeled as **F1** and **F3**.

Table 2-2: Common Function Keys

Key	Function	Description
F1	Help	**F1** always bring up the on-line help displays.
F3	Exit	**F3** always lets the user exit out the current display. **F3** is used at the User Application Menu, to sign off.
F5	Refresh	**F5** updates the display if the user has made a change to the data.
F7	Scroll Up	**F7** lets the users scroll upwards through lists.
F8	Scroll Down	**F8** lets the users scroll down through lists.

Other F Keys There are other **F** keys used for different purposes and their uses are shown at the bottom of the displays where they are active.

F13 Through F24 On a PC keyboard, hold down the **Shift** key and press **F1** to activate **F13**. The table below shows how to activate the higher numbered **F** keys:

Table 2-3: Accessing High-Numbered Function Keys on a PC

Function Key	PC Key Strokes	Function Key	PC Key Strokes
F13	**Shift** + **F1**	**F19**	**Shift** + **F7**
F14	**Shift** + **F2**	**F20**	**Shift** + **F8**
F15	**Shift** + **F3**	**F21**	**Shift** + **F9**
F16	**Shift** + **F4**	**F22**	**Shift** + **F10**
F17	**Shift** + **F5**	**F23**	**Shift** + **F11**
F18	**Shift** + **F6**	**F24**	**Shift** + **F12**

Using Some of the Other Keys

Field Exit

This key appears as the right-hand **Ctrl** key on the PC keyboard. The **Field Exit** key is familiar to AS/400 users as a means of clearing a field to the right of the cursor location.

Reset

This key appears as the left-hand **Ctrl** key on the PC keyboard. **Reset** is the normal response to many system error messages. Consult with the installing programmer for clarification.

Escape

The **Esc** key brings down the Attention Key Menu, which offers short cut access to commonly used functions such as Work With Members, and Send Message. The Attention Key Menu is maintained with the Run Time Application.

The Attention Key Menu also has a Display Message option that lets the users work with any system messages that be holding up their printing or processing jobs.

Print Screen

The **Print Screen** key is useful for making hard copies of static displays. After each screen print, the message `Print operation complete to the default printer device file` appears, notifying the user that the screen print was successful. Press the **Reset** key to remove this message.

3 Setup

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Finding Setup Menu

Objectives

The following steps will help you find the Inventory Control Setup Menu. This will be used as the Main Starting Point for each set of instructions listed.

Instructions

1. **Open your AS/400 session and sign on.**
   This routine can vary between organizations. Ask your system administrator for help if you have trouble signing on.
   The `User Application` menu appears.

   Here is a display of the applications you have been given to work with. The list of applications is controlled through the Run Time module. You can limit access to certain applications by working with the users' authorities.

   - In this display, `YOURCO` is short for `Your Company`, and `OTHRCO` is short for `Other Company`.
   - The Other Company represents another company that your organization either owns or with whom it affiliates itself.

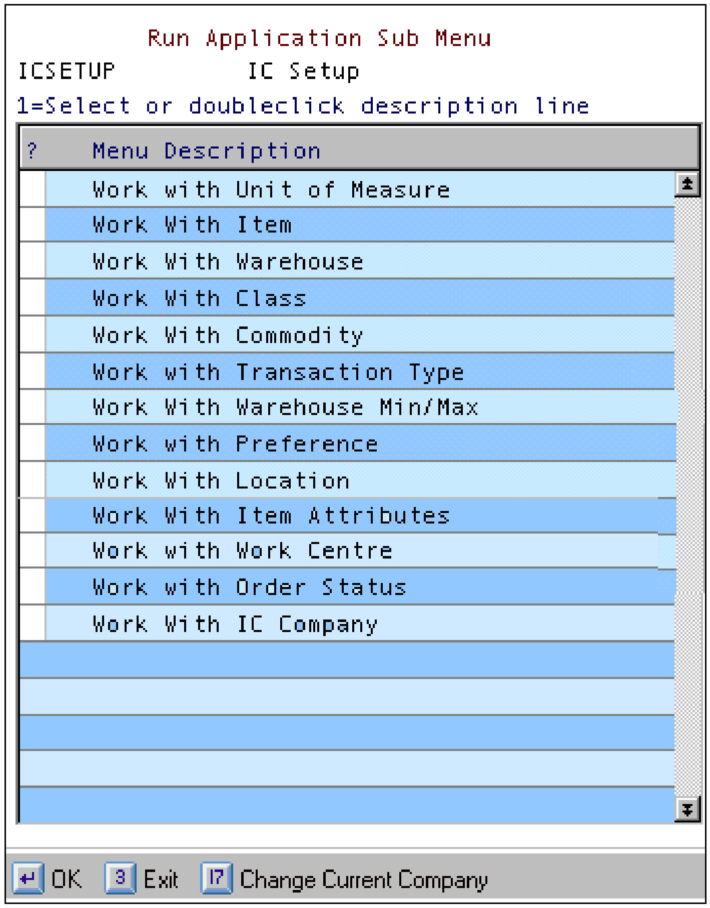
2. **Double click Inventory Control**.
   The `Inventory Control` menu appears.

3. **Double click IC Setup Menu.**
   The `Inventory Control Setup` menu appears. This menu will be the main starting point for setting up the Inventory Control Lists.

   For a list of items displayed on this menu *see Figure 3-1: Inventory Control Setup Menu on page 3-8.*

Figure 3-1: Inventory Control Setup Menu

These menu items lead to full-screen displays



Working With Items

Objectives

The objective of this section is to show step-by-step instructions on how to work with items on the Item Master List.

After reading this section, you will have a better understanding about:

- Adding items to the Item Master List
- Setting up items for buying and selling
- Creating Bill of Material items
- Editing, displaying, copying, renaming, removing items
- Working with item alternates
- Working with item notes
- Working with item drawings
- Working with item routers

Adding A New Item

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Item`.**
   The `Work with Item` menu appears.
2. **From the `Work With Item` menu, click on the Add button**.
   The `Add Item Master` menu appears.
3. **Fill in the fields**.
   You will need to fill in the required fields. *See Figure 3-2: Add Item Master display on page 3-11.*
4. **Click on the OK button to continue**.
   The confirm prompt appears to the lower right of the screen..

5. **Click on the OK button to confirm**.
   The `Work with Item Attribute` menu appears.
   Note: Attributes are not required when adding a new item; however for instructions on how to add an attribute, *see Adding an Item Attributes on page 3-21*.
6. **Click on the Exit button.**
   The `Work with Item by Warehouse` menu appears. This is where you will be assigning the item to a specific warehouse.
7. **Click on the Add button.**
   The `Select Warehouse` panel appears.
8. **Double click on the warehouse you want to assign the item to.**
   The `Add Item to Warehouse` panel appears.
9. **Fill in fields.**
   You will need to fill in the required fields. *See Figure 3-3: Add Item Warehouse display on page 3-11*.
10. **Click on the OK button to continue.**
    The confirm prompt appears to the lower right side of the screen.
11. **Click on the OK button to confirm.**
    You are returned to the `Work with Item by Warehouse` menu. The item you assigned has now been added. *See on page*.
    Note: You can assign this item to another warehouse by clicking on the **Add** button and then repeat steps 7 thru 10.
12. **Click on the Exit button.**
    You are returned to the `Work with Item` menu.
    Repeat steps 2 thru 11 to add another Item.
13. **Click on the Exit button to return to the `Inventory Setup` menu.**

Figure 3-2: Add Item Master display

You are required to fill in the highlighted fields before continuing

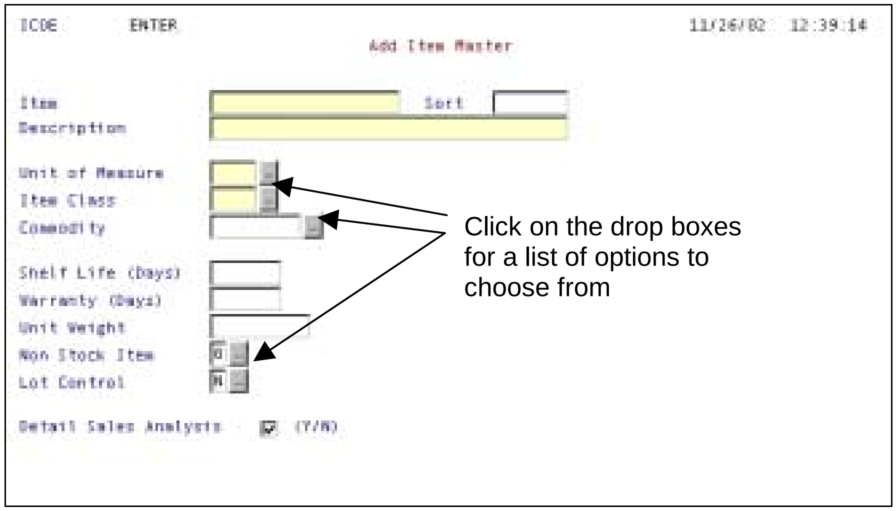
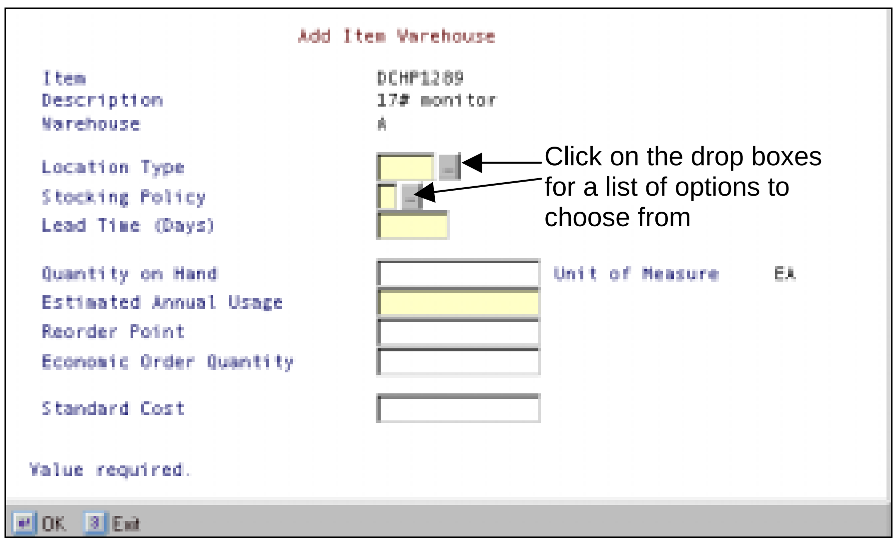


Figure 3-3: Add Item Warehouse display

You are required to fill in the highlighted fields before continuing



Setting Up an Item for Buying and Selling

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Item Master`.**
   The `Work With Item` menu appears.
2. **From the `Work With Item` menu, click on the Add All Item Aspects button**.
   The `Add Item Masters` menu appears.
3. **Fill in the fields**.
   You will need to fill in the required fields. *See Figure 3-4: Add Item Master display on page 3-13.*
4. **Click on the OK button to continue**.
   The confirm prompt appears to the lower right side of the screen.
5. **Click on the OK button to confirm**.
   The `Work with Item Attribute` menu appears.
   Note: Attributes are not required when adding a new item, however for instructions on how to add an attribute see section on page.
6. **Click on the Exit button.**
   The `Work with Item by Warehouse` menu appears. This is where you will be assigning the item to a specific warehouse.
7. **Click on the Add button.**
   The `Select Warehouse` panel appears.
8. **Double click on the warehouse you want to assign the item to.**
   The `Add Item to Warehouse` panel appears.
9. **Fill in fields.**
   You will need to fill in the required fields. *See Figure 3-5: Add Item Warehouse display on page 3-14.*
10. **Click on the OK button to continue.**
    The confirm prompt appears to the lower right of the screen.

11. Click on the OK button to confirm.

You are returned to the `Work with Item by Warehouse` menu. The item you assigned has now been added. *See on page*.

Note: You can assign this item to another warehouse by clicking on the **Add** button and then repeat steps 7 thru 10.

12. Click on the Exit button.

The `Add Item Sales Tax` panel appears.

13. Double click on the applicable tax.

The `Add Item Sales Tax` panel remains . This allows you to select more tax options.

Note: To select all tax options at once, key a ***1*** in front of each option and then click on the **OK** button.

14. Click on the Exit button.

You are returned to the `Work with Item` menu.

Repeat steps 2 thru 13 to add another Item for buying and selling.

15. Click on the Exit button to return to the `Inventory Setup` menu.

Figure 3-4: Add Item Master display

You are required to fill in the highlighted fields before continuing

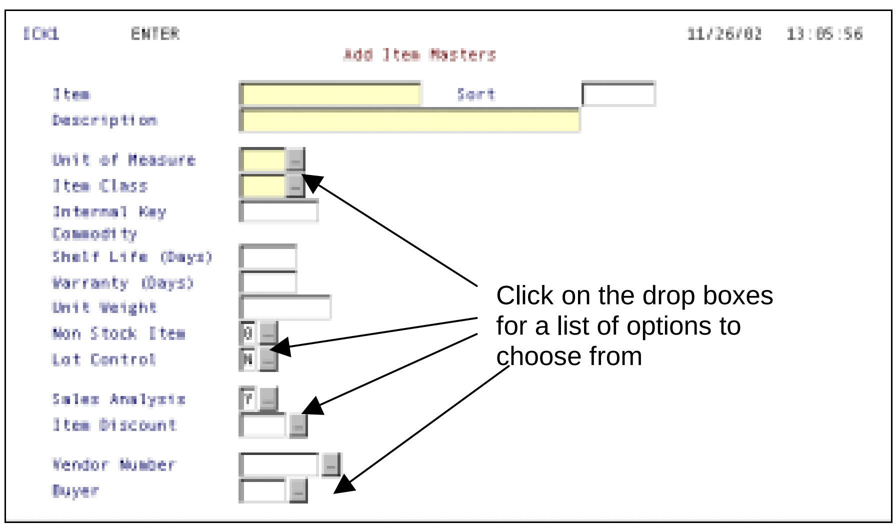
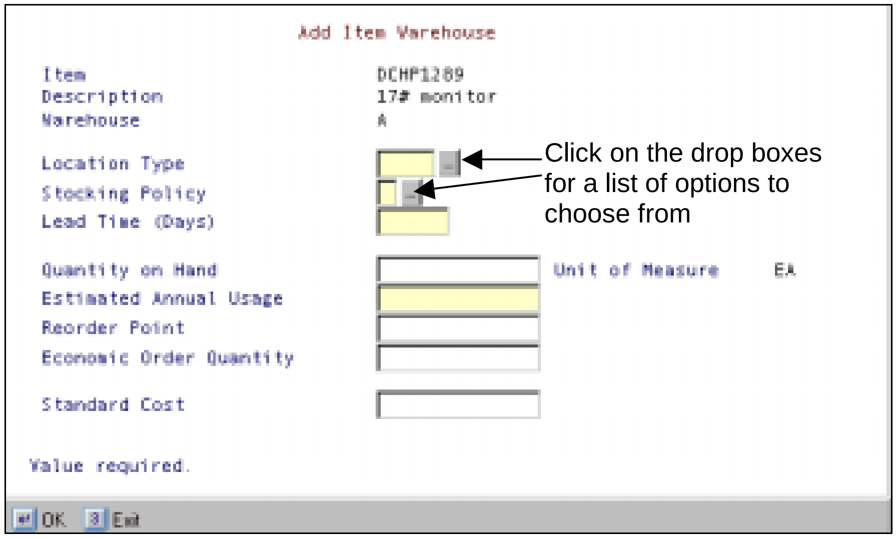


Figure 3-5: Add Item Warehouse display

You are required to fill in the highlighted fields before continuing



Click on the drop boxes for a list of options to choose from

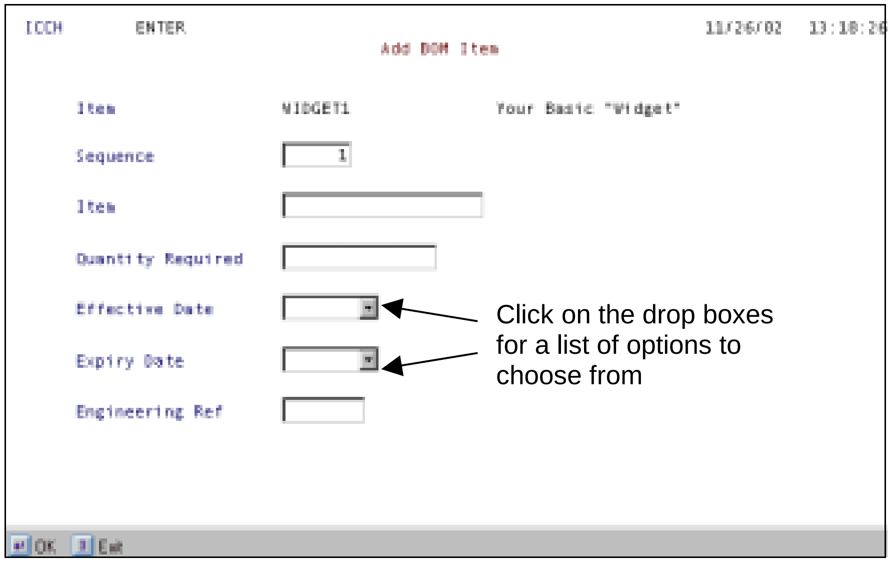
Adding Bill of Material Item

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Item Master`.**
   The `Work with Item` menu appears.
2. **Place a *1* in front of an Item number and then click the OK button.**
   The `Work with Item B.O.M.` menu appears.
3. **Click the Add button.**
   The `Add BOM Item` panel appears.
4. **Fill in the fields.**
   See Figure 3-6: Add Item Warehouse display on page 3-16.
5. **Click on the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
6. **Click on the OK button to confirm.**
   You are returned to the `Add BOM Item` display. **Note**: Follow steps 4 thru 6 to add another B.O.M. Item.
7. **Click on the Exit button.**
   You are returned to the `Work with Item B.O.M.` menu. The B.O.M. item you created is displayed.
8. **Click on the Exit button.**
   You are returned to the `Work With Item` menu.
9. **Click on the Exit button to return to the Inventory Setup menu.**

Figure 3-6: Add Item Warehouse display

Fill in the fields



Click on the drop boxes for a list of options to choose from

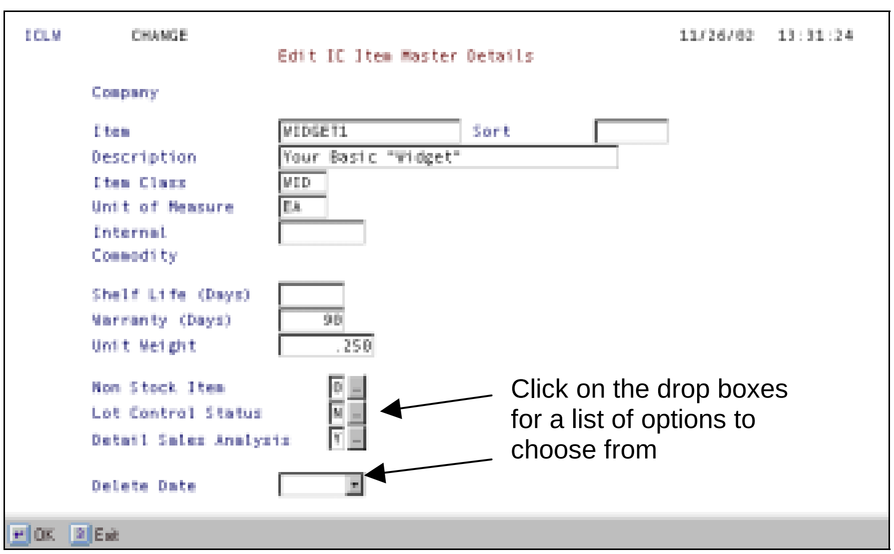
Making Changes to Item Details

Instructions

1. **Starting from the Inventory Setup menu, double click on Work with Item Master.**
   The Work with Item menu appears.
2. **Place a *2* in front of an Item number, and then click on the OK button.**
   The `Edit Item Master Details` panel appears.
3. **Make changes to the appropriate fields.**
   See Figure 3-7: Edit Item Master Details display below.
4. **Click on the OK button to continue.**
   The confirm prompt appears to the lower right side of the screen.
5. **Click on the OK button to confirm.**
   You are returned to the `Work With Item` menu. The changes have been recorded.
6. **Click on the Exit button to return to the Inventory Setup menu.**

Figure 3-7: Edit Item Master Details display

Changes can be made to any of the fields



Copying an Item

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Item Master`.**
   The `Work with Item` menu appears.
2. **Place a *3* in front of an Item number, and click on the OK button.**
   The `Copy Item Master` menu appears.
3. **Key in the new Item Number.**
4. **In the Item Class field, click on the prompt box to the right.**
   The `Select Class` panel appears.
5. **Double click the class you wish to select.**
   You are returned to the `Copy Item Master` panel.
6. **Make the necessary changes to any other fields.**
7. **Click on the OK button to confirm.**
   The confirm prompt appears to the lower right side of the screen.
8. **Click on the OK button to confirm.**
   With Work with Item Attribute menu appears.
9. **Click on the Exit button.**
   You are returned to the `Work With Item` menu.
10. **Click on the Exit button to return to the Inventory Setup menu.**

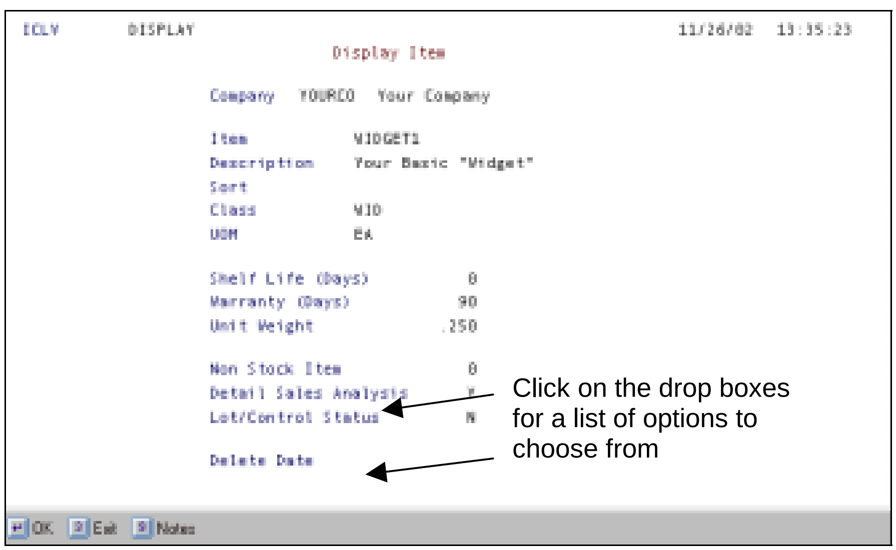
Displaying an Item

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Item Master`.**
   The `Work with Item` menu appears.
2. **Place a *5* in front of an Item number, and click on the OK button.**
   The `Display Item` panel appears. This panel allows you to view the data pertaining to the Item Number displayed. *See Figure 3-8: Display Item below.*
3. **Click on the Exit button.**
   You are returned to the `Work With Item` menu.
4. **Click on the Exit button to return to the `Inventory Control Setup` menu.**

Figure 3-8: Display Item

All item details are displayed on this screen



Renaming an Item

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Item Master`.**
   The `Work with Item` menu appears.
2. **Place a *7* in front of an Item number, and click on the OK button.**
   The `Rename Item Master` display appears.
3. **Change Item Number**
   Key in the new name for the item.
4. **Click on the OK button to continue.**
   The confirm prompt appears to the lower right side of the screen.
5. **Click on the OK button ton confirm.**
   The `Review Item Number Audit` panel appears.
6. **Double click on the item you wish to select.**
   The Review Item Number Audit panel remains allowing you to select another item.
7. **Click on the Exit button.**
   You are returned to the `Work With Item` menu.
8. **Click on the Exit button to return to the `Inventory Setup` menu.**

Adding an Item Attributes

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Item Master`.**
   The `Work with Item` menu appears.
2. **Place an *8* in front of an Item number, and then click on the OK button.**
   The `Work with Item Attribute` menu appears.
3. **Click on the Add button**
   The `Add Item Attribute Key` display appears.
4. **Click on the prompt box to the right of the Attribute field.**
   The Select Attribute panel appears.
5. **Click on an attribute to select.**
6. **Click on the Exit button.**
   You are returned to the `Work With Item` menu.
7. **Click on the Exit button to return to the Inventory Setup menu**

Making Changes to Item Attributes

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Item Master`.**
   The `Work with Item` menu appears.
2. **Place an *8* in front of an Item number, and then click on the OK button.**
   The `Work with Item Attribute` menu appears.
3. **Place a *2* in front of a ???number, and then click on the OK button.**
   The `Edit Item Attribute` display appears.
4. **Click on the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
5. **Click on the OK button to confirm.**
   You are returned to the `Work with Item Attribute` menu.
6. **Click on the Exit button.**
   You are returned to the `Work With Item` menu.
7. **Click on the Exit button to return to the Inventory Setup menu.**

Deleting Item Attributes

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Item Master`.**
   The `Work with Item` menu appears.
2. **Place an *8* in front of an Item number, and then click on the OK button.**
   The `Work with Item Attribute` menu appears.
3. **Place a *4* in front of ??? number, and then click on the OK button.**
   The confirm prompt appears to the lower right of the screen.
4. **Click on the OK button to confirm the deletion.**
   You are returned to the `Work with Item Attribute` menu. The Attribute you deleted is displayed as `***DELETED***`.
5. **Click on the Exit button.**
   You are returned to the `Work With Item` menu.
6. **Click on the Exit button to return to the Inventory Setup menu.**

Adding Item Notes

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Item Master`.**
   The `Work with Item` menu appears.
2. **Place a *9* in front of an Item number, and the click on the OK button.**
   The `Work With Item Notes` menu appears.
3. **Click on the Add button.**
   The `Add Item Master Notes` display appears.
4. **Type in any necessary notes and then click on the OK button.**
   The confirm prompt appears to the lower right of the screen.
5. **Click on the OK button to confirm.**
   You are returned to the `Work with Item Notes` menu. The notes you added to the Item number is displayed.
6. **Click on the Exit button.**
   You are returned to the `Work With Item` menu.
7. **Click on the Exit button to return to the `Inventory Setup` menu.**

Making Changes to Item Notes

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Item Master`.**
   The `Work with Item` menu appears.
2. **Place a *9* in front an Item number, and then click on the OK button.**
   The `Work with Item Notes` menu appears.
3. **Place a *2* in front a note, and then click on the OK button.**
   The `Edit Item Notes` display appears.
4. **Make any necessary changes to the Notes field.**
5. **Click on the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
6. **Click on the OK button to confirm.**
   You are returned to the `Work with Item Notes` menu.
7. **Click on the Exit button.**
   You are returned to the `Work With Item` menu.
8. **Click on the Exit button to return to the `Inventory Control` menu.**

Deleting Item Notes

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Item Master`.**
   The `Work with Item` menu appears.
2. **Place a *9* in front of an Item number, and then click on the OK button.**
   The `Work with Item Notes` menu appears.
3. **Place a 4 in front of a note, and then click on the OK button.**
   The `Delete Item Notes` display appears.
4. **Click on the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
5. **Click on the OK button to confirm deletion.**
   You are returned to the Work with Item Notes menu.
6. **Click on the Exit button.**
   You are returned to the `Work With Item` menu.
7. **Click on the Exit button to return to the `Inventory Setup` menu.**

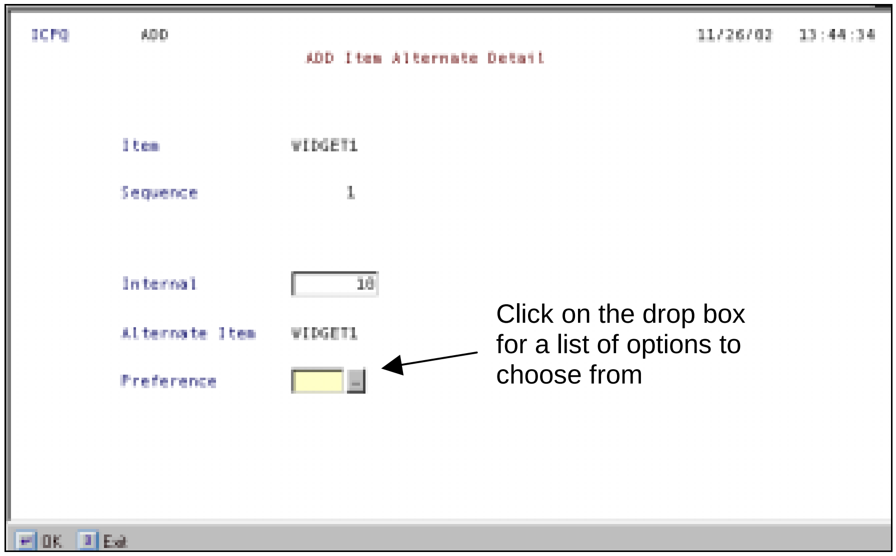
Creating an Alternate Item Number

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Item Master`.**
The `Work with Item` menu appears.
2. **Place an *A* in front of an Item number, and then click on the OK button.**
The `Work with Item Alternates` menu appears. The message `No Data to Display` appears on the bottom left of the screen.
3. **Click on the Add button.**
The `Select Item` panel appears.
4. **Double click on the item you wish to create an alternate number for.**
The `Add Item Alternate Detail` panel appears.
5. **Fill in the fields.**
You will need to fill in the required fields. *See Figure 3-9: Add Item Warehouse display on page 3-28.*
6. **Click on the OK button to continue.**
The confirm prompt appears on the bottom right of the screen.
7. **Click on the OK button ton confirm.**
You returned to the `Select Item` panel. **Note**: Follow steps 3 thru 7 to add another alternate to the item.
8. **Click on the Exit button.**
The `Add Item Alternate Key` panel appears.
9. **Click on the Exit button.**
You are returned to the `Work With Item` menu.
10. **Click on the Exit button to return to the `Inventory Setup` menu.**

Figure 3-9: Add Item Warehouse display

You are required to fill in the `Preference` field before continuing



Changing an Alternate Item

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Item Master`.**
   The `Work with Item` menu appears.
2. **Place an *A* in front of an Item number, and click on the OK button.**
   The `Work with Item Alternates` menu appears. Next, you will be using **Option 2** to make changes to an alternate Item**.**
3. **Place a *2* in front of an Sequence number, and click on the OK button.**
   The `Edit Item Alternate Key` display appears.
4. **Click on the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
5. **Click on the OK button to confirm.**
   You are returned to The `Work with Item` menu.
6. **Click on the Exit button to return to the `Inventory Setup` menu.**

Deleting an Alternate Item

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Item Master`.**
   The `Work with Item` menu appears.
2. **Place an *A* in front of an Item number, and click on the OK button.**
   The `Work With Item Alternates` menu appears. Next, you will be using **Option 4** to delete an alternate item.
3. **Place a *4* in front of an Sequence number, and click on the OK button.**
   The `Delete Item Alternate` panel appears.
4. **Click on the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
5. **Click on the OK to confirm the deletion.**
   You are returned to the `Work with Item Alternates` menu.
6. **Click on the Exit button.**
   You are returned to the `Work With Item` menu.
7. **Click on the Exit button to return to the `Inventory Setup` menu**

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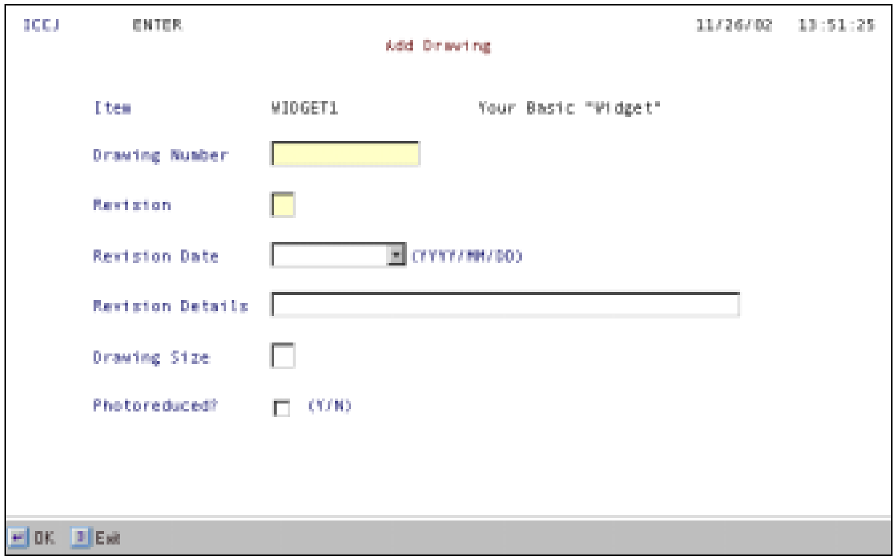
Adding a Drawing to an Item

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Item Master`.**
   The `Work with Item` menu appears.
2. **Place a *D* in front of an Item number, and click on the OK button.**
   The `Work With Drawings` menu appears.
3. **Click on the Add button.**
   The `Add Drawing` display appears.
4. **Fill in the required fields.**
   See Figure 3-10: Add Item Warehouse display on page 3-32.
5. **Click on the OK button to continue.**
   The confirm prompt appears on the lower right of the screen.
6. **Click on the OK button ton confirm.**
   You are returned to the `Work with Drawings` menu. The drawing you added is now displayed.
7. **Click on the Exit button.**
   You are returned to the `Work With Item` menu.
8. **Click on the Exit button to return to the `Inventory Control Setup` menu**

Figure 3-10: Add Item Warehouse display

You are required to complete the highlighted fields before continuing



Making Changes to an Item Drawing

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Item Master`.**
   The `Work with Item` menu appears.
2. **Place a *D* in front of an Item number, and click on the OK button.**
   The `Work With Drawings` menu appears.
3. **Place a *2* in front of a Drawing number, and then click on the OK button.**
   The `Edit Drawing Details` display appears.
4. **Make changes to the appropriate fields.**
5. **Click on the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
6. **Click on the OK button to confirm.**
   You are returned to the `Work With Drawing` menu. The changes are listed.
7. **Click on the Exit button.**
   You are returned to the `Work With Item` menu.
8. **Click on the Exit button to return to the `Inventory Control Setup` menu.**

Copying an Item Drawing

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Item Master`.**
   The `Work with Item` menu appears.
2. **Place a *D* in front of an Item number, and click on the OK button.**
   The `Work With Drawing`s menu appears.
3. **Place a *3* in front of a Drawing number, and then click on the OK button.**
   The Copy Drawing display appears.
4. **Make the appropriate changes to the fields.**
5. **Click on the OK button to continue**
   The confirm prompt appears to the lower right of the screen.
6. **Click on the OK button to confirm.**
   You are returned to the `Work with Drawings` menu.
7. **Click on the Exit button**
   You are returned to the `Work With Item` menu.
8. **Click on the Exit button to return to the `Inventory Control Setup` menu**

Deleting an Item Drawing

Instructions

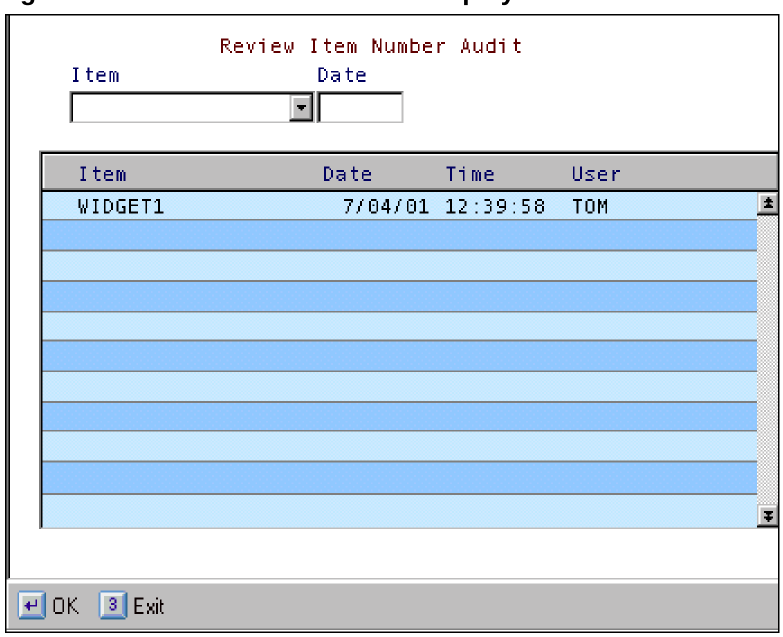
1. **Starting from the `Inventory Setup` menu, double click on `Work with Item Master`.**
   The `Work with Item` menu appears.
2. **Place a *D* in front of an Item number, and click on the OK button.**
   The `Work With Drawings` menu is displayed.
3. **Place a *4* in front of a Drawing number, and then click on the OK button.**
   The `Delete Drawings` display appears.
4. **Click on the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
5. **Click on the OK button to confirm the deletion.**
   You are returned to the `Work With Drawings` menu. The drawing you deleted has been removed from the menu.
6. **Click on the Exit button.**
   You are returned to the `Work With Item` menu.
7. **Click on the Exit button to return to the `Inventory Control Setup` menu.**

Viewing The History of an Item

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Item Master`.**
   The `Work with Item` menu appears.
2. **Place an *H* in front of an Item number, and click on the OK button.**
   The `Review Item Number Audit` panel appears. *See Figure 3-11: Review Item Number display below.*
3. **Click on the Exit button.**
   You are returned to the `Work With Item` menu.
4. **Click on the Exit button to return to the `Inventory Control Setup` menu.**

Figure 3-11: Review Item Number display



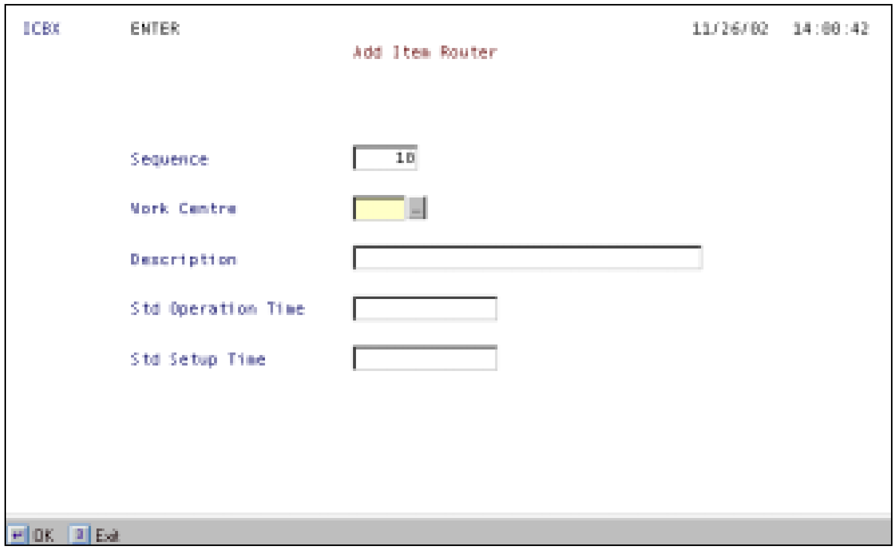
Adding an Item Router

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Item Master`.**
   The `Work with Item` menu appears.
2. **Place an *R* in front of an Item number, and click on the OK button.**
   The `Work with Item Router` menu appears.
3. **Click on the Add button.**
   The `Add Item Router` display appears.
4. **Fill in the required fields.**
   See Figure 3-12: Add Item Router display on page 3-38.
5. **Click on the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
6. **Click on the OK button to confirm.**
   You are returned to the `Work with Item Router` menu. The new Item Router is displayed.
7. **Click on the Exit button.**
   You are returned to the `Work With Item` menu.
8. **Click on the Exit button to return to the `Inventory Control Setup` menu.**

Figure 3-12: Add Item Router display

You are required to fill in the `Work Centre` field before continuing



Making Changes Item Router Details

Instructions

1. **Starting from the `Inventory Setup Menu`, double click on `Work with Item Master`.**
   The `Work With Item` menu appears
2. **Place an *R* in front of an Item number, and then click on the OK button.**
   The Work with Item Router menu appears.
   See on page.
3. **Place a *2* in front of an Sequence number, and then click on the OK button.**
   The `Edit Item Router Details` display appears.
4. **Make changes to the appropriate fields.**
5. **Next, click on the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
6. **Click on the OK button to confirm.**
   You are returned to the `Work with Item Router` menu. Your changes have been recorded.
7. **Click on the Exit button.**
   You are returned to The `Work with Item` menu appears.
8. **Click on the Exit button to return to the `Inventory Control Setup` menu.**

Copying an Item Router

Instructions

1. **Starting from the `Inventory Setup` menu, Double click on `Work with Item Master`.**
   The `Work with Item Master` menu appears.
2. **Place your cursor in front of an Item number, key in an *R* and click on the OK button.**
   The `Work with Item Router` menu appears.
3. **Place your cursor in front of an Sequence number, key in a *3* and click on the OK button.**
   The `Copy Item Router` display appears.
4. **Make changes to the necessary fields.**
5. **Click on the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
6. **Click on the OK button to confirm.**
   You are returned to the `Work with Item Router` menu. The sequence number you copied is displayed.
7. **Click on the Exit button.**
   You are returned to the `Work With Item` menu.
8. **Click on the Exit button to return to the `Inventory Setup` menu.**

Deleting an Item Router

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Item Master`.**
   The `Work with Item` menu is appears.
2. **Place an R in front of an Item number, and the click on the OK button.**
   The `Work with Item Router` menu is appears.
   See on page.
3. **Place a *4* in front of a Sequence number and then click on the OK button.**
   The `Delete Item Router` display appears.
4. **Click on the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
5. **Click on the OK button to confirm the deletion.**
   You are returned to the `Work with Item Router` menu.
   The sequence number is displayed as `***DELETED***`
6. **Click the Exit button.**
   You are returned to the `Work With Item` menu.
7. **Click on the Exit button to return to the `Inventory Control Setup` menu**

Displaying Item Usage

Instructions

1. **Starting from the `Inventory Control Setup` menu, double click on `Work with Item Master`.**
   The `Work with Item` menu appears.
2. **Place a *U* in front of an Item number, and then click the OK button.**
   The `Work with Item Usage` menu is displayed.
3. **Click on the Exit button.**
   You are returned to the `Work With Item` menu.
4. **Click on the Exit button to return to the `Inventory Control Setup` menu.**

Working with Unit of Measure

Objectives

The objective of this section is to show step-by-step instructions on how to setup Units of Measure. The Unit of Measure determines the amount or quantity adopted as a standard of measurement for other amounts or quantities of the same kind.

After reading this section, you will have a better understanding about:

- Creating unit of measure codes
- Editing unit of measure codes
- Working with unit of measure details

Creating Unit of Measure Codes

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Unit of Measure`.**
   The `Work with Unit of Measure` menu appears.
2. **Click on the Add button.**
   The `Add Unit of Measure Key` display appears.
3. **Fill in the Unit of Measure field with a new key.**
   Note: This key can be up to 4 characters long.
4. **Click on the OK button.**
   A description field appears in the same display.
5. **Fill in an appropriate description for the new key and then click on the OK button**
   The confirm prompt appears to the lower right of the screen.
6. **Click on the Exit button to confirm.**
   You are returned to the `Work with Unit of Measure` menu. The new Unit of Measure is displayed.

7. **Click on the Exit button to return to the `Inventory Control Setup` menu.**

Making Changes to Unit of Measure

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Unit of Measure`.**
   The `Work with Unit of Measure` menu appears.
2. **Place a *2* in front of a UOM, and then click on the OK button.**
   The `Edit Unit of Measure Details` display appears.
3. **Make the necessary changes to the description field and then click on the OK button.**
   The confirm prompt appears on the lower right of the screen.
4. **Click on the OK button to confirm.**
   You returned to the `Work with Unit Measure` menu. The UOM is displayed with the new description.
5. **Click on the Exit button to return to the `Inventory Control Setup` menu.**

Adding Details to a Unit of Measure

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Unit of Measure`.**
   The `Work with Unit of Measure` menu appears.
2. **Place an *8* in front of a UOM, then click on the OK button.**
   The `Work with Conversions` menu appears.
3. **Click on the Add button.**
   The Add Conversion Factor Key display appears.
4. **Fill in the Sequence field.**
5. **Click on the OK button to continue.**
   Two new fields appear on the same display.
6. **Fill in UOM and Factor fields.**
7. **Click on the OK button to continue**
   The confirm prompt appears to the lower right of the screen.
8. **Click on the OK button to confirm.**
   You are returned to the `Work with Conversions` menu.
9. **Click the Exit button.**
   You are returned to the `Work with Unit of Measure` menu.
10. **Click the Exit button to return to the `Inventory Control Setup` menu.**

Making Changes to Unit of Measure Details

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Unit of Measure`.**
   The `Work with Unit of Measure` menu appears.
2. **Place an 8 in front of a UOM, and then click on the OK button.**
   The Work with Conversions menu is displayed.
3. **Place a *2* in front of ???, and then click on the OK button.**
   The `Edit Conversion` display appears.
4. **Make the necessary changes and then click on the OK button.**
   The confirm prompt appears to the lower right of the screen.
5. **Click on the OK button to confirm.**
   You are returned to the `Work with Conversions` menu.
6. **Click on the Exit button.**
   You are returned to the `Work With Unit of Measure` menu.
7. **Click on the Exit button to return to the `Inventory Setup` menu.**

Deleting Unit of Measure Details

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Unit of Measure`.**
   The `Work with Unit of Measure` menu appears.
2. **Place an *8* in front of ???, and then click on the OK button.**
   The `Work with Conversions` menu appears.
3. **Place a *4* in front of ??, and then click on the OK button.**
   The `Delete Conversion` display appears.
4. **Click on the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
5. **Click on the OK button to confirm the deletion.**
   You are returned to the `Work with Conversions` menu.
6. **Click on the Exit button.**
   You are returned to the `Work with Unit of Measure` menu.
7. **Click on the Exit button to return to the `Inventory Setup` menu.**

Working with Warehouses Types

Objectives

The objective of this section is to show step-by-step instructions on how to setup your individual warehouse types.

After reading this section, you will have a better understanding about:

- Creating warehouse types
- Editing and deleting warehouse types
- Working with inventory stocking levels for warehouse types
- Working with asset stocking levels for warehouse types

Adding New Warehouse Types

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Warehouse Min/Max`.**
   The `Work with Warehouse Type` menu appears.
2. **Click on the Add button.**
   The `Add Warehouse Type` display appears.
3. **Fill in the `Warehouse Type` field with a new code.**
   Note: This code can be up to 6 characters long.
4. **Next, give the new Warehouse Type a description and then click on the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
5. **Click on the OK button to confirm.**
   You are returned to the `Work with Warehouse Type` menu. The new Warehouse Type is displayed.

Editing Warehouse Types

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Warehouse Min/Max`.**
   The `Work with Warehouse Type` menu appears.
2. **Place a *2* in front of the Warehouse Type you want to edit and then click the OK button.**
   The `Edit IC Warehouse Type` display appears.
3. **Make your changes and then click the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
4. **Click on the OK button to confirm.**
   You are returned to the `Work with Warehouse Type` menu. The changes you made are displayed.

Adding Asset Stocking Levels to Warehouse Types

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Warehouse Min/Max`.**
   The `Work with Warehouse Type` menu appears.
2. **Place an *A* in front of the Warehouse Type you are working with and then click the OK button.**
   The `Work With FA Stocking Level` menu appears.
3. **Click the Add Stocking Level button.**
   The `Add FA Stocking Level` panel appears.
4. **Fill in the fields**.
   You are required to fill in all the fields before continuing.
5. **Click the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
6. **Click on the OK button to confirm.**
   You are returned to the `Work With FA Stocking Level` menu. The asset stocking level you added is displayed.

Editing Asset Stocking Levels on Warehouse Types

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Warehouse Min/Max`.**
   The `Work with Warehouse Type` menu appears.
2. **Place an *A* in front of the Warehouse Type you are working with and then click the OK button.**
   The `Work With FA Stocking Level` menu appears.
3. **Place a 2 in front of the Asset Stocking Level you want to edit and then click on the OK button.**
   The `Edit FA Stocking Level` panel appears.
4. **Make your changes and then click the OK button to continue**.
   The confirm prompt appears to the lower right of the screen.
5. **Click on the OK button to confirm.**
   You are returned to the `Work With FA Stocking Level` menu. The changes you made are displayed.

Deleting Asset Stocking Levels from Warehouse Types

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Warehouse Min/Max`.**
   The `Work with Warehouse Type` menu appears.
2. **Place an *A* in front of the Warehouse Type you are working with and then click the OK button.**
   The `Work With FA Stocking Level` menu appears.
3. **Place a *4* in front of the Asset Stocking Level you want to delete and then click on the OK button.**
   The `Delete FA Stocking Level` panel appears.
4. **Click the OK button to continue**.
   The confirm prompt appears to the lower right of the screen.
5. **Click on the OK button to confirm.**
   You are returned to the `Work With FA Stocking Level` menu. The Stocking Level you deleted has been removed from the list.

Adding Inventory Stocking Levels to Warehouse Types

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Warehouse Min/Max`.**
   The `Work with Warehouse Type` menu appears.
2. **Place a *P* in front of the Warehouse Type you are working with, and then click the OK button.**
   The `Work With IC Stocking Level` menu appears.
3. **Click the Add button.**
   The `Add IC Stocking Level` panel appears.
4. **Fill in the fields**.
5. **Click the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
6. **Click on the OK button to confirm.**
   You are returned to the `Work With IC Stocking Level` menu. The item stocking level you added is displayed.

Editing Inventory Stocking Levels on Warehouse Types

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Warehouse Min/Max`.**
   The `Work with Warehouse Type` menu appears.
2. **Place a *P* in front of the Warehouse Type you are working with, and then click the OK button.**
   The `Work With IC Stocking Level` menu appears.
3. **Place a 2 in front of the Item you want to edit and then click on the OK button.**
   The `Edit IC Stocking Level` panel appears.
4. **Make your changes and then click the OK button to continue**.
   The confirm prompt appears to the lower right of the screen.
5. **Click on the OK button to confirm.**
   You are returned to the `Work With IC Stocking Level` menu. The changes you made are displayed.

Deleting Inventory Stocking Levels from Warehouse Types

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Warehouse Min/Max`.**
   The `Work with Warehouse Type` menu appears.
2. **Place a *P* in front of the Warehouse Type you are working with and then click the OK button.**
   The `Work With IC Stocking Level` menu appears.
3. **Place a *4* in front of the Item you want to delete and then click on the OK button.**
   The `Delete IC Stocking Level` panel appears.
4. **Click the OK button to continue**.
   The confirm prompt appears to the lower right of the screen.
5. **Click on the OK button to confirm.**
   You are returned to the `Work With IC Stocking Level` menu. The Stocking Level you deleted has been removed from the list.

Deleting Warehouse Types

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Warehouse Min/Max`.**
   The `Work with Warehouse Type` menu appears.
2. **Place a *4* in front of the Warehouse Type you want to remove and then click the OK button.**
   The `Delete IC Warehouse Type` display appears.
3. **Click the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
4. **Click on the OK button to confirm.**
   You are returned to the `Work with Warehouse Type` menu. The Warehouse Type you deleted has been removed from the list.

Working with Warehouse Master

Objectives

The objective of this section is to show step-by-step instructions on how to setup your company's individual warehouses.

After reading this section, you will have a better understanding about:

- Adding a warehouse to the master list
- Adding warehouse locations
- Working with output queues
- Adding items to a warehouse

Adding a Warehouse to the Master list

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Warehouse Master`**
   The `Work with Warehouse` menu appears.
2. **Click on the Add button.**
   The `Add Warehouse Master Key` display appears.
3. **Fill in the Warehouse field with a new code.**
4. **Click the OK button to continue.**
   Three new fields appears on the same display,
5. **Fill in the Account Number, Description and Warehouse Type fields.**
   For a description of these fields see on page.
6. **Click the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.

7. **Click on the OK button to confirm.**
   You are returned to the `Work with Warehouse` menu.
8. **Click on the Exit button to return to the `Inventory Setup` menu**

Editing the Warehouse Master

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Warehouse Master`.**
   The `Work with Warehouse Master` menu appears.
2. **Place a *2* in front of a Warehouse number, and then on the OK button.**
   The `Edit Warehouse Master` display appears,
3. **Make changes to the necessary fields and then click on then OK button.**
   The confirm prompt appears to the lower right of the screen.
4. **Click on the OK button to confirm.**
   You are returned to the `Work with Warehouse` menu.
5. **Click on the Exit button to return to the `Inventory Setup` menu.**

Adding a Location to a Warehouse

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Warehouse Master`.**
   The `Work with Warehouse Master` menu appears.
2. **Place a *5* in front of a Warehouse number, and then click on the OK button.**
   The `Work with Location` menu appears.
3. **Click on the Add button**
   The `Add Location Master Key` display appears.
4. **Fill in the Location field with a new key.**
   For a description of this field see on page.
5. **Click the OK button to continue.**
   Two new fields appear on the same display.
6. **Fill in the Location and Description fields.**
   For a description of these fields see on page.
7. **Click the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
8. **Click on the OK button to confirm.**
   You are returned to the `Work with Location` menu. The new location has been displayed.
9. **Click on the Exit button.**
   You are returned to the `Work with Warehouse Master` menu.
10. **Click on the Exit button to return to the Inventory Setup menu.**

Editing Warehouse Locations

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Warehouse Master`.**
   The `Work with Warehouse` menu appears.
2. **Place a *5* in front of a Warehouse, and then click on the OK button.**
   The `Work with Location` menu appears.
3. **Place a *2* in front of a Warehouse location, and then click on the OK button.**
   The Edit Location Master Detail display appears.
4. **Make the necessary changes and then click on the OK button.**
   The confirm prompt appears to the lower right of the screen.
5. **Click on the OK button to confirm.**
   You are returned to the `Work with Location` menu. Your changes have been recorded.

Set Output Queue for a Warehouse

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Warehouse Master`.**
   The `Work with Warehouse` menu appears.
2. **Place an *8* in front of a Warehouse, and then click on the OK button.**
   The `Edit Output Queue` panel appears.
3. **Click on the drop box next to the Output Queue field.**
   The `Select ZZ Output Queue` panel appears.
4. **Double click the queue you want to use.**
   You are returned to the Edit Output Queue panel. The Output Queue field has been filled in with the selection.

   Note: If the Queue you want is not listed you can add it from this panel. For complete instructions on how to add an Output Queue see Adding an Output Queue on page 3-65.
5. **Click on the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
6. **Click on the OK button to confirm.**
   You are returned to the `Work with Warehouse` display. The Output Queue for the selected warehouse has been set.

Adding an Output Queue

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Warehouse Master`.**
   The `Work with Warehouse` menu appears.
2. **Place an *8* in front of a Warehouse, and then click on the OK button.**
   The `Edit Output Queue` panel appears.
3. **Click on the drop box next to the Output Queue field.**
   The `Select ZZ Output Queue` panel appears.
4. **Click on the Add button.**
   The Add Output Queue panel appears.
5. **In the Output Queue field key in the new queue. You will need to give it a description.**
   Note: Before you add a new output queue the 400 must be made aware of it. See your system administrator.
6. **Click on the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
7. **Click on the OK button to confirm.**
   You are returned to the Select ZZ Output Queue. The new queue is listed.

Adding Items to a Warehouse

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Warehouse Master`.**
   The `Work with Warehouse` menu appears.
2. **Place a *P* in front of a Warehouse, and then click on the OK button.**
   The `Work with Warehouse Item` menu appears. All the items for this warehouse are displayed.
3. **Click on the Add button**
   The `Select Item` panel appears.
4. **Select the item you want to add, and then double click on it.**
   The `Add Warehouse Item` panel appears.
5. **Fill in the required fields and then click on the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
6. **Click on the OK button to confirm.**
   You are returned to `the Work with Warehouse Item` display. The item has been added to the warehouse.
7. **Click the button to return to the `Work with Warehouse` menu.**

Setting Item Class

Objective

The objective of this section is to show step-by-step instructions on how to create and maintain your company's items classes.

After reading this section, you will have a better understanding about:

- Adding an item class
- Editing an item class

Adding an Item Class

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Class`.**
   The `Work with Class` menu appears.
2. **Click on the Add button**
   The `Add Item Class KEY` display appears.
3. **Fill in the `Item Class` field with a new code.**
   Note: This key can be up to 4 characters long.
4. **Click the OK button to continue.**
   The `Add Item Class` display appears.

   Note: You are required to fill in the `description` field before continuing. The `Internal Commodity` field is optional.
5. **Fill in the description field with a meaningful description, and then click on the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
6. **Click the OK button to confirm.**
   You are returned to `the Work with Class` menu. The item class has been added to the list.

Editing an Item Class

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Class`.**
   The `Work with Class` menu appears.
2. **Place a *2* in front of the Class you want to edit, and then click on the OK button.**
   The `Edit Item Class KEY` display appears.
3. **Make the desired changes, and then click OK button.**
   The confirm prompt appears to the lower right of the screen.
4. **Click the OK button to confirm.**
   You are returned to `the Work with Class` menu. The changes to the Class are displayed.

Setting up Commodity Codes

Objectives

The objective of this section is to show step-by-step instructions on how to create and maintain your inventory commodity codes.

After reading this section, you will have a better understanding about:

- Adding commodity codes
- Editing commodity codes

Adding a Commodity Code

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Commodity`.**
   The `Work with Commodity` menu appears.
2. **Click on the Add button.**
   The `Add IC Commodity` display appears.
3. **In the `Commodity` field key in the Commodity Code. In the `Description` field key in a description of the commodity.**
4. **Click on the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
5. **Click the OK button to confirm.**
   You are returned to the `Work with Commodity` menu. The commodity you added is displayed.

Editing a Commodity

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Commodity`.**
   The `Work with Commodity` menu appears.
2. **Place a 2 in front of a Commodity Code, and then click on the OK button.**
   The `Edit Commodity Details` display appears.
3. **Make the appropriate changes.**
4. **Click on the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
5. **Click the OK button to confirm.**
   You are returned to the `Work with Commodity` menu. The changes you made are displayed.

Setting up Transaction Types

Objectives

The objective of this section is to show step-by-step instructions on how to create and maintain inventory Transaction Types.

After reading this section, you will have a better understanding about:

- Adding a new transaction type
- Editing a transaction type
- Removing a transaction type

Adding Transactions Types

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Transaction Type`.**
   The `Work with Transaction Type` menu appears.
2. **Click on the Add button.**
   The `Add Transaction Key` display appears.
3. **Fill in the `Transaction` field with a new code.**
   Note: This key can be up to 6 characters long
4. **Click on the OK button to continue.**
   The `Add Transaction Details` display appears. You are required to fill in both fields.
5. **In the description field, key in a meaningful description. Next, click on the prompt box to the right of the Transaction Type field.**
   A new panel appears giving you two options to choose from.

6. **Select the transaction type by clicking on it.**
   You are returned to the `Add Transaction Details` display. The Transaction Type field is filled in.
7. **Click on the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
8. **Click on the OK button to confirm.**
   You are returned to the `Add Transaction Key` display.
9. **Click the Exit button.**
   You are returned to the `Work with Transaction` menu. The new Transaction is displayed.

Editing Transactions Types

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Transaction Type`.**
   The `Work with Transaction Type` menu appears.
2. **Place a *2* in front of the Transaction Type you want to edit, and then click on the OK button.**
   The `Edit Transaction Key` display appears.
3. **Make the desired changes, and then click OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
4. **Click on the OK button to confirm.**
   You are returned to the `Work with Transaction` menu. The changes you made are displayed.

Deleting Transactions Types

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Transaction Type`.**
   The `Work with Transaction Type` menu appears.
2. **Place a *4* in front of the Transaction Type you want to delete, and then click on the OK button.**
   The `Delete Transaction` display appears.
3. **Click the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
4. **Click the OK button to confirm.**
   You are returned to the `Work with Transaction` menu. The Transaction Type you deleted has been removed from the list.

Setting Up Preference Codes

Objectives

The objective of this section is to show step-by-step instructions on how to create and maintain the inventory Preference Codes.

After reading this section, you will have a better understanding about:

- Adding preference codes
- Editing preference codes
- Removing preference codes

Adding Preference Codes

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Preference`.**
   The `Work with Preference Codes` menu appears.
2. **Click on the Add button.**
   The `Add Engineering Preference Key` display appears.
3. **Fill in the `Preference` field with a new code.**
   Note: This key can be up to 4 characters long
4. **Click on the OK button to continue.**
   The `Add Preference Details` display appears. You are required to fill in a description before continuing.
5. **In the description field, key in a meaningful description. Next, click on the OK button.**
   The confirm prompt appears to the lower right of the screen.

6. **Click on the OK button to confirm.**
   You are returned to the `Work with Preference Codes` menu. The new Preference Code is displayed.

Editing Preference Codes

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Preference`.**
   The `Work with Preference Codes` menu appears.
2. **Place a *2* in front of the Preference Code you want to edit, and then click on the OK button.**
   The `Edit Engineering Preference` display appears.
3. **Make the desired changes, and then click OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
4. **Click on the OK button to confirm.**
   You are returned to the `Work with Preference Codes` menu. The changes you made are displayed.

Deleting Preference Codes

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Preferences`.**
   The `Work with Preference Codes` menu appears.
2. **Place a *4* in front of the Preference Code you want to delete, and then click on the OK button.**
   The `Delete preference` display appears.
3. **Click the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
4. **Click the OK button to confirm.**
   You are returned to the `Work with Preference Codes` menu. The Preference Code you deleted has been removed from the list.

Setting Up Location Types

Objectives

The objective of this section is to show step-by-step instructions on how to create and maintain warehouse location types.

After reading this section, you will have a better understanding about:

- Adding location types
- Editing location types
- Removing location types

Adding Location Types

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Location`.**
   The `Work with Location Types` menu appears.
2. **Click on the Add button.**
   The `Add Location Type Key` display appears.
3. **Fill in the `Location Type` field with a new code.**
   Note: This key can be up to 4 characters long
4. **Click on the OK button to continue.**
   The `Add Location Type` display appears. You are required to fill in a description before continuing.
5. **In the description field, key in a meaningful description. Next, click on the OK button.**
   The confirm prompt appears to the lower right of the screen.
6. **Click on the OK button to confirm.**
   You are returned to the `Work with Location Type` menu. The new Location Type is displayed.

Editing Location Types

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Location`.**
   The `Work with Location Type` menu appears.
2. **Place a *2* in front of the Location Type you want to edit, and then click on the OK button.**
   The `Edit Location Type` display appears.
3. **Make the desired changes, and then click OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
4. **Click on the OK button to confirm.**
   You are returned to the `Work with Location Type` menu. The changes you made are displayed.

Deleting Location Types

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Location`.**
   The `Work with Location Type` menu appears.
2. **Place a *4* in front of the Location Type you want to delete, and then click on the OK button.**
   The Location Type has been removed from the list.

Setting Up Attribute Codes

Objectives

The objective of this section is to show step-by-step instructions on how to create and maintain inventory attribute codes.

After reading this section, you will have a better understanding about:

- Adding attribute codes
- Editing attribute codes
- Removing attribute codes

Adding Item Attribute Codes

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Item Attributes`.**
   The `Work with Item Attributes` menu appears.
2. **Click on the Add button.**
   The `Add Attributes Code Key` display appears.
3. **Fill in the `Attribute` field with a new code.**
   Note: This key can be up to 6 characters long.
4. **Click on the OK button to continue.**
   The `Add Attribute` display appears. You are required to fill in both fields.
5. **In the description field, key in a meaningful description. Next, click on the prompt box to the right of the Attribute Type field.**
   A new panel appears giving you two options to choose from.
6. **Select the attribute type by clicking on it.**
   You are returned to the `Add Attribute` display. The Attribute Type field is filled in.

7. **Click on the ↵ OK button to continue.**
   The confirm prompt appears to the lower right of the screen.

8. **Click on the ↵ OK button to confirm.**
   You are returned to the `Work with Item Attributes` menu. The new Attribute is displayed.

Editing Item Attribute Codes

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Attributes.`**
   The `Work With Item Attributes` menu appears.
2. **Place a *2* in front of the Attribute you want to edit, and then click on the OK button.**
   The `Edit Item Attribute` display appears.
3. **Make the desired changes, and then click OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
4. **Click on the OK button to confirm.**
   You are returned to the `Work With Item Attributes` menu. The changes you made are displayed.

Deleting Item Attribute Codes

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Attributes`.**
   The `Work with Item Attributes` menu appears.
2. **Place a *4* in front of the Location Type you want to delete, and then click on the OK button.**
   You will see ***DELETED*** in place of the Attribute you removed.

Setting Up Work Centres

Objectives

The objective of this section is to show step-by-step instructions on how to create and maintain company Work Centres.

After reading this section, you will have a better understanding about:

- Adding new work centres
- Editing an work centre details
- Using copy option to create new work centres
- Removing a work centre

Adding Work Centres

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Work Centre`.**
   The `Work with Work Centre` menu appears.
2. **Click on the Add button.**
   The `Add Work Centre` display appears.
3. **Fill in the `fields`.**
   You are required to fill in the `Work Centre` and `Description` fields before continuing.
4. **In the Work Centre field key in a new code.**
   Note: This key can be up to 6 characters long.
5. **Next, fill in the description field with a meaningful description of the Work Centre.**
6. **Click on the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.

7. **Click on the OK button to confirm.**
   You are returned to the `Work with Work Centre` menu. The new Work Centre is displayed.

Editing Work Centres

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Work Centres.`**
   The `Work With Work Centre` menu appears.
2. **Place a *2* in front of the Work Centre you want to edit, and then click on the OK button.**
   The `Edit Work Centre Details` display appears.
3. **Make the desired changes, and then click OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
4. **Click on the OK button to confirm.**
   You are returned to the `Work With Work Centre` menu. The changes you made are displayed.

Using the Copy Option to Create New Work Centres

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Work Centres.`**
   The `Work With Work Centre` menu appears.
2. **Place a *3* in front of the Work Centre you want to copy, and then click on the OK button.**
   The `Copy Work Centre` display appears.
3. **Make the appropriate changes, and then click OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
4. **Click on the OK button to confirm.**
   You are returned to the `Work With Work Centre` menu. The new Work Center is displayed.

Deleting Work Centres

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Work Centres`.**
   The `Work with Work Centre` menu appears.
2. **Place a *4* in front of the Work Centre you want to delete, and then click on the OK button.**
   The `Delete Work Centre` display appears.
3. **Click the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
4. **Click the OK button to confirm.**
   You are returned to the `Work with Work Centre` menu.
   Note: You will see ***DELETED*** in place of the Work Centre you removed.

Working with Order Status Codes

Objectives

The objective of this section is to show step-by-step instructions on how to create and maintain item order status.

After reading this section, you will have a better understanding about:

- Creating an order status code
- Editing work order codes
- Removing work order codes

Adding Work Order Status

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Order Status`.**
   The `Work with Order Status` menu appears.
2. **Click on the Add button.**
   The `Add Work Order Status` panel appears.
3. **Fill in the `fields`.**
   You are required to fill in the all the fields before continuing.
4. **In the Order Status field key in a new code.**
   Note: This key can be up to 6 characters long.
5. **Fill in the description field with a meaningful description of the Work Order.**
6. **Next you need to click on the prompt boxes to the right of the remaining fields**
   A new panel will appear each time giving you the option of `Yes` or `No`.

7. **Make your selection by clicking on it.**
   Each time the panel will disappear and the fields will be filled in.

8. **Once all the fields have been filled in, click on the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.

9. **Click on the OK button to confirm.**
   You are returned to the `Work with Order Status` menu. The new Work Order Status is displayed.

Editing Work Order Status

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Order Status.`**
   The `Work With Order Status` menu appears.
2. **Place a *2* in front of the Status you want to edit, and then click on the OK button.**
   The `Edit Work Order Status` display appears.
3. **Make the desired changes, and then click OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
4. **Click on the OK button to confirm.**
   You are returned to the `Work With Order Status` menu. The changes you made are displayed.

Deleting Work Order Status

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with Order Status`.**
   The `Work with Order Status` menu appears.
2. **Place a *4* in front of the Status you want to delete, and then click on the OK button.**
   The `Delete Work Order Status` display appears.
3. **Click the OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
4. **Click the OK button to confirm.**
   You are returned to the Work with Order Status menu. **Note:** You will see ***DELETED*** in place of the Status you removed.

Editing IC Company

Objectives

The objective of this section is to show step-by-step instructions on how to make changes to the Inventory Control Company

Instructions

1. **Starting from the `Inventory Setup` menu, double click on `Work with IC Company.`**
   The `Work With IC Company` menu appears.
2. **Place a *2* in front of the Company you want to edit, and then click on the OK button.**
   The `Edit Company` display appears.
3. **Make the desired changes, and then click OK button to continue.**
   The confirm prompt appears to the lower right of the screen.
4. **Click on the OK button to confirm.**
   You are returned to the `Work With IC Company` menu.
   The changes you made have been recorded.

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