

## Overview

A requirement of any inventory system is that all items being tracked need to have a unique code to identify each item that is being tracked by the inventory system. The more parts that you have, the more important that your part numbering scheme is.

Developing a part numbering system should be well planned. Many companies have gone through the process of developing an item numbering system many times before they finally settle on one. There is no absolute right or wrong way for everyone. Just the way that works best for you based on your requirements. I am going to try and provide you with some of the considerations that I have seen and make some recommendations.

## Who will be using the part numbers for your company?

- Purchasing person for orders and returns
- They usually prefer vendor part numbers (*Alias Parts*)
- Inventory person for restocking and counting parts
  - They often prefer part numbers that are grouped by part type
  - They sometimes prefer the part number to reference a warehouse row and bin number for easily locating the parts in the warehouse.
- Field technicians for invoicing
  - They want something logical and easy to lookup.
  - They often prefer part numbers that are grouped by part type
- Office staff for billing
  - They want something logical and easy to lookup.
  - They often prefer part numbers that are grouped by part type
- If your goal is to track inventory quantities, then every one of the operators must use your assigned part numbers. If any of the operators in the processing cycle does not use the part numbers, then you will not be able to accurately track your inventory quantities.

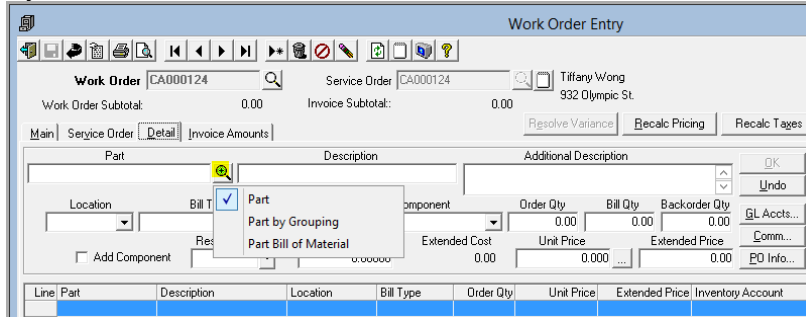
## What are your requirements

- Do you want to be tracking inventory quantities?
- Do you issue detailed purchase orders?
- Do you get similar parts from multiple vendors?
  - Will you have multiple of what you consider the same part, which could be from various manufacturers?
- Will your operators be manually typing or keying in these part numbers in some instances?
- Will you be using Ascente Mobile Pro tablets to select parts from?
- Do you purchase from multiple vendors?
- Will you be purchasing in detail or just by a total purchase amount?
- Do you track costs on your service or job cost jobs?
- Do you transfer parts to jobs in detail by part number and quantities or just by a total cost?

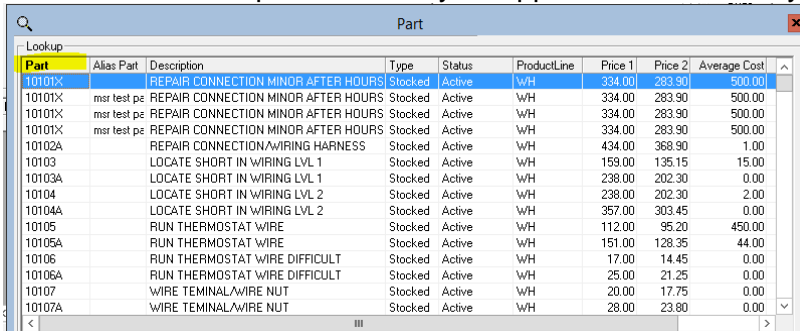
## Looking Up Parts in Ascente

These various ways of looking up part numbers may be a factor in determining how you will be assigning your part numbers.

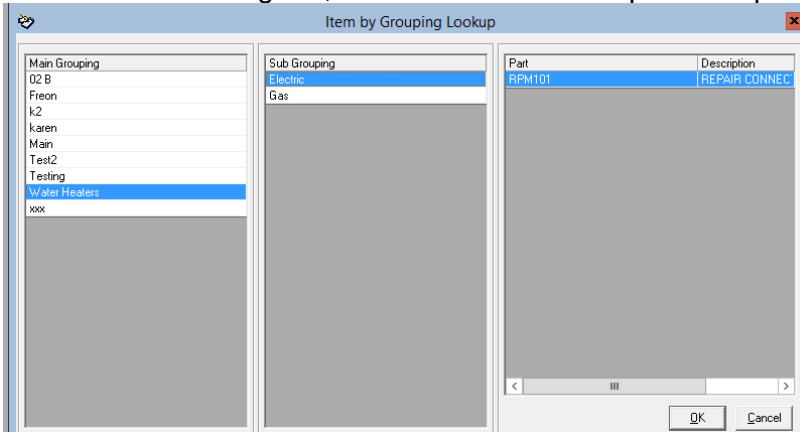
- Part numbers can be searched for using the part number or part description and ‘%’ wildcard searches are available.
- There are three available parts lookup methods in Ascente:
  - By Part Number
  - By Part Grouping (Three Tiered Lookup)
  - By Part Bill of Material - Flatrate Tasks



- How are parts sorted in the lookups:
  - By Part Number
    - These are sorted alphanumerically as opposed to numerically.



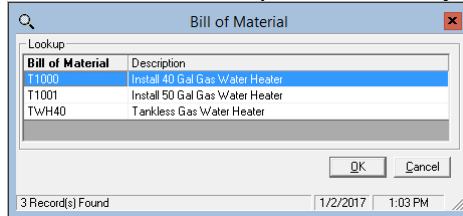
- By Part Grouping
  - You determine how these are sorted when you setup the Part Grouping Records. This method works great, but there is some setup time required.



## Ascente Inventory Control Part Numbering Considerations



- By Part Bill of Material
  - These are sorted alphanumerically as opposed to numerically.



### Quantity Tracking Considerations

You should *always* avoid creating multiple part numbers for the same part if your goal is to track quantities by part number. I have seen companies setup multiple parts for the same actual part. I have seen companies do this when a part can be provided by multiple vendors and they want to use the manufacturer's part number. This works well for ordering parts, but if all of these parts are not separated and just put in the same bin as the other common parts; no one will know for sure which of the actual part numbers was really used. The answer to this in Ascente is setting up only one part record and then adding 'Alias' part numbers to that one part for the vendor parts.

### Part Numbering Considerations

- Avoid Long Part Numbers where possible.
  - The longer the item number is the more likely it is that:
    - The purchase order could have the wrong item number entered
    - The technician will not enter the correct item number
    - The invoicing person will have a harder time reading the technicians writing and an incorrect item number could be entered.
  - Any of these issues will result in incorrect information being entered into the system and quantity tracking and costing being incorrect.
- Try to group common part numbers together for sorting purposes. This will make part lookups easier and quicker. If all of the copper parts started with 'CP', then when a lookup is done for 'CP' parts, all of the copper parts will be returned. IE: CP0001, CP0002, CP0003 ...
- Consider making all part numbers the same number of digits so that entering the part numbers will be easier. IE: CP0001, CP0002, CP0003 (*all six digit part numbers*).
- Using the Part Grouping (*Three Tier Lookup*) is the favorite method for easily accessing parts. You will have to do the initial setup for this.

### What parts do you have to add?

- You need to create a part record for:
  - Any part that you want to track quantities for
  - Any part that you want used as a Part Bill of Material / Flat Rate Task Part
  - Any part that you want used as a component part for a Part Bill of Material / Flat Rate Task.
  - Any part to be used as a Jobsite – Component – Part List record.
    - Examples are filters, freon and belts. These are required for the Filter Requirements Report. Any auto-add parts
  - A 'Variance' part number that can be automatically added if the [Resolve Variance] button is used on the Work Order form.

Ascente  
Inventory Control  
Part Numbering Considerations



### What parts should you add?

- You should create a part record for:
  - Common parts that are often used, but not necessarily tracking quantities for. These would be flagged as a 'Service' parts. Examples of these are:
    - Trip Charges
    - Labor

Method	Considerations	Pros	Cons
Make the item code describe the item. An example being <b>'1/2 IN CPR 90'</b>	<ul style="list-style-type: none"> <li>• This becomes a problem as you keep adding items that are similar.</li> </ul>	<ul style="list-style-type: none"> <li>• Items are easy to understand</li> </ul>	<ul style="list-style-type: none"> <li>• Item are a different number of digits.</li> <li>• Becomes a problem adding items as the inventory grows</li> <li>• Possible data entry problems</li> </ul>
Manufacturer Item Number or Vendor Item Number. An example being <b>'SA12422212CA6'</b>	<ul style="list-style-type: none"> <li>• Will the techs use this item number?</li> </ul>	<ul style="list-style-type: none"> <li>• Item number is predetermined</li> <li>• The vendor will be familiar with the item number on purchase orders.</li> <li>• The item is described by the item number.</li> <li>• Your vendor or manufacturer may be able to provide you with pricing updates.</li> </ul>	<ul style="list-style-type: none"> <li>• The item number could be very long.</li> <li>• Data entry errors are more possible the longer the item number is.</li> <li>• You make some sacrifices when purchase an item numbering system because they are never exactly what you want.</li> </ul>
Flatrate Service Part Numbers	<ul style="list-style-type: none"> <li>• Are the numbers logical and can your techs and data entry operators use these item numbers?</li> </ul>	<ul style="list-style-type: none"> <li>• Item number is predetermined</li> <li>• This is a faster way to get an item numbering system installed</li> </ul>	<ul style="list-style-type: none"> <li>• You are forced to use item codes determined by the flatrate service</li> <li>• Does the flatrate service have all the items you need?</li> <li>• The item number could be very long.</li> <li>• Data entry errors are more possible the longer the item number is.</li> <li>• Items are hard to understand</li> <li>• You make some sacrifices when purchase a flatrate item numbering system</li> <li>• Required bins to be labeled or price books be distributed</li> </ul>
Fixed Length - Numeric Item Numbers. An example being <b>1001234</b> and <b>1001235</b>	<ul style="list-style-type: none"> <li>• It is not obvious what the item actually is, but the data entry is easier because the length is fixed and the entry is all numeric.</li> </ul>	<ul style="list-style-type: none"> <li>• Data entry is easier because the length is fixed and it is all numeric</li> </ul>	<ul style="list-style-type: none"> <li>• Items are hard to understand</li> <li>• Required bins to be labeled or price books to be distributed</li> </ul>
Segmented, Fixed Length – Alphanumeric Item Numbers. An example being <b>COP1234</b> and <b>COP1235</b>	<ul style="list-style-type: none"> <li>• It is not obvious what the item actually is, but the data entry is easier because the length is fixed and the starting digits indicate what type of item it is. COP = Copper</li> </ul>	<ul style="list-style-type: none"> <li>• Data entry is easier because the length is fixed</li> <li>• Items are somewhat easier to understand than numeric item numbers because of the digits at the beginning</li> </ul>	<ul style="list-style-type: none"> <li>• Required bins to be labeled or price books to be distributed</li> </ul>

## Common Mistakes

- Inventory Database Integrity
  - Have one person that oversees how parts are entered and maintained. If everyone can add parts, the odds are that you are going to lose control of your inventory database.
  - Don't just use a vendors or manufacturers entire database of parts. When you have a huge database of parts, it will negatively impact your operations and lookups because of the large number of records. You should try to filter only the parts you stock.
  - Make sure that your '*Part Descriptions*' contain the keywords that you need for doing lookups.
  - I hope this is not going to be a shock to you, but there will always be parts that you will need that are not in your parts database. I say this because you do not need to setup a part number for a special order part that you do not stock. Some companies make the mistake of adding those parts into their parts database '*just in case*' they may need it some day in the future. Having unnecessary parts in your database makes operations a lot more difficult.
- Allowing multiple operators to input part numbers and not using a standard formatting of the part numbers or descriptions. This will ruin the integrity of your inventory database.
- Don't create duplicate part numbers! Always do a lookup before adding a new part number to be sure it does not already exist with a different part number. Setup '*Alias Parts*' if you purchase the same part from multiple vendors.