

Creating a Material

Overview:

When creating material records the user should never use the following characters within the Material Description field ~! @ # \$ % ^ & * () += \ " ' ? / > < The user must also ensure to select the appropriate tick boxes to match the material - the **Active** box is ticked automatically when creating the new material.

To Create a New Material

From the OPTO ribbon, select the 'Inventory' tab and **click** on the 'New/Edit Materials' icon to open the 'Material Details' window. **Click** in the **Material Code** field and enter a new code, **press <TAB>** to advance to the **Material Description** field and enter a description. Fill the **Date Entered** field and ensure the **Active** box has been ticked automatically. Enter your employee number in the **Emp No** field **press <F2>** and select the employee from the pop-up list then **click OK**. In the **Material Group** field **press <F2>** and select a group for the new material from the pop-up list and **click OK**.

For this example the material is purchased in a 50 litre drum, so in the field for **Multiple**, 50 has been entered (50 = 50 Litres = Drum). **Press <TAB>** until the cursor is in the **UoM 1** field and enter the correct Unit of Measure or **press <F2>** and select from the pop-up list and **click on OK**, repeat for **UoM 2**. **UoM 1** and **UoM 2** cannot be the same.

UoM 1 – The amount by which the material distributed.

UoM 2 – The capacity by which the material is purchased. (Used only for Purchase Orders).

Ensure that the **Pur UoM 2** box (1) is ticked as this will automatically enter the correct unit of measure when purchasing the material.

The screenshot shows the 'Material' window with the following details:

- Material Code:** ABC23
- Material Description:** 50 Litre Drum of Thinners
- Rev:** (empty)
- Date Entered:** 11/10/2010
- Details** tab is selected.
- Active:**
- Inventory Item:**
- Actual Purchase in Multiple:**
- Dummy:**
- Pre Order:**
- Emp:** 666
- Job:** J K
- Fill to Maximum:**
- Auto Order:**
- Job Group Qty in Multiple:**
- Web Site:**
- Material Group:** 10
- Bom T:** Multiple
- Length:** 6.0000
- Width:** 6
- Weight:** .000
- Surface:** .000
- Volume:** .000
- UoM 1:** MTR
- UoM 2:** LGT
- Thick:** .00
- Lead/T:** 1
- Supplier Code:** STATEWIDE_METAL_SUP, DIV_3
- Sup Mat Code:** ABC23
- Supplier Description:** 50 Litre Drum of Thinners
- Date Price:** 11/10/10, 04/09/13
- UoM 1 Price:** 3.0000, .0000
- UoM 2 Price:** 150.0000, .0000
- Ref. QPrf:** Yes Yes, No
- Sub Material Group:** 201 Aluminium
- Inventory:** On Hand: 443.0000, Bin Location: (empty), Used In: (empty), Allocated: .0000, Plan: .0000, Available: 443.0000
- Purchasing:** Min Order: .0000, Max Level: .0000, Safety Level: .0000, Reorder Level: .0000, Stock Type: (empty), On Order: .0000, To Order: .0000
- UoM Conversion Factor:** UoM2 > UoM1: 6.000000
- Margin:** .00, 4.50
- Sell Price:** 4.5000
- Account Details:** Purch Acc: 5-1200, Sales Acc: 4-1600, Asset Acc: 1-1600

Press <TAB> to advance to the **Supplier Code** field, and enter the supplier code or **press <F2>** and select the supplier from the pop-up list and **click on OK**. **Press <TAB>** to advance to the **UoM 2 Price** (2) field and enter the price for the Drum and **press <TAB>**, this will calculate the price per litre and the **UOM Conversion Factor** field (3). Fill the other fields as necessary and **press <F9>** to save.