



How to Use Existing Part as a Template When Adding a New Inventory Part

CFAWin includes a template feature when creating new parts inventory to reduce manual data entry. Templates are useful when adding the same part to multiple stockrooms or similar parts to the same stockroom.

To Use a Record as a Template:

1. In the **Inventory Table**, highlight the record to use as a template.
2. Click the **New** (white paper) icon.
3. Enter the **Stockroom** and **New Part#**, then click **OK**.
4. An Application Message appears asking, "USER, do you want to use Part#-Stockroom: #####-## as a template?"
5. Click Yes to proceed.
6. The new inventory record is created as an exact copy of the template.

The following information is copied to the new inventory record and must be edited by the user if different for the new part:

- Description
- Cross-Reference Numbers, including Manufacturers, Vendors, Order Lead Days
- Date Added
- Qty Type
- Replenishment, Warranty, Notes
- Turn
- Seasons
- Notes

The following information is not copied to the new inventory record:

- Last Unit Price (defaults to 0.00)
- Average Unit Price (defaults to 0.00)
- Date of Last Purchase (defaults to current system date)
- Costs and Qtys
- Backorder Qty/Vendor
- JPEGs

NOTE: The new record also **does not** update any Inventory Kits.