BILL of MATERIALS ENTRY/MAINTENANCE
STEP by STEP PROCEDURE

STEP 1: SETTING UP THE CONTROL FILES
The Control Files set the file space for Bill of Materials.

From the Profit Manager main menu,
Select System Control, BOM CONTROL MAINTENANCE.

```
BILL OF MATERIALS
1-MAXIMUM # OF LEVELS:17
2-MAX. # OF ASSEMBLY CHAIN RECS: 10
3-EXPLODE BLOCK LENGTH: 10
4-MAX. # OF ITEMS ON A BILL:  300
5-PRE-KIT ANALYSIS TO DISPLAY SOH:Y
6-ROUND UP BOM QTY:Y
7-LOW LEVEL CODE SUPPRESS?
```

1-Maximum # of Levels: Enter the maximum number of levels a bill of material can have.
Valid entries are 0 - 99.

2-Max. # of Assembly Chain Recs: Enter the maximum number of sub-assemblies a single-level bill of material can have.

3-Explode Block Length: This field is for PBSI programmers use only.

4-Max. # of Items on a Bill: Enter the maximum number of items a bill of material can have (the default is 300).

5-Pre-kit Analysis to Display SOH: Valid entries are Y or N. If Y is entered, stock-on-hand will appear on the Pre-kit Analysis Reports (does not include quantities allocated). If N is entered, the available stock appears on the Pre-kit Analysis Reports (includes allocated quantities).

6-Round Up BOM Qty: Valid entries are Y or N. If Y is entered, inventory will always round up to the next whole number (e.g.,: BOM quantity is 4.2, the inventory relieved will be 5). If N is entered, the system rounds normally (e.g.,: BOM quantity is 4.2, inventory relieved will be 4. If BOM quantity is 4.5, inventory relieved is 5).

STEP 2: BOM ENTRY/MAINTENANCE

From the Profit Manager main menu,
Select Bill of Materials, Bill of Material Entry/Maintenance.

```
                        BILL OF MATERIALS FILE MAINTENANCE                BOM100
PARENT                    DESC                                 UM         TYP
                                                             QUANTITY
 LN  COMPONENT NUMBER    DESCRIPTION                          OR COST  REFERENCE


 ENTER ASSEMBLY OPTION:                ENTER COMPONENT OPTION:    LINE#:
     A = ADD NEW ASSEMBLY                  A = ACTIVATE AN INACTIVE COMPONENT
     D = DELETE ENTIRE ASSEMBLY            C = CHANGE COMPONENT
     F = FIND ASSEMBLY                     D = DEACTIVATE AN ACTIVE COMPONENT
     R = REMOVE INACTIVE COMPONENTS        I = INSERT INACTIVE COMPONENTS
     C = CHANGE TYPE OF BILL               N = VIEW COMPONENTS(CR=NEXT OR LINE#)
     E = END -- RETURN TO BOM MENU         E = END COMPONENT PROCESSING
```

FIELD DEFINITIONS:

Enter Assembly Option: This is the item to produce or make.

A = Add New Assembly: Add a new parent item..
D = Delete Entire Assembly: Delete the entire Bill of Material.
F = Find Assembly: Find a Bill of Material.
R = Remove Inactive Components: Delete blank lines on the Bill of Material.
C = Change Type of Bill: Change type of bill. Valid entries are:
O = Option Bill of Material to activate Feature and Options.
R = Regular bill.
PH = Phantom (A phantom is an item that you assemble as a kit (e.g.,: garage door). All components are shipped together unassembled.
E = End -- Return to BOM menu.

The selections on the right deal only with the items needed to make the parent.

Enter Component Option: **Line#**

A = Activate an Inactive Component: Add a component.
C = Change Component: For item lines, change any field after the item description. For comment lines, change any field.
D = Deactivate an Active Component: Delete an item line within the BOM
I = Insert Inactive Components: Insert a blank line (type I to insert and when prompted, enter the number of component lines to add (lines are added after the last component line)). After inserting, enter A to activate an inactive component.
N = View Components(CR=next or Line#): If more than one page, enter N and press ENTER in the line # field or enter a line number.
E = End Component Processing: Exit the component section.

STEP 3: ADD A NEW BILL OF MATERIAL

```
                        BILL OF MATERIALS FILE MAINTENANCE                BOM100
PARENT ?                  DESC                                 UM         TYP
                                                             QUANTITY
 LN  COMPONENT NUMBER    DESCRIPTION                          OR COST  REFERENCE



 ENTER ASSEMBLY OPTION: A              ENTER COMPONENT OPTION:    LINE#:
     A = ADD NEW ASSEMBLY                  A = ACTIVATE AN INACTIVE COMPONENT
     D = DELETE ENTIRE ASSEMBLY            C = CHANGE COMPONENT
     F = FIND ASSEMBLY                     D = DEACTIVATE AN ACTIVE COMPONENT
     R = REMOVE INACTIVE COMPONENTS        I = INSERT INACTIVE COMPONENTS
     C = CHANGE TYPE OF BILL               N = VIEW COMPONENTS(CR=NEXT OR LINE#)
     E = END -- RETURN TO BOM MENU         E = END COMPONENT PROCESSING
ITEM NOT ON MASTER FILE, CREATE? Y
```

At the ENTER ASSEMBLY OPTION, enter A.
The cursor positions in the PARENT ? field. Enter the parent number (or press Enter for an inquiry of available items). If the entered item number does exist in the Inventory Item file, the system will prompt, ITEM NOT ON MASTER FILE, CREATE? Y. Press ENTER.

Because the item was not found on the Inventory Item Master File, the system displays the item file where you can input the information for the new item. Once the information is entered, the system will prompt ADD A WAREHOUSE RECORD Y/N: Y. Press ENTER.

Enter the Inventory Warehouse File information for the item. The system asks, ADD ANOTHER RECORDS? Enter Y if you do want to add additional warehouse records. Enter N if no other warehouse records need to be added. The system returns to the Inventory Item Master File screen. Press ENTER to return to the Bill of Materials menu.

```
                        BILL OF MATERIALS FILE MAINTENANCE                BOM100
PARENT TEST               DESC TEST PARENT ITEM                UM         TYP
SAME-AS (OR <CR>)?                                           QUANTITY
 LN  COMPONENT NUMBER    DESCRIPTION                          OR COST  REFERENCE



 ENTER ASSEMBLY OPTION: A              ENTER COMPONENT OPTION:    LINE#:
     A = ADD NEW ASSEMBLY                  A = ACTIVATE AN INACTIVE COMPONENT
     D = DELETE ENTIRE ASSEMBLY            C = CHANGE COMPONENT
     F = FIND ASSEMBLY                     D = DEACTIVATE AN ACTIVE COMPONENT
     R = REMOVE INACTIVE COMPONENTS        I = INSERT INACTIVE COMPONENTS
     C = CHANGE TYPE OF BILL               N = VIEW COMPONENTS(CR=NEXT OR LINE#)
     E = END -- RETURN TO BOM MENU         E = END COMPONENT PROCESSING
IF 'SAME-AS' IS TYPE 'O' BILL, PRODUCT CONFIGURATOR WILL BE INVOKED
```

SAME-AS (OR <CR>)?: The system is asking for an item number where a bill of material can be copied from. If you enter a parent number, and it has a bill of material, the bill will copy into the bill of material for the item you are adding. If you don't want to copy an existing bill, press the SPACE BAR and press ENTER.
Note: If the SAME-AS bill is a type O (Option Bill), the system will invoke the Product Configurator option.

```
                        BILL OF MATERIALS FILE MAINTENANCE                BOM100
PARENT TEST               DESC TEST PARENT ITEM                UM          TYP R
ENTER NUMBER OF COMPONENTS: 2                               QUANTITY
 LN  COMPONENT NUMBER    DESCRIPTION                          OR COST  REFERENCE
  1 ?


 ENTER ASSEMBLY OPTION:                ENTER COMPONENT OPTION: A    LINE#: 1
     A = ADD NEW ASSEMBLY                   A = ACTIVATE AN INACTIVE COMPONENT
     D = DELETE ENTIRE ASSEMBLY             C = CHANGE COMPONENT
     F = FIND ASSEMBLY                      D = DEACTIVATE AN ACTIVE COMPONENT
     R = REMOVE INACTIVE COMPONENTS         I = INSERT INACTIVE COMPONENTS
     C = CHANGE TYPE OF BILL                N = VIEW COMPONENTS(CR=NEXT OR LINE#)
     E = END -- RETURN TO BOM MENU          E = END COMPONENT PROCESSING
```

The system prompts ENTER NUMBER OF COMPONENTS. Enter the number of items to add to the bill. The cursor positions in the TYP (type) field. Valid entries are: R (regular), O (option), or PH (phantom). R is the default (press ENTER and R will appear).

The cursor positions at the ENTER COMPONENT OPTION field on the right-side of the screen. Enter A and a line number (the line number tells the system where to add the item on the bill). For a new bill, this is always line 1.

At the line number prompt, ?, enter an existing item number or press ENTER to inquire (you can add an item that doesn't exist, refer to adding an item to the Inventory Item Master File as described in step 2).

Once you have entered the item, the system displays the description and positions the cursor in the QUANTITY OR COST field. Enter a quantity (the quantity is: How many of these components do you need to make one parent item?) The system will prompt: COST DIVISOR..

COST is used only for comment lines (this provides the ability to add cost to the material without affecting the item cost in the Inventory Item Master File). To enter a comment line, enter C for the component number. Type the comment in the description field and leave the cost field blank. To add cost for a separate component, enter C for the component number, type the description, then enter a cost and a cost divisor.

```
 LN  COMPONENT NUMBER    DESCRIPTION                          OR COST  REFERENCE
  1  123                 PLYWOOD - 3/4 INCH ROUGH              1.000
                  EFF. FROM          THRU
  2  C                   COMMENT TO ADD COST                 600.000
                                                        COST DIVISOR:    1
```

Example of Cost Comment

Note: Effective dates are normally blank These dates are only used when phasing out one component with another, effective on a particular date.

Once all the items are added, enter E at the ENTER COMPONENT OPTION to end. The system will ask, CREATE ROUTER NOW? N (default is no). Entering Y takes you to the Router Operation File Maintenance screen (refer to the document, Routing Step-by-Step, for details about this screen).

STEP 4: UPDATES
From the Bill of Materials main menu,
Select UPDATE MATERIAL COSTS: this adds the cost of material only.
Select UPDATE LABOR BURDEN & MATERIAL COST: this adds the cost of the material (BOM) and the labor/burden (ROUTER).

For both of these menu options, the system will prompt:
UPDATE STANDARD COSTS, CURRENT COSTS OR BOTH (S,C,B)?
PRINT COSTED BILLS?
A-ALL ITEMS, L-LIST, R-RANGE, or E-END.

> ***Caution:*** Updating cost changes the value of the items (this includes all stock-on-hand for the items). Make sure your accountant is aware of any changes you make to the costs.

STEP 5: BILL OF MATERIAL INQUIRY
From the Bill of Material main menu,
Select BILL OF MATERIAL INQUIRES

```
BILL OF MATERIAL INQUIRY      BOM150

OPTIONS:
         (1) END THE PROGRAM
         (2) SINGLE LEVEL EXPLODE
         (3) MULTI LEVEL EXPLODE
         (4) SINGLE LEVEL WHERE USED
         (5) MULTI LEVEL WHERE USED
         (6) SUMMARIZED BILL
         (7) PRE-KIT ANALYSIS
ENTER OPTION (1-7):
```

(2) SINGLE LEVEL EXPLODE: Option to see only the first level of a parent item.
(3) MULTI LEVEL EXPLODE: Option to see all levels of a parent item.
(4) SINGLE LEVEL WHERE USED: Option to find a parent item of component one level up.
(5) MULTI LEVEL WHERE USED: Option to find a parent item of a component all levels.
(6) SUMMARIZED BILL: Ability to see all items within a BOM summarized.
(7) PRE-KIT ANALYSIS: Ability to see available stock on a BOM.

STEP 6: BILL OF MATERIAL REPORTS

From the Bill of Material main menu,
Select BILL OF MATERIAL REPORTS

```
BILL OF MATERIAL REQUESTS          BOM200

OPTIONS:
 (1) END THE REQUESTS
 (2) SINGLE LEVEL EXPLODE
 (3) MULTI LEVEL EXPLODE
 (4) SINGLE LEVEL WHERE USED
 (5) MULTI LEVEL WHERE USED
 (6) COSTED BILL OF MATERIAL
 (7) SUMMARIZED BILL
 (8) LAST ACTUAL COSTED BILL OF MATERIAL
ENTER OPTION (1-8):
```

Options are the same as BOM Inquires except:
(6) COSTED BILL OF MATERIAL: Ability to see costs by component.
(8) LAST ACTUAL COSTED BILL OF MATERIAL: Ability to see the costs of the BOM the last time the bill was produced.

Note: The last option on the BOM main menu, F&O Product Configurator, is covered in another procedure.