

Bill of Materials Overview

Have you been searching for an easy way to sell a group of products together such as custom Gift Baskets, floral arrangements or Patio furniture sets?

In today's module you will learn how to create a Bill of Materials sku along with its components in Inventory Maintenance.

We will also review how to sell an item like this at POS and take a look at some common uses for Bill of Material or BOM SKUs.

Topics

- Bill of Material Defined
- Setup a Bill of Material
- Sell Bill of Material at POS

Bill of Material Defined

A Bill of Material or BOM is a group of items linked together for selling purposes.

It consists of two primary parts. The BOM header sku and the component SKUs that will be sold as a unit.

The header is the number that will be used in POS [pause] and used to look up historical sales information.

The component SKU's will have their inventory relieved when the header sku is sold at POS.

This is similar to a Kit in the Eagle system. However, the Bill of Materials list of components are not static.

The list of components, [pause] the quantity of each [pause] and even the price of the Bill of Material can be modified on the fly at POS.

Setup a Bill of Material

Create the Bill of Material Header Sku in Inventory Maintenance or IMU.

There are three key fields on the Codes tab that need to be reviewed:

1. Keep Stock Info should be set to No
2. Keep Prices should be set to No, and
3. The Bill of Materials flag should contain a Y for Yes.

Once these fields are set you can click on the 'Bill of Materials' hyperlink to add your component SKU's.

The top section of the Maintain Bill of Materials window controls permissions, pricing and printing.

The 'Sell at' drop down window gives you multiple choices regarding the items that will be priced.

Options Include 'Discount off of List'. If no list price is available in Inventory Maintenance, the system uses the retail price.

'Fixed' is the price used at POS, no matter what items are added or subtracted from the BOM

A 'Fixed Price plus add-ons' would increase the price of the Bill of material by whatever additional items are added on the fly at POS.

'Mark up from Cost' provides you with a box to enter the mark up percentage.

And 'Sum of the Components' uses Best Pricing to add up the components and arrive at a retail.

Check boxes at the top of the screen determine if you can make changes to the Bill of Material at POS, [pause] allow the adding of Additional components [pause]

or place component pieces on a Buyer's list for ordering purposes.

The 'Post Components at POS' check box will add SKUs into the body of the transaction instead of the single header BOM sku.

This will allow partial shipment of the BOM components. For example, a BOM deck package that a customer does not want delivered all at once.

See the Eagle Online Help for more information on this specific setting.

Once the determined fields have been selected or checked you will want to press the 'Add' or F4 button to create the BOM Header SKU parameters.

Click the 'Add' button again to begin defining the component SKUs.

You can:

1. Add a regular SKU number
2. Add a sku from an inventory viewer
3. Or Add a comment line about the Bill of Material

SKUs being added here must already exist in your inventory file.

Click 'Add Sku' and the 'Add Bill of Materials Record' window displays.

Enter the Quantity of this item that will be included in the assembly.

Populate the 'Multiple Choice Group' if your selected SKU is one of many SKU choices for that particular item.

For example an item type that has several SKU's that represent different colors or sizes.

Indicate if this particular SKU is the Default Choice.

The 'Print Option' allows you to decide if:

1. Both the Invoice and the Shop Order print
2. if only the Invoice prints
3. the SKU is not printed at all
4. or it only prints on the Shop Order

Decide if the 'Price' or 'Quantity' of this item is Changeable.

The 'Required?' field determines whether or not this component can be deleted.

If the 'Sell At' field in the Maintain Bill of Materials window is set to 'Sum of Components' you can indicate that a 'Special Price' is allowed.

The 'Price to Use' field tells the Eagle system to use a predefined price such as Retail, Matrix, List, etc.

If this SKU was designated to be part of a 'Multiple Choice Group' you can enter the next SKU choice. In our example, the choices are different colored cushions. Press OK.

To add SKUs that are not in this Multiple Choice Group, press Cancel [pause] and then click Add again.

Add the additional components to your Bill of Material Header SKU.

Hit the Cancel button to close the dialog box and you will see a list of the items or comments that were entered.

The buttons at the Top of the screen allow you to 'Change', 'Delete' or move items up or down in the list.

You can also double click on any line to make alterations.

Lines that are part of a Multiple Choice Group give you access to all of the included SKUS.

Once your Bill of Material has been created or modified to your liking it is ready to be sold at POS.

Sell Bill of Material at POS

Selling a Bill of Material at POS is a very straight forward process.

If the 'Allow Changes at POS' box was not checked it works just like any other SKU.

However, if changes are permitted there is some additional functionality available.

Begin a transaction in the Order Mode.

Type in the Bill of Material Header SKU and press Enter.

In the Quantity field type in 1 and press Enter.

The Bill of Materials Posting window will display.

To delete components from the BOM that are not marked as required, check the boxes next the unwanted components and then click the 'Delete' button.

Select 'Yes' to confirm.

Dependent on the BOM Header settings you can change a Component piece here. Select the item and update the Quantity, Description or Price.

If you added a multiple choice item, select the SKU you will to sell on this transaction.

Make any necessary modifications to the BOM. We will add our table back in.

Now, click the Post button at the top of the screen.

Proceed as you normally would to add additional items to the POS Order.

For more information on this, see the Training on Demand 'Orders' class.

Selling a single SKU at POS to relieve inventory of several items can save time and increase add on sales figures.

The freedom to change components, prices and quantities allows you greater flexibility to sell your merchandise in enticing and innovative combinations.

Be sure to watch the other classes in this Agenda to become a pro with the Bill of Materials function.

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Corporate Office

804 Las Cimas Parkway
Austin, TX 78746
USA

Toll Free: +1.888.448.2636
Direct: +1.512.328.2300
Fax: +1.512.278.5590

Latin America and Caribbean

Blvd. Antonio L. Rodriguez #1882 Int. 104
Plaza Central, Col. Santa Maria
Monterrey, Nuevo Leon, CP 64650
Mexico

Phone: +52.81.1551.7100
Fax: +52.81.1551.7117

Europe, Middle East and Africa

No. 1 The Arena
Downshire Way
Bracknell, Berkshire RG12 1PU
United Kingdom

Phone: +44.1344.468468
Fax: +44.1344.468010

Asia

238A Thomson Road #23-06
Novena Square Tower A
Singapore 307684

Singapore
Phone: +65.6333.8121
Fax: +65.6333.8131

Australia and New Zealand

Suite 2 Level 8,
100 Pacific Highway
North Sydney, NSW 2060
Australia

Phone: +61.2.9927.6200
Fax: +61.2.9927.6298