Using Bill of Materials

Now that we have a basic understanding of what a BOM SKU is and how it can be used, this course will take a look at maintaining your Bill of Material records and selling these items in Point of Sale.

Maintenance consists of Adding New Items or Comments, Modifying existing items, and Deleting items or an entire BOM record.

Topics

- Add New Items or Comments
- Modify Bill of Material Items
- Delete Bill of Material Items
- Bill of Materials in POS

Add New Items or Comments

Display the Maintain Bill of Materials window by clicking on the BOM hyperlink on the codes tab of Inventory Maintenance.

In the 'BOM' field, type in the Bill of Materials SKU and press Enter.

This will show you your existing data.

To add a new SKU, click the 'Add' button in the ribbon menu.

If you know the SKU number you can select 'Add SKU' and enter it here. Set the Quantity of this item that will be included in the Bill Of Material.

Update the 'Multiple Choice Group' field. Our particular arrangement allows for a Red or Green pepper plant. We have named our Multiple Choice Group, 'PEPPER'. Check the 'Default choice?' box if this SKU will be the default choice at POS. In our example, the Red

Pepper has already been marked as the default, so we will leave this box unchecked.

Select the appropriate Print Options.

Finally, determine if the item will be able to have the 'Price Changeable?', 'Qty Changeable?', or if it is 'Required?'.

Use this field if you want to indicate a 'Special Price' for this component. The price you enter overrides the 'best pricing' rule on the system.

You can also select a 'Price to Use' from the dropdown list.

Click 'OK' to Add the SKU.

Only one of the Multiple Choice items appears in the grid. This is the SKU that was marked as the Default Choice.

Double click the line to view the item that was just added to the Multiple Choice Group.

From this dialog box you can 'Add', 'Change' or 'Delete' the SKU from the group.

You can also choose to 'Add SKU from Viewer' and open an Inventory Grid.

Click 'Change Lookup' to identify the SKU you wish to add. Highlight it and press Select.

You are presented with the same dialog box. Fill it out accordingly and press 'OK' to add the SKU.

Choose option 3 to 'Add a Comment.

Type in your comment. Up to 32 characters are permitted.

Fill in the 'Multiple Choice Group' if the comment will be part of a list of comments available at Point of Sale.

Similar to a SKU, a Multiple Choice Group must have one Comment identified as the 'Default Choice?'.

Do not use the same Multiple Choice Group name that you used for your SKU. In our example we will label this Group 'SUN'.

Select the desired 'Print Option' from the drop down list and check the 'Required?' box if the comment must be a part of your Bill of Material record.

Click 'Ok' and then the Cancel button to return to the Maintenance grid.

Double clicking the line opens the Select Multiple Choice Item dialog box where you and Add, Change or Delete Comments.

Modify Bill of Material Items

To make changes to an existing component of your Bill of Material item, type the BOM SKU number and press Enter.

Double click the line that you want to modify.

If the Component you selected is not a Multiple Choice item, the 'Change Bill of Materials record' dialog box displays.

Type in any new information and click 'OK'.

If the component selected is a Multiple Choice item, the 'Select multiple choice item' dialog box displays.

Click on the SKU that you want to modify and then press 'Change'.

Update the information and then click 'OK'.

Click 'Cancel' to close the dialog box.

If you need to rearrange the order in which the SKUs and Comments display on your Bill of Material, click on the component that you wish to move.

Use the 'Move Dn' or 'Move Up' button to alter the component and comment list.

Delete Bill of Material Items

If the item you wish to Delete is not part of a Multiple Choice group you would simply check the box beside the item you want to remove and click the 'Delete' button in the ribbon menu.

Click 'Yes' to confirm the action.

If the SKU or Comment selected is part of a Multiple Choice Group, you will be notified that the entire group will be deleted.

Confirm the action if this is the desired outcome.

If you need to delete an entire Bill of Material record including all of its components, make sure it is not on any Open POS documents such as Orders, Special Orders or Estimates.

Display the BOM SKU.

Click the 'Delete' button at the top of the screen.

The Delete Menu displays.

Choose the option to delete the BOM.

Confirm the action. The deletion is confirmed at the bottom of the screen.

Bill of Materials in POS

Sell the BOM SKU as you would any other.

If the BOM header did not indicate to 'Allow Changes at POS', the SKU will post as any other item would.

If changes are permitted at POS the Bill of Materials viewer opens and based on your security settings you can 'Add', 'Change' or 'Delete' items.

You can also 'Reprice' the Bill of Material based on the Gross Margin or a Markup percentage.

You can also add any additional 'Comments'.

Press 'post when you are done making changes and complete the transaction as you normally would.

Maintaining your Bill of Material records is done through a familiar grid layout and ribbon menu. Selling these items in Point of Sale utilizes a similar easy to use format.

Review this lesson as many times as needed to add new components and comments, modify existing ones, and delete any that are no longer needed.

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