# Assembly Entry

Cavallo Support - 2024-12-03 - Miscellaneous

**Overview**

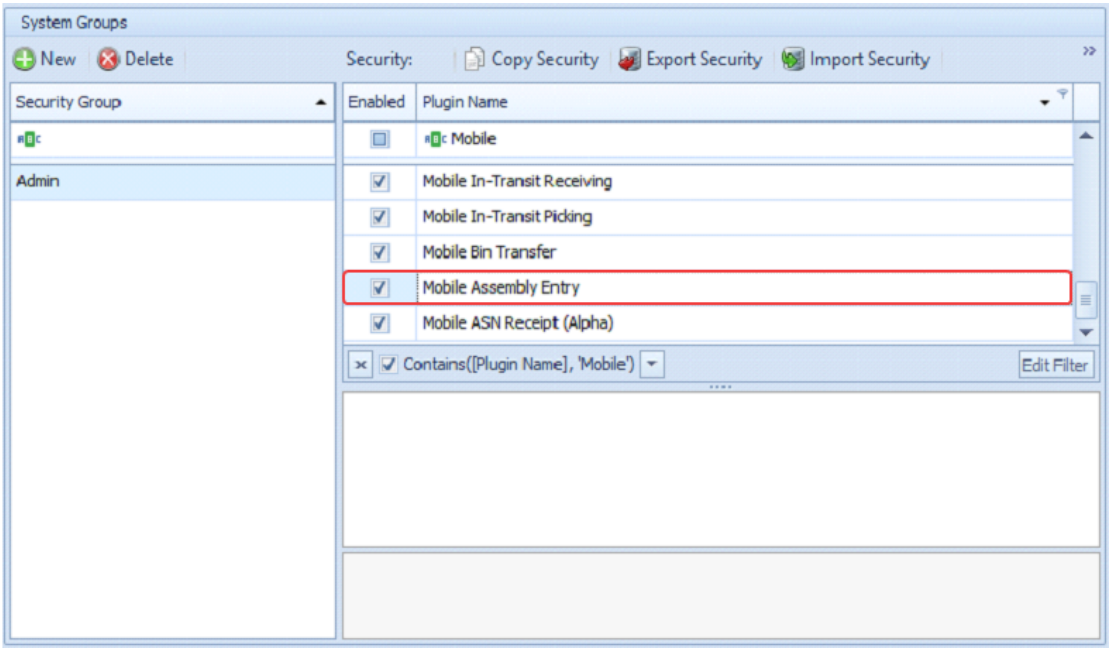
In DataCollection iOS and Android, the Assembly Entry module allows users to select a Bill of Materials and a quantity that will be produced at a specified site. When the assembly is posted in GP, the relevant inventory quantities will adjust – the finished good quantity will increase while the raw materials (*components*) on the BOM will be consumed. This documentation will cover the setup, and use, of the Assembly Entry module within DataCollection.

**Note:** Currently, this module is only available on DataCollection iOS and Android; it is not available on DataCollection for Windows Mobile at this time

**Setup**

Before using the Assembly Entry module on the device, you must enable the 'Mobile Assembly Entry' security in the DataCollection Console for each security group that should have access to the screen. The security can be accessed quickly by searching for “Mobile” in the plugin name field.

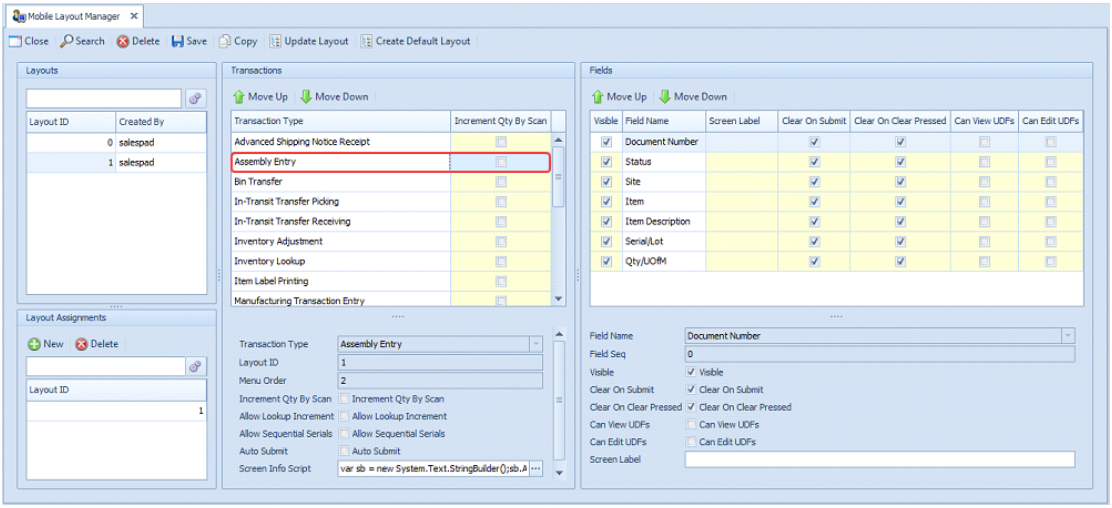
**Note:** There are no sub-securities for this module




Once this security is enabled for all relevant security groups, make sure to save before exiting.

The 'Mobile Layout Manager' must also be updated to make the Assembly Entry screen available in the main menu on the device. Select the 'Setup' tab in DataCollection Console, then click 'Mobile Layout Manager' to open it. Clicking the 'Search' button will refresh the available layouts. Note that the Layout ID of "0" is reserved for the read-only default template. Select this first, click the 'Update Layout' button, then click 'Search' again to reload the list.

For every following layout, select the layout and click the 'Update Layout' button to refresh the possible transaction types for that specific layout ID. Review the layout’s 'Transactions' list, verifying that "Assembly Entry" has appeared, then rearrange the list as desired to determine where it will appear on the device. Select "Assembly Entry" from the 'Transactions' list to update its properties, and review the 'Fields' list to rearrange the visible field order and update their properties. Make sure to update every layout, and save before exiting.

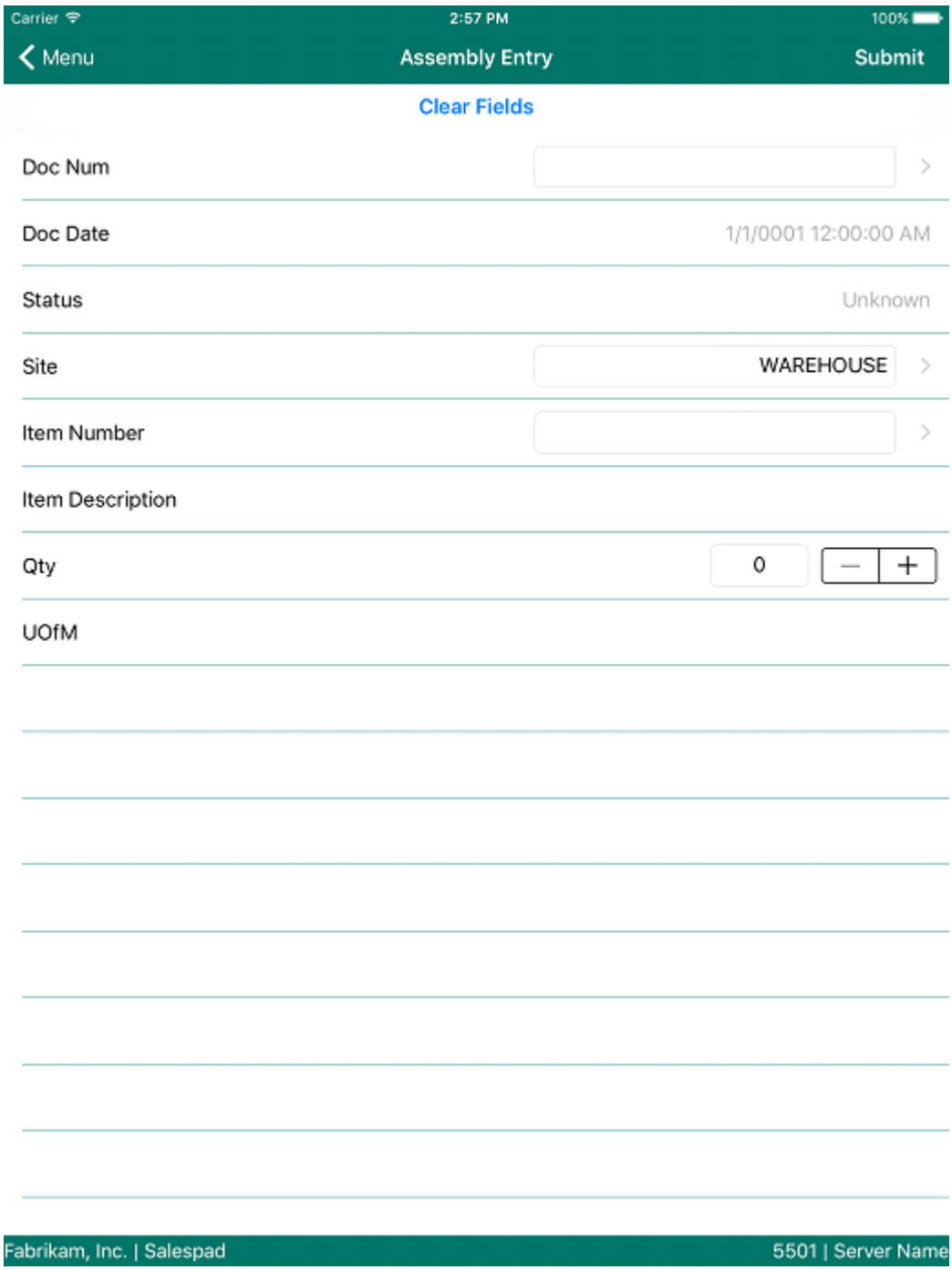



If "Assembly Entry" does not appear in the 'Transactions' list after clicking the "Update Layout" button, verify that your current build supports this new functionality. If you are using a compatible build, but you still do not see this option, please contact SalesPad Support for assistance.

**Note:** Assembly Entry does not support Increment Qty by Scan

**Usage**

After you've gone through the Setup section, 'Assembly Entry' will be available as an option in the main menu of DataCollection iOS and Android. Tapping on this new option will lead you to the Assembly Entry screen.




Here are some quick descriptions of each of the fields displayed on this screen:

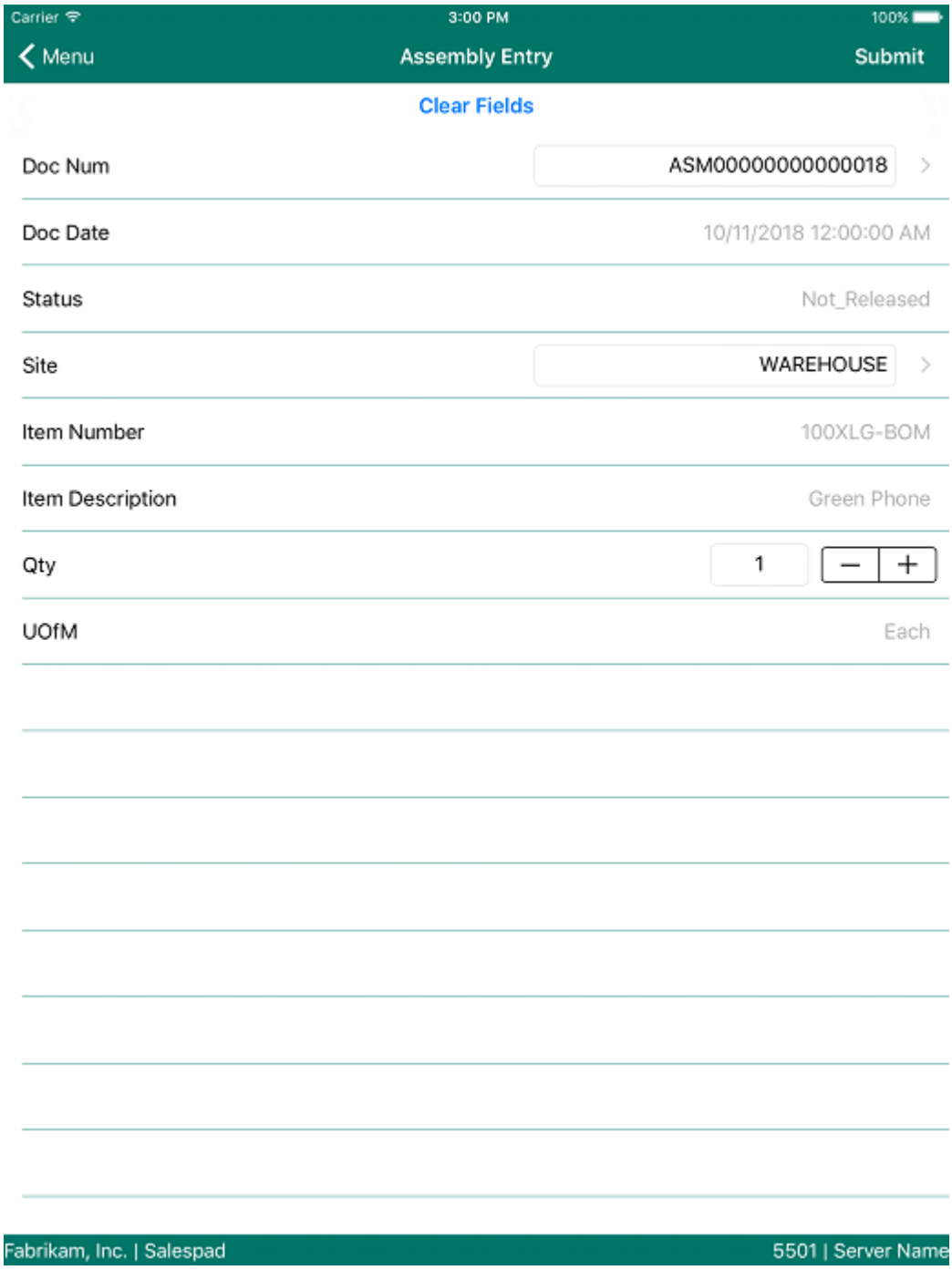
- **Doc Num** – This field displays the document number for the currently selected document. It will present a lookup of all open Assembly Entry documents when tapped. Document numbers can also be entered manually in the available text field, and will load the matching assembly document if found.
- **Doc Date** – This read-only field displays the creation date for the currently selected document.
- **Status** – This read-only field displays the status of the currently selected document.
- **Site** – This field displays the location for the currently selected document. It will present a lookup of all available warehouses when tapped. The site can also be entered manually in the available text field and will load the matching location if found.
- **Item Number** – This field displays the BOM Number of the Bill of Materials for the currently selected document. It will present a lookup of all BOMs when tapped. BOM Numbers can also be entered manually in the available text field and will load the matching BOM if found.
- **Item Description** – This read-only field displays the item description for the currently selected BOM Number.
- **Qty** – This field displays the quantity of the currently selected BOM that will be produced for the currently selected document.

- **UofM** – This read-only field displays the base unit of measure for the currently selected BOM Number.

The Assembly Entry module allows you to create new assembly documents, as well as update existing assembly documents.

Existing assembly documents can be loaded by searching via the Doc Num field. When tapped, this field will present a lookup of all existing assembly documents. Selecting one of the displayed documents will return you to the Assembly Entry screen, and populate all viable fields with that document's information.

Alternatively, a document number can be entered manually into the text field, and if it is found to exist, the other fields will populate with information for that document. When loading an existing assembly document, the Item/BOM Number cannot be modified; only the 'Site' and 'Qty' fields will be editable. Changing these values and submitting the transaction will update the existing assembly document.




To create a new assembly document, simply enter (*or select*) an item number, then specify a 'Site' and 'Qty'. Submitting the transaction with an empty 'Doc Num' field will prompt the server to generate a document number for it. A new document number can also be specified by manually entering it into the 'Doc Num' field; however, if the 'Doc Num' already exists, it will load that document instead.

To avoid overwriting work, if a 'Doc Num' must be specified, instead of being automatically generated, enter it first to be sure that it does not already exist. If it is new, the 'Doc Date' will update to the current date, and the 'Status' will update to "New".




When trying to submit a transaction where the specified BOM and/or its components have not been assigned to the specified site, the application will ask if they should be assigned to the site. Selecting "No" will cancel the submission process, while selecting "Yes" will attempt to assign the BOM and/or its components as necessary to the specified site. A prompt will display whether this succeeds.

**Note:** All new assembly documents will be created with a status of 'Not Released' in DC iOS and Android. This functionality does not support releasing or posting assemblies

After this is complete, you can release the document via SalesPad Desktop or Microsoft Dynamics GP (*releasing cannot be done within DC*). Finally, when ready, posting the transaction within Microsoft Dynamics GP will update your inventory levels.