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# Manufacturing BOMs

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## Overview

Manufacturing Bill of Materials (BOM) functionality in SalesPad allows you to create a list of parts or components that are used to create a finished good.

This document covers the search and creation screens for Manufacturing BOMs.

## Security

To create and access BOMs, you must enable the following security settings in the Security Editor:

*Manufacturing BOM Audit* - This enables Manufacturing BOM Audit Tab on the Manufacturing BOM Screen, which allows the user to view a change history on the Manufacturing BOM.

### *Manufacturing BOM Components*

- Show Cost: True/False - *Determines if a user has permission to view the component cost.*

*Manufacturing BOM Entry* - Enables the Manufacturing BOM Entry screen, which allows the users to view, create, and edit Manufacturing BOMs.

- Can Edit: True/False - *Determines if a user can edit a BOM*
- Scripts
  - On Load Script - *Script that executes before a BOM is loaded.*
  - Pre Save Script - *Script that executes before a BOM is saved.*
- Pending Approval BOMs
  - Can Approve BOMs: True/False - *Determines if the user has permission to approve Pending Approval BOM types.*
  - Can Manually Edit Pending Approval BOMs - *Determines if the user can edit Pending Approval BOMs through the BOM Entry Screen*

*Manufacturing BOM Line Mass Update* - Enables the Manufacturing BOM Line Mass Update screen, this allows users to quickly view and edit Manufacturing BOM Lines across multiple Manufacturing BOMs from one location.

- Auto Search: True/False - *Determines if the form automatically searches when opened.*
- Can Export Grid: True/False - *Determines if a user has permission to export the grid to an Excel file.*
- Show Cost: True/False - *Determines if a user has permission to view the component cost.*

*Manufacturing BOM Mass Update* - Enables the Manufacturing BOM Mass Update screen, which will allow the user to add components, and update multiple Manufacturing BOMs all at one time.

- Auto Search: True/False - *Determines if the form automatically searches when opened.*
- Can Export Grid: True/False - *Determines if a user has permission to export the grid to an Excel file.*
- Show Cost: True/False - *Determines if a user has permission to view the component cost.*

*Manufacturing BOM Properties* - Enables the Manufacturing BOM Properties Panel on the Manufacturing BOM Entry screen header. This panel allows the user to view and edit properties on the Manufacturing BOM.

- Default BOM Category - *Specifies a default BOM Category when creating a new BOM.*
- Default BOM Type - *Specifies a default BOM Type when creating a new BOM.*
- Show Cost: True/False - *Determines if a user has permission to view the BOM Cost.*

*Manufacturing BOM Search* - Enables the Manufacturing BOM Search Screen, which allows the user to search for Manufacturing BOMs.

- Auto Search: True/False - *Determines if the form automatically searches when opened.*
- Can Export Grid: True/False - *Determines if a user has permission to export the grid to an Excel file.*

Manufacturing BOM User Fields – Enables User Defined Fields on Manufacturing BOMs.

- Allow Layout Customization: True/False - *Determines if a user has permission to edit the User Field layout*
- Read Only: True/False - *Determines if a user has permission to edit User Fields*

1. Manufacturing BOM Mass Approval
2. Manufacturing BOM Component Mass Delete
3. Manufacturing BOM Component Mass Update
4. Manufacturing BOM Mass Add Components
5. Manufacturing BOM Mass Update BOM

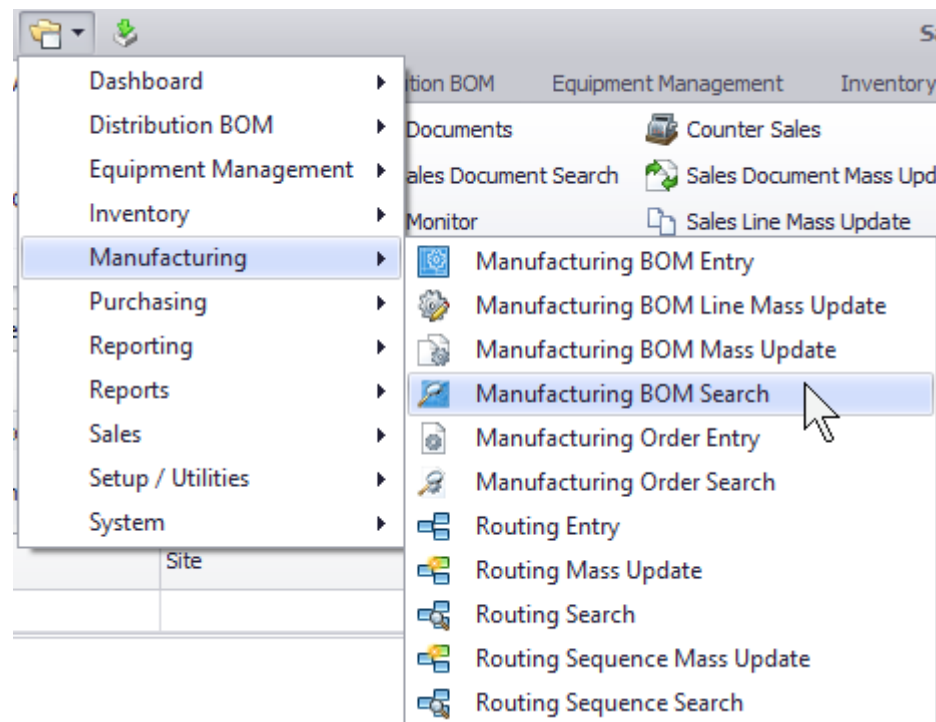
#### Settings

1. Save Engineering BOM as Pending Approval - If enabled, when modifying an Engineering BOM via Manufacturing BOM Mass Update or Manufacturing BOM Line Mass Update, the changes will instead be applied to a SalesPad BOM of Type: 'Pending Approval'. See Pending BOMs.
2. Effective In Date - Specify the number of days in the future that you want the effective in date to be when creating a new BOM.
3. Effective Out Date - Specify the number of days in the future that you want the effective out date to be when creating a new BOM.
4. Update BOM Revision Level: True/False - When enabled, and a BOM is changed and saved, this will automatically update the revision and save the previous version of the BOM as a historical revision.
5. Manufacturing BOM Line Columns to Include in Audit - Allows users to specify the columns that are included in the BOM audit.

#### Usage

Finding and Opening an Existing Manufacturing BOM

Find and open existing Manufacturing BOMs on the Manufacturing BOM Search tab (Modules > Manufacturing > Manufacturing BOM Search):



To search for Manufacturing BOMs, enter a full or partial BOM Number. You can narrow the results by entering full or partial entries for BOM Name, BOM Type, BOM Category, or BOM Revision Level. You can toggle between viewing Active Manufacturing BOMs and Historical Manufacturing BOMs by selecting View Historical under Search Options. Click **Search**.

Manufacturing BOM Search

Close Search

Search By

BOM Number: BOM Type: BOM Revision Level: BOM Category:

Search Options

View Historical

Search Results

Revision L...	Mfg B...	Default Is...	BOM Name	Net Phant...	Is Historical	BOM Type	Backflus...	Default ...	Date Mo...	Sub Revision ...	Effectiv...	BOM Ca...	Modified By
3	100XLG			0		1	0			0	3/12/2014	1	aland
14	BA100G	WC1		0		1	0	WAREH...	4/12/2017	0		1	sa
1	BACK ASS...	WC1		0		1	0	WAREH...		0		3	sa
1	BARREL A...	WC1		0		1	0	WAREH...		0		3	sa
1	CBA100	WAREHO...		0		1	0	WC1		0	4/1/2015	1	sa
1	CHAIR	WC1		0		1	0	WAREH...		0		1	sa
1	COMPDUM	WC1		0		1	0	WAREH...		0		1	sa
1	COMPUTER	WC1		0		5	0	WAREH...		0		1	sa
1	DRIVE ASSY	WC1		0		1	0	WAREH...		0		1	sa
1	EXTERIO...	WC1		0		1	0	WAREH...		0		1	sa
1	FAXX-SHP...	WC1		0		1	0	WAREH...		0		1	sa
1	FAXX-SHP...	WC1		0		1	0	WAREH...		0		1	sa
1	HA100G			0		1	0		4/12/2017	0		1	sa
1	PEN	WC1		0		1	0	WAREH...		0		1	sa
1	PHONEBOT			0		1	0		4/12/2017	0		1	sa
1	PRO1	PAINT		0		1	0	WAREH...	4/12/2017	0	1/21/2014	1	sa
1	SEAT ASS...	WC1		0		1	0	WAREH...		0		1	sa
1	WATCH	WAREHO...		0		1	0	WC1	4/12/2017	0		1	sa
1	WATCH	WC1		0		5	0	WAREH...		0		1	sa

You can further filter results using the Filter line (Refer to: SalesPad Grids - Filtering and customizing). To open the desired Manufacturing BOM, click the Mfg. BOM Number hyperlink, press space bar, or double click anywhere on the BOM line.

#### Creating a New Manufacturing BOM

To create a new Manufacturing BOM from the Manufacturing BOM Search Screen, click **New**. A new Manufacturing BOM Entry screen will open in a new tab:

Manufacturing BOM Search Manufacturing BOM Entry

Close Save Delete

Manufacturing BOM Properties

BOM Number: BOM Category: Regular BOM Type: Mfg. BOM BOM Name: Qty To Build: 1

Description: Revision Level: 1 Unit Of Measure: BOM Cost: 0.00 Effective Date: 3/12/2014

Manufacturing BOM Component Manufacturing BOM Audit

New Delete Insert

Component Item...	Sub BOM T...	Modified By	Qu...	Quan...	Quant...	Positi...	Sub BO...	BOM C...

Component Number: Description: Position: Sub BOM Type: BOM Category: Sub BOM Name: Quantity Build: U of M Build: Extended Qty: Issue From: Issue To:

Quantity Fixed: U of M Fixed: U of M Base: Extended Cost: Quantity Available: In Date: Out Date: Shrink %: Option %: Lead Time Offset: Offset From:

Floor Stock Backflush Item Alternate Eng. Approval for Substitution Actual Consumed Check Single Lot Only

Fill in the following fields: BOM Number, BOM Type, BOM Category, Revision Level, and Effective Date.

#### Pending Approval BOMs

Pending Approval BOMs are created when a user makes a change to Engineering BOMs via either the Manufacturing BOM Mass Update, or Manufacturing BOM Line Mass Update screens. The Engineering BOM will remain unchanged in the system, and the changes are made on a BOM with type: Pending Approval.

Once the changes have been reviewed, the Pending Approval BOM can be approved from either the BOM Entry screen, or from the Manufacturing BOM Mass Update screen via the Manufacturing BOM Mass Approval plugin.

In the approval process, the Pending Approval BOM will replace the current Manufacturing BOM for that item number in the system. If there is no Manufacturing BOM for that item, then a new Manufacturing BOM will be created. Afterwards, the Pending Approval BOM will be removed from the system.

To use this functionality, you must enable the Setting: *Save Engineering BOM as Pending Approval*. Consider the following example:

A user searches a 512 SDRAM Engineering BOM in BOM Lines Mass Update, and modifies the component 256 SDRAM with a change to increase the Shrink Percent from .7 to .9

**Component Mass Update**

Component Number:  ...

Sub BOM Type:

BOM Category:

Sub BOM Name:  ...

Quantity Build:  0

U of M Build:

Quantity Fixed:  0

U of M Fixed:

Issue From:

Issue To:

Shrink %:  0.9

Option %:  .

Description:

Position:  0

U of M Base:

Unit Cost:  0.00

Extended Quantity:  0

Extended Cost:  0.00

Quantity Available:  0

In Date:

Out Date:

Lead Time Offset:  0

Offset From:

☐ Floor Stock

☐ Backflush Item

☐ Alternate

☐ Actual Consumed Check

☐ Single Lot Only

Alternate For:

OK Cancel

The change is then reviewed, and approved for production.

The user then searches for the 512 BOM from Manufacturing BOM Search and finds both the Pending Approval BOM with the changed Shrink Percent, and the original, unchanged Engineering BOM.

**Manufacturing BOM Search**

Close Search New

Search By

BOM Number:  512 BOM Type:  BOM Revision Level:

BOM Name:  BOM Category:

Search Options

☐ View Historical

Search Results

Mfg BOM Number	BOM Type	BOM Name	BOM Category	Revision Level	Default Issue To	Default Issue From	Effective Date
512 SDRAM	Engineering BOM		Regular	12	WC1	WAREHOUSE	
512 SDRAM	Pending Approval		Regular	12	WC1	WAREHOUSE	

The user opens the 512 SDRAM Pending Approval BOM. An **Approve** button is on the taskbar if the user has the Security: **Can Approve BOMs** enabled.

Once approved, the Pending Approval BOM is flipped to a new Manufacturing BOM since there were none previously in the system.

The user could also Mass Approve Pending BOMs from the Manufacturing BOM Mass Update form, via the Manufacturing BOM Mass Approval plugin.

#### Dynamic Search Criteria

Using Item Master, Manufacturing BOM, and Manufacturing BOM Line User Defined Fields, we can refine our BOM and BOM Line searches.

To search for BOMs of a particular Item Class, we create an Item Master UDF. This UDF must be named with a suffix that is equivalent to the name of the field in spvItemMaster that we want to search on.

For a list of available fields in spvItemMaster see [Available Fields in spvItemMaster](#)

For more information on configuring SalesPad UDFs see [User Defined Fields Editor](#)

For this example, we will name our UDF "xBOMSearch\_Item\_Class\_Code", which will add search capabilities for "Item\_Class\_Code" in spvItemMaster

User Field Editor

Close Save Update Database Table Design Layout Export Import

Bus. Objects User Fields New Delete Copy Field Properties

Bus. Object Seq Disabled Field

Assembly  
Assembly Line  
BOM  
BOM Line  
Cash Receipt  
Customer  
Customer Addr  
Inventory Lot Num  
Inventory Serial Num  
**Item Master**  
Manufacturing BOM  
Manufacturing BOM Line  
Manufacturing Order  
Purchase Line Item  
Purchase Order  
Purchase Receipt  
Purchase Receipt Line Item  
Sales Document  
Sales Line Item  
Vendor  
Vendor Addr

0 ☐ xBOMSearch\_Item\_Class\_Code

Table Name: Item Master  
Field Name: xBOMSearch\_Item\_Class\_Code  
Map To:   
Screen Label: Item Class Code:  
Field Type: Text Length: 100  
Blank Value:   
Value Options:

Options

☐ Field is Read Only ☐ Field is Required (Returns Only)  
☐ Field is a File Attachment ☐ Field is Rich Text Memo  
☐ Field is a Customer Lookup Cust. Class Lookup   
☐ Field is a Hyperlink ☐ Field is an Image

Quick Report:   
UDF Calculation:

Additionally, we can input the following quick report that will allow us to select available Item Classes from a list rather than free typing them.

```
select ITMCLSCD=""
union
select ITMCLSCD from IV40400
```

If a user adds the xBOMSearch\_Item\_Class\_Code UDF to the BOM Search or either of BOM Mass Update screens, user input will become part of the search criteria. In this case, we have returned all BOMs that have the Item Class: FG-ACT

Manufacturing BOM Search

Close Search

Search By

BOM Number:  BOM Type:  BOM Revision Level:   
BOM Name:  BOM Category:  Item Class Code: FG-ACT

Search Options

ITMCLSCD  
ATT CORD  
CABINETS  
CATALOG  
COMPONENT2  
COMPONENTS  
FG-ACT  
FG-STD  
FINGOODS  
MEMORY-1  
MEMORY-2  
MODEMS  
PRINTERS-1  
PRINTERS-2  
RETAIL  
RM-ACT  
RM-STD  
SERVERS-1  
SERVERS-2

Search Results

Revision L...	Mfg BOM Number	Default I...	BOM Name	Net Phan...	Is Historical	BOM Type	Backflus...	De
1	COMPUTER	WC1		0	<input type="checkbox"/>	5	0	W
1	PEN	WC1		0	<input type="checkbox"/>	1	0	W

The same process of creating UDFs to refine search criteria can also be applied to Manufacturing BOM and Manufacturing BOM Line UDFs

Here we are returning a search that uses a Manufacturing BOM UDF: xBOMSearch\_Date\_Modified

Manufacturing BOM Search

Close Search

Search By

BOM Number: BOM Type: BOM Revision Level: BOM Name: BOM Category: Date Modified: 3/12/2014

Search Options

☐ View Historical

Search Results

Revision ...	Mfg BOM Number	Default ...	BOM Name	Net Pha...	Is Histor...	BOM Type	Backflus...	Default ...	Date Modified	Effect...	Sub Revis...	BOM ...	Modified By
2	512 SDRAM			0	<input type="checkbox"/>	Eng. BOM	0		3/12/2014	3/12/2...	0	Regular	scottf

These UDF Dynamic Search fields can be added to the BOM Search, the Manufacturing BOM Mass Update, and Manufacturing BOM Line Mass Update forms.

#### Mass Update BOM and BOM Lines

There are two forms for Mass Updating fields on BOMs and on BOM components. These forms are: Manufacturing BOM Mass Update and Manufacturing BOM Line Mass Update, respectively. For each of these forms there are plugins that can be run to apply mass update operations on the BOMs or their components.

#### Manufacturing BOM Mass Update Plugins:

Manufacturing BOM Mass Approval: used to mass approve Pending BOMs

Manufacturing BOM Mass Update BOM: used to mass update BOM fields

Manufacturing BOM Mass Add Components: used to mass add components to BOMs

#### Manufacturing BOM Line Mass Update Plugins:

Manufacturing BOM Component Mass Update: used to mass update component fields

Manufacturing BOM Component Mass Delete: used to mass delete components from BOMs