



Bill of Materials Overview Document

for Sage 100 ERP

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Table of Contents

Introduction	1
Main Menu	2
Bill of Materials Maintenance	2
Picking Sheet Printing	3
Production Entry	4
Production Entry Register/Update	5
Production Label Printing	6
Disassembly Entry	7
Disassembly Entry Register/Update	8
Cost Roll-Up Register	9
Reports Menu	10
Single-Level Bill of Materials Report	10
Indented Bill of Materials Report	11
Summarized Bill of Materials Report	12
Single-Level Where-Used Report	13
Indented Where-Used Report	14
Summarized Where-Used Report	15
Component Requirement Report	16
Gross Requirements Report	17
Costed Bill of Materials Report	18
Bill Validation Report	19
Production History Report	20
Engineering Change History Report	21
Change Control Menu	22
Engineering Change Entry	22
Engineering Change Register	23
Replace and Delete Component Entry	24
Replace and Delete Component Register	25
Setup Menu	26
Bill of Materials Options	26
Utilities Menu	27
Purge Bill of Materials History	27

Introduction

This document includes overview information about each task in the Bill of Materials module that is accessible from the menus. You can print this document to use as an offline reference.

The information in this document is also available in the Help system in the overview Help topics.

For additional information about the software, refer to the Help system, which also includes the following:

- Overview information for windows that cannot be accessed directly from menus
- Procedures that guide you step-by-step through common activities
- Explanations of important concepts
- Field descriptions
- Flowcharts
- FAQs

Main Menu

Bill of Materials Maintenance

Navigation

Select Bill of Materials Main menu > Bill of Materials Maintenance.

Overview

Use Bill of Materials Maintenance to create and maintain bills of material. A bill of materials is commonly referred to as the bill structure because it defines the relationships between the component items that make up the bill (or product). A bill has a parent item code and component item codes. Use Bill of Materials Maintenance to set up, maintain, and inquire into the parent item, components, and miscellaneous charges that make up the parent item.

Information for each bill is divided into two parts. The first part consists of header information such as the bill description and bill type. Five fundamental bill types are supported: standard, engineering, inactive, kit, and phantom. The selected bill type depends on how the bill is used. The second part consists of component line items, miscellaneous charge codes, and comment lines.

During system startup, you can build a Bill of Materials file containing records for each bill structure. You can access information from the files that are already established to speed up the data entry process. For example, the Common Information file contains information used to create the Bill file.

NOTE Bills associated with an inventory item using Standard, Lot, or Serial valuation methods cannot be kit-type bills. Bills with an associated inventory item cannot be phantom-type bills.

After the Bill file is established and all bills are on file, you can perform any necessary maintenance by entering the bill number and/or revision code, and then modifying the appropriate fields.

Picking Sheet Printing

Navigation

Access this task using one of the following methods:

- Select Bill of Materials Main menu > Picking Sheet Printing.
- Select Bar Code Reports menu > B/M Picking Sheet Printing.

NOTE This task is available only if an option other than None is selected in the Print Picking Sheets By field in the Bill of Materials Options window.

Overview

Use Picking Sheet Printing to produce picking sheets itemizing the locations, types, and quantities of all components required for specified bill configurations. Any number of separate bill configurations can be specified for printing. Comments entered can be printed in one of three formats. You can also select to print miscellaneous charges.

If this task is selected from the Bar Code module, bar codes can be printed for information such as the warehouse, bill number, routing number, and component. Bar code printers must be predefined using Bar Code Printer Maintenance.

The unit of measure, quantity per bill, and extended quantity are printed for each component item. The extended quantity is factored by the yield percentage and scrap percentage when the Allow Yield and Scrap Percentage Factors check box is selected in the Bill of Materials Options window. Additional columns are provided for manually recording the quantities picked and the amounts short of stock. For components using a lot or serial number costing method, space is also provided for writing the appropriate identifying number. Other information on the picking sheet includes the warehouse code, bill number and description, effective date, and option codes.

NOTE The data entered in the grids is saved automatically to the Bill of Materials data files, and is not saved with the form code.

Production Entry

Navigation

Select Bill of Materials Main menu > Production Entry.

Overview

Use Production Entry to enter the receipt of manufactured goods into inventory and the consumption of the corresponding component parts. This task is primarily used to record manufacturing transactions after the assembly of the manufactured goods.

Production Entry allows you to enter a bill number, indicate how many of the finished products have been manufactured, and record the component usage, as well as the receipt of the finished product, into inventory. This is performed as a one-step process and does not directly support a work-in-process accounting system.

Components of a bill explode automatically; however, additions, deletions, and changes to the components, including miscellaneous code lines, are allowed.

Production entries that are entered, but not yet updated, can be maintained whenever necessary. You cannot modify the original bill number, revision code, option code, quantity, or effective date when maintaining a previous entry. To modify this information, you must delete the entire entry and enter the new information.

Production Entry Register/Update

Navigation

Select Bill of Materials Main menu > Production Entry Register.

Overview

The Production Entry Register lists all information entered in Production Entry and is used to check the accuracy of the entered data. You must print the register before the production entries can update (post) to the permanent files.

NOTE The register can be printed by batch if the Allow Batch Entry check box is selected in the Bill of Materials Options window.

After printing, review the Production Entry Register for accuracy. If there are errors, return to Production Entry and make the necessary changes. Reprint the register and proceed with the update.

WARNING Do not, under any circumstances, interrupt the update process.

During the update process, the following occurs:

- The quantity on hand for the bill produced is increased.
- The quantity on hand for the components used is reduced.
- The transaction detail is updated in the appropriate inventory history files.
- The production history is updated in the Bill of Materials Production History file if the Retain Production History check box is selected in the Bill of Materials Options window.
- The General Ledger Daily Transaction file is updated for the future printing of the Daily Transaction Register and subsequent update to the general ledger.

When the update completes, you are prompted to print the Daily Transaction Register and update the general ledger entries posted from the Production Entry Register.

Production Label Printing

Navigation

Access this task using one of the following methods:

- Select Bill of Materials Main menu > Production Label Printing.
- Select Bar Code Reports menu > Production Label Printing.

Overview

Use Production Label Printing to print pre-cut labels for manufactured items entered in Production Entry. You can align the data to fit the size of your labels and the format of your label sheets. For example, one type of label can be printed for packages or products and another type for labeling file folders or other internal records.

NOTE The Production Entry Register must be updated prior to printing production labels.

If this task is selected from the Bar Code module, bar codes can be printed for such items as the item number, bin location, retail price, standard price, and lot and serial numbers. Bar code printers must be predefined using Bar Code Printer Maintenance.

You can enter a selection of warehouses, item codes, and bin locations to print. You can also reprint selections of production labels, and clear selected production labels from the current production label file. In addition to the production entry number, production entry date, and actual cost, you can print additional information contained in the Inventory file.

Production Label Printing is dependent on the option selected in the Print Receipt Labels field in the Item Maintenance window. If Yes is selected, one production label is printed for each bill regardless of the quantity entered, except for serialized bills where a separate label is printed for each serial number. If No is selected, production labels are not printed for each bill. If By Item is selected, the quantity of production labels equals the quantity of each bill produced.

NOTE Production labels are not printed when None is selected at the Print Production Labels field in the Bill of Materials Options window.

NOTE You can save settings in this window by creating a new form code. Changes to settings for the STANDARD form code are not saved when you close the window.

Disassembly Entry

Navigation

Select Bill of Materials Main menu > Disassembly Entry.

Overview

Use Disassembly Entry to relieve a parent item from inventory and return all of its component items to inventory. Disassembly Entry can be used in three separate situations: disassembly of a manufactured item to return its component items to stock, disassembly of a purchased item to salvage its component parts, and reversal of previously posted production entries.

Disassembly entries that have been entered but not yet updated to the permanent files can be maintained whenever necessary. You cannot modify the original bill number, revision code, option code, quantity, or effective date when maintaining a previous entry. To modify any of this information, you must delete the entire entry and enter the new information.

When you use Disassembly Entry to record the disassembly of bills for manufactured or purchased items, any miscellaneous charges associated with the parent item are not automatically included because they represent costs associated with the assembly process, not the disassembly process. Miscellaneous charges, for example, labor and overhead, are recoverable but can be added manually. When production entries are reversed; however, miscellaneous charges are included automatically.

When a parent item is relieved from inventory, it is valued at its actual cost. If this amount differs from the accumulated costs of all components, the difference must be posted to the adjustment account. This posting entry balances the cost of the parent item to the costs of the components in the general ledger.

If you disassemble a product to increase component stock levels, and later reassemble its components to create a remanufactured item, you will not always salvage 100 percent of the components originally used. For example, scrap and yield are not recovered on a disassembled product, whereas a production entry does take scrap and yield into account.

Disassembly Entry Register/Update

Navigation

Select Bill of Materials Main menu > Disassembly Register/Update.

Overview

Use Disassembly Register to list all information entered in Disassembly Entry and to check the accuracy of the information. The register must be printed before the disassembly entries can be updated (posted) to the permanent files.

This report includes the disassembly number, disassembly date, bill number, and the quantity of the disassembled bill. For each component item, the report provides the component item code, description, quantity per bill, extended quantity, unit cost, extended cost, and the general ledger account number.

For each disassembly entry, the total cost of all component items (including any miscellaneous charges) is shown as the entry number total. The total cost of the parent bill relieved from inventory is shown as the inventory cost. The difference between these two costs is posted to the manufacturing variance account.

Review the Disassembly Register for accuracy. If there are errors, return to Disassembly Entry, and make the necessary changes. Reprint the Disassembly Register and proceed with the update.

WARNING Do not, under any circumstances, interrupt the update process.

During the update process, the following occurs:

- The quantity on hand for the disassembled parent item is reduced.
- The quantity on hand for the component items is increased.
- The miscellaneous charge expenses and inventory adjustments are posted to the general ledger.
- The transaction detail is updated in the appropriate inventory history files.
- Disassembly entry information is updated in the Production History file.

Cost Roll-Up Register

Navigation

Select Bill of Materials Main menu > Cost Roll-Up Register. In Cost Roll-Up Register, click Print or Preview.

Overview

Use Cost Roll-Up Register to calculate the cost of each bill based on the cost of each component item and miscellaneous charge. The cost of all component bills assigned to the selected parent bill is recalculated, regardless of the number of levels involved. The standard cost for the inventory item is updated with the calculated cost following the completion of the report.

You can select whether to update the cost of the selected parent bills, or to update the cost of all component bills, regardless of the number of levels. Kit and option bills are not included in the cost calculation. Only the current revision of base bills is updated.

The cost of each component item can be selected to use the Average, Last, or Standard Cost method. Information provided on the register includes the bill number, description, revision (if applicable), calculated cost, old cost, and cost variance.

The Cost Roll-Up Register calculates costs based on Bill of Materials components and miscellaneous charges only. If the Work Order module is installed, and you want to use the labor and overhead costs established in Routing Maintenance in the cost calculation (instead of miscellaneous charges), use the Work Order Cost Roll-Up Register.

WARNING If the accounting date falls into a period closed in the general ledger, a warning appears and you will not be able to print or update.

After printing the Cost Roll-Up Register, review it for accuracy. If there are errors, return to Bill of Materials Maintenance and make the necessary changes. Then reprint the Cost Roll-Up Register and proceed with the update.

WARNING Do not, under any circumstances, interrupt the update process.

During the update process, the following occurs:

- The standard cost of each bill in the Item file is updated.
- If cost roll-up is performed on inventory items using the Standard Cost method, the appropriate general ledger adjustments are posted to the inventory and adjustment accounts. The amount of the adjustment for each item appears in the Extension column of the report. This amount is calculated by multiplying the quantity-on-hand amount by the variance adjustment amount (old standard cost minus new standard cost). The adjustment amount is debited to the inventory account and credited to the manufacturing variance account. The actual account numbers used are specified in the Inventory Management Product Line Maintenance task.

If there are postings to the general ledger for standard cost items, you are prompted to print the Daily Transaction Register and update the general ledger entries posted from the Cost Roll-Up Register.

Reports Menu

Single-Level Bill of Materials Report

Navigation

Select Bill of Materials Reports menu > Single-Level Bill of Materials Report.

Overview

Use Single-Level Bill of Materials Report to list all component items for only the first level of a bill. If any of the components listed represent subassemblies, the subassembly components are not detailed. You can enter a selection of bill numbers, bill revisions, and user-defined fields (UDFs) to print.

NOTE This report is the only report that lists option interaction bills.

You can select specific bill types or all bill types to include on the report. You can also include comment lines, miscellaneous charges, and/or option bills. If your bills include phantom bill components, you can choose to not list (blow through) the phantom bill number, and list the phantom bill components instead.

Indented Bill of Materials Report

Navigation

Select Bill of Materials Reports menu > Indented Bill of Materials Report.

Overview

Use Indented Bill of Materials Report to print each bill with all of its subassembly components. The report lists all component items on a bill, with each level indented from the preceding level. The level number is preceded by dashes to indicate the component level. For example, level 1 prints as -1, level 2 prints as --2. Any component up to level 10 is indented. The indented report format provides a complete view of the bill structure.

Information on the report includes engineering changes, maximum lot sizes, bill option prices, and the last-used date for each bill. Only the first description line of subassembly bills prints.

You can select all or any of five bill types to include on the report, and include comments, miscellaneous charges, engineering changes, and option bills. You can also select the number of levels to print, partial or full line comments, or no comments at all, and print the report for the current revision only. You can enter a selection of bill numbers, bill revisions, and user-defined fields (UDFs) to print. The routing number for the base bill and the option bill is printed if routing numbers were entered in Bill of Materials Maintenance.

NOTE Option interaction bills are not printed on this report.

Summarized Bill of Materials Report

Navigation

Select Bill of Materials Reports menu > Summarized Bill of Materials Report.

Overview

Use Summarized Bill of Materials Report to print each bill with all of its subassembly components. The report lists all component items on a bill, summarized by item code. The summarized report format acts as a parts list for the parent bill and provides the opportunity to spot potential errors in the bill structure. You can select the number of levels and enter a selection of bill numbers, bill revisions, and user-defined fields (UDFs) to print. You can also select to print the report for the current revision only.

Information on the report includes raw material items and purchased items. Each bill is broken down into items, and only these items are listed, not the bill itself. Comment lines and miscellaneous code lines are not included on this report. The routing number for the base bill and the option bill prints if routing numbers were entered in Bill of Materials Maintenance.

Because the same item can be included at different levels in the bill structure, a count is kept of the number of occurrences of each component in the bill structure (this count is displayed in the Occur column). If an item occurs more than once in the bill structure, the total required quantity per bill reflects the combined total for all occurrences.

NOTE Option interaction bills are not printed on this report.

Single-Level Where-Used Report

Navigation

Select Bill of Materials Reports menu > Single-Level Where-Used Report.

Overview

Use Single-Level Where-Used Report to list, by item code, all parent bills that use a specified component item. The specified component item must be used on the first level of a bill for the bill to be included. The single-level report format helps you determine whether an item can be deleted from inventory or if a replacement item can be used.

NOTE The Indented Where-Used Report provides a listing of all finished products that can be affected by a component change.

You can enter a selection of component item codes and warehouses to print. You can also include the current inventory quantity information on the report.

Indented Where-Used Report

Navigation

Select Bill of Materials Reports menu > Indented Where-Used Report.

Overview

Use Indented Where-Used Report to list by item code, all bills that contain a specified component item. The level of the bill on which the specified component occurs is indented from the preceding level. For example, level 1 prints as -1, level 2 prints as --2, The first level on this report indicates bills that directly use the component item. The second level indicates a bill that uses a subassembly with the specified item as a component. Any component up to level 10 is indented.

The indented report format provides an overview of the bill structure, allowing you to see all the finished products that are affected by an item change.

You can include the current inventory quantity information and enter a selection of component item codes and warehouses to print. You can also select to print the report for the current revision only.

Summarized Where-Used Report

Navigation

Select Bill of Materials Reports menu > Summarized Where-Used Report.

Overview

Use Summarized Where-Used Report to list by item code, all the bills that use a specified component item. The summarized report format provides the total number of times a bill uses each specified component. Because the specified component can be used at different levels in the bill structure, a count is kept of the number of times each component occurs in the bill structure (this count is displayed in the Occur column). If an item occurs more than once in the bill structure, the total required quantity per bill reflects the combined total for all occurrences.

Unlike the Indented Where-Used Report, this report only lists a parent bill once per item, no matter how many times that parent bill is used as a subassembly in other bills.

You can print the report for the current revision only and enter a selection of component item codes and warehouses to print. You can also include the current inventory quantity information and select to print only end item bills and current revision on the report. End items are parent bills that are not subassemblies of any other bills.

Component Requirement Report

Navigation

Select Bill of Materials Reports menu > Component Requirement Report.

Overview

Use Component Requirement Report to list the components required to make the number of items specified for each bill configuration. The report also advises you of any stock shortages.

You can select a bill configuration, including a bill number, revision, bill options, quantity to be manufactured, and the component warehouse. Any number of bill configurations can be entered per report. The quantity available is calculated based on the option selected in the Include in Quantity Available field in the Inventory Management Options window. Yield and scrap percentages are factored into the component requirement calculation.

NOTE If Indented is selected in the Format field, the scrap percentage is not included in the calculation.

You can also select to round the amounts in the Quantity Required for Components and Quantity to Produce for Bills columns to the next whole unit when using Integer Units of Measure.

Stock shortages for component items are determined for each bill configuration separately. To obtain shortage information reflecting the total requirement of a group of bills, you must run the Gross Requirements Report.

NOTE The data entered in the grids is saved automatically to the Bill of Materials data files, and is not saved with the report setting.

Gross Requirements Report

Navigation

Select Bill of Materials Reports menu > Gross Requirements Report.

Overview

Use Gross Requirements Report to list the total component quantities required to make the number of items specified for all selected bills. Any number of bill configurations can be entered for the report. This report also advises you of any stock shortages.

You can select a bill configuration, including the bill number, revision, bill options, quantity to be manufactured, and the component warehouse. The quantity available is calculated based on the selection in the Include in Quantity Available field in the Inventory Management Options window. Yield and scrap percentages are also factored into the gross requirement calculation.

You can also select to round the amounts in the Quantity Required for Components and Quantity to Produce for Bills columns to the next whole unit when using Integer Units of Measure.

If inventory items appear multiple times on the Gross Requirements report, it is due to a missing revision code. Revision codes can be missing for one of the following reasons:

- An item is listed multiple times within a bill and the revision code is missing in one of the listings. The Bill of Materials module treats this as two separate items.
- An item is listed multiple times within a bill and an occurrence of the item was entered on the bill with the Require Bill Revision Codes check box cleared in the Bill of Materials Options window leaving the revision code blank. Subsequently, the Require Bill Revision Codes check box is selected and another instance of the item was added with a revision code.
- If bills were imported without revision codes for components.

NOTE The data entered in the grids is saved automatically to the Bill of Materials data files, and is not saved with the report setting.

Costed Bill of Materials Report

Navigation

Select Bill of Materials Reports menu > Costed Bill of Materials Report.

Overview

Use Costed Bill of Materials Report to list the item and extended bill costs for either a selection of bills or specific bill configurations.

You can use the average cost, last cost, or the standard cost to calculate the item and extended bill costs. You can select the bill types and the number of bill levels to include on the report. You can also select to round the amount in the Quantity to Produce column to the next whole unit when using Integer Units of Measure. Yield and scrap percentages are factored into the quantity requirement calculation when printing a selection of bills with yield or specific bills and the Allow Yield and Scrap Percentage Factors check box is selected in the Bill of Materials window. You can enter a selection of bill numbers, bill revisions, and user-defined fields (UDFs) to print. You can include option codes, blow through phantoms, select to print all effective engineering changes or changes made through a specified date. You can also print each bill on a separate page.

If your bills include phantom bill components, you can print the components instead of printing only the phantom bill numbers.

NOTE Option interaction bills are not printed on this report.

NOTE The data entered in the grids is saved automatically to the Bill of Materials data files, and is not saved with the report setting.

Bill Validation Report

Navigation

Select Bill of Materials Reports menu > Bill Validation Report.

Overview

Use Bill Validation Report to provide an exception listing of bills that failed integrity tests. The tests performed include checking for bills that do not have corresponding inventory item codes, bills without components, or phantom bills not used in assemblies. This report also checks for bills that have exceeded the value entered in the Maximum Number of Levels field in the Bill of Materials Options window.

NOTE To ensure the proper use of the Bill of Materials module, this report should be run on a regular basis.

Production History Report

Navigation

Select Bill of Materials Reports menu > Production History Report.

NOTE This report is available only if the Retain Production History check box is selected in the Bill of Materials Options window.

Overview

Use Production History Report to provide a history of production and disassembly information. The report can be sorted by entry number, bill number, or entry date. You can print the report for production history only, disassembly history only, or both production and disassembly history.

You can enter a selection of entry numbers, bill numbers, entry dates, product lines, and user-defined fields (UDFs) to print. You can include component detail information and select the data entry type to print.

Production history information will be retained indefinitely until manually purged using Purge Bill of Materials History in the Bill of Materials Utilities menu.

Engineering Change History Report

Navigation

Select Bill of Materials Reports menu > Engineering Change History Report.

NOTE This report is available only if the Enable Engineering Change Control check box is selected in the Bill of Materials Options window.

Overview

Use Engineering Change History Report to provide an audit trail of all engineering changes on file. The report can include only the bill numbers affected, or it can include the component items within those bills.

You can enter a selection of change numbers, bill numbers, effective dates, and user-defined fields (UDFs) to print.

Engineering change history information is retained until it is purged using the Purge Bill of Materials History utility.

Change Control Menu

Engineering Change Entry

Navigation

Select Bill of Materials Change Control menu > Engineering Change Entry.

NOTE Engineering Change Entry is available only if the Enable Engineering Change Control check box is selected in the Bill of Materials Options window.

Overview

Use Engineering Change Entry to record engineering change notices and implement controlled changes to the bill structure between revisions of a bill. This method allows you to forecast requirements for future periods.

Engineering changes can be implemented for a variety of reasons, such as error correction, cost reduction, design improvements, quality improvement, and changes in material specification. Each engineering change can affect one or more components within a bill.

Because the bills are not actually changed (the additions are marked with a starting date and the deletions are marked with a deletion date), all bill configurations remain on file. You can view any bill configuration by entering its change number. Engineering changes entered using Engineering Change Entry that have not been updated can be maintained at any time.

Engineering Change Register

Navigation

Access this window using one of the following methods:

- Select Bill of Materials Change Control menu > Engineering Change Register.
- Select Bill of Materials Change Control Menu > Engineering Change Entry. In the Engineering Change Entry window, click the Print button.

Overview

The Engineering Change Register is an audit report that itemizes entries made in Engineering Change Entry. Printing the Engineering Change Register is the first step in the file update process. It provides an opportunity to check for errors before posting the information to the permanent files.

Information on the register includes the change number, effective date, bill number, component item code and description, and action code, as well as the quantity per bill for the components being added.

The change number is deleted after the Engineering Change Register is printed.

WARNING Do not, under any circumstances, interrupt the update process.

Review the Engineering Change Register for accuracy. If there are errors, make the necessary changes in Engineering Change Entry, reprint the Engineering Change Register, and then proceed with the update. During the update process, the entries made in Engineering Change Entry are posted to the permanent files.

Replace and Delete Component Entry

Navigation

Select Bill of Materials Change Control menu > Replace and Delete Component Entry.

Overview

Use Replace and Delete Component Entry to replace one component with another component in every bill where it is used. You can also delete a component from every bill where it is used.

WARNING If used incorrectly, this task can cause damage to your bill structure. Verify the accuracy of the Replace and Delete Component Register before updating the changes.

Replace and Delete Component Entry differs from Engineering Change Entry in that all bills using a component are affected, and all changes are made directly following the Replace and Delete Component Register.

NOTE Previously entered component replacements or deletions not yet updated to the general ledger can be maintained at any time.

Replace and Delete Component Register

Navigation

Access this window using one of the following methods:

- Select Bill of Materials Change Control menu > Replace and Delete Component Register.
- Select Bill of Materials Change Control menu > Replace and Delete Component Entry. In the Replace and Delete Component Entry window, click the Print button.

Overview

Use Replace and Delete Component Register to produce an audit report that itemizes entries made in Replace and Delete Component Entry. Printing this register is the first step in the file update process, and allows you to check for errors before posting the information to the permanent files.

The information on the register includes the original and replacement component number, description, bill revision, and bills affected by each component replacement or deletion.

WARNING Do not, under any circumstances, interrupt the update process.

Setup Menu

Bill of Materials Options

Navigation

Select Bill of Materials Setup menu > Bill of Materials Options.

The General Ledger, Common Information, and Inventory Management modules must be set up before the Bill of Materials module can be set up.

For new companies, you can only access Bill of Materials Options after completing the Bill of Materials Setup Wizard.

Only one user at a time can access Bill of Materials Options. The second user accessing Bill of Materials Options will open an inquiry window where fields can only be viewed.

Overview

Bill of Materials Options presents a series of options that allow you to maintain features most appropriate for your business. Some of these options are defined during new company setup using the Bill of Materials Setup Wizard, but can be further maintained in this window.

Utilities Menu

Purge Bill of Materials History

Navigation

Select Bill of Materials Utilities menu > Purge Bill of Materials History.

WARNING Back up your data before performing this purge.

Overview

Use Purge Bill of Materials History to remove history data for production, disassembly, and engineering change records. You can purge multiple history files or one history file at a time. The purging of engineering change history files is determined by the effective date, and not removal date. If the effective date is beyond the removal date, engineering change records are not removed.

The System Activity Log is updated with the date, time, company code, user logon, and a message that the Purge Bill of Materials History utility was run.