Job Bill of Materials Process (BOM)

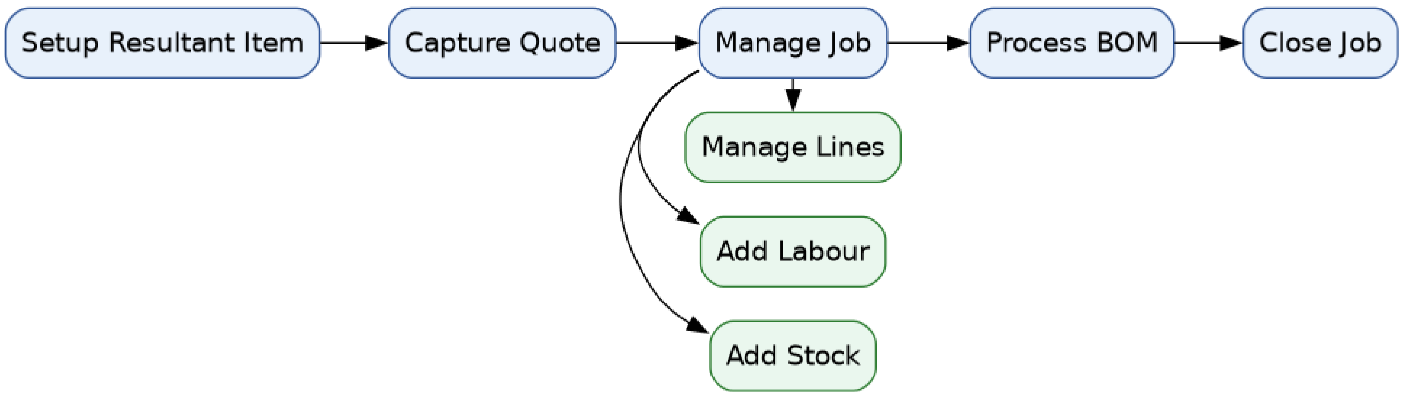
The Job Bill of Material (BOM)

This process enables you to produce a BOM resultant item using a job, ensuring accurate control of the final item cost, including all applicable labour and service costs.

Process Steps:

Quote
Create and prepare the initial job quote.
Manage Job
Convert the approved quote into an active job and manage it accordingly.
Add Labour and Service Costs
Include any relevant labour or additional service costs to ensure the total job cost is accurate.
Process Job BOM and Close
Process the Job BOM to generate the resultant item, then close the job.

Job Bill Of Material (BOM) Process

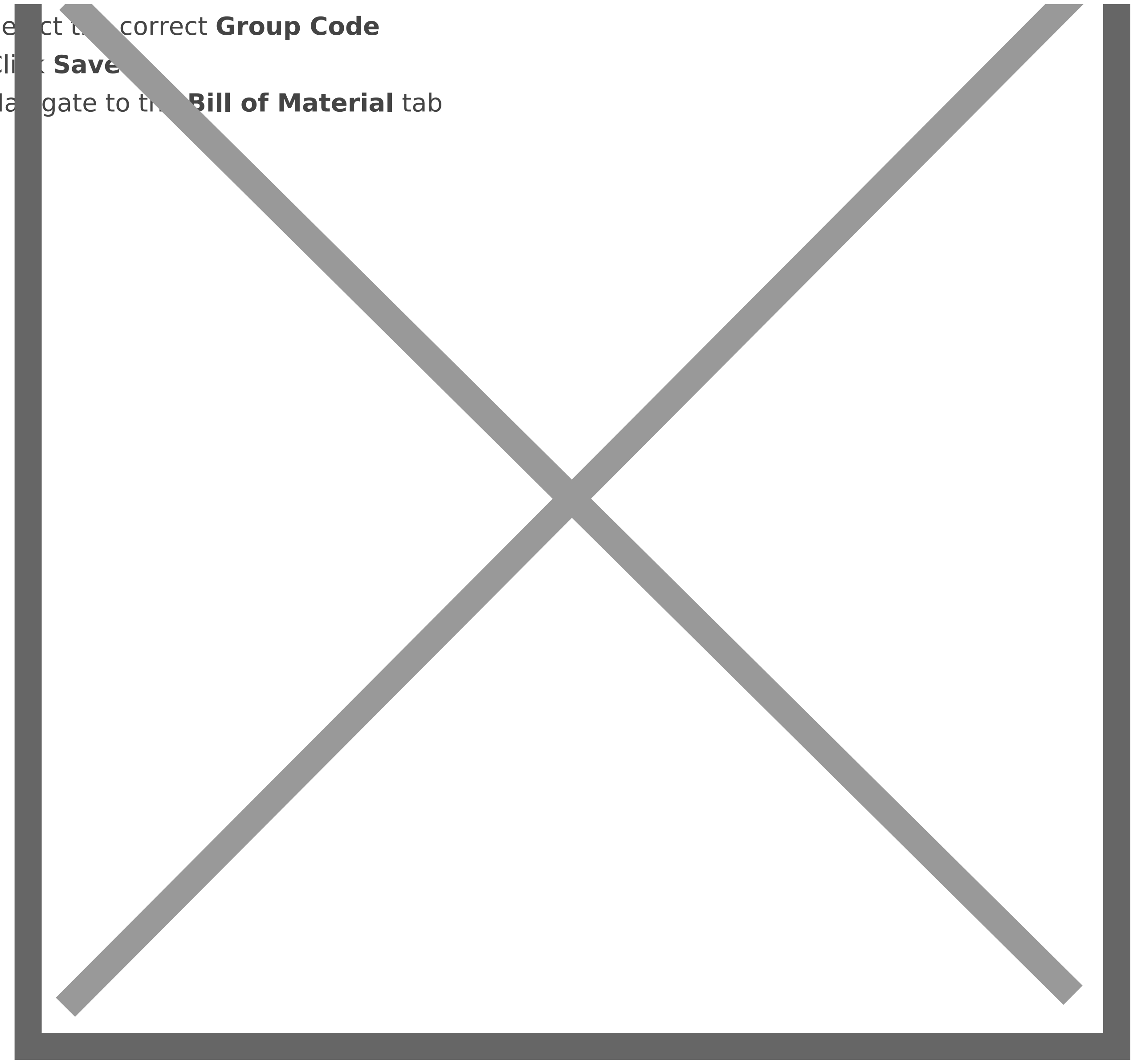


Resultant Item Setup

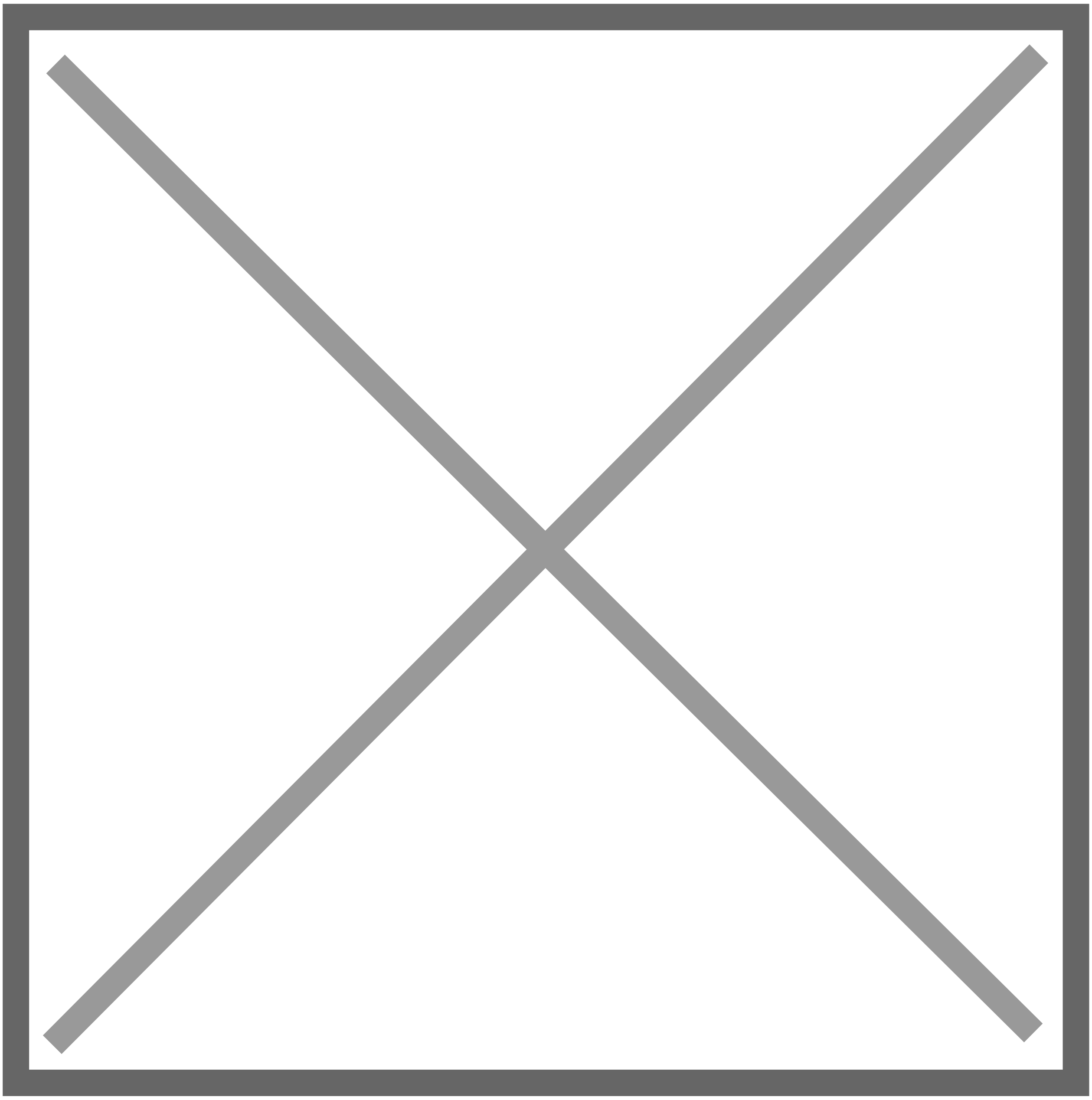
Go to **Inventory > Configuration > Inventory Setup**

- Click **Add**
- Enter an **Item Code** (ensure it aligns with your existing inventory coding convention)
- Enter the required **Item Description**

- Select the correct **Group Code**
- Click **Save**
- Navigate to the **Bill of Material** tab

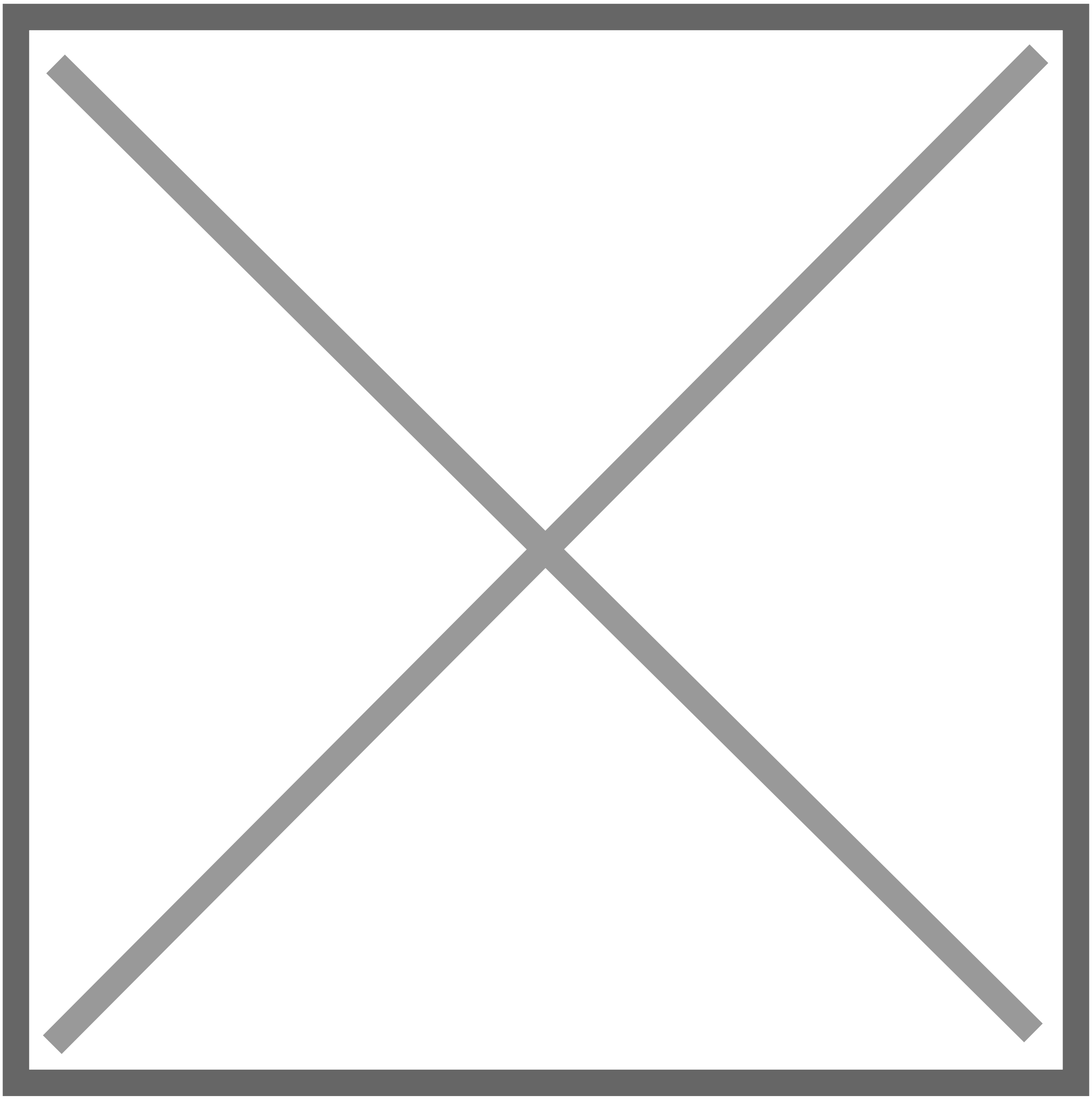


- Select the **BOM Item** checkbox
- Click **Save and Close**



Setup the BOM item

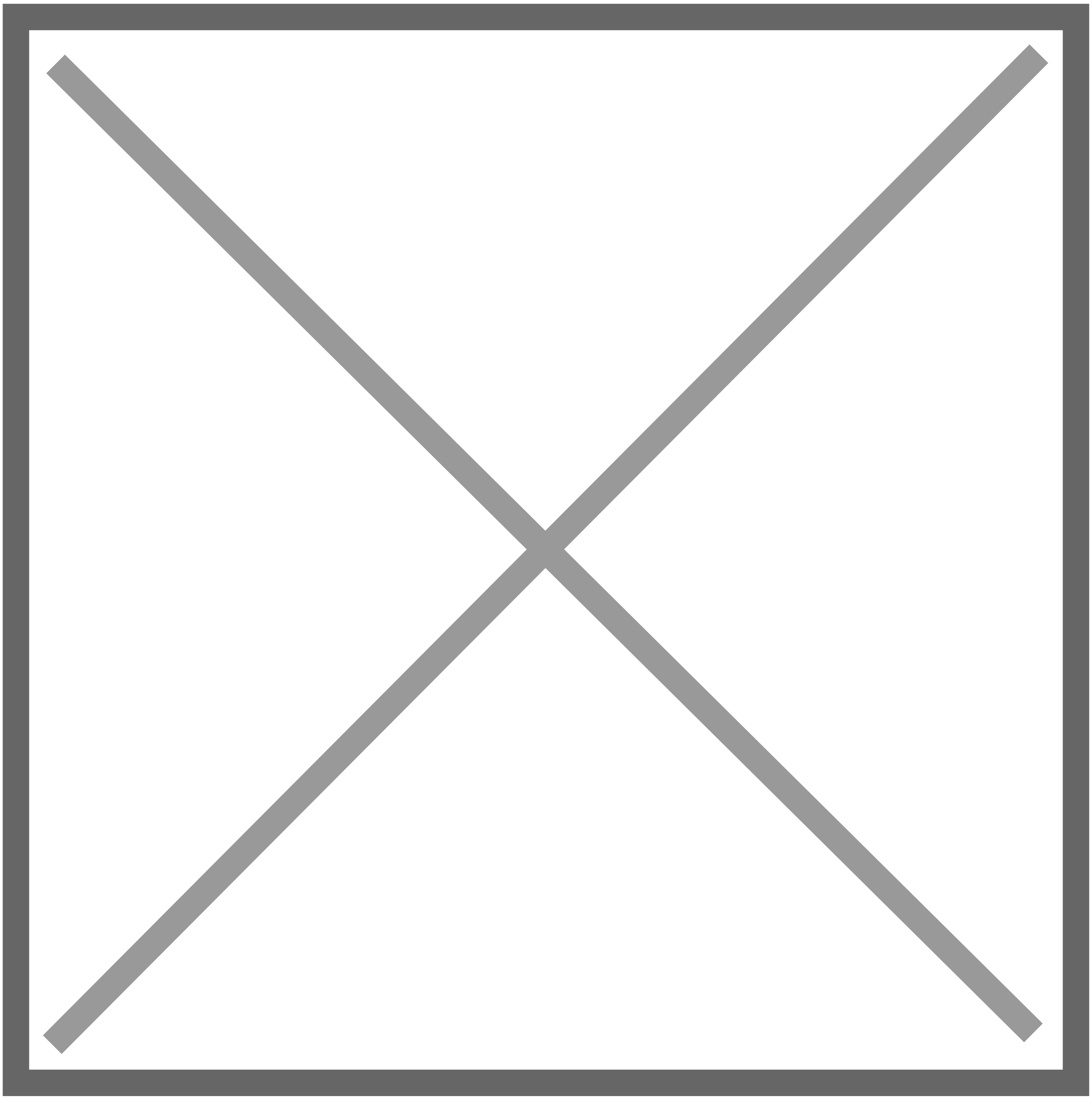
Go to setup the Bill of Materials item



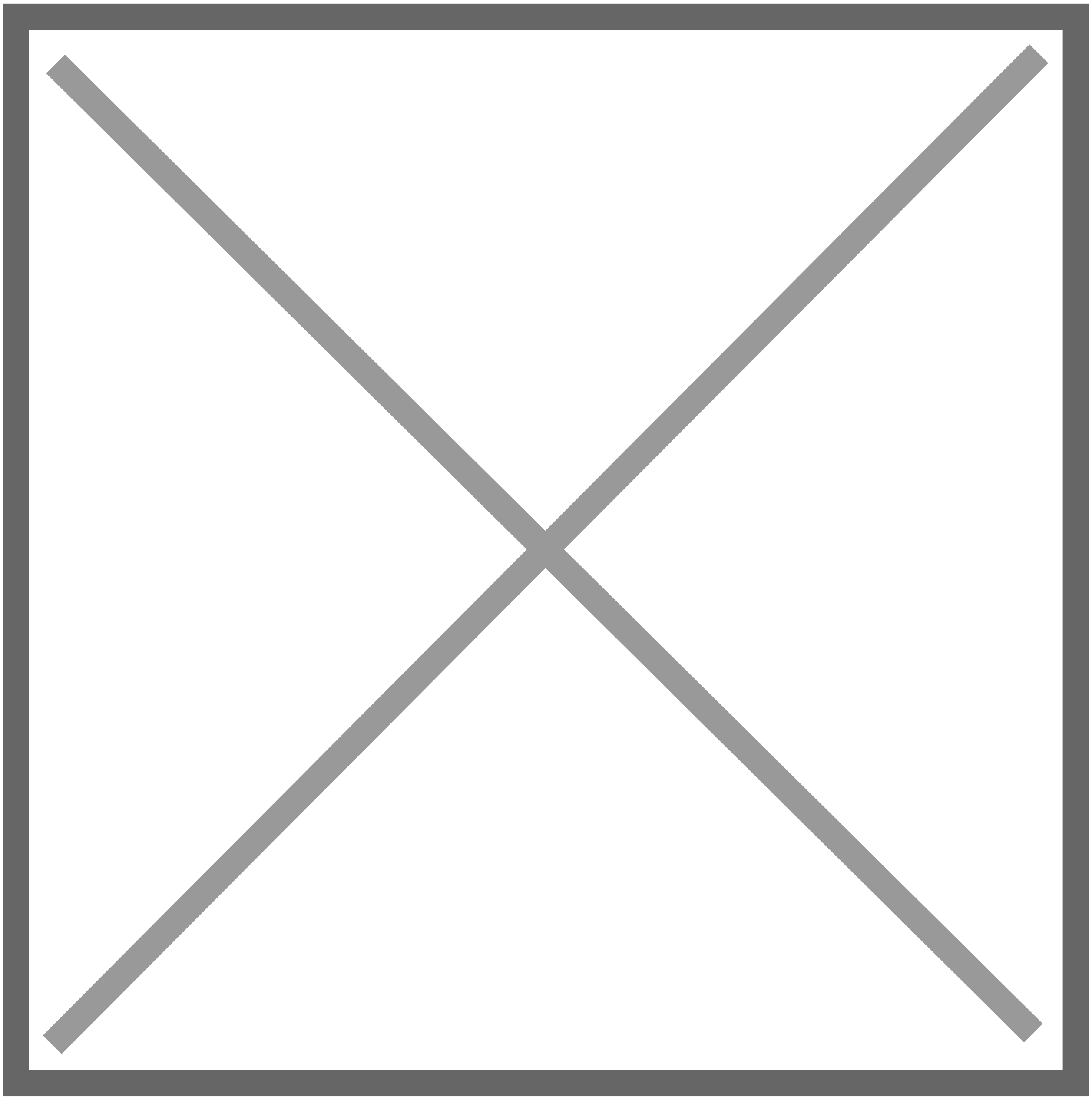
Capture Quote - Job Costing

Job Costing > Activity >Quotation

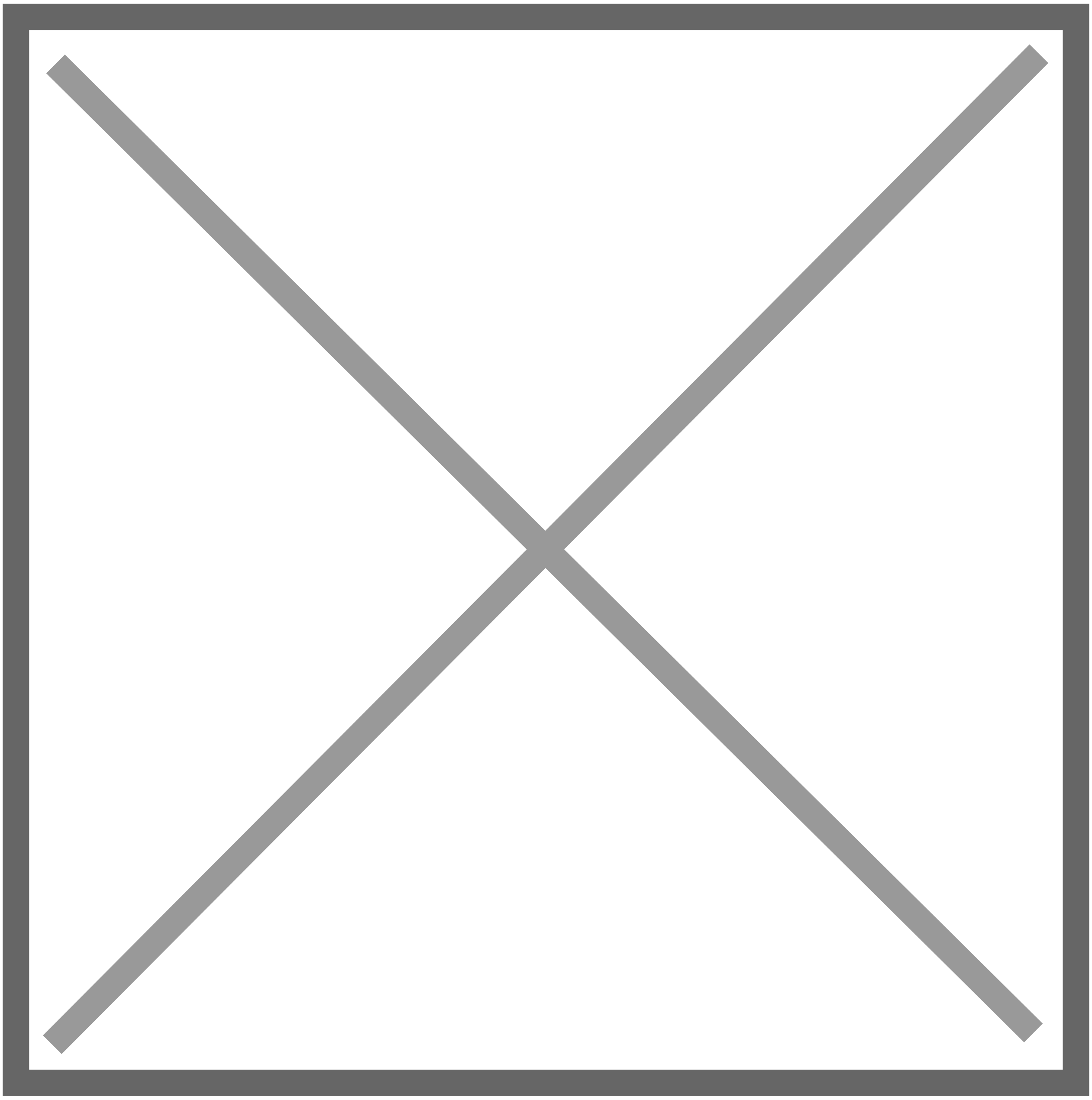
- Enter the **GST Production Account Code**
- Enter the **Description** and **Reference**
- Enter the **Order Number**
- Click the **Address** tab



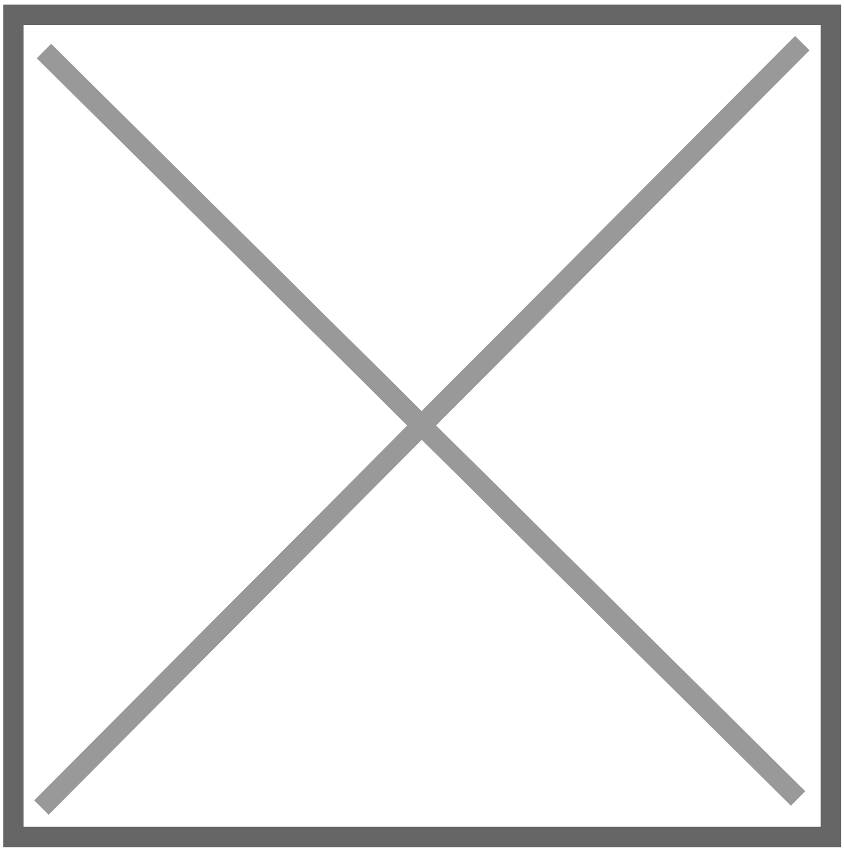
- Enter the required **Division**
- Enter the required **Region**
- Enter the **Invoice Group** (if applicable)



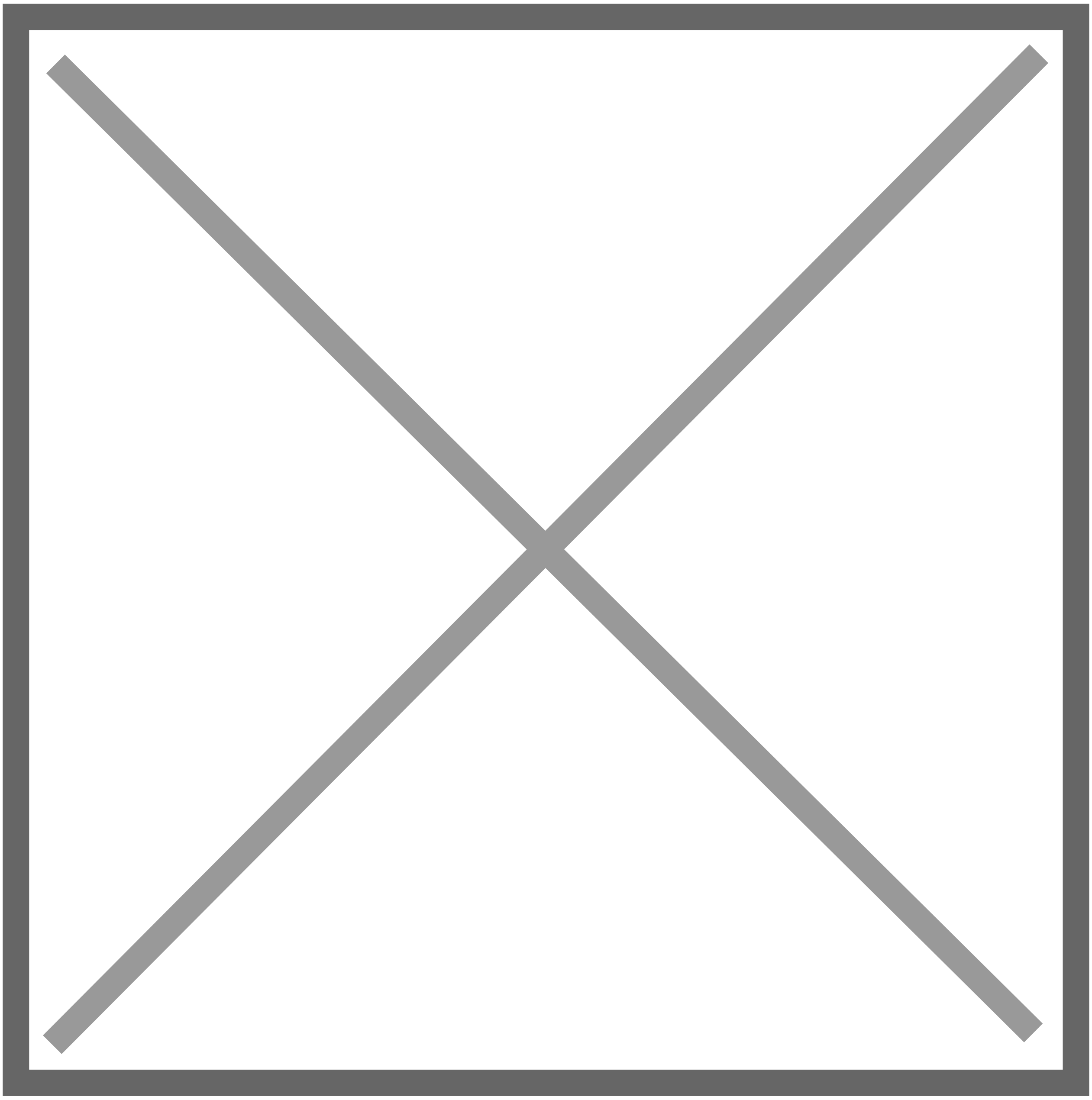
- Click **Save**
- Select the **Add** tab
- Choose the **Stock Code** or enter the description for the resultant item to be produced
- Enter the required **Quantity**
- Enter the estimated **Cost Price -** Do **not** enter a selling price



- Click **Save and Close**
- Click the **Approval Options** dropdown
- Select **Customer Approval** – this must be selected to ensure correct reporting
- Select **Approve to Job**



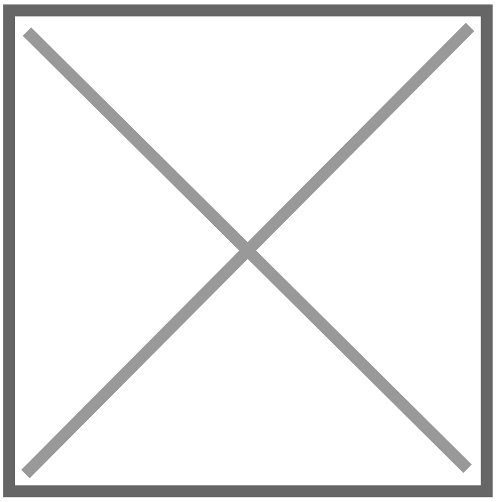
Once **Approve to Job** has been selected, this screen will appear
Ensure the appropriate options are selected based on how you want to control and manage the job



Ensure the **Exceed Quantities** and **Value** options are selected.

(This allows quantities and values to exceed the original job budget where required)

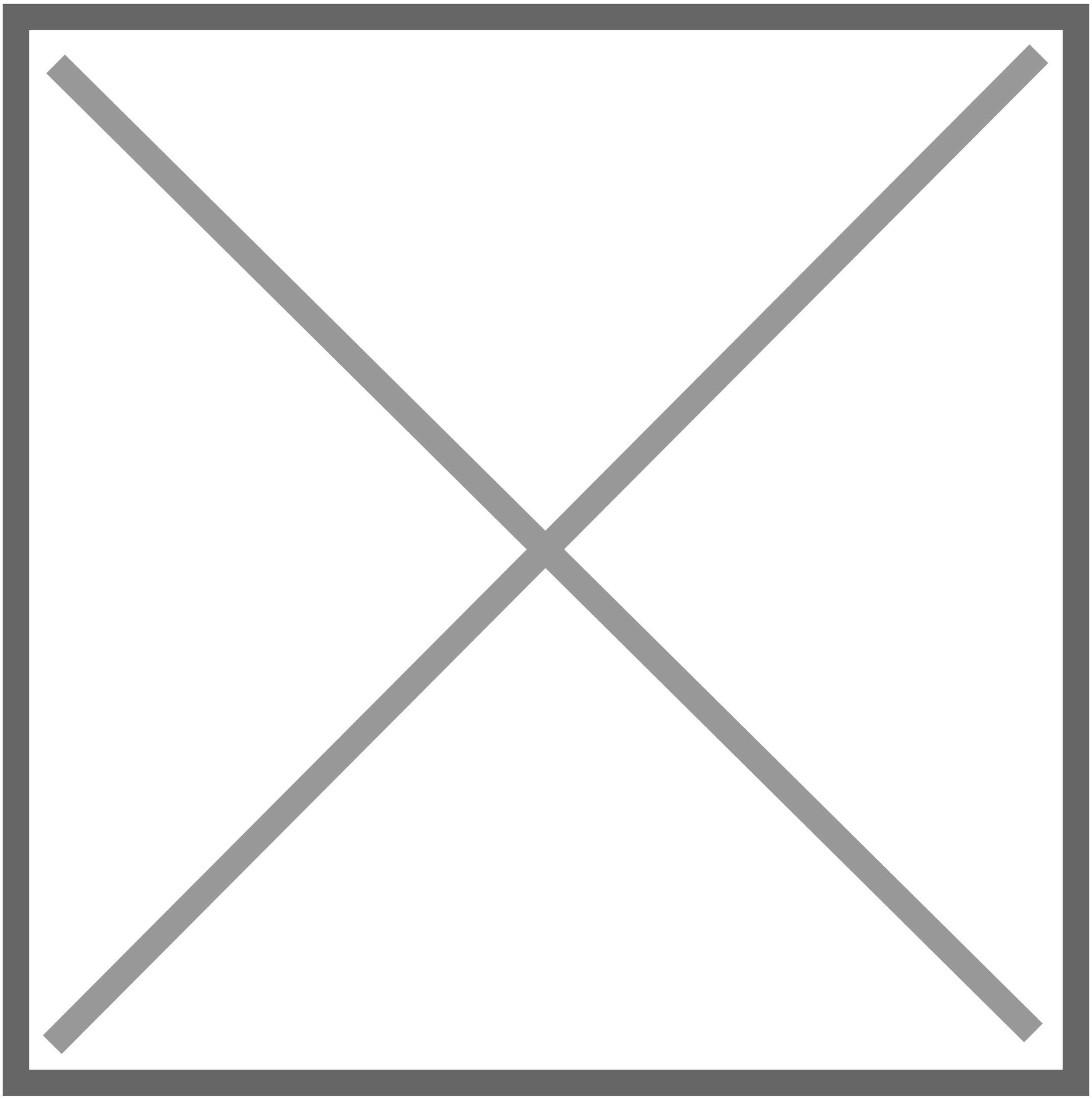
- Click **Continue**
- Click **OK**



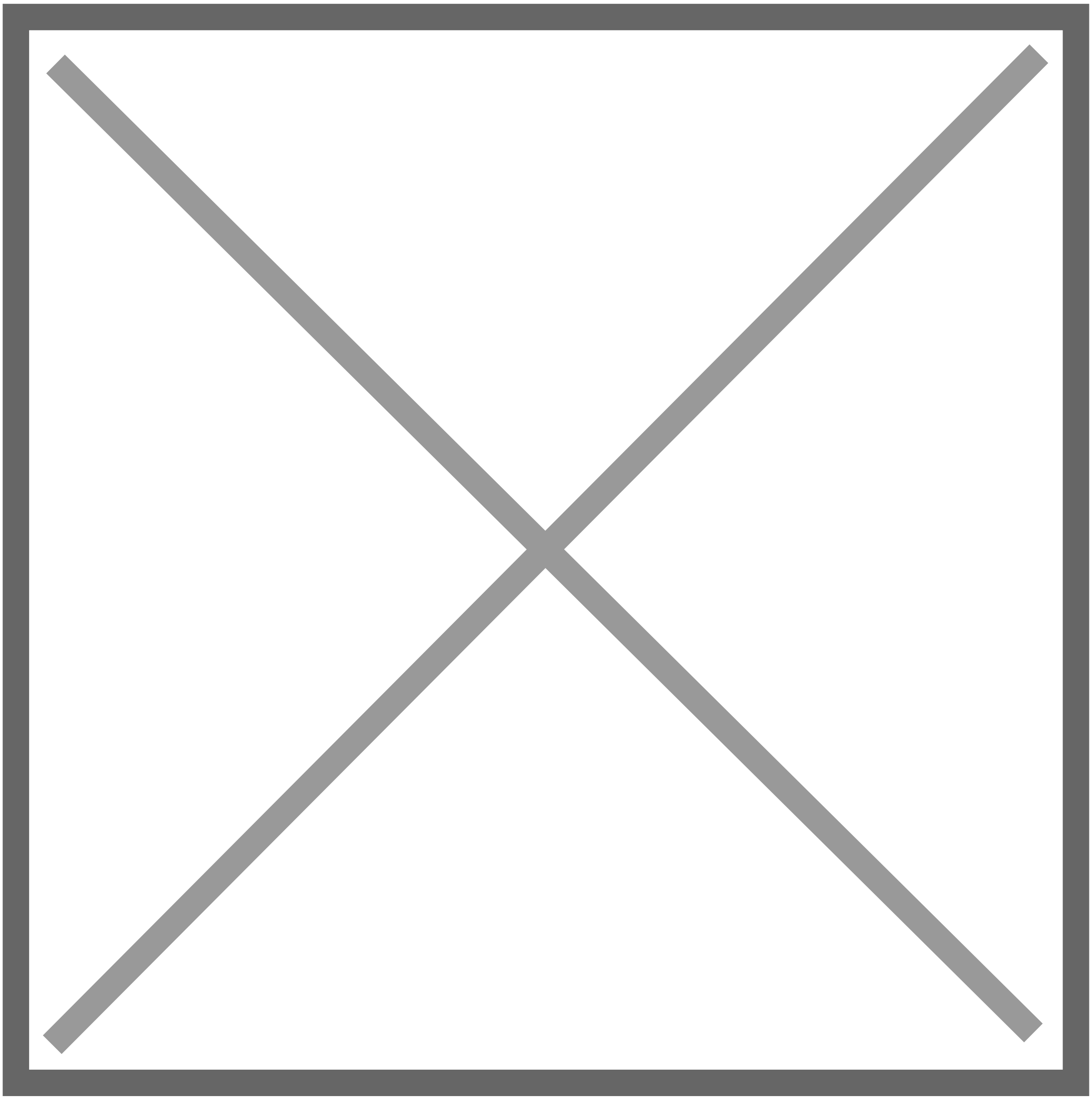
Manage Job

Job Costing > Activity > Manage Job

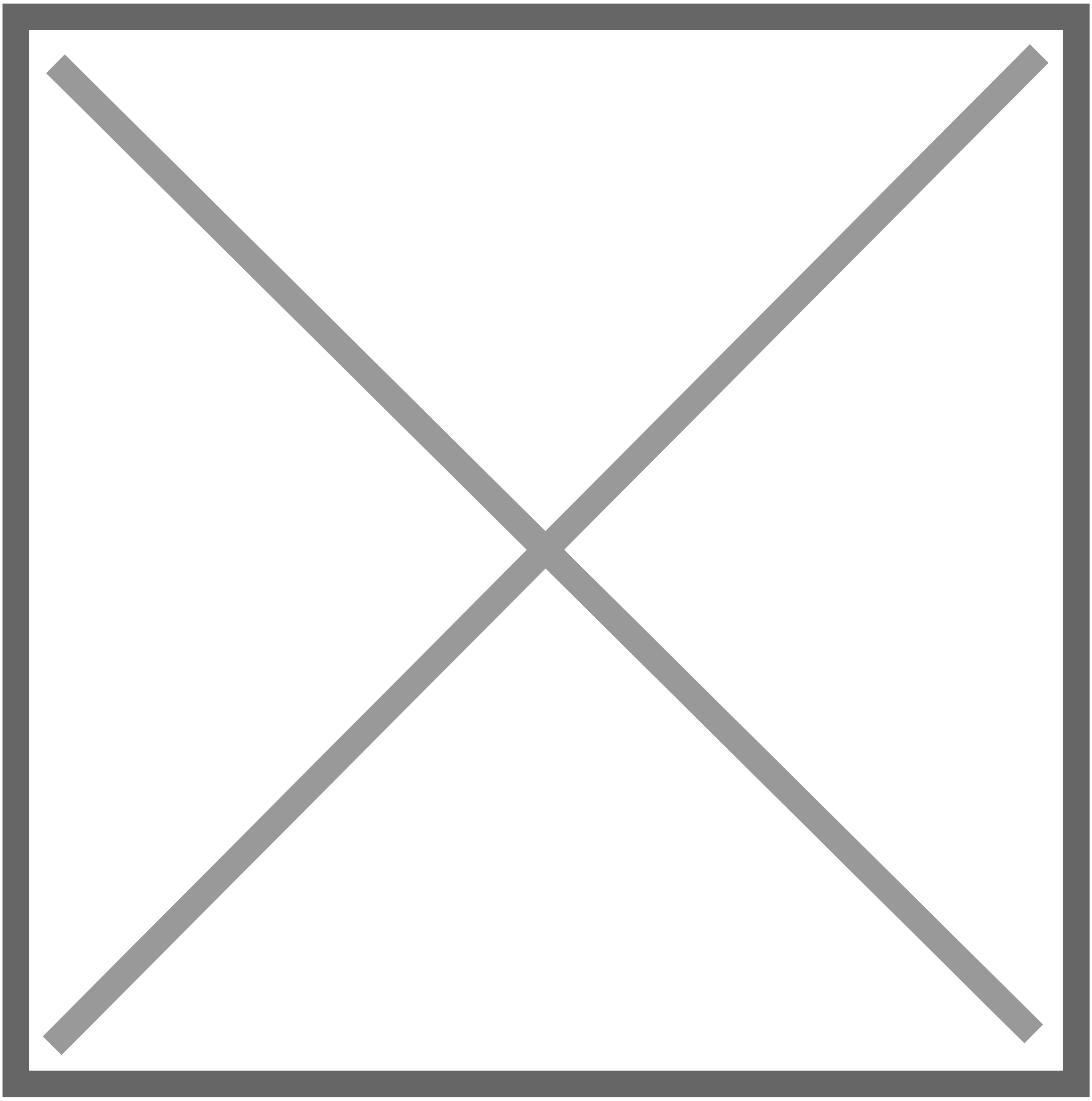
- Enter the **Job Number**
- Select the required **Production Job**
- Click **Manage Job**
- Click the **Cost to Company** button



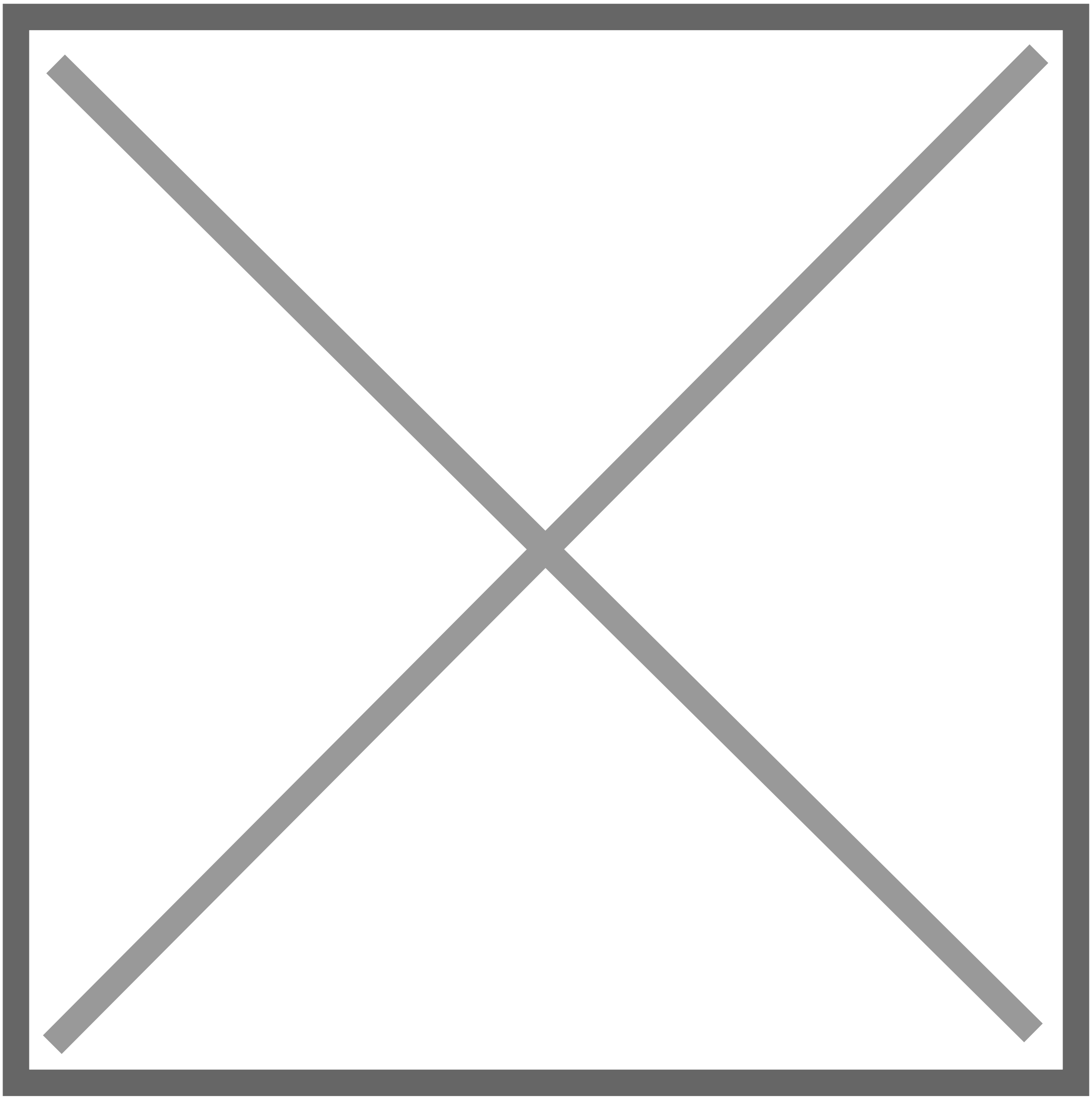
- Enter the **Item Code** of the stock item being used to produce this BOM item
- Enter the required **Quantity**
- Click **Save and New** to add another item



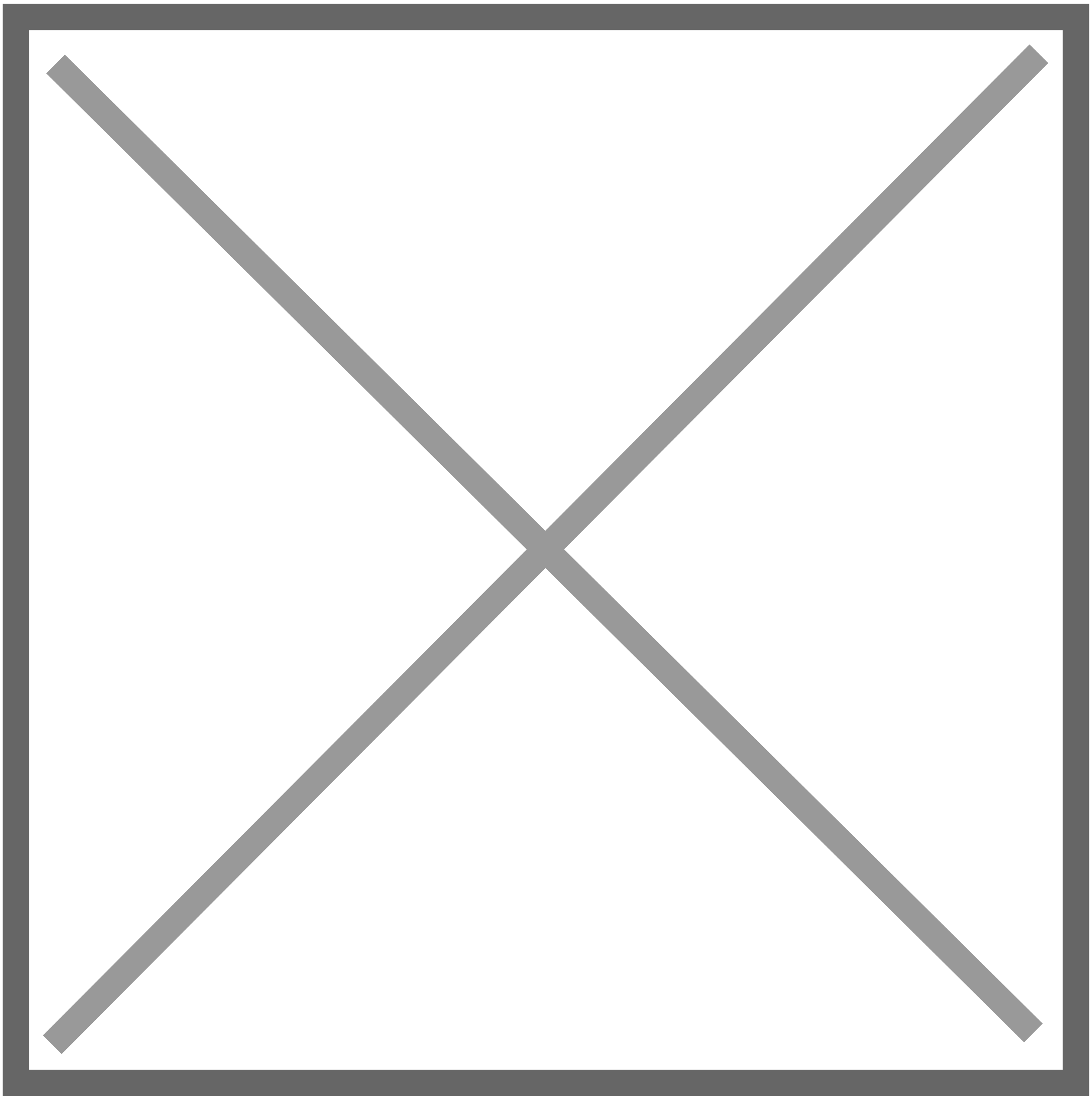
- Continue adding all items required to produce the resultant item



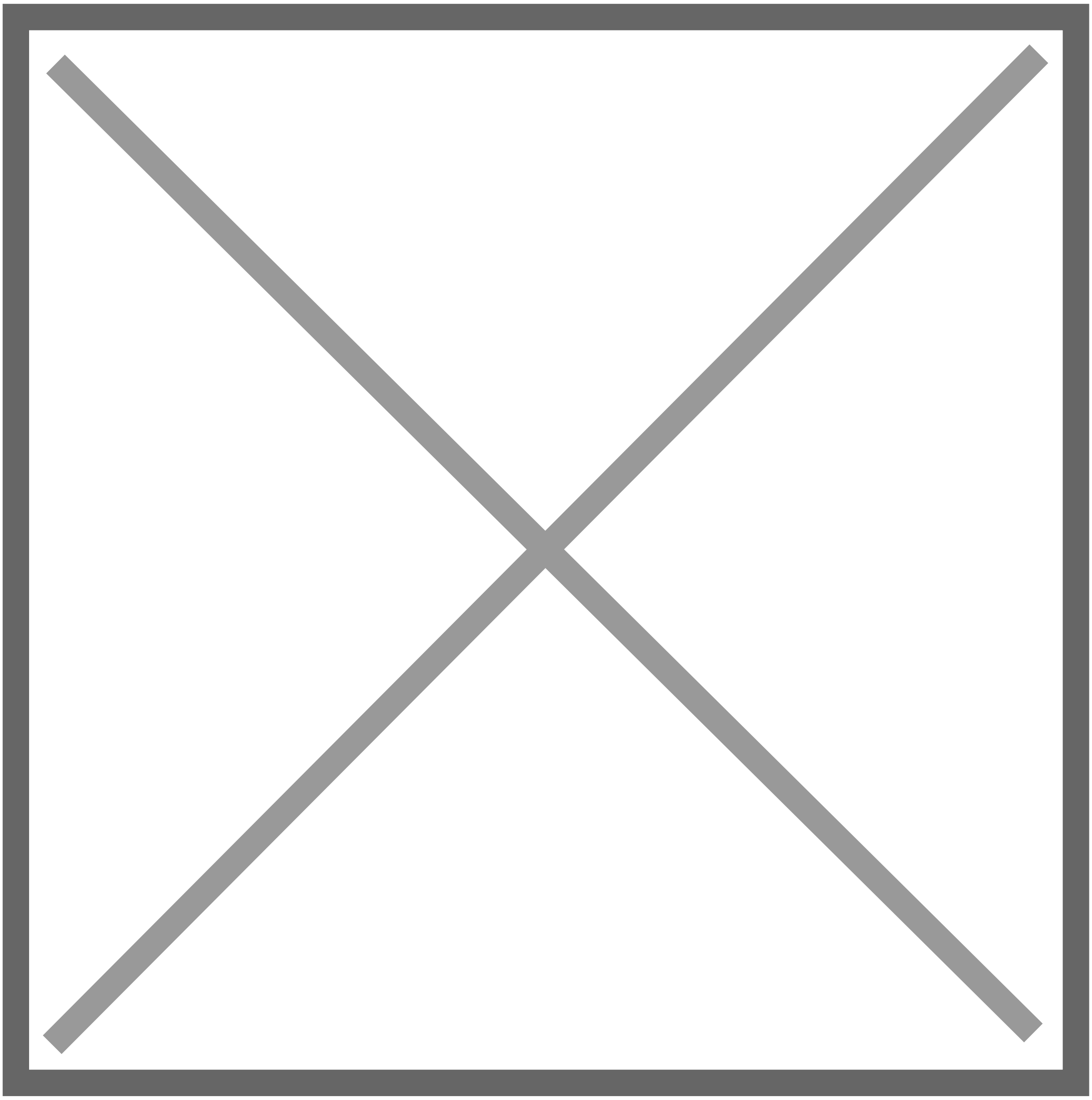
You can check stock on hand for both the component items and the resultant item by navigating to:
Inventory > Analysis > Stock Enquiry



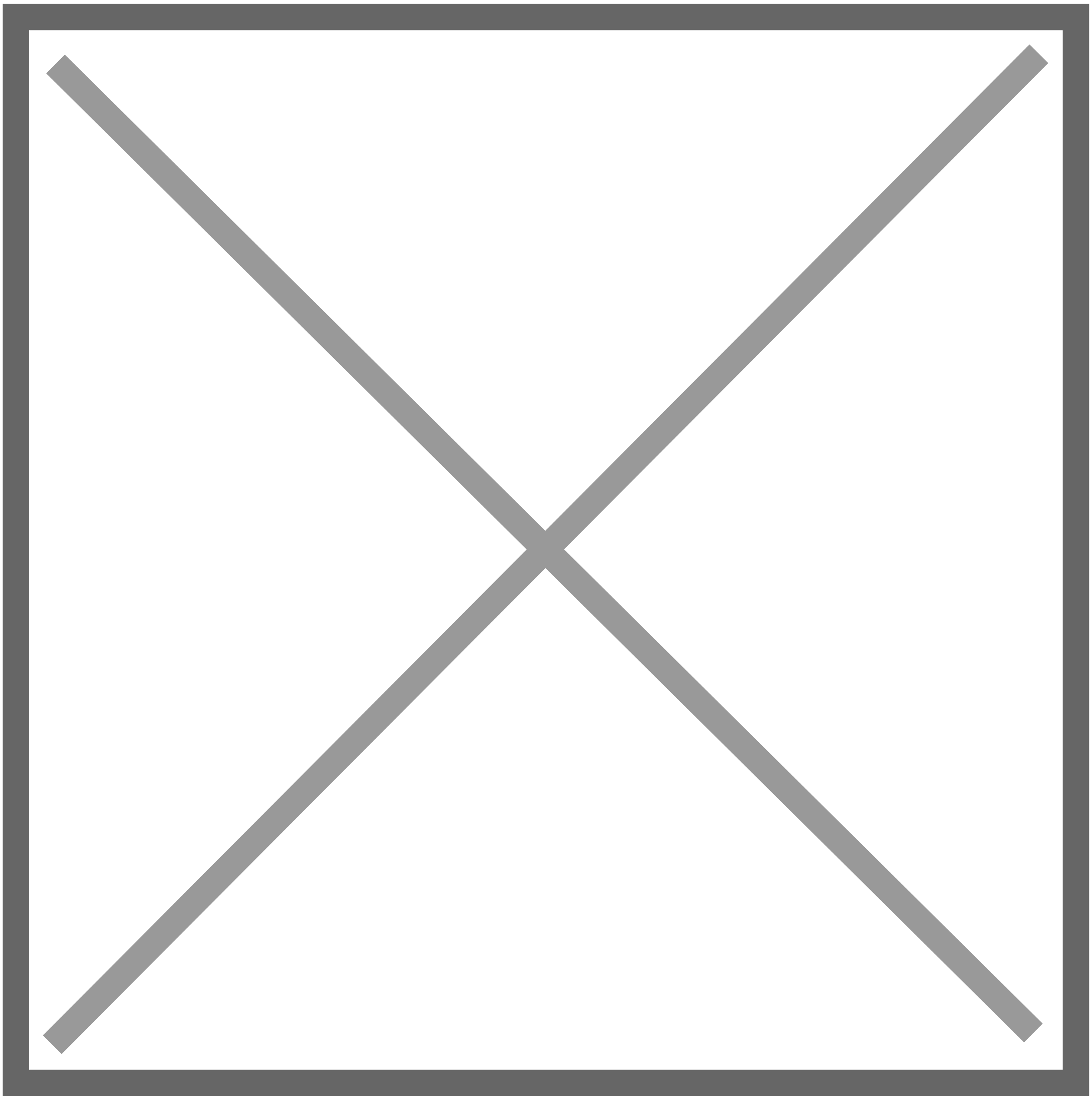
- Manage the stock items added to the job
- Double-click the relevant line and enter the **quantity used**



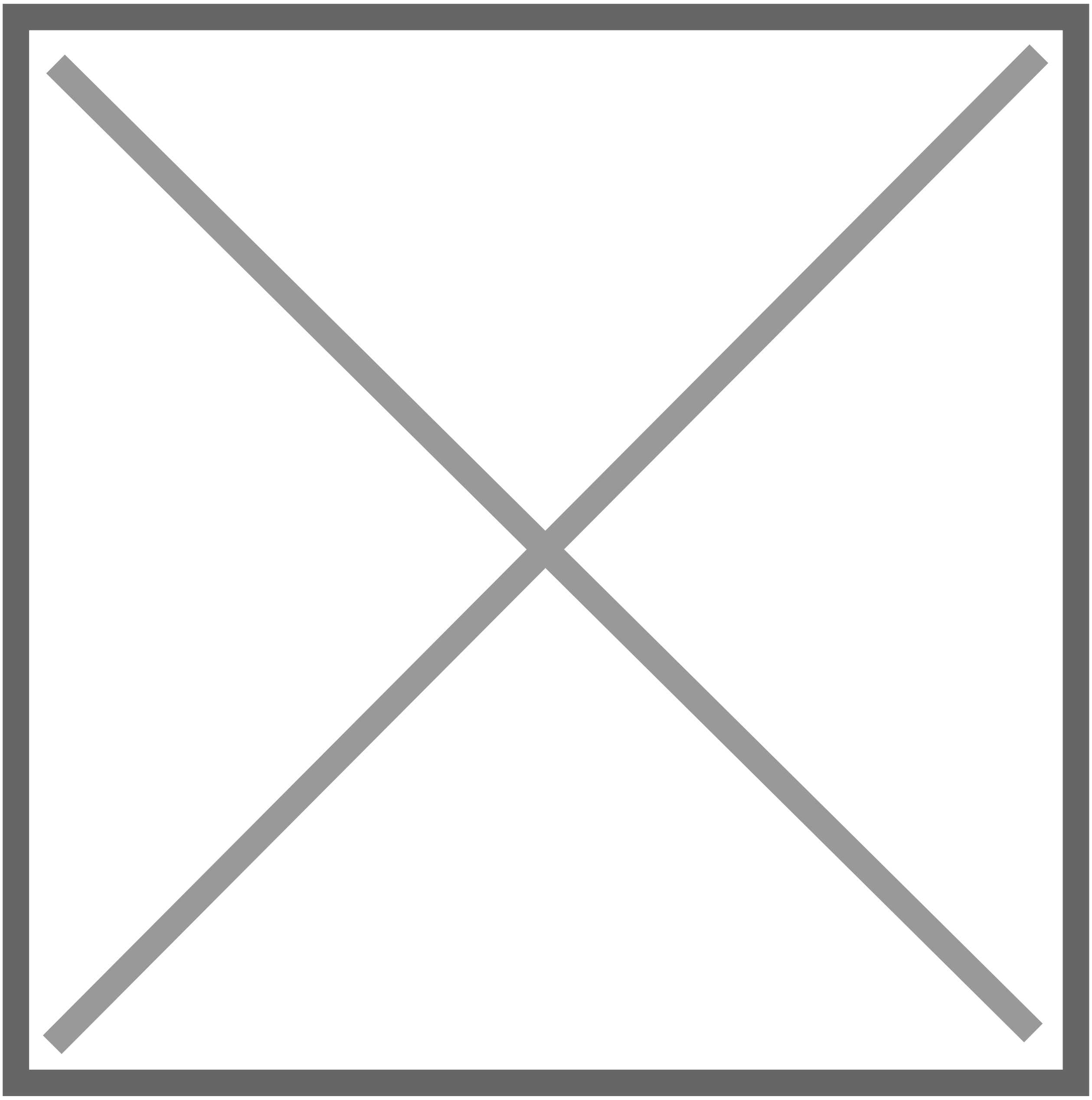
Once all stock items have been processed, review the job lines to ensure they are accurate and have been correctly managed



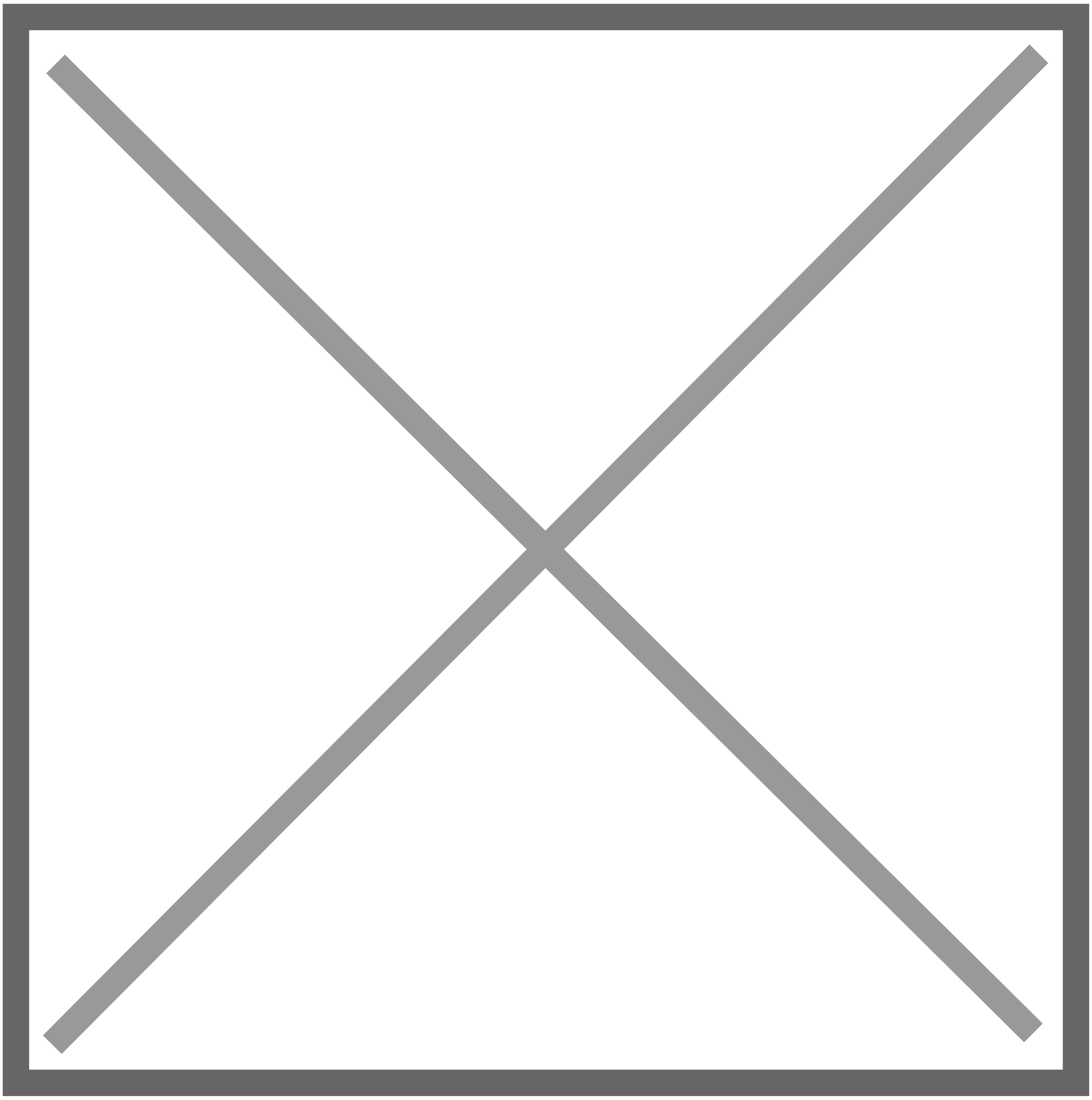
Ensure all timesheets from relevant staff have been submitted and are ready for capture, or have already been entered into the system



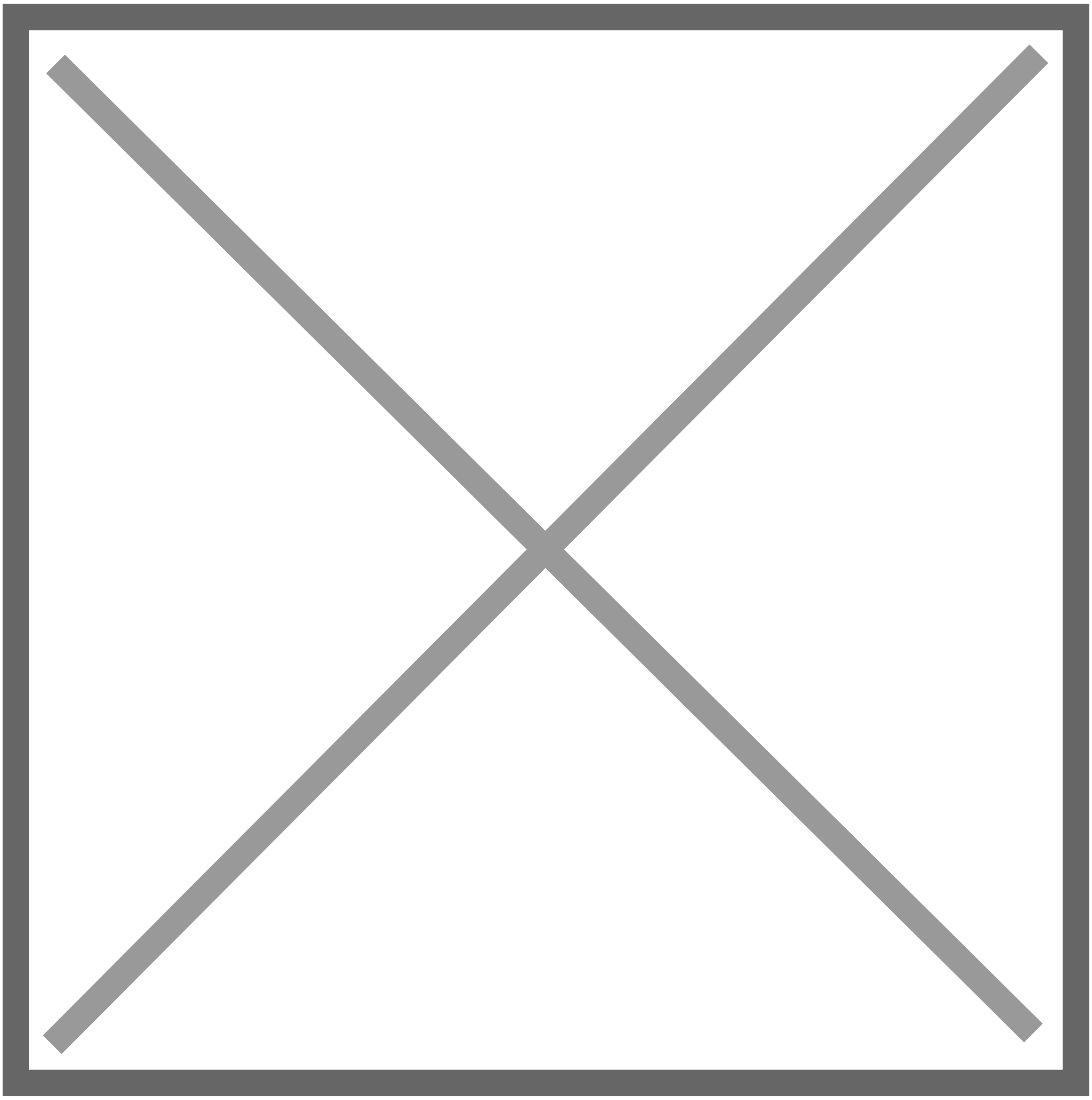
- Check the costing analysis of the job
- Open the job
- Select the **Print** tab
- Click the **Job Total Analysis** button



Click the **Managed Totals** tab



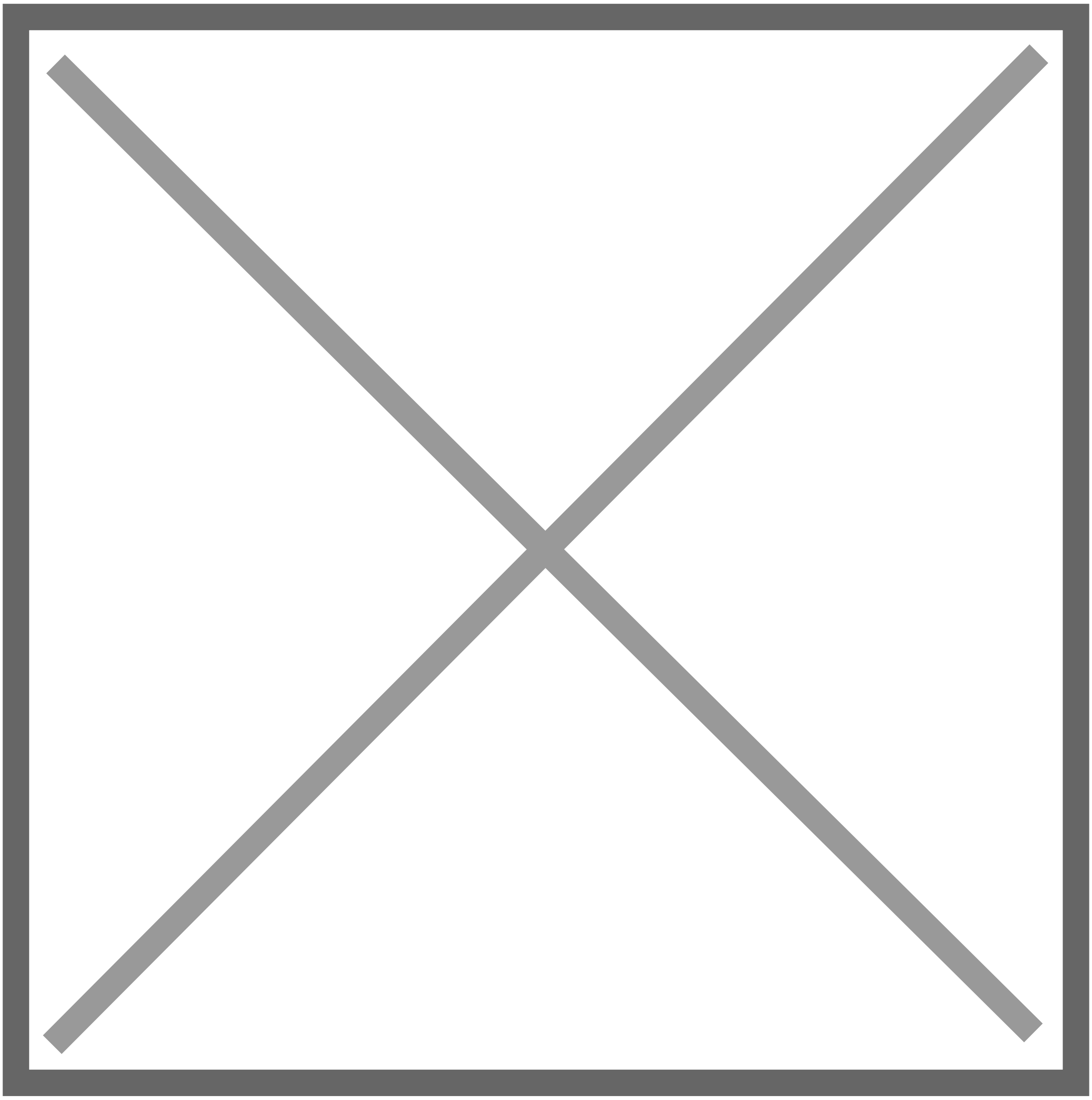
- Click the **View Details** Button



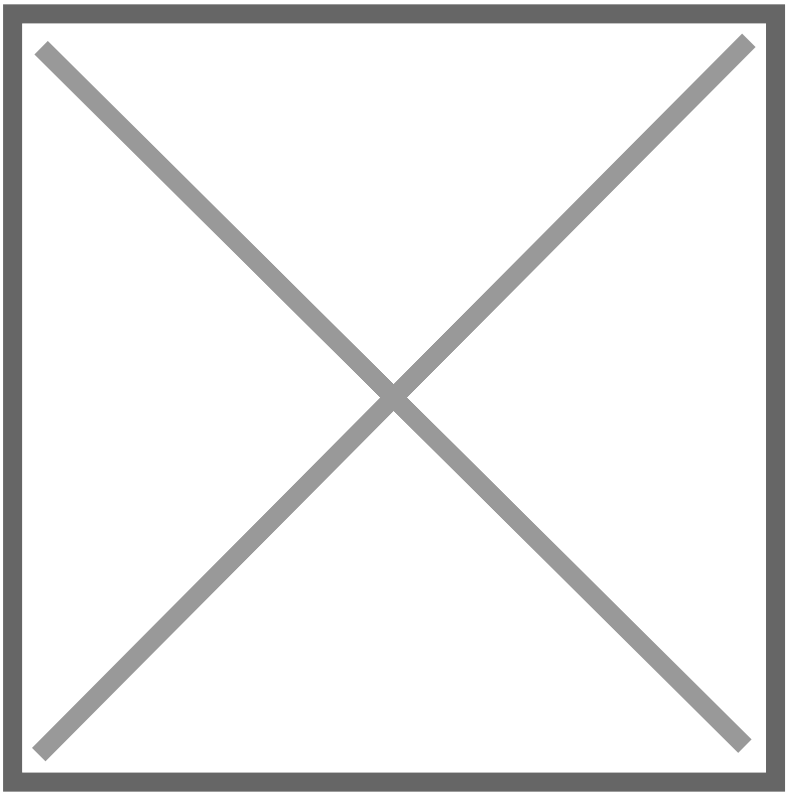
Review the details to ensure everything is accurate.

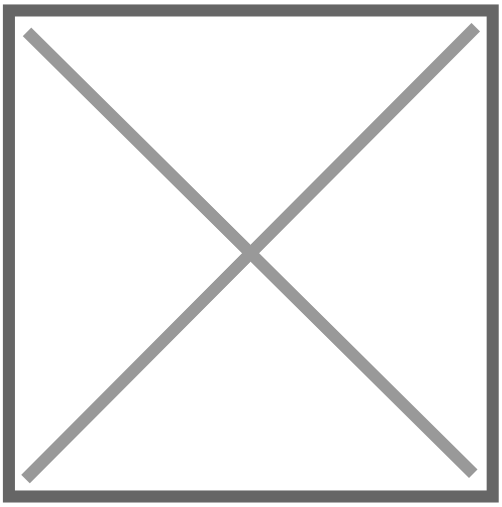
Once all lines have been verified and the job is ready to be completed:

- Close all open windows
- Return to the **Job Search** screen
- Search for the job, then click the **Extras** dropdown
- Select the **Job BOM** button

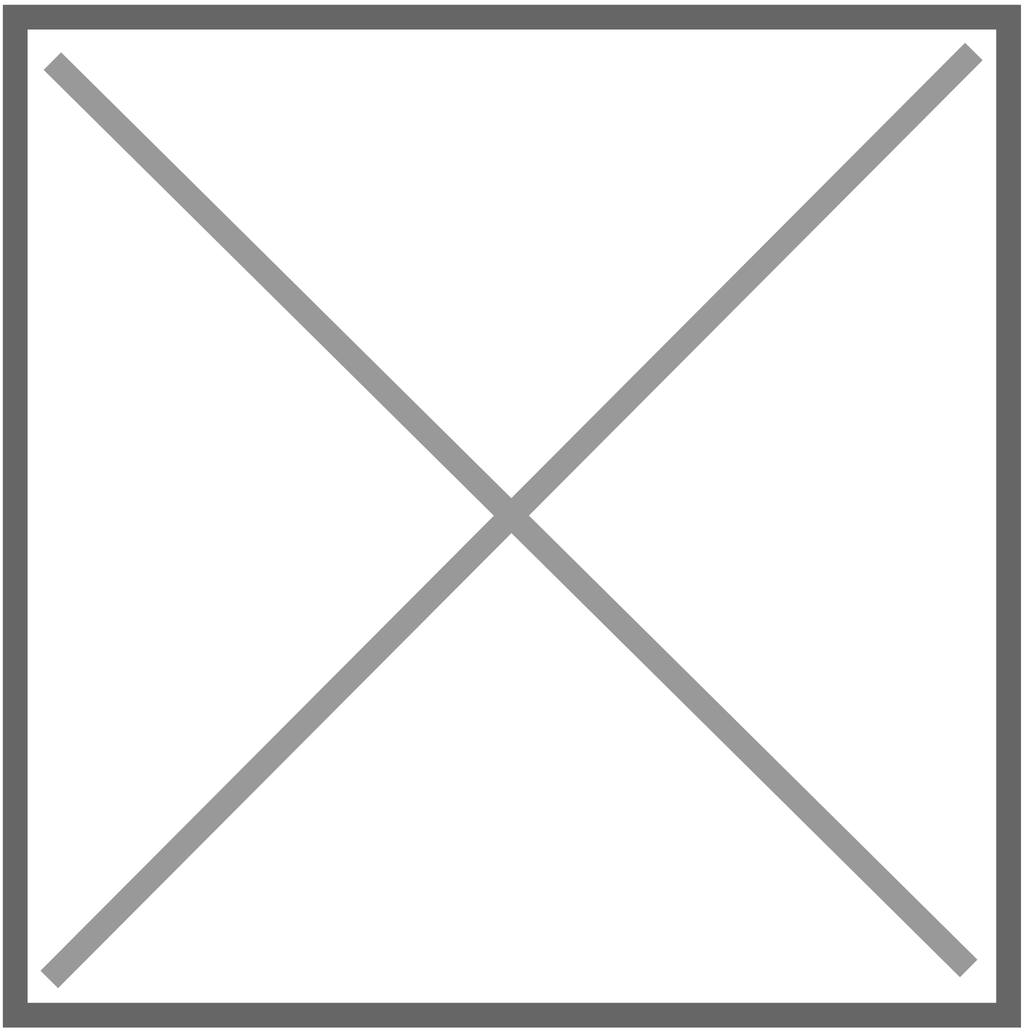


- Enter the **Resultant Item Code**
- Enter the **Quantity** to be produced
- Click **Save**
- Click **Process**

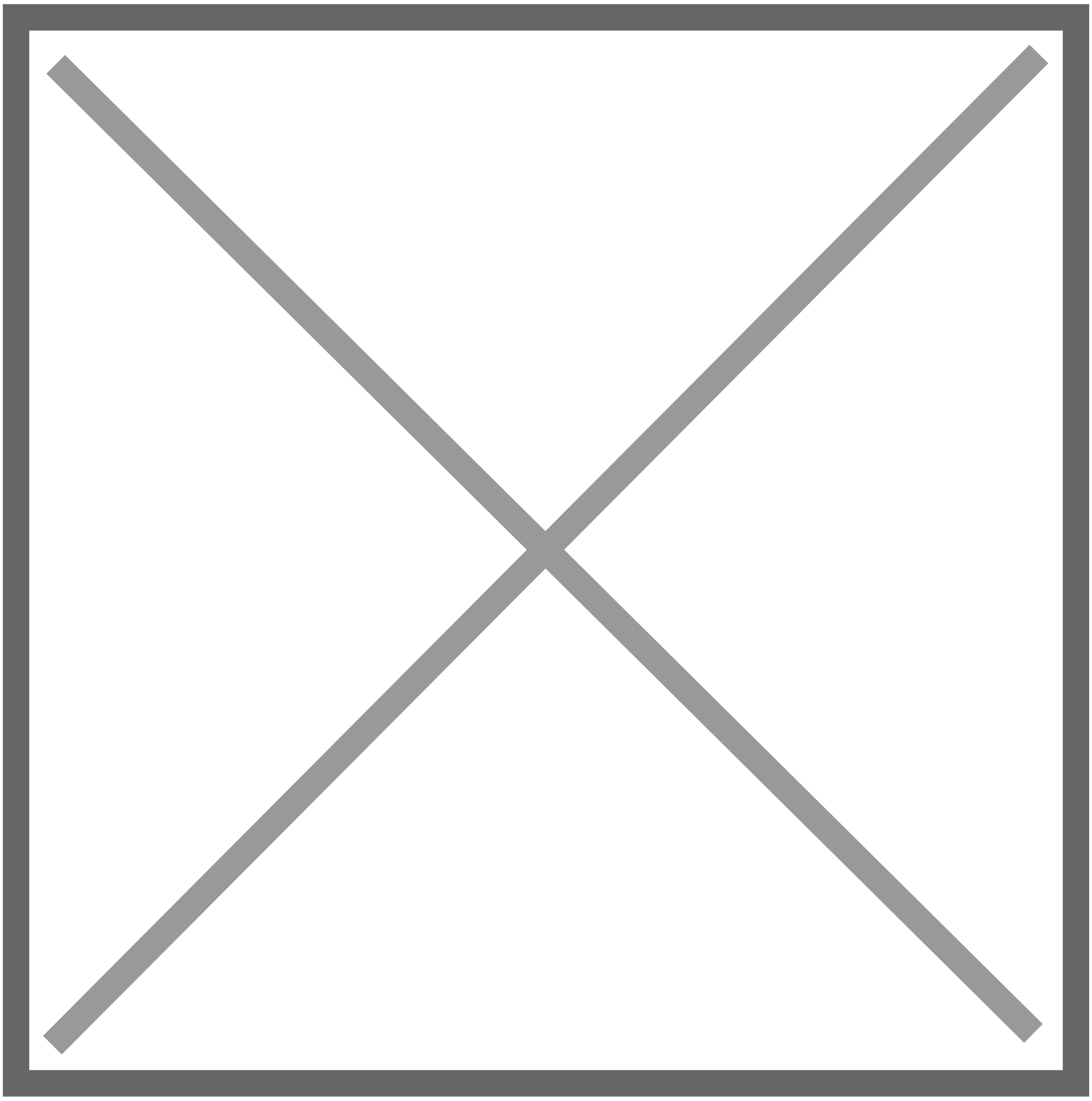




- Verify the BOM Item Stock



You will notice that the **resultant item stock on hand** has now been updated and increased accordingly



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