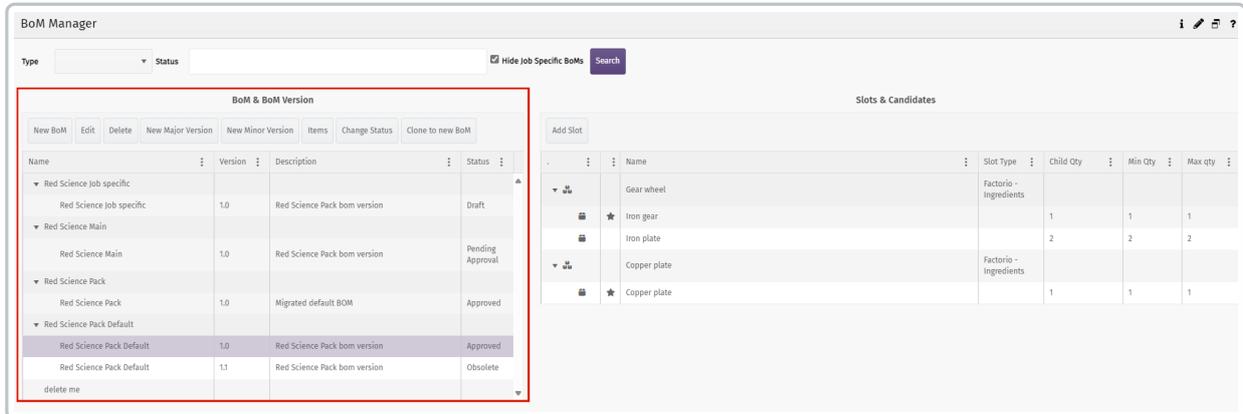


# BoM & BoM Version

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The **BoM & BoM Version** section is part of the **BoM Manager** screen.



The screen is accessed from the **Products** and the **Recipes** pages. From the **Products** page, the **Bill of Material** button is a menu item that appears when you select a product. From the **Recipes** page, the **BoM Manager** button is a menu item that appears when you select a recipe. Both paths display the **BoM Manager** screen for the selected product/recipe.

A BoM has a header and one or more versions. A BoM version is made up of a major version number and a minor version number.

## BoM Version Status

BoM versions may have the following statuses:

- **Draft:** BoMs that are in draft.
- **Pending Approval:** BoMs that are pending approval.
- **Approved:** BoMs that were approved.
- **Pre-production:** BoMs of this status may only be used for pre-production jobs and by users with the appropriate test permissions.
- **Pending Virtual Test:** BoMs of this status may only be used for virtual test jobs by users with the appropriate permissions.
- **Obsolete:** An obsolete BoM version prevents the creation of new items based on that BoM version. However, existing items will continue to reference an obsolete BoM version and if in WIP, may be completed.

## Create a BoM Type

To create a BoM you require a [product](#) and a BoM Type. A BoM Type lets you group BoMs based on how you would like them to be managed. For example, whether it's controlled or not, and which Approval Permissions can approve a BoM of a specific type.

1. Navigate to the **BoM Types** page and click **Add**.
2. Complete the **Add BoM Type** input screen.

## Add/Edit BoM Type input screen

The following properties can be defined for a BoM Type:

*Blue fields in the form are required and are flagged with an asterisk (\*) in this document.*

**Name\***: The name of the BoM Type.

**Description**: A description of the BoM Type.

**Job Specific\***: Select Yes if the BoM Type is job specific.

**Controlled\***: Select Yes if BoMs of this type are controlled.

**Approval Signature Required\***: Select Yes if an approval signature is required.

**Permission Category**: Your selection here will filter what's displayed in the **Approval Permission** drop down.

**Approval Permission\***: The permission that's allowed to approve BoMs of this type.

## Create a BoM

1. Navigate to the **Products** screen and select the product that the BoM applies to. This would be the product that is being produced using the BoM.
2. Click the **Bill of Material** menu item that appears to open the **BoM Manager** screen.  
Note that you can also access BoM Manager from the **Recipes** page.
3. Click on **New BoM** to display the **BoM** input screen.
4. The following information is required:
  - a. **Product**: The parent product the BoM applies to.
  - b. **BoM Type**: Select a BoM Type from the drop down.
  - c. **BoM name**: The name of the BoM.
5. Click **Save**.

## New Major Version

1. Click the BoM for which you want to create a new major version.
2. Click the **New Major Version** menu item to display the **Up Major Version** popup asking if you would like to create a new major version.
3. Click **Confirm** to create the new major version of the BoM.

## New Minor Version

1. Click the BoM for which you want to create a new minor version.
2. Click the **New Minor Version** menu item to display the **Up Minor Version** popup asking if you would like to

create a new minor version.

3. Click **Confirm** to create the new minor version of the BoM.

## Items

The material items that use the selected BoM version. Clicking an item displays the following menu items:

### Transfer button

The selected item can be transferred to a different BoM version within a BoM. For example, you can transfer from 1.1 to 1.2 or 1.2 to 1.1. You cannot transfer across BoMs.

### BoM button

The BoM button displays the complete Bill of Materials with build records for the selected item.

## Change Status

The **Change Status** menu item lets you choose one of the following statuses for the BoM:

- Draft
- Pending Approval
- Pre-production
- Pending Virtual Test
- Approved
- Obsolete

For more information on statuses, see the [BoM Version Status](#) section.

## Clone to new BoM

When you clone a BoM, the new BoM created will have the same slots and candidates as the original.

1. Click the **Clone to new BoM** menu item to display the popup.
  2. Select the BoM Type of the new BoM that will be created and provide a name.
  3. Click **Save**.
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