



ZEPTER IT
Solutions for Business & Management

Sales Item Bill of Materials

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Project

2010007 Country Model Improvement

Prepared by

Zepter IT International

Revision Log

Change Record

Version	Date	Editor	Revision Notes
1.00	2010-09-17	Artur Marciniak	Document created
1.01	2010-10-08	Artur Marciniak	Template change
1.02	2010-10-27	Artur Marciniak	Template change (Introduction, name of chapter 2)
1.03	2010-10-29	Stephan Boehler	Test & Revise
1.04	2012-02-17	Piotr Swaryczewski	Zepter IT logo changed
1.05	2014-05-22	Kamila Dura	Screenshots, paths update

Related Documents

Date	Version	Document Name

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1. Sales Item – Bill of Materials

1.1. Introduction

This document explains how to enter sales item - bill of materials into NAV.

Following conventions are used in the manual

- texts in the quotation marks (for example: „Functions”) are names of the forms, tables and the names of the buttons
- texts in the quotation marks with ‘->’ inside (for example: “Zepter Soft -> Contract Processing -> Sales Contracts”) are menu paths
- bold texts (for example **Sales Contract No.**) are names of the fields/columns in forms
- Texts in italic (e.g. *New*) are field values
- Paragraphs preceded with the headline **IMPORTANT** and framed, contain the key information.

1.2. Step-by-Step Guide

1. To define Sales item bill of materials go to 'Zepter Soft -> Sales Items -> Lists -> Sales Items'
2. Create new Sales Item card by pressing 'New' button on 'Home' tab and fill-in required data (according to the manual CM_MAN_DSM_IPR_Sales_Item_006).

3. Click 'Bill of Materials' button on 'Navigate' tab.

4. On "Bill of Materials" page enter components of set. In field **No.** enter sales item no. or find it on the list.

The screenshot shows the 'Edit - Bill of Materials - PROMOTION' window. The main table displays the following data:

Starting Date	Ending Date	No.	Variant Code	VAT Prod. Posting Group	Part of Parent	Percent of Parent	Part of Parent (Turnover)	Percent of Parent (Turnover)	Quantity
		PAG-860		VAT20	0,00	0	0,00	0	
		PAG-961-1255		VAT20	0,00	0	0,00	0	

A dropdown menu is open for the 'No.' field of the selected row, showing a list of items with checkboxes:

No.	Description	Bill of Mat...
PAG-961-1255	BIOPTRON OXY STERILE SPRAY 125ML	<input type="checkbox"/>
PAG-961-2505	BIOPTRON OXY STERILE SPRAY 250ML	<input type="checkbox"/>
PAG-964-FSM	MEDALL BODENSTATIV	<input type="checkbox"/>
PAG-965	MEDALL FARBLICHTTHERAPIE SET	<input type="checkbox"/>
PAG-990	BIOPTRON PRO1 EEC MIT TISCHSTATIV	<input type="checkbox"/>
PAG-990-01	BPRO1 REFLEKTORSPIEGEL	<input type="checkbox"/>
PAG-990-02	BPRO1 REFLEKTORSPIEGELEINHEIT INKL. RAHMEN	<input type="checkbox"/>
PAG-990-03	BPRO1 EINSATZRAHMEN FÜR SPIEGEL	<input type="checkbox"/>
PAG-990-04	BPRO1 KUPFERWÄRMELEITER	<input type="checkbox"/>
PAG-990-05	BPRO1 GEHÄUSE FRONTSEITE	<input type="checkbox"/>
PAG-990-07	BPRO1 SCHRAUBEN K30 X 13 T10	<input type="checkbox"/>
PAG-990-08	BPRO1 TISCHSTÄNDER FUSSTEIL	<input type="checkbox"/>

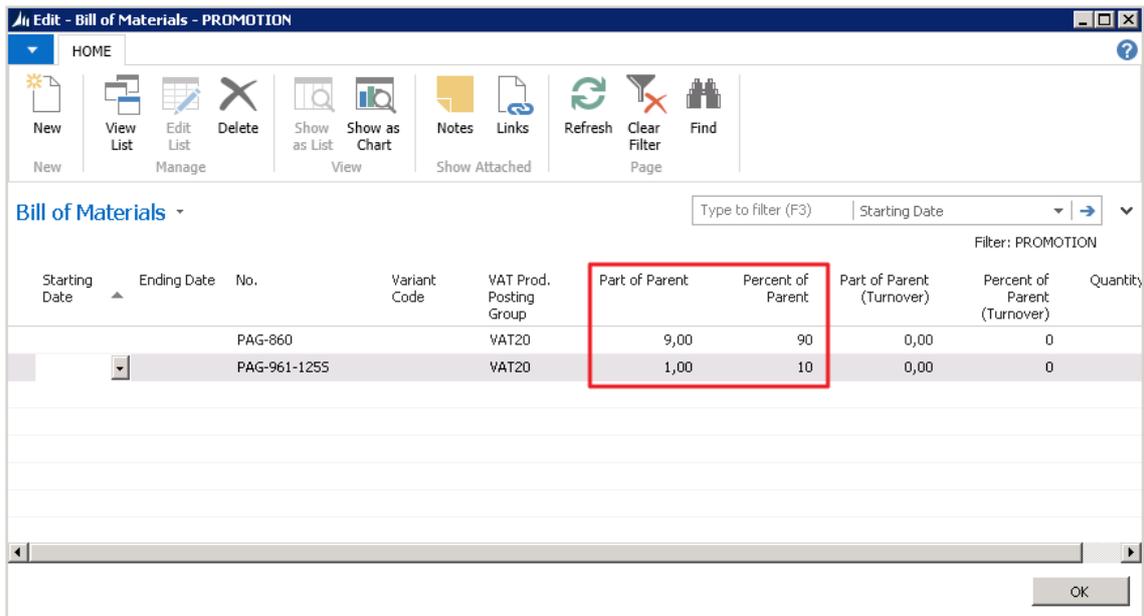
The window includes a ribbon with options like 'New', 'View List', 'Edit List', 'Delete', 'Show as List', 'Show as Chart', 'Notes', 'Links', 'Refresh', 'Clear Filter', and 'Find'. The 'Bill of Materials' section has a search filter 'Type to filter (F3)' and a 'Starting Date' dropdown. The filter is set to 'PROMOTION'. At the bottom right, there is an 'OK' button.

5. Define components' prices. There are two methods of defining components' prices:

A. Calculate the prices of components by defining percentage per component.

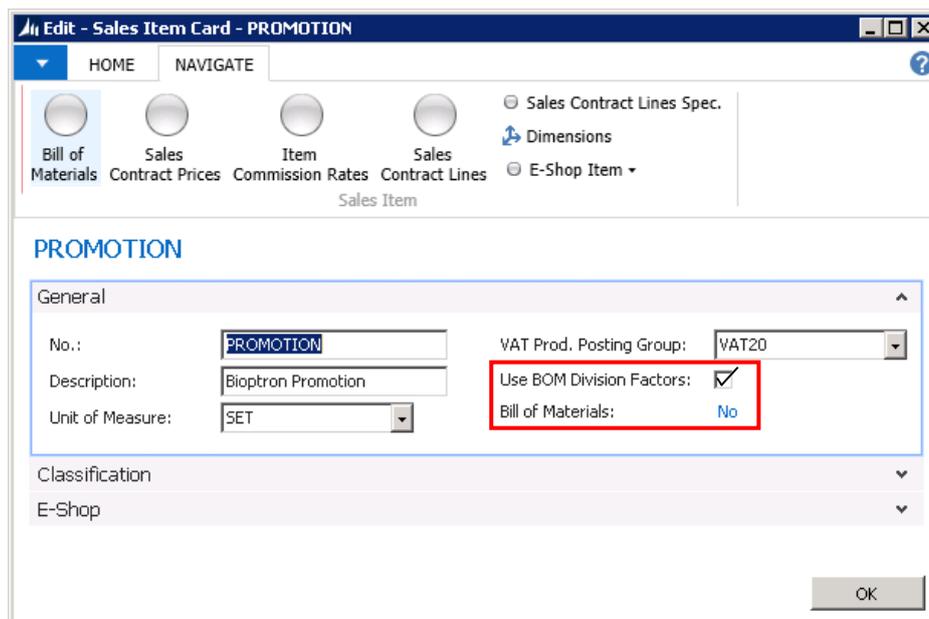
Field **Part of Parent** has to be filled-in, then system automatically calculates and displays **Percent of Parent** field. Price of BOM will be split to its components according to proportion set in **Percent of Parent** column. If all components have the same value in **Part of Parent/Percent of Parent**, then system splits total BOM's price equally to all components.

IMPORTANT: if value in field **Part of Parent** is zero, system does not allow to release sales contract.



Starting Date	Ending Date	No.	Variant Code	VAT Prod. Posting Group	Part of Parent	Percent of Parent	Part of Parent (Turnover)	Percent of Parent (Turnover)	Quantity
		PAG-860		VAT20	9,00	90	0,00	0	
		PAG-961-1255		VAT20	1,00	10	0,00	0	

To use division factors, **Use BOM Division Factor** checkbox on Sales Item card has to be marked.



General

No.: PROMOTION
 Description: Bioptron Promotion
 Unit of Measure: SET

VAT Prod. Posting Group: VAT20
 Use BOM Division Factors:
 Bill of Materials: No

Field **Bill of Materials** is checked automatically if there are components entered for the set.

B. Calculate the prices of components in proportion to their sales prices.

Checkbox **Use BOM Division Factors** has to be unmarked, then price of BOM will be split to its components in proportion to Sales Item Prices of components.

The screenshot shows the 'Edit - Sales Item Card - PROMOTION' dialog box. The 'General' tab is active, displaying the following fields:

- No.: PROMOTION
- Description: Biopton Promotion
- Unit of Measure: SET
- VAT Prod. Posting Group: VAT20
- Use BOM Division Factors: (highlighted with a red box)
- Bill of Materials: Yes

The 'Classification' and 'E-Shop' sections are collapsed. An 'OK' button is visible at the bottom right.

2. Advanced Guide

2.1. Setup Process / Administrators

Field Name	Description								
General Tab									
Use BOM Division Factors	<p>Leave this unchecked to have the system calculate the price of components in proportion to their sales prices</p> <p>Check this to define the division factors manually. This can be used for example in case there are not for all components sales prices defined.</p> <p>Example:</p> <table border="1"> <thead> <tr> <th><u>Part of Parent</u>¹</th> <th><u>Percent of Parent</u>²</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>12.5</td> </tr> <tr> <td>4</td> <td>50</td> </tr> <tr> <td>3</td> <td>37.5</td> </tr> </tbody> </table> <p>¹ defined by user</p> <p>² calculated by system and will always be 100 in total.</p>	<u>Part of Parent</u> ¹	<u>Percent of Parent</u> ²	1	12.5	4	50	3	37.5
<u>Part of Parent</u> ¹	<u>Percent of Parent</u> ²								
1	12.5								
4	50								
3	37.5								
Bill of Materials	Is checked by system if there is a Bill of Material defined								

2.2. Periodic Activities

2.3. Exception Handling