



Bill of Material Setup

SOP 156

Revision A, 10/30/2020

Approved by: Don Stanton

PURPOSE:

A Bill of Materials (BOM) is a list of the parts or components and quantities of each needed to produce an end product or finished good. Items may have several different revisions of a formula with one revision being designated as the default.

PROCESS STEPS:

Creating a new Bill of Materials (BOM)

1. Navigate to Inventory > Bill of Material
2. Click New.
3. On the General tab:
 - a. Enter the part number in the Part Number field.
 - b. Enter a unique revision name in the Revision field.
 - c. Enter the Formulator and appropriate formula unit.
 - d. Enter the Batch Yield based on the components on the bill of materials.
 - e. Check appropriate boxes to identify if this BOM will be the default, lab only, or for regulatory purposes.
4. On the QC/Stability Tests, add appropriate QC tests.
5. Click Add button in the header to begin adding the component part numbers. The Edit BOM Line window will pop-up.
 - a. Enter component part number.
 - b. Enter Quantity per (this is the quantity which will make up specified yield set on General tab).
 - c. Select appropriate BOM Unit.
 - d. Click Next to add additional part numbers.
 - e. Click Save
6. Click Save in the header to save the new Bill of Materials.

Creating a new revision of current Bill of Materials (BOM)

1. Navigate to Inventory > Bill of Material
2. Click the New button in the header.
3. On the Edit Bill of Materials screen, type in the part number in the part number field.
4. Click the Same As button in the header. Choose the part number and revision to be copied. Click Apply.
5. Type in the new Revision name in the Revision field.
6. To edit quantities of parts on the BOM, click part number line and click Modify in the header. The Edit BOM line window will appear and user can change/add quantities, units, calculations, notes, etc.
7. To add new part numbers to the BOM, click Add in the header. The Edit BOM line window will appear. User can then specify part number to be added as well as quantities, units, calculations, notes, etc.
8. On the General tab:
 - a. Enter the part number in the Part Number field.
 - b. Enter a unique revision name in the Revision field.
 - c. Enter the Formulator and appropriate formula unit.
 - d. Enter the Batch Yield based on the components on the bill of materials.
 - e. Check appropriate boxes to identify if this BOM will be the default, lab only, or for regulatory purposes.



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9. Click Save in the header to save the new revision of the Bill of Materials.

REVISIONS

Rev	Date	Change
I/R	12/05/17	New
A	10/30/20	Change to v16 Menu names