

Assembly and Creating a Bill of Materials

Last Modified on 08/25/2021 1:13 pm EDT

Overview

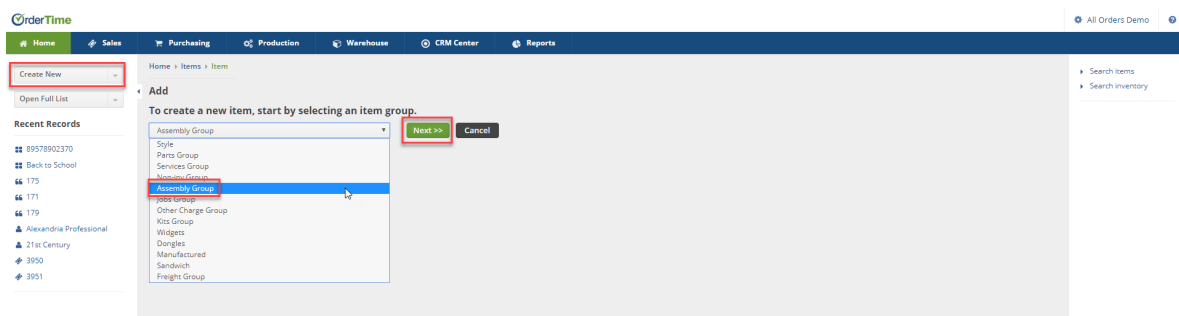
* A Kit and an Assembly are not interchangeable. Please see [Kits vs Assemblies](#) for details. *

An Assembly is taking two or more items and combining them to create a new item.

Creating a Bill of Materials

To set-up a new Bill of Material:

1. Select Item from the *Create New* drop-down menu, or click the *+New Item* button located on the Items listing screen.
2. Select **Assembly Group** from the drop-down.
3. Click the *Next>>* button.



This will bring up the *Create a New Assembly* screen. The *New Assembly* screen is broken up into two areas: General/Other and the Tabs.

- On the General/Other section, you have the ability to either manually enter a name for your Assembly, or automatically generate one by pressing **Next Item No.**
- Next you will choose the *Unit of Measurement (UOM) Set* associated with the new Assembly.
- You can set up the UOM Set inside the Profile List section.
- Other available options on the New Assembly screen include the ability to select if the Assembly is *Active*.
- The Tabs section gives you the ability to select General options, Purchasing options, Notes and Custom specifications about the new Assembly.

OrderTime Beta

Project021

Home Sales Purchasing Production Warehouse Reports

Create New Open Full List

Recent Records

- Emailto
- styletest
- Bell Inc.
- Service Provider 1 PITM
- Hello Kitty
- 4
- Service Provider 1
- ABCCom
- Plumbing101

Home > Items > Item

Item - Next Item No.

Save Reset

General

Group Assembly Group

Name

UOM Set HR-1

Other

Active ☒

General Purchasing Notes Custom

Description

Price 0.00

Weight

Volume

Income Account Sales [Income]

COGS Account Cost Of Goods [Cost of Goods]

Asset Account Inventory [Other Current Asset]

Bin

Track lots or serial numbers ☐

Tax Code

Class

Make lead time

Once all the information are entered click Save.

Add Components and Selections

After the Assembly Group is created, you can select the Assembly from the Item menu and then Add Components and Selections.

1. Open the Assembly Group record and click the *Edit Bill of Materials* button.
2. Once the edit screen opens, click the +Add button next to the corresponding area.
3. The Steps pop-up allows you to enter the Steps, Time, Hours and select if it is 'Active'.
4. Click **Save**.

OrderTime

All Orders Demo

Home Sales Purchasing Production Warehouse Reports

Create New Open Full List

Recent Records

- NASA Parts
- 9068
- 01001B
- 47
- 722
- 1800 Got Junk SE Florida
- 71
- 128
- 122

Home > Items > Bills of Material > Bill of Materials

NASA Parts EDIT

This is a phantom bill of materials

Description

Pricing

PRICE	TOTAL COST	MARGIN \$	MARGIN %	MARKUP %
0.0	0.0	0.0	0.0	0.0

Step

+ Add

STEP

Picking

Component

+ Add

ITEM DESCRIPTION LINE INSTRUCTIONS QTY PER UOM STD. COST STD. COST EXT. ONE TIME COSTED ACTIVE ACTIONS

Instructions EDIT

Steps

Step Picking

Time QC

UOM Assembly

Active Outsource

QC2

Anodize

Painting

FILLING

Save Cancel

1. In the Add/Edit Component section, enter the Item Number, Production Line Instructions, Quantity Per and select if it is being used only One Time and if the selection is 'Active'.
2. Click Save when completed.

The screenshot shows the OrderTime interface for creating a Bill of Materials (BOM) for 'NASA Parts'. A modal window titled 'Add/ Edit Component' is open, allowing the user to add a new component. The modal contains the following fields:

- Item:** A dropdown menu showing '01012A'.
- Line Instructions:** A text area containing 'NASA Equipment- Rocket Giro A1X'.
- Qty Per:** A text input field with the value '1'.
- One Time:** A checkbox that is currently unchecked.
- Active:** A checkbox that is currently checked.

Below the modal, there is a table with columns: ITEM, DESCRIPTION, LINE INSTRUCTIONS, QTY PER, UOM, STD. COST, STD. COST EXT., ONE TIME, COSTED, ACTIVE, and ACTIONS. The 'Add' button is visible in the top right of the modal.

Once you have entered the necessary information to generate a Bill of Material, the next screen will indicate the items chosen and the steps needed to create it. If needed, you can add pricing to the Bill of Materials to include the labor or any other cost associated with the Bill of Materials.



Remember, you always have the option to make changes to your Bill of Materials by simply clicking on the Edit icon under the ACTIONS Column. Editing capabilities are available for the Steps and Components section.

The screenshot shows the OrderTime interface for the 'NASA Parts' Bill of Materials. The 'Pricing' section is highlighted with a red box. Below the 'Pricing' section, there is a table with columns: STEP, DESCRIPTION, LOCATION, TIME, UOM, PARTSCOST, NONPARTSCOST, TOTALCOST, ACTIVE, and ACTIONS. The 'Add' button is visible in the top right of the Pricing section.

PRICE	TOTAL COST	MARGIN \$	MARGIN %	MARKUP %
10	202.193	-192.19	-192.19	-95.05

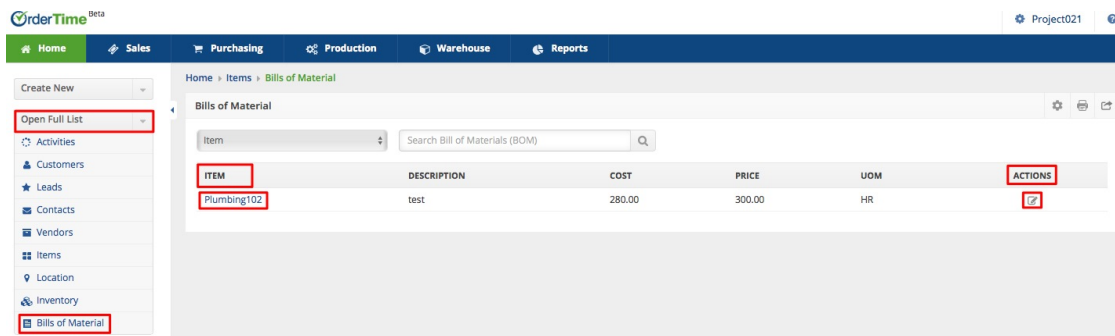
STEP	DESCRIPTION	LOCATION	TIME	UOM	PARTSCOST	NONPARTSCOST	TOTALCOST	ACTIVE	ACTIONS
Picking	Default Step	HQ	1	HR	202.193	0.000	202.193	ⓘ	✎ ⚙

ITEM	DESCRIPTION	LINE INSTRUCTIONS	QTY PER	UOM	STD. COST	STD. COST EXT.	ONE TIME	COSTED	ACTIVE	ACTIONS
01012A	Washer, M-6 locking	NASA Equipment- Rocket Giro A1X	1.000	YD	0.300	0.300	ⓘ	⊗	⊗	✎ ⚙
01023A	Wheel lug nut, chrome (5)		1.000	EA	201.893	201.893	ⓘ	⊗	⊗	✎ ⚙

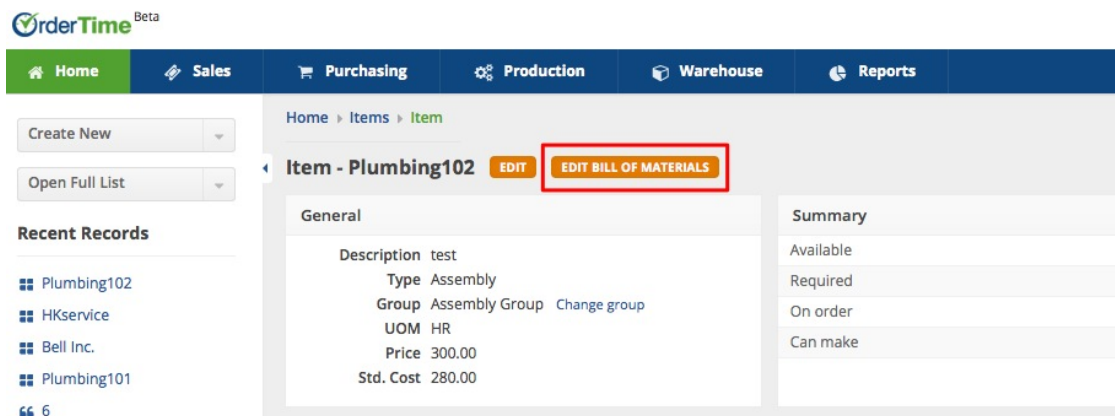
Configuring Bill of Materials

Order Time allows you to offer your customers selections and options when ordering kit items or configurable bill of materials. Once you have created them, you can establish choices and options; and you can add them to a quote or sales order later on.

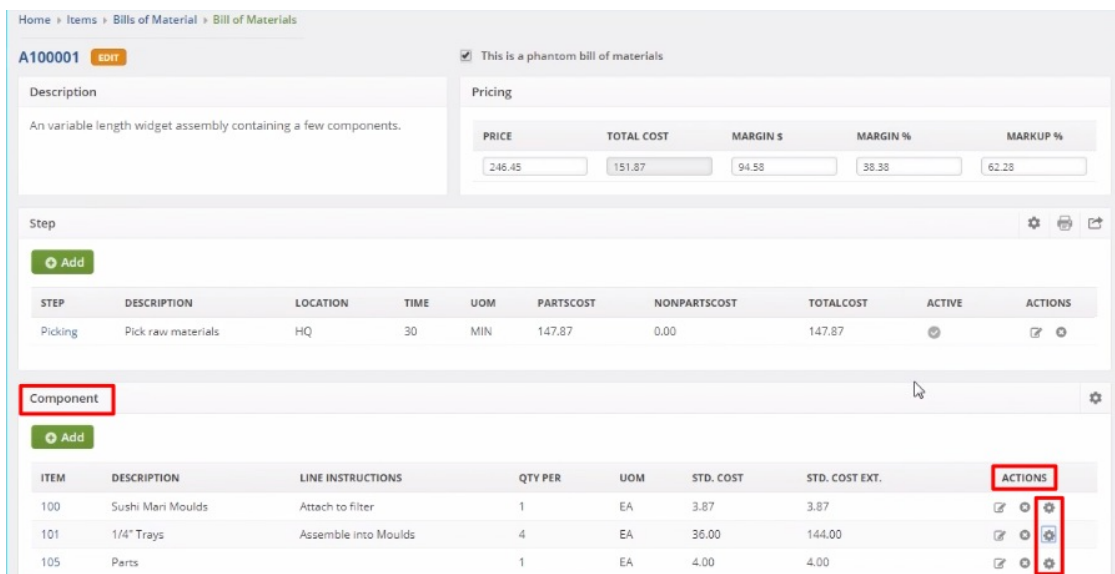
1. Click Open Full List and select Bill of Materials.
2. Under the Actions column, click the Edit icon of the item that you want to configure the bill of materials.



Alternatively, you can click the Item and click the Edit Bill of Materials button.



3. Click the Configure (gear) icon to where you can add a Variable or a Yes/No configuration to each of the components of the Bill of Materials.



- Variable: This type provides customer with choices from several items. You may list an unlimited number of alternates as long as no item is duplicated.

1. Select Variable from the Type drop-down list.
2. The entry is Active by default.
3. Enter values for the Per Price, Name and Description fields.
4. Click Save & Continue.

5. In the Add/Edit Options pop-up window , the default component will be displayed. Click the +Add button.

6. In the Add/Edit Selection pop-up window , add your selection by filling out the Item, Price Per and Qty Per fields.
7. Check One Time, as needed. Generally, when used on a sales order, the quantity of the kit selections is multiplied by the quantity ordered for the entire kit. You may want, however, to include an item that does not vary with the kit quantity. To accomplish this, check the 'One Time' and the selection quantity will not vary in proportion with kit quantity but rather stay fixed.
8. The entry is Active by default.
9. Click Save.
10. Repeat steps 5 to 9 to add more selections.

- Yes/No: This type is used to set optional items to be included in the kit.

1. Select Yes/No from the Type drop-down list.
2. The entry is Active by default.
3. Enter values for the Per Price, Name, Description and Qty Per fields.
4. Check 'Is Optional' box to set the default value to 'Yes'.
5. The entry is Active by default.
6. Click Save.

Add/Edit Options

Type: Yes/No

Active: ☒

Price per: 0

Name:

Description:

Qty Per: 4

Is Optional: ☐

Active: ☒

Save Cancel

- You can also add a Yes/No configuration to an existing Yes/No configuration:

1. Select Yes/No from the Type drop-down list.
2. The entry is Active by default.
3. Type in the Price Per value.
4. Select if you are adding the entry to a New Grouping or Existing Grouping.
5. New Grouping: Enter values in the Name and Description fields.
6. Existing Grouping: Select from the drop-down list.
7. Fill out the Qty Per field.
8. Check 'Is Optional' box to set the default value to 'Yes'.
9. The entry is Active by default.
10. Click Save.

Add/Edit Options

Type: Yes/No

Active: ☒

Price per: 0

☐ New grouping

☒ Existing grouping

Options for tank

Qty Per: 1

Is Optional: ☒

Active: ☒

Save Cancel

[More about Inventory Control with Order Time](#)

[More about Manufacturing with Order Time Inventory](#)