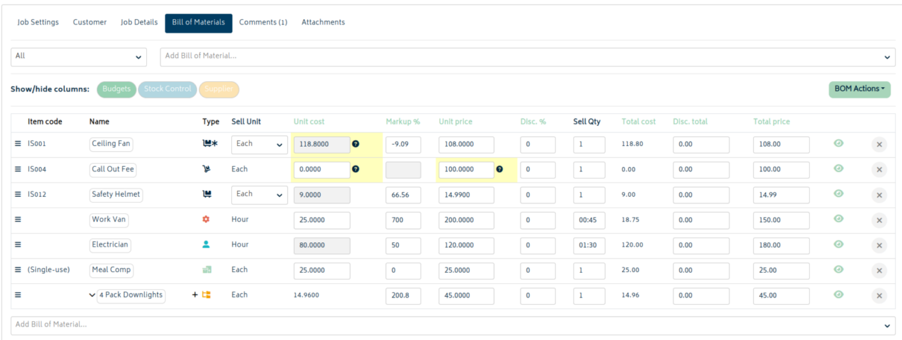
Knowledge Base

The BOM Tab

The Bill of Materials is used to set the requirements for the job, which feeds into the other modules (quoting, purchasing, et cetera).



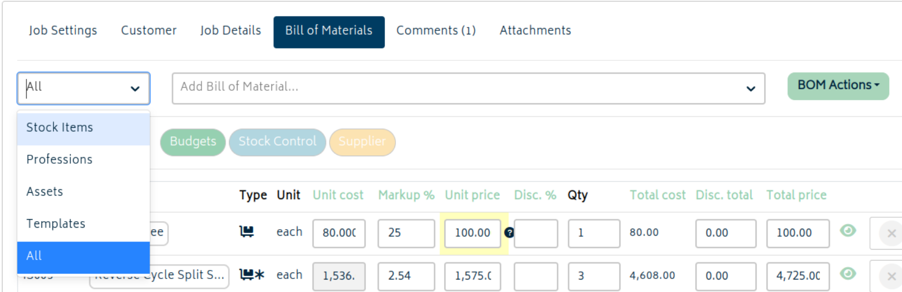
Setting professions on a job's BOM allows those professions to have employees' time scheduled and tracked against the job. Adding stock items allows those items to later be purchased or reserved from inventory and consumed onto the job to record their costs.

As the job evolves, you may return here multiple times to modify the items or professions required to carry out the job.

Adding Line Items

You can choose any combination of Stock Items, Professions, Assets, or Templates that will be needed for the job from the dropdown menu in the middle of the page or near the bottom.

Adding these items on the BOM does not remove the items from the stock. Using items and removing them from stock is done through recording consumables.



There are two dropdowns at the top of the BOM tab.

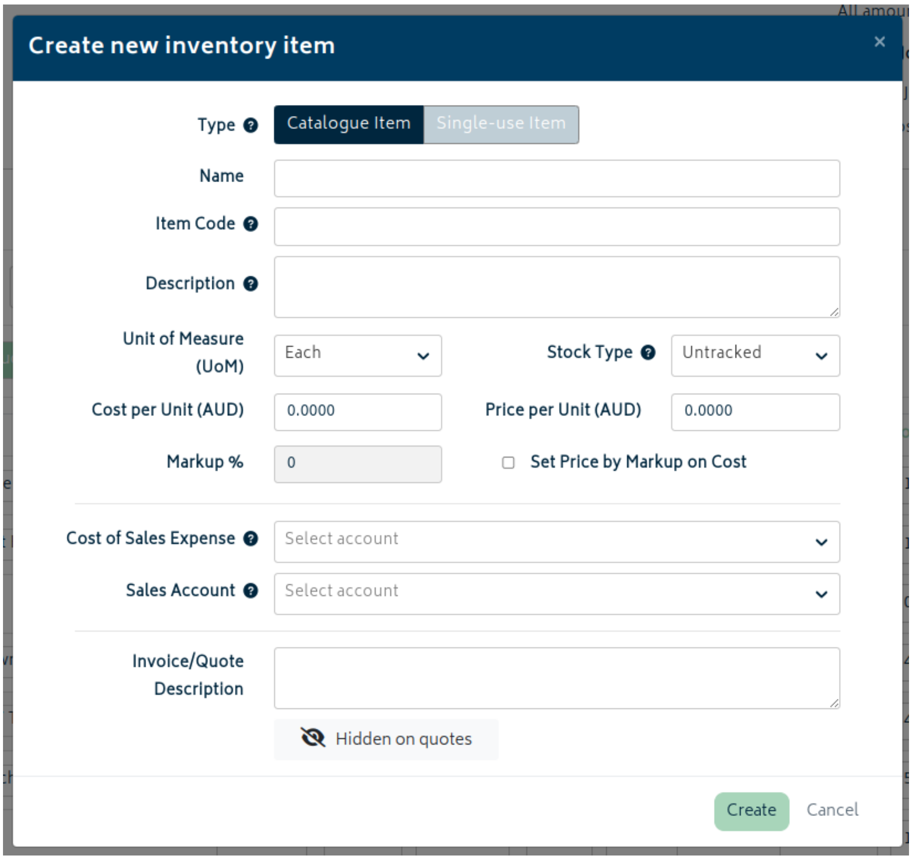
- The dropdown on the left allows you to filter the dropdown search on the right to show only “Stock Items”, “Professions”, “Assets” or “Templates”. By default, the system searches “All” cost categories.
- The dropdown in the middle of the page allows you to search for the specific item you’d like to add. For Inventory items and Templates, the search reads from any combination of Item Code, Item Name or Item Description. For Professions and Assets, the name alone is used to search.
    - You also have the option to create a new Stock Item if it does not exist. It also allows you to create temporary inventory item to be used for that job and that job only.

Once you have found your items from the dropdown on the right, click on the item in the dropdown and it will be added to your Bill of Material list for the job. The items in the BOM are sorted so that the most recent item added is at the top of the list. If you add from the dropdown at the bottom of the BOM, the item will instead be inserted at the bottom of the list. Items added to the BOM can be rearranged as you please with a drag and drop function, and this order will carry over to the quoting and invoicing stages of the job.

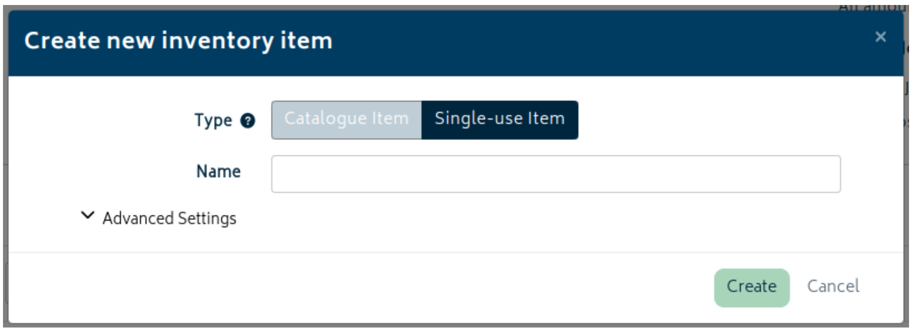
Note: If you are unable to search for a particular item that is part of your existing inventory, professions, assets, or templates, it’s most likely because the item has already been added into the BOM for this job. Unless the item is inside a template, it cannot be added twice at the same level onto the BOM. The system does not allow you to duplicate an item – however, it allows you to update required quantity as needed.

Creating New Line Items

When selecting from stock items, you have the option to create new items on the spot.



These can be either catalogue items (reusable across other jobs) or single-use untracked items. If you make a catalogue item, it will be visible in your inventory, but single-use items are job-specific and do not appear in the inventory. To learn more about making inventory items in general, refer to the Create a New Inventory Item article.



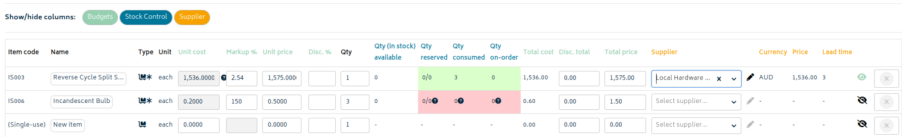
Single-use items are useful for a variety of purposes:

- Custom orders from a customer or for a supplier
- Items you need to purchase to complete this job that you don't expect to purchase again
- Services you have contracted out and need to record against the job
- Various employee expenses (such as transportation or meal reimbursement)
- Tracking receipts and on-the-spot purchases related to the job
- Site rental fees

Unlike catalogue items, single-use items can only be created as untracked. In order to create single-use items, you will need to set up their GL accounts under Organisation Settings.

Line Item Components

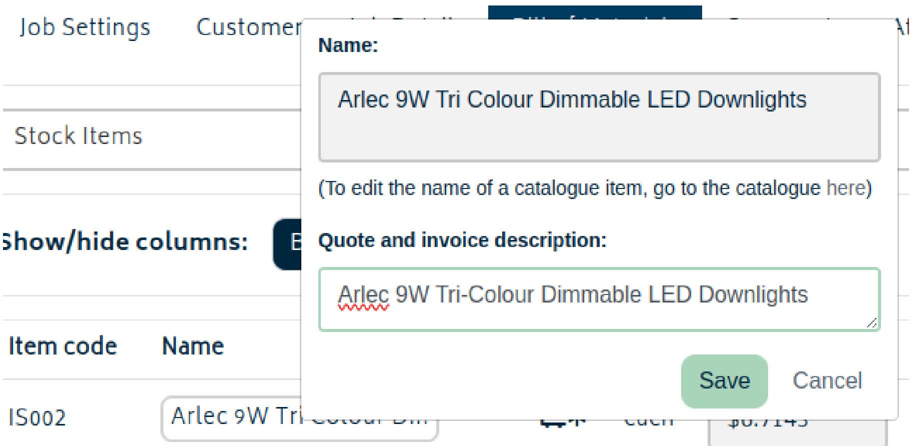
Once you've added an item, it will show on the list with several columns of data. You can use the Budgets and Stock Control buttons to show or hide their related columns so the amount of visible data doesn't get overwhelming, or to allow it to fit on your monitor.



If you have a lower zoom setting or are using an ultrawide monitor, you will be able to see more of these fields at once. These fields are described below:

Standard columns

- **Item Code:** The unique item code. Assets, Professions, Templates, and Single-Use Items don't have this.
- **Name:** The name of the line item. You can click this to change the item description used on quotes and invoices, or the name of single-use items.
    - For single-use items, an Edit button will also appear here. Clicking it will allow you to edit the item's properties.



- **Type:** The icon indicates the type of item it is:

 indicates an untracked inventory item.

 indicates a tracked inventory item.

 indicates a tracked-per-instance inventory item (each has a serial number).

 indicates an asset.

 indicates a template. By clicking "+" you may add items to the template.

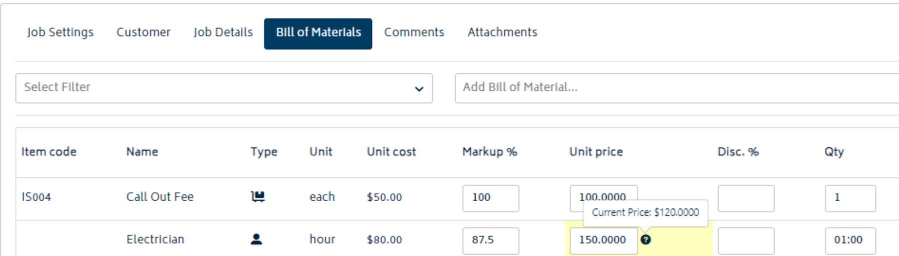
 indicates a profession.

- **Unit:** Displays the unit of measure that has been set up in catalogue for the item.
- **Qty:** Indicates the quantity required of this item to complete the job.

Budget columns

- **Unit Cost:** For untracked items, professions and assets this is set in the edit page for these catalogue item. Refer to editing inventory, professions, and assets for more information. For tracked inventory items, the cost is based off an average cost of stock on hand, and updated from the purchasing module as items are purchased.
- **Markup%:** Indicates the mark up based on the difference of cost (purchase price) & price (selling price).
- **Unit Price:** Indicates your selling price for an item.

Note: If there are any changes made to the selling price on the BOM page i.e. the markup has been increased or reduced or the selling price itself has been amended, the system will highlight the “Unit Price” in yellow with a popover “(?)”. If a user hovers onto the “(?)”, they will be able to see what the current price for this item is in the catalogue.



- **Disc%:** Allows users to add a discount % on selling price. This can be further displayed on the invoice. If you’d like to automate discounts, refer to the Pricing Schemes section.
- **Total cost:** The cost of the item multiplied by the quantity required displays that total cost of an item.
- **Total:** Indicates the actual discounted amount based on disc%.

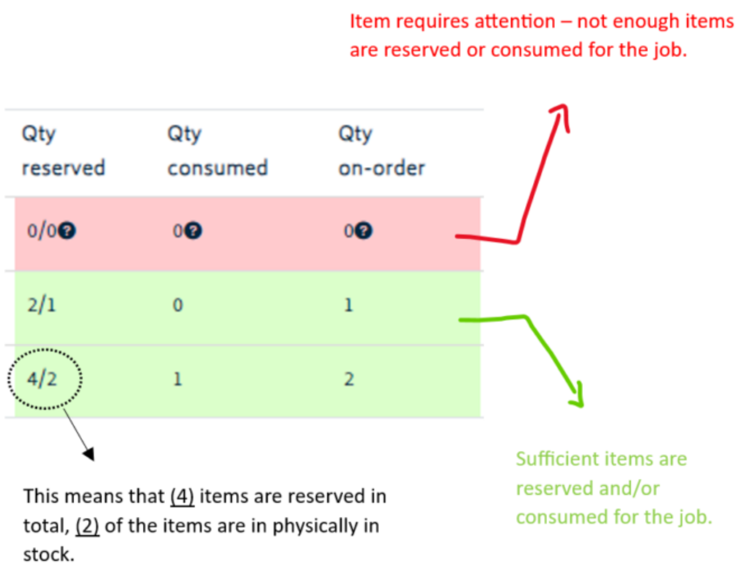
Note: a user can either add the discount % under “disc%” or discount amount under “Disc. total.”

- **Total price:** The price of the item multiplied by the quantity required displays the total price of an item.

Stock columns

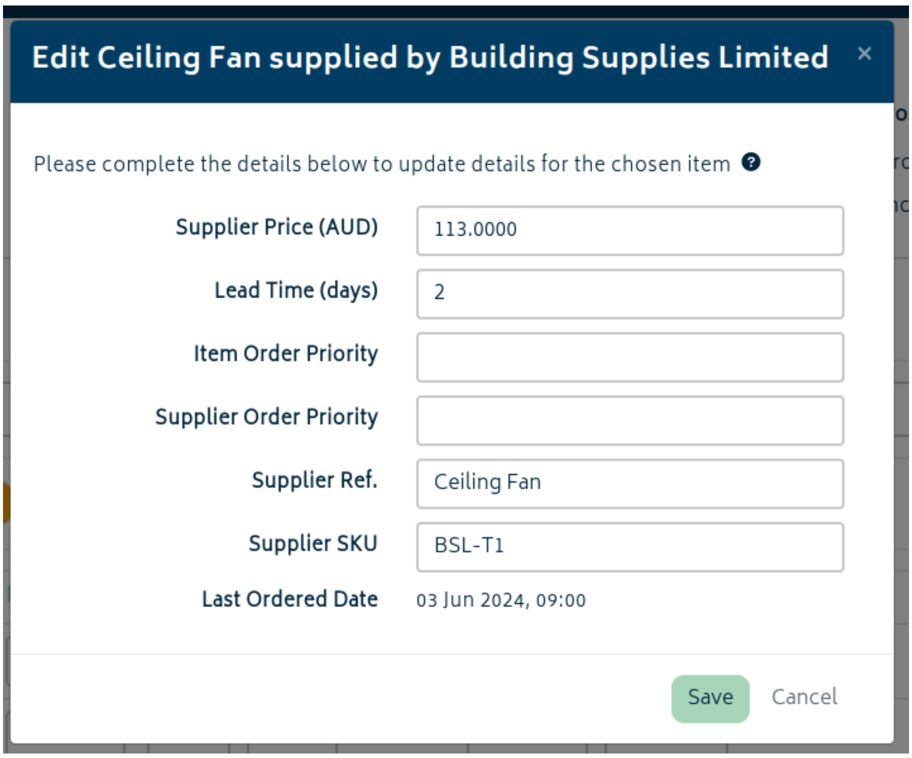
- **Qty (in stock) available:** Shows the stock on hand quantity (for tracked inventory items).
- **Qty Reserved:** This shows the items that are reserved for jobs (for tracked inventory items). See image below for more information on the formatting of this column.
- **Qty Consumed:** Shows the quantity of an item that has been consumed for this job. An item will not be included into actual cost unless it is consumed onto the job. To learn more about consuming items onto jobs, refer to the recording consumables section of the Job Actions knowledge base page (for tracked inventory items).
- **Qty on-order:** Displays the quantity that is on order, meaning a purchase order has been raised for this job for this line item and awaiting delivery (for tracked inventory items).

Formatting of the Qty columns on the BOM page:



Supplier columns

-
    - **Supplier:** When a purchase order is raised for this item, this will be the supplier chosen by default.
        - You can view and edit the supplier's item information using the pencil icon next to this field. Doing so will allow you to fill in any missing information and also see the last time this item was purchased.



- **Currency:** If the multi-currency add-on is enabled, this column allows you to see the currency the supplier prices their items in.

- **Price:** This column shows the price of the item as set by the supplier. If it is priced in an international currency, the Cost column will reflect an estimated converted price.
- **Lead time:** How many days it will usually take for supplier turnaround. This will be used to calculate the expected date the PO will be received when it is made.
    - As shipping service is highly variable, note that the lead time is measured in calendar days – not weekdays/business days.

Item visibility on quote:

- This icon means that an item will be included into the quote/estimate by default.
- This icon means that an item will not be included into the quote/estimate by default.

Note: other ways to change the visibility toggle:

- A user can change the default display options for items by editing the inventory item itself. This can also be done in bulk from the inventory upload/update function.
- On the quote/estimate pages, this field can also be toggled and changed from the default. Any updates made for this item on the job, either on this page, or on the quote page, will be saved and visible on both pages.

- Removing a line item:
    - this icon allows users to remove an item altogether from the BOM for the job.

Note: in Gojee you can set up pricing schemes and apply these to a combination of customers and/or job items. Refer to the Pricing Schemes section for more information.

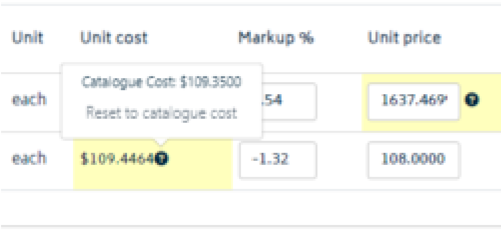
Changes to Cost and Price

When an item is added to the BOM, the cost and the price of the catalogue item at the time the item was added on the job is stored in the job data. When changes to the cost and price of an item are made after adding an item to a job (this could be via purchasing items at a different list price, editing the inventory item through stock adjustments, or setting a supplier for the item that is different than normal), this information is presented visually to the user so they can see what has changed. The cost and or price cell for a line item will change to yellow highlighting in this case.

Unit cost	Markup %	Unit price
$1596.9231	2.54	1637.469
$109.4464	-1.32	108.0000

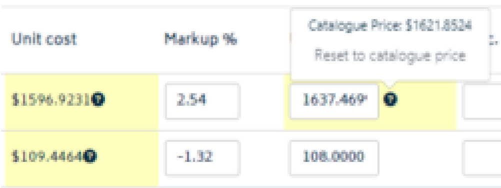
Changes to cost:

- Hover over the (?) icon next to the cost field and you will be presented an option to reset the cost saved on the job for this item to the latest catalogue cost:



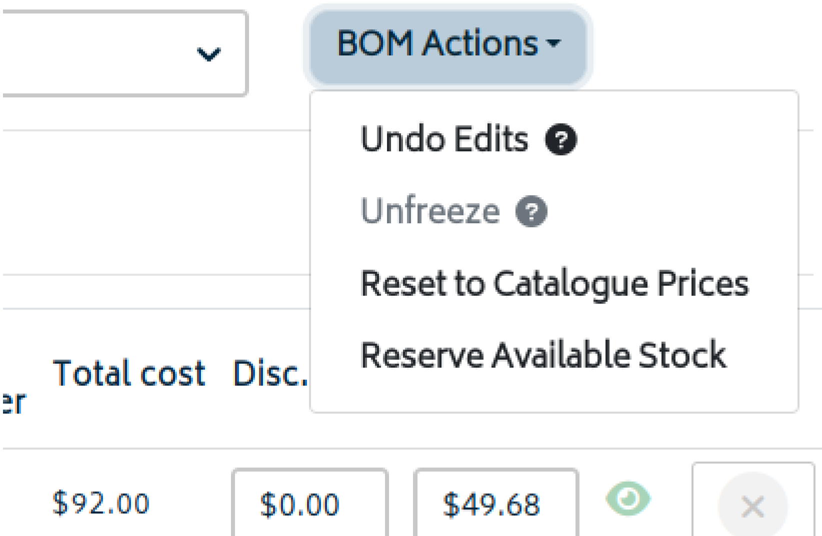
Changes to price:

- Like on costs, you can hover over the option to reset the price to the latest catalogue price:



- Price resetting can also be done in bulk on the BOM page using the "Reset to Catalogue Prices" BOM action detailed below.

BOM Actions



Undo Edits:

- This will reset the BOM back to the last saved state. It's equivalent to closing the BOM page without saving and re-opening it. This allows you to keep any changes made on other parts of the job if you change your mind about modifying the BOM.

Unfreeze:

- If there is an approved quote for the job, then the system will lock any changes on the BOM page. If you hit this button, the quote status will be changed so that it's no longer approved. You will then be able to make changes to the BOM and re-issue a quote from the updated form of the BOM.

Note: The BOM is used for planning and the quote/estimate is designed as the starting point for the job. Having an approved quote does not stop you from using Record Consumables to record items used on the job that weren't included in the quote – this is the difference between the quotation and the actual cost of the job.

Reset to Catalogue Prices:

- This will reset all prices for line items on the BOM to the current catalogue price. This function will *not* update cost, only price. To update costs to current catalogue cost, you will need to do these one at a time.

Reserve Available Stock:

- If stock is available in inventory, this will make a reservation for those items. Stock received through job-specific purchase orders have reservations made for them automatically.

Next: Viewing Existing Jobs.