We are currently updating our site; thank you for your patience.

MAINTENANCE

TASKS – ASSIGN / REMOVE A BILL OF MATERIALS (BOM)

Linking material resource requirements to a Task, gives you the ability to see which parts are required for the Task to be completed. Part Requests will be created for the Task when the Task is generated. In order to link a Bill of Materials for parts required, you will need to ensure one has been configured. Refer to the Creating a New Bill of Materials manual to ensure that a BOM is already set up before you continue with this manual.
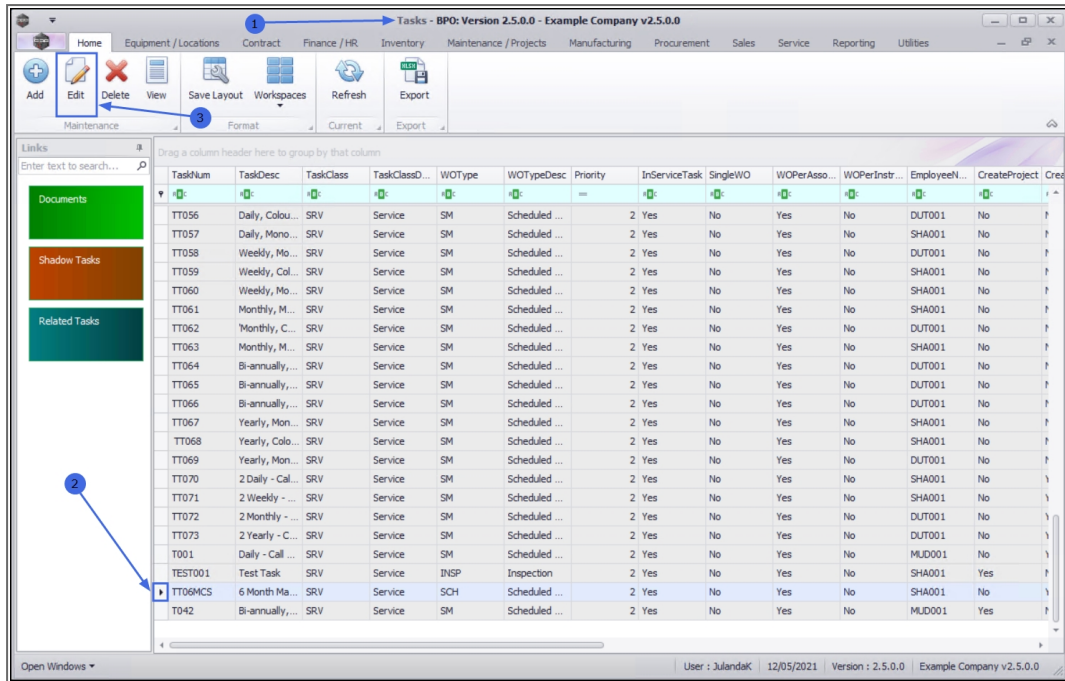
Ribbon Access: Maintenance / Projects > Tasks
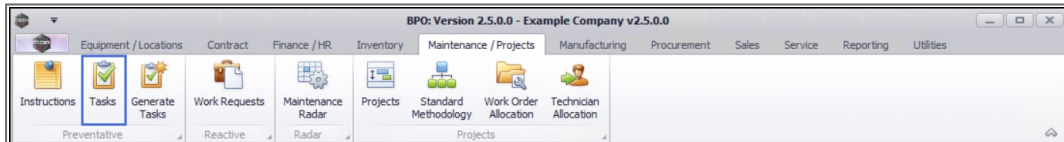
1. The **Tasks** listing screen will be displayed.
2. Click on the **row** of the task you wish to assign a BOM to.
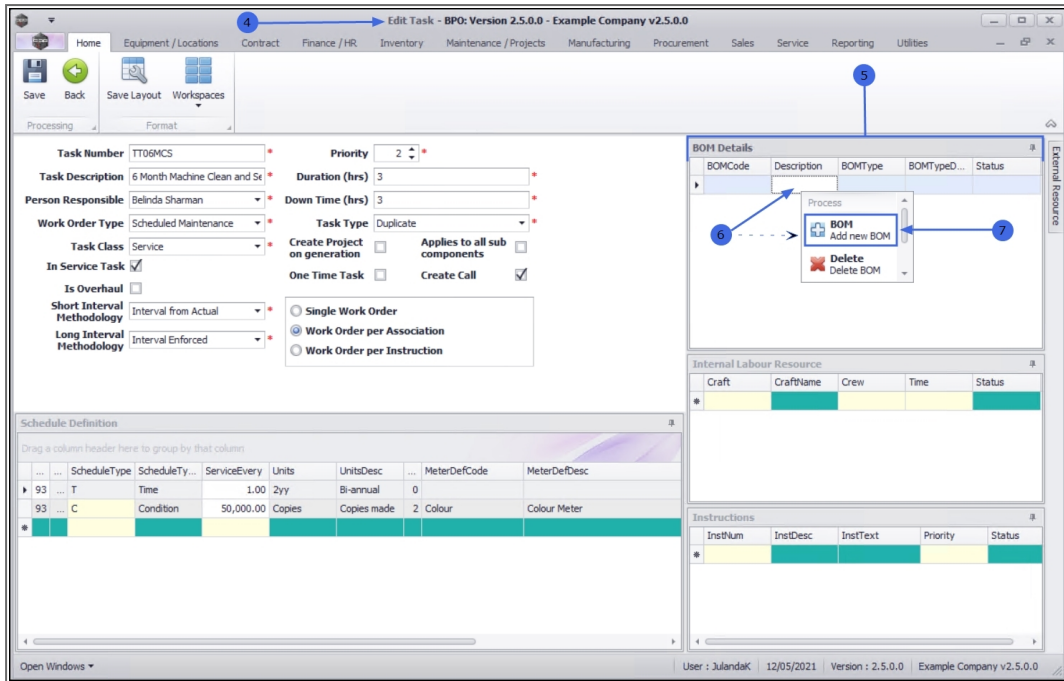3. Click on **Edit**.

   ⤤ **Short cut key: Right click** to display the **Process** menu list. Click on **Edit**.
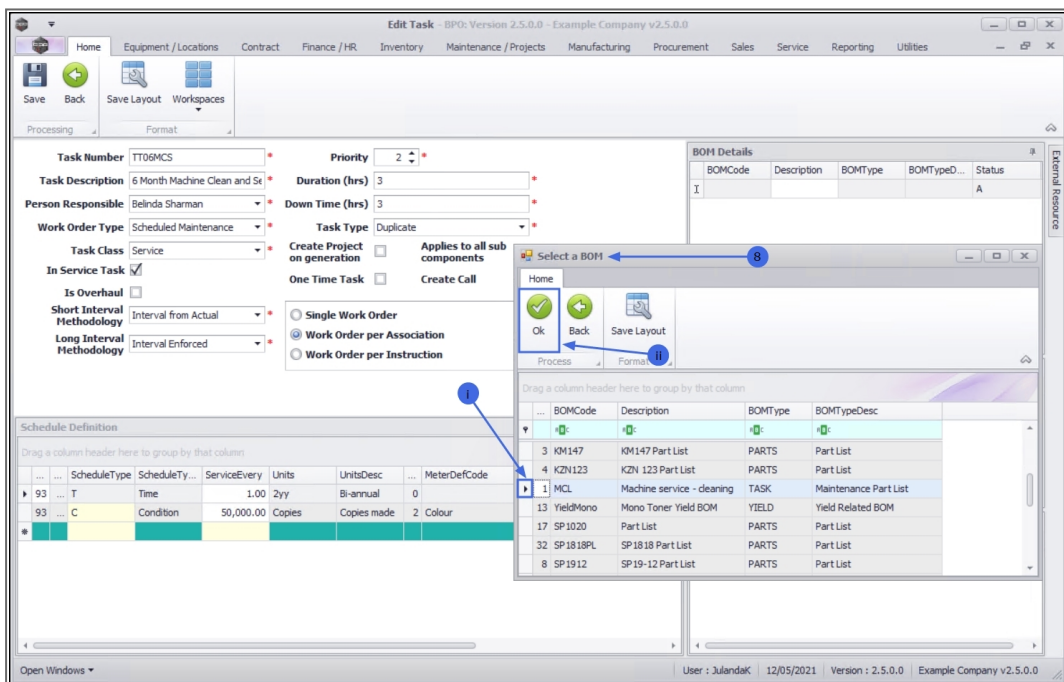
4. The **Edit Task** screen will be displayed.

ASSIGN BOM DETAILS TO TASK

5. In the **BOM Details** frame,
6. **Right click** in an available line in the BOM details data grid to display the **Process** menu.
7. Click on **BOM** - Add new BOM.

8. The **Select a BOM** screen will be displayed.

    i. Click on the **row** of the **BOM** you wish to attach to this task.

    ii. Click on **OK**.

8. The selected BOM will be displayed in the **BOM Details** frame.

9. **Expand** the BOM Items frame to view a list of all the items required to complete the task.

10. Continue adding BOMs to the task as required.
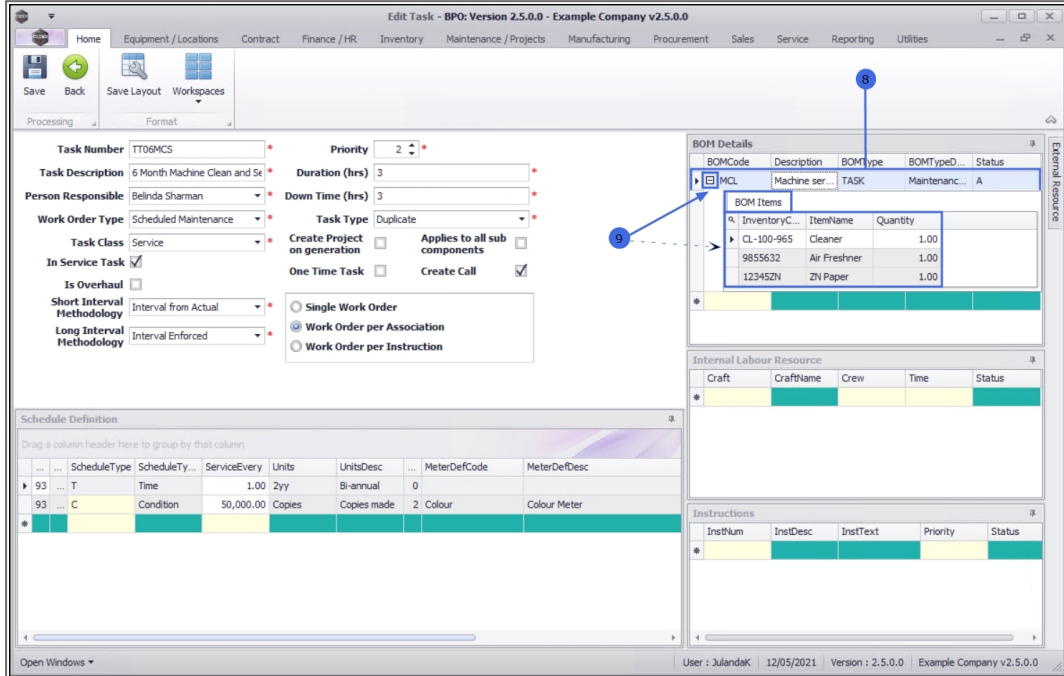

REMOVE BOM DETAILS FROM A TASK

1. From the **BOM Details** frame,

2. **Right click** in the row of the BOM you wish to remove from the Task to display the **Process** Menu.

3. Select **Delete** - Delete BOM
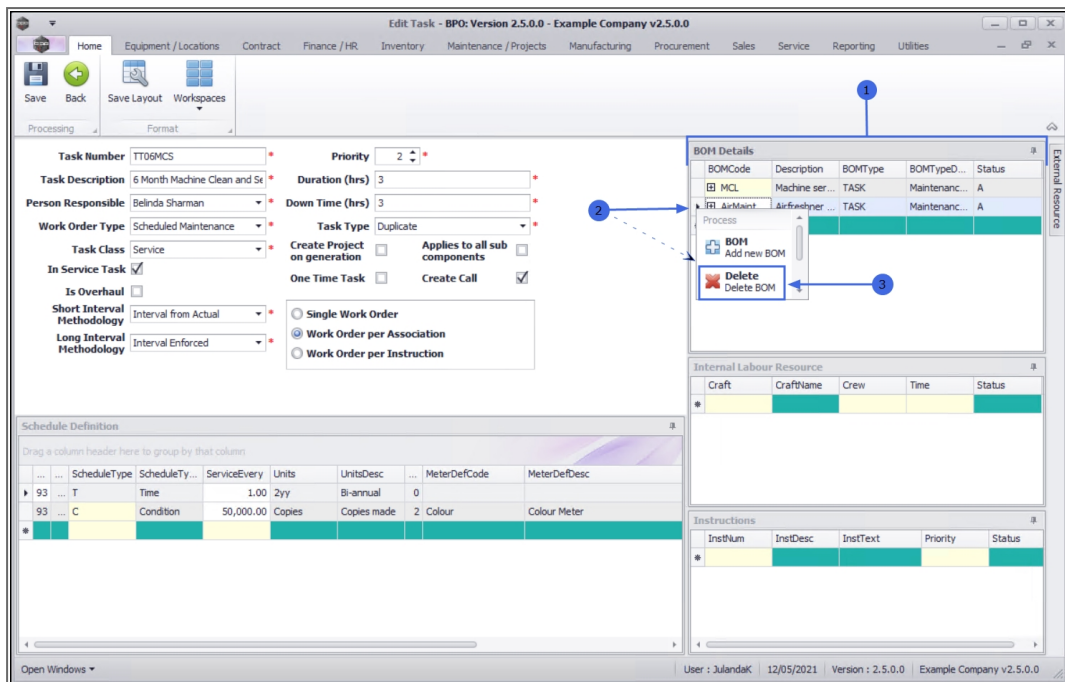
4. When you receive the **Delete BOM** message to confirm;
   - **Are you sure you want to delete this bom [**bom code**]?**
5. Click on **Yes** if you are certain about your selection, or
   - Click on **No** to ignore the request and leave the BOM assigned to the Task.

SAVE THE BOM DETAILS

6. When you have finished editing the Task, click on **Save**.
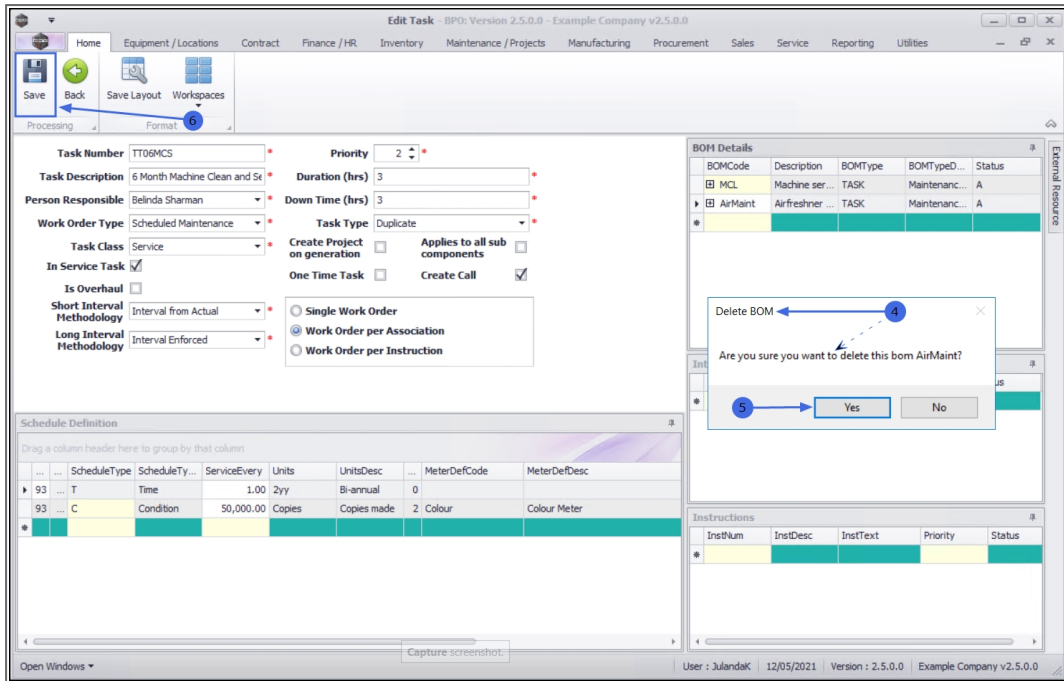
7. You will return to the **Tasks** list screen.

8. When you receive the **Tasks** message to confirm that;

 - **The Task: [**task number**] has been saved.**
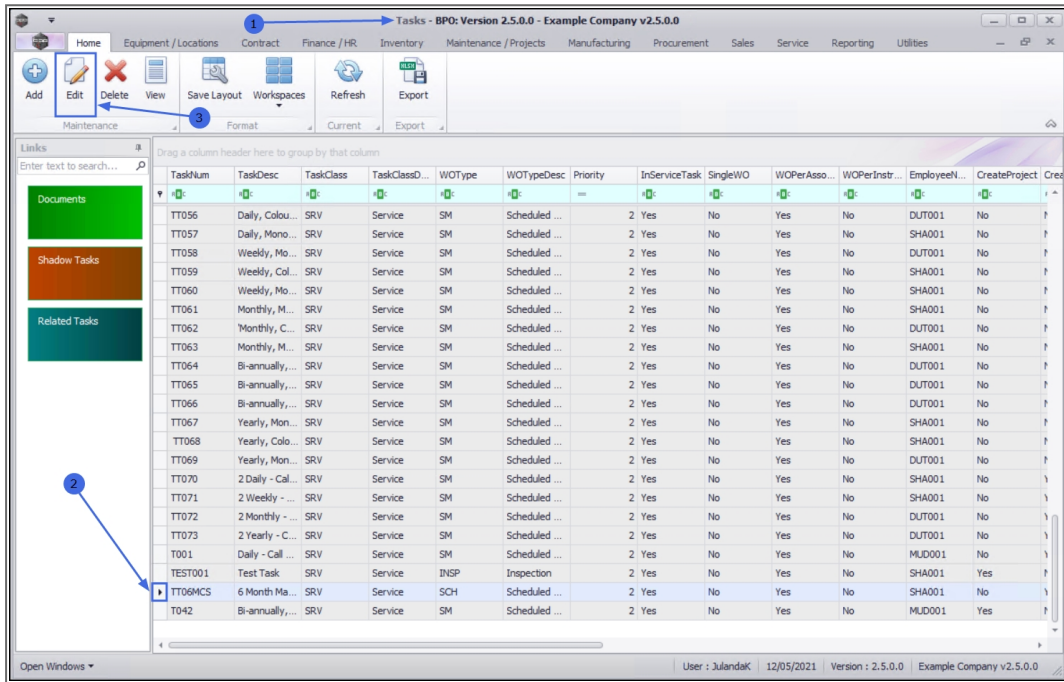
9. Click on **OK**.
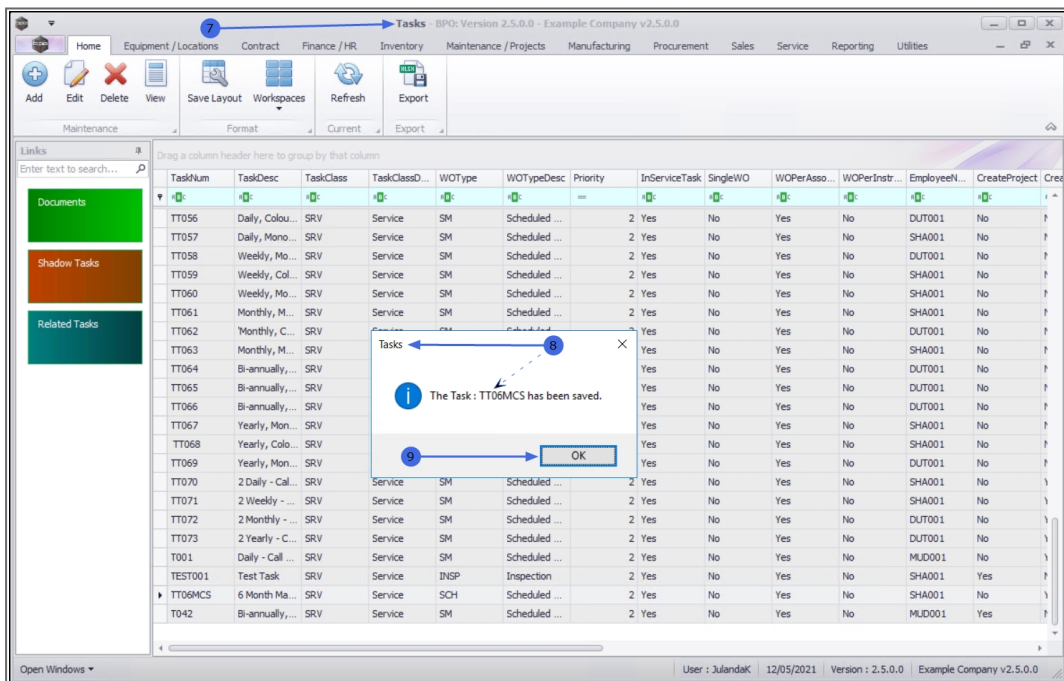
VIEW THE STATUS

1. From the **Tasks** list screen,
2. Click on the row of the **task** you wish to view the status of.
3. Click on **Edit**.

> 🏹 Short cut key: **Right click** to display the **Process** menu list. Click on **Edit**.

4. The **Edit Task** screen will be displayed.
5. The **Status** field for the BOM you have assigned has now been updated with **A - Active**.
6. Click on **Back** to return to the **Tasks** list screen.

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