



Introduction

The Bill Of Materials function includes two separate templates :-

- The **Multiline template** emulates the New BOM and Amend BOM screens in Sage 200, which allows you to create or amend a Bill Of Materials

Status	LHM	Group By ID	Header/Action	Item Selection Code	Item Selection Name	Reference	Description	Change/Reference	Quality/Standard	Revision	Control
		1577579	CREATE	FL/LARGE-KITCHEN-PK-SW3	FL/LARGE-KITCHEN-PK-SW3	FL/LARGE-KITCHEN-PK-SW3	Standard kitchen pack for larger kitchens s		BEST	1.02	FALSE

- The **Multiline template with version control** allows for the same functionality with the addition of version control. This allows you to have multiple versions of a BOM for the same product.

To create a new BOM start by entering in the data required on the template and click **Create**

There are multiple sheets within both templates. The first is **AllFields** this covers all fields from all tabs normally shown in the BOM screen in Sage 200.

Alternatively, they are also broken down into different sheets such as **AllFields_NoAnalysisCodes, Details, Components, Operations_Full, Operations_FromRegister etc.** Each of these sheets can still be tailored to only contain the data relevant to you.



Map Fields

The table below explains the purpose of each of the fields available to the worksheet: -

Status	<p>Populated when selecting either the Validate or Create buttons on the Excel Data Bridge ribbon.</p> <ul style="list-style-type: none"> • The default status on a successful validation will be Pending • The default status on a successful creation will be Processed <p>When attempting to post to Sage 200, the status field should either be cleared, or display a status of Pending. Any other data entered in this field will prevent the transaction being created in Sage 200.</p> <p>Should an error be returned in this cell when attempting to post, it will appear in red. The error should be corrected in the worksheet, and the status field cleared before attempting to post again</p>
URN	Populated when Create button is clicked.
GroupByID	If no group ID is given it will default to different for each line. Further details at end of user guide
HeaderAction	<p>Header Action determines what action is being taken against the Bill of Materials, the options are:</p> <ul style="list-style-type: none"> • Create • Update • Delete • Ignore
The following fields relate to the header section for Creating/Amending BOM screen in Sage 200	
Code	The Stock Item Code
Name	The Stock Item Name
The following fields relate to the details tab for Creating/Amending BOM screen in Sage 200	
Reference	Reference for the BOM
Description	Description for the BOM
ChangeReference	Change reference for BOM
QualityStandard	Quality Standard for BOM
Revision	Revision for BOM
OnHold	Use TRUE to put on hold or false to not put on hold
Reason	If on hold a reason code can be entered
DefaultBuildQuantity	Set default build quantity for BOM



DefaultCostQuantity	Set default cost quantity for BOM
CalculateOverheadsAutomatically	Use TRUE to turn on FALSE to turn off
OverheadContribution	If previous field is FALSE the overhead contribution can be entered
UseOnlyInBOMModule	Use TRUE to turn on FALSE to turn off
ComponentAssociationRequired	Use TRUE to turn on FALSE to turn off
DateEntered	Displays the date of BOM creation
EnteredBy	Select user BOM is entered by
EffectiveFrom	Set effective from date
EffectiveTo	Set effective to date
The following fields relate to the components tab for Creating/Amending BOM screen in Sage 200	
CompReferencesRequired	Use TRUE to turn on FALSE to turn off
ComponentAction	Component Action determines what action is being taken against the component line, the options are: <ul style="list-style-type: none"> • Create • Update • Delete • Ignore
ComponentID	Should not be changed if amending a component
CompSequence	Set BOM component sequence number
CompCode	Set component item code
CompName	Set component item name
CompQuantity	Set component quantity
CompUnitofMeasure	Set Unit of Measure
CompType	Set component type
CompUseCompUseSpecificVersion	Use TRUE to turn on FALSE to turn off
CompBOMVersion	If previous field is TRUE set version
CompInstruction	Instruction for component
CompScrapPercentage	Set component scrap percentage
CompFixedQty	Use TRUE to turn on FALSE to turn off
CompUseOnlyInBOM	Use TRUE to turn on FALSE to turn off
CompShowCommentLines	Use TRUE to turn on FALSE to turn off
CompReferenceID	If component reference required is set to TRUE an ID will be populated
CompReference	Set component reference
CompNotes	Add component notes
The following fields relate to the operations tab for Creating/Amending BOM screen in Sage 200	
OperationAction	Operation Action determines what action is being taken against the operation line, the options are: <ul style="list-style-type: none"> • Create • Update • Delete • Ignore



OperationID	Should not be changed if amending an operation. If creating a new operation enter a unique numeric value such as 1.
OperationSequence	Set BOM operation sequence number
OperationType	Operation Types available are: <ul style="list-style-type: none"> • New • Existing • Comment
OpShowCommentLine	Use TRUE to turn on FALSE to turn off
OperationReference	Right click >
OperationDescription	Set operation description
OperationSubContract	Use TRUE to turn on FALSE to turn off
OperationDoNotPrint	Use TRUE to turn on FALSE to turn off
OpOverlapQty	Set operation overlap quantity
OpOverlapPercentage	Set operation overlap percentage
OpShrinkagePercentage	Set operation shrinkage percentage
OPRuntimeHours	Set operation runtime hours
OPRuntimeMins	Set operation runtime minutes
OPRuntimeSecs	Set operation runtime seconds
OpQtyPerRun	Set operation quantity per run
OpDelayMins	Set operation delay minutes
OpDelaySecs	Set operation delay seconds
OperationNotes	Add operation notes
OPResourceAction	Operation Resource Action determines what action is being taken against the operation resource line, the options are: <ul style="list-style-type: none"> • Create • Update • Delete • Ignore
OPResourceLineNo	Set the line number of the operation resource
OPResourceStepNo	Set the step number of the operation resource
OPResourcePhase	Operation resource phases available: <ul style="list-style-type: none"> • Setup • Runtime • Teardown
OPResourceType	Operation resource types available: <ul style="list-style-type: none"> • Labour Resource • Labour Resource Group • Machine Resource • Machine Resource Group • Tool Resource • Tool Resource Group
OPResourceReference	Set operation resource reference
OPResourceDescription	Set operation resource description
OpResourcePrimary	Use TRUE to select FALSE to deselect



OPResourceSecondary	Use TRUE to select FALSE to deselect
OPResourceRate	Set operation resource rate
OPResourceQuantity	Set operation resource quantity
OpResourceCostingRateTimeUnit	Set operation resource costing rate time unit
OPResourceHours	Set operation resource hours
OPResourceMins	Set operation resource minutes
OPResourceSecs	Set operation resource seconds
OPResourceFixedLength	Use TRUE to select FALSE to deselect
OPResourceFixedQuantity	Set operation resource fixed quantity
OPResourceManningLevel	Set operation resource manning level
OPResourceNotes	Enter operation resource notes
OpResourceTimeUnit	Set operation resource time unit
OpResourceTimeUQuantity	Set operation resource time unit quantity
The following fields relate to the subcontract tab for Creating/Amending BOM screen in Sage 200	
OPSubcontractID	Should not be changed if amending a subcontract line
OPSubAction	Operation Subcontract Action determines what action is being taken against the operation subcontract line, the options are: <ul style="list-style-type: none"> • Create • Update • Delete • Ignore
OPSubPreferred	Set if operation subcontract is preferred
OPSubCode	Set operation subcontract code
OPSubOrderRef	Set operation subcontract order reference
OpSubLeadTime	Set operation subcontract lead time
OpSubOrderDetails	Set operation subcontract order details
OpSubSaturday	Use TRUE to select FALSE to deselect
OPSubSunday	Use TRUE to select FALSE to deselect
OPSubCostHeading	Set operation subcontract costing heading
OPSubQtyBrkAction	Operation Subcontract Quantity Break Action determines what action is being taken against the operation subcontract quantity break line, the options are: <ul style="list-style-type: none"> • Create • Update • Delete • Ignore
OPSubQtyBrkLineNo	Set operation subcontract quantity break line number
OPSubQtyBrkFrom	Set operation subcontract quantity break from
OPSubQtyBrkTo	Set operation subcontract quantity break to
OPSubQtyBrkCost	Set operation subcontract quantity break cost
OPSubQtyBrkRatePerItem	Set operation subcontract quantity break rate per item



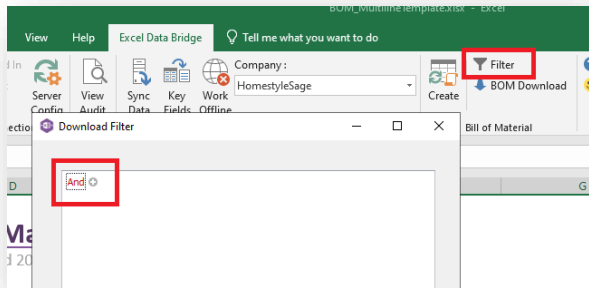
OPSubQtyBrkHoursOffSite	Set operation subcontract quantity break hours off site.
The following fields relate to the component tab for Creating/Amending BOM screen in Sage 200	
OpCompAction	Operation Subcontract Component Action determines what action is being taken against the operation component line, the options are: <ul style="list-style-type: none"> • Create • Update • Delete • Ignore
OpCompLineNo	Set operation component line number
OPCompCode	Set operation component code
OpCompQuantity	Set operation component quantity
The following field relates to the notes tab for Creating/Amending BOM screen in Sage 200	
Notes	Enter notes
The following fields relate to the drawings tab for Creating/Amending BOM screen in Sage 200	
DrawingAction	Drawing Action determines what action is being taken against the drawing line, the options are: <ul style="list-style-type: none"> • Create • Update • Delete • Ignore
DrawingLineNo	Set drawing line number
DrawingReference	Set drawing reference
The following fields relate to the analysis code tab for Creating/Amending BOM screen in Sage 200	
Acct Mgr	Set account manager
Buyer	Set buyer



How to Download Existing BOMs from Sage 200 into Excel Data Bridge

Filtering

Click the Filter button from the ribbon. The screen appears as follows



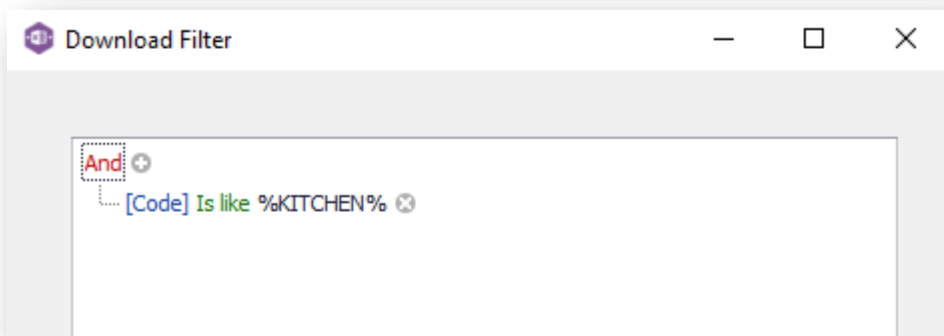
Setting a filter uses the same logic as filters in Sage 200: -

FIELD **OPERATOR** **VALUE**

For example, add the following filter to download the Sage 200 BOM for FL/LARGE-KITCHEN-PK: -

CODE **EQUALS** **FL/LARGE-KITCHEN-PK**

Wildcards can also be used to download BOMs containing certain data. For example, if I wanted to download all BOMs with the word **%KITCHEN%** somewhere in the code, I would click the + next to And, then add the following filter before clicking OK. :-



Tips – Filters

- Clicking the + next to And allows you to add a condition, or use the Insert or Add keys.
- Clicking the x at the right of a condition allows you to delete it or use the Delete key.
- Clicking And allows you to: -
 - Add a condition
 - Add a group of conditions
 - Change the linking operator on a filter with multiple conditions
 - Clear all current conditions (only if any are set)

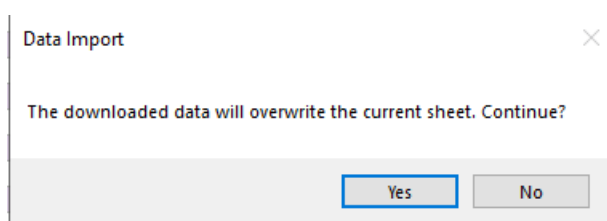


Downloading Data from the Filter

Once the filter has been set, click **BOM Download** on the ribbon bar. A new screen will appear with the filtered BOMs you require. Select the items you wish to be downloaded by ticking on the left-hand side and click download.

Group By ID	Code	Name	Reference	Description	Change Re...	Quality Sta...	Revision	On Hold	Version	Version Sta...	Checked Out	Component...	Date Entered	Date Enter...	Effective F...	Effective To	Use Only L...	Default Bul...	Default Co...	Calculate O...	Mark Up Pe...	Overhead ...	No
<input checked="" type="checkbox"/>	1513613	FLATCHE...	Standards ...	FLATCHE...	Standard ki...		0.20	FALSE	0.20	ACTIVE	FALSE	TRUE	01/11/2019				FALSE	1	1	TRUE	0	0	0
<input type="checkbox"/>	1513609	FLARGE...	Standard ki...	FLARGE...	Standard ki...		0.23	FALSE	0.23	ACTIVE	FALSE	TRUE	01/11/2019				FALSE	1	1	TRUE	0	0	0
<input type="checkbox"/>	1513640	FLSMALL...	Standard ki...	FLSMALL...	Standard ki...		0.21	FALSE	0.21	ACTIVE	FALSE	TRUE	01/11/2019				FALSE	1	1	TRUE	0	0	0

When downloading data from Sage 200, any existing data in the template will be overwritten in the worksheet. A message appears confirming this to give the opportunity of saving the file before the data is downloaded.



Clicking Yes, will download all data from Sage 200 that matches the filter request.

NOTE – if several rows are downloaded into Excel Data Bridge for one BOM In this example each line is assigned a unique value in the GroupByID / Component ID / CompReferenceID / OperationID columns.

Group by ID / Component ID / CompReferenceID / OperationID from downloaded BOM's

When a BOM has been downloaded from Sage 200 please retain the ID's provided and ensure any new lines have the Group by ID number provided from the download. This will help ensure that all BOM lines are correctly organised and grouped together based on the Group ID provided in the download.

IMPORTANT When creating 1 new component line and we suggest you use the value '1' in Component ID. For multiple line use 1,2, 3 etc. Failure to do this will result in the line being missed.

ComponentAction	ComponentID	CompSequence	CompC
UPDATE	1513613	1	PANEL/
UPDATE	1513614	2	PANEL/
UPDATE	1513615	3	PA/SHE
UPDATE	1513616	4	PANEL/
UPDATE	1513617	5	PA/SHE
UPDATE	1513618	6	DOOR/
UPDATE	1513619	7	PANEL/
UPDATE	1513620	8	PANEL/
UPDATE	1513621	9	DOOR/
UPDATE	1513622	10	PK/BUE
UPDATE	1513623	11	PK/CAF
UPDATE	1513624	12	PK/DO
UPDATE	1513625	13	IR/LAR
UPDATE	1513626	15	PM/SIN
UPDATE	1586286	17	ABBuilt
CREATE	1	22	ABCool
CREATE	2	23	ABCool



Group by ID

When creating multiple BOMs to Sage 200 at once, Excel Data Bridge needs to inform Sage 200 which lines belong together.

Any unique data can be entered to keep any ID lines together, such as using numbers 1, 2, 3, 4 or letters a, b, c, d.

IMPORTANT When creating additional new lines on an existing downloaded BOM ensure the Group by ID has the same number as per the download.

Excel Data Bridge Browse

There are various columns can search your Sage 200 data directly from the Excel Data Bridge function. Right click within the column, select **Excel Data Bridge Browse** and the Browser search will appear. Select 1 or multiple items and the click **Submit** to bring them through to the sheet.

The image shows two screenshots. The left screenshot is a context menu in Excel with 'Excel Data Bridge Browse' highlighted in a red box. The right screenshot is a 'Browse' dialog box with a table of items. The 'Submit' button and the first two rows of the table are highlighted in red boxes.

<input type="checkbox"/>	Code	Name	Free Stock
<input checked="" type="checkbox"/>	ABBuiltIn/15/0/2	AB Built-In Cookers...	73
<input type="checkbox"/>	ABBuiltIn/15/1/2	AB Built-In Cookers...	51
<input checked="" type="checkbox"/>	ABBuiltIn/15/20/2	AB Built-In Cookers...	31
<input type="checkbox"/>	ABBuiltIn/15/21/2	AB Built-In Cookers...	43
<input type="checkbox"/>	ABBuiltIn/16/0/2	AB Built-In Cookers...	12
<input type="checkbox"/>	ABBuiltIn/16/1/2	AB Built-In Cookers...	40
<input type="checkbox"/>	ABBuiltIn/16/20/2	AB Built-In Cookers...	38
<input type="checkbox"/>	ABBuiltIn/16/21/2	AB Built-In Cookers...	41
<input type="checkbox"/>	ABCookHoods/22/2	AB Cooker Hoods C...	13
<input type="checkbox"/>	ABCookHoods/23/2	AB Cooker Hoods S...	24
<input type="checkbox"/>	ABFSE/12/0/2	AB Freestanding El...	40
<input type="checkbox"/>	ABFSE/12/1/2	AB Freestanding El...	35
<input type="checkbox"/>	ABFSE/12/20/2	AB Freestanding El...	36
<input type="checkbox"/>	ABFSE/12/21/2	AB Freestanding El...	40
<input type="checkbox"/>	ABFSE/13/0/2	AB Freestanding El...	38



Action Indicators

The action indicator states what action you wish to carry out.

- Create – Creates a BOM line in Sage 200
- Update – Updates existing BOM line in Sage 200
- Ignore – Any changes will be ignored.
- Delete – Deletes BOM line from Sage 200

IMPORTANT When creating 1 new component line and we suggest you use the value '1' in Component ID. For multiple line use 1,2, 3 etc. Failure to do this will result in the line being missed.

ComponentAction	ComponentID	CompSequence	CompC
UPDATE	1513613	1	PANEL/
UPDATE	1513614	2	PANEL/
UPDATE	1513615	3	PA/SHE
UPDATE	1513616	4	PANEL/
UPDATE	1513617	5	PA/SHE
UPDATE	1513618	6	DOOR/
UPDATE	1513619	7	PANEL/
UPDATE	1513620	8	PANEL/
UPDATE	1513621	9	DOOR/
UPDATE	1513622	10	PK/BUE
UPDATE	1513623	11	PK/CAP
UPDATE	1513624	12	PK/DOO
UPDATE	1513625	13	IR/LARO
UPDATE	1513626	15	PM/SIN
UPDATE	1586286	17	ABBuilt
CREATE	1	22	ABCool
CREATE	2	23	ABCool

How to send completed / amended BOMs to Sage

Once you have entered your BOM information, you will need to send the data to Sage, to make your changes. The status bar will give one of two responses.

- **Processed** – Data was submitted to Sage 200 successfully.
- **ERROR** - If validation is unsuccessful, an error will be returned in red. This error must be rectified, and the error cleared from the status field before submitting the data again.



Amending Templates

The worksheet templates have been created in an Excel table with the correct formatting applied.

To add additional rows, firstly locate the cell at the bottom right hand corner of the formatted table.

Goods Value	Tax Value	Gross Value

Goods Value	Tax Value	Gross Value

Now select the cell then click and drag down on the arrow. Extra rows will be added with the correct formatting.

To add additional columns, right click on the column heading where you would like your new column to appear and select. **Insert>Table Columns to the left.**

Line Date		Gross Value
	00	1200
	00	2400
	30	180

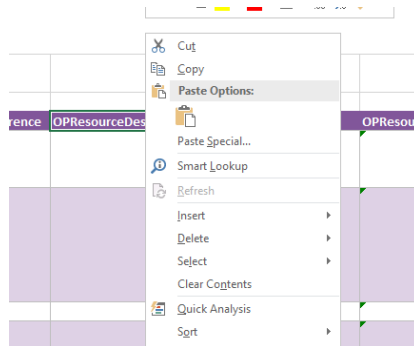
A new column will be added, named Column 1. Rename the column in Excel, then refer to the next section on how to map this column in designer.

O	P
Column1	Line Date



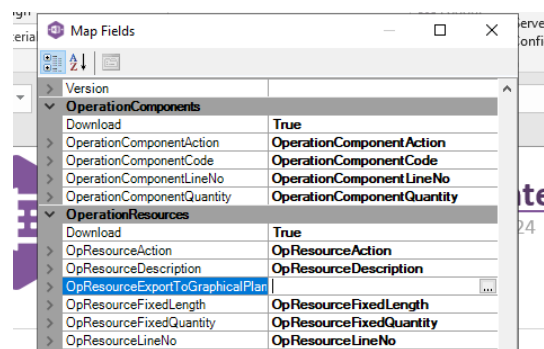
Mapping New Columns


To add a column right click on an existing column on the template. Select **Insert > Column to the left**



Once a new column has been added to the template, it can be mapped to the required Sage 200 field.

Click Designer to open the mappings for the template and to locate the field to map the column to.



Click the  ellipsis to the right of the field. The cell mapping window will appear.

Select the cell range for the column before clicking OK.

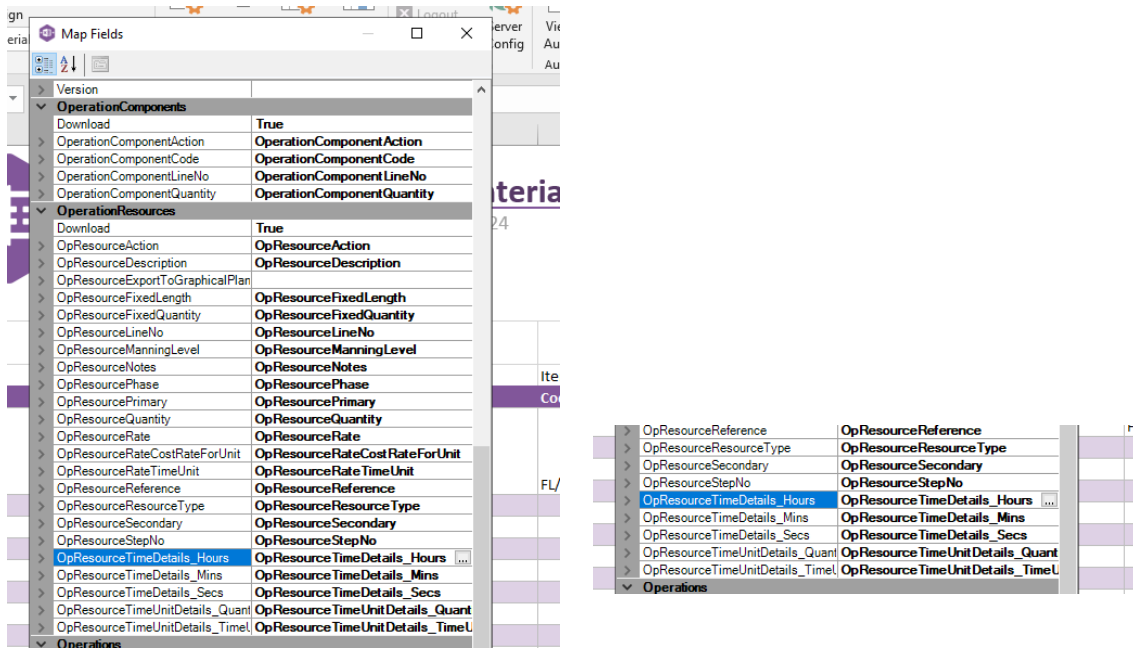
The column is now mapped and can be populated in Excel Data Bridge.



Deleting Unwanted Columns

To delete an unwanted column in a template complete the following steps.

Remove the field mapping from the designer. To do this open the designer to view the mapping.



Clear the data in mapping field. Close the designer then click Validate Design to check for errors.

Lastly remove the column from the template. Right click the column heading and select **Delete>Table Columns**.

