

Bitloom

BOMCompare

Creatio Application for BOM Structure Comparison

Creatio

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1. Introduction

The **BOMCompare Application** helps organizations manage and analyze **Bill of Materials (BOM)** structures within the system.

In many organizations, identical materials are stored under different names or codes. This leads to:

- Duplicate materials
- Increased procurement complexity
- Inventory redundancy
- Poor master data quality

This application analyzes material data provided by the organization, allows users to define comparison groups directly within the system, **select Parent Materials**, and **automatically generate BOM** structures for detailed analysis.

The application is designed to run within the Creatio environment and integrates with the platform's process automation capabilities.

This guide explains:

- How to install the application
- How to configure required lookups
- How to configure BOM groups
- How to compare BOM structures

For demonstration purposes, this guide uses **two example groups**:

- **Bike**
- **Car**

2. Prerequisites

Before installing the BOMCompare application, organizations should prepare the Material master data that needs to be analyzed.

These materials should be **grouped together outside the system**, for example:

- In **Excel**
- In another **ERP or Material management system**

The application assumes that all relevant materials are available in the Material lookup before creating comparison groups.

Users will define groups and select Parent Materials directly within the application interface.

Once these groups and Parent Materials are identified, the BOMCompare application can be used to analyze their BOM structures.

3. Installing the Application

Follow these steps to install the application.

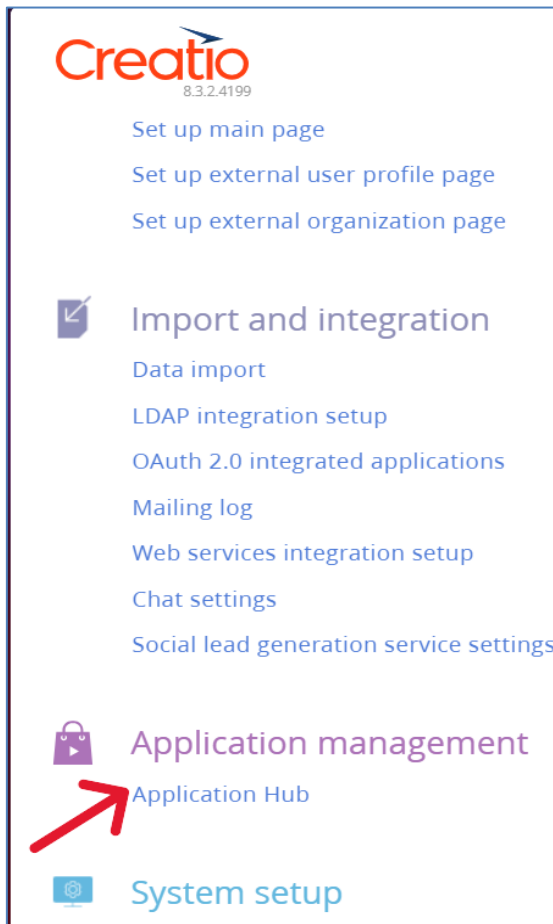
Step 1 – Log in to Creatio

Log in to your Creatio instance using **System Administrator credentials**.

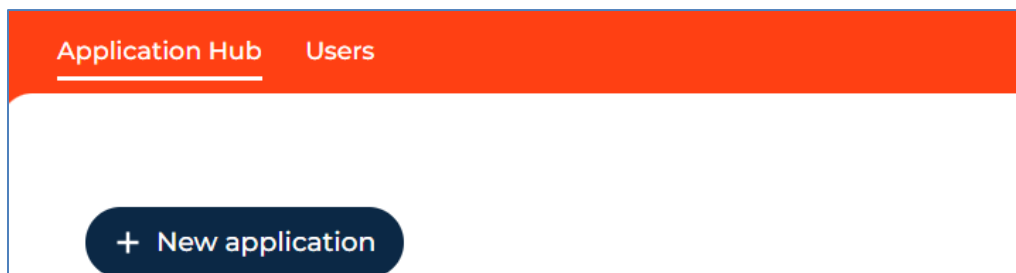
Step 2 – Download the Application

Download the **BOMCompare** package from the Creatio Marketplace. Navigate to:

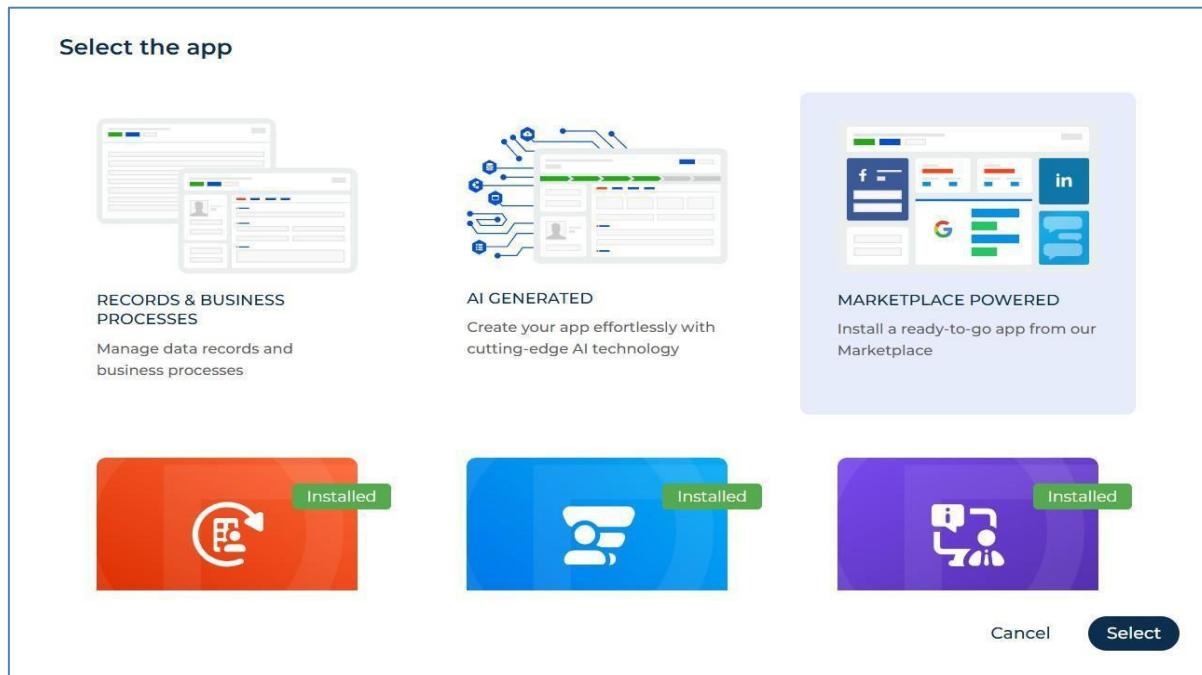
System Designer → Applications Hub



Then Add **New Application**



Go to Marketplace Powered application and download the package.



Step 3 – Upload the Package

Upload the application package and start the installation. Creatio

will automatically install:

- BOM workplace
- Lookups
- Group section
- Business processes

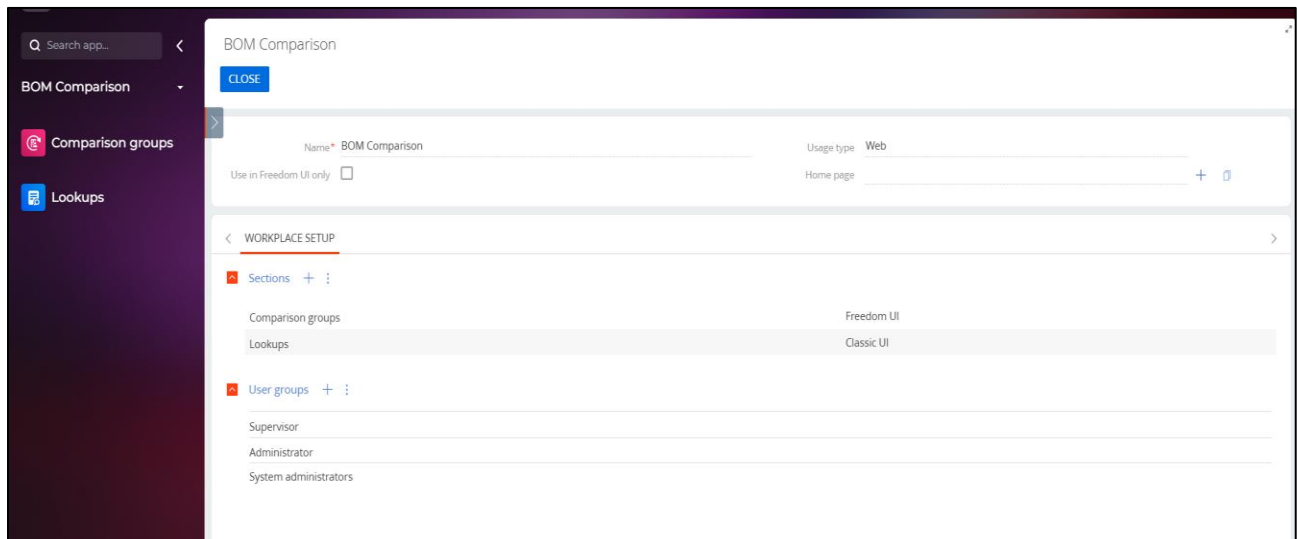
Step 4 – Configure Workplace Access

After installation, verify that the **BOM workplace** is enabled.

Navigate to:

System Settings → Workplace Setup

1. Locate the **BOM Workplace**.
2. Ensure the workplace is **enabled**.
3. Verify that the following sections are included:
 - Lookups
 - Group
4. Provide access to the users or roles who will use the BOMCompare application

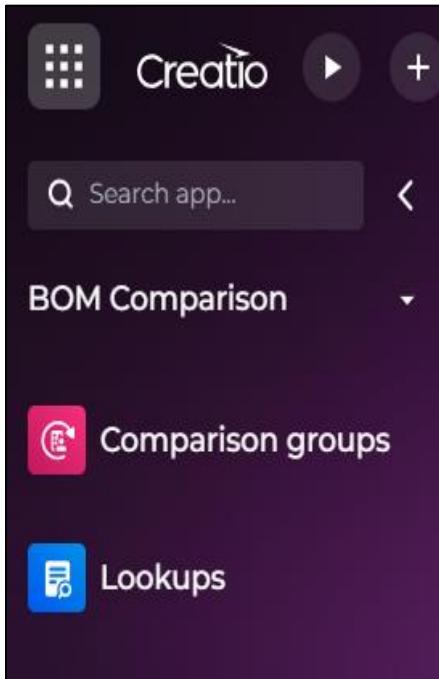


Step 5 — Complete Installation

Once installation is finished:

1. Refresh the application
2. Navigate to the BOM workplace
3. Verify that the following sections are available:
 - Lookups

- Group



4. Configuring Lookups

4.1 Organizing BOM Lookups (Recommended)

For better usability and easier navigation, it is recommended to organize all BOMCompare-related lookups inside a dedicated folder.

When multiple lookups exist in the system, users may need to search for each lookup individually in the **Lookup section**, which can become time-consuming.

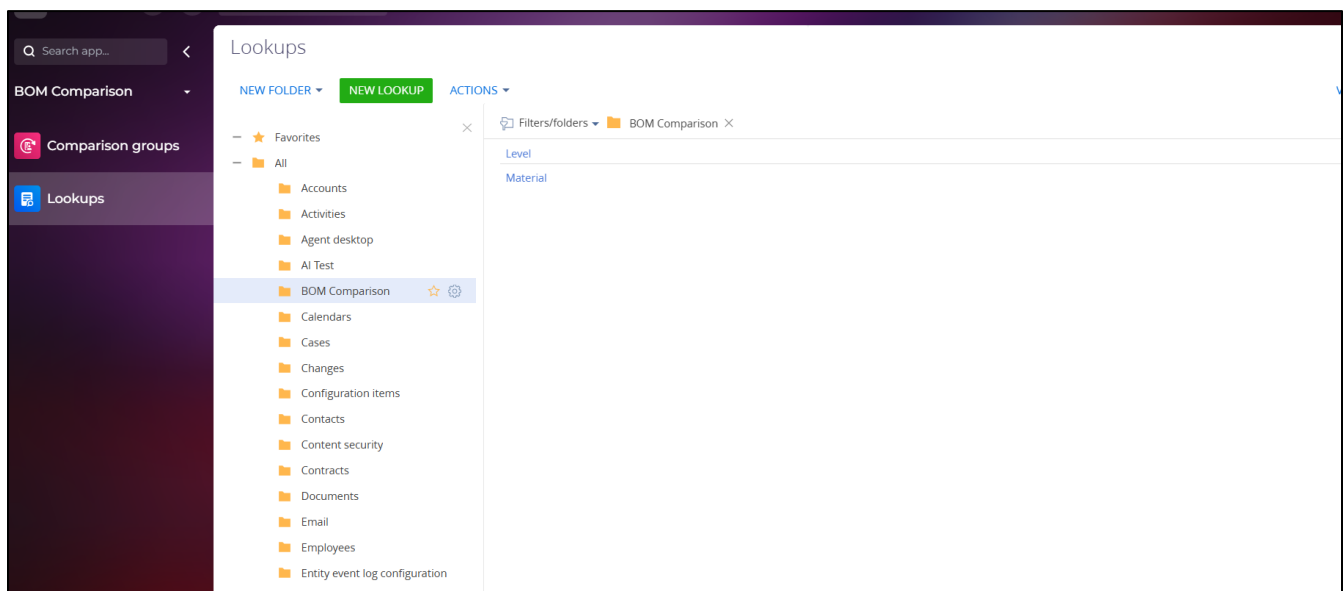
To improve intuitiveness, it is suggested to create a separate folder named **“BOM”** inside the Lookup section and place all BOMCompare lookups inside that folder.

Before using the application, some lookup data must be configured. Navigate to:

BOM → Lookups

The following lookups should be added in the BOM folder :

- Level
- Material



By organizing the lookups in a single folder:

- Users can quickly access all related lookups.
- Navigation becomes simpler and faster.
- Administrators can manage BOM-related data more efficiently

When a user navigates to the **Lookup section**, they can directly open the **BOM folder** to access all required lookups without searching for them individually.

5. Lookup Configuration Order

To ensure the application works properly, configure lookups in the following order:

1. Level
2. Material

The **Bill of Material lookup and Parent Material** is automatically populated by the system, so users do not need to manually add records there.

6. Lookup Setup

Step 1 – Configure Levels

Levels define the hierarchy of materials in the BOM structure.

Navigate to:

Lookups → Level

The system is already configured with **Levels from 1 to 9**.

Level name	Level no	
------------	----------	--

Levels help the system determine how materials relate to each other within the BOM structure.

If a BOM structure contains **more than 9 hierarchy levels**, the user must manually add additional levels in this lookup.

Step 3 – Configure Materials

The Material lookup stores all materials used in BOM structures. Navigate to:

Lookups → Material

Important fields include:

Field	Description
Material name	Name of the material
Material description	Description of the material
Child material	Indicates the component material in the hierarchy
Child material description	Description of the child material

Important rule:

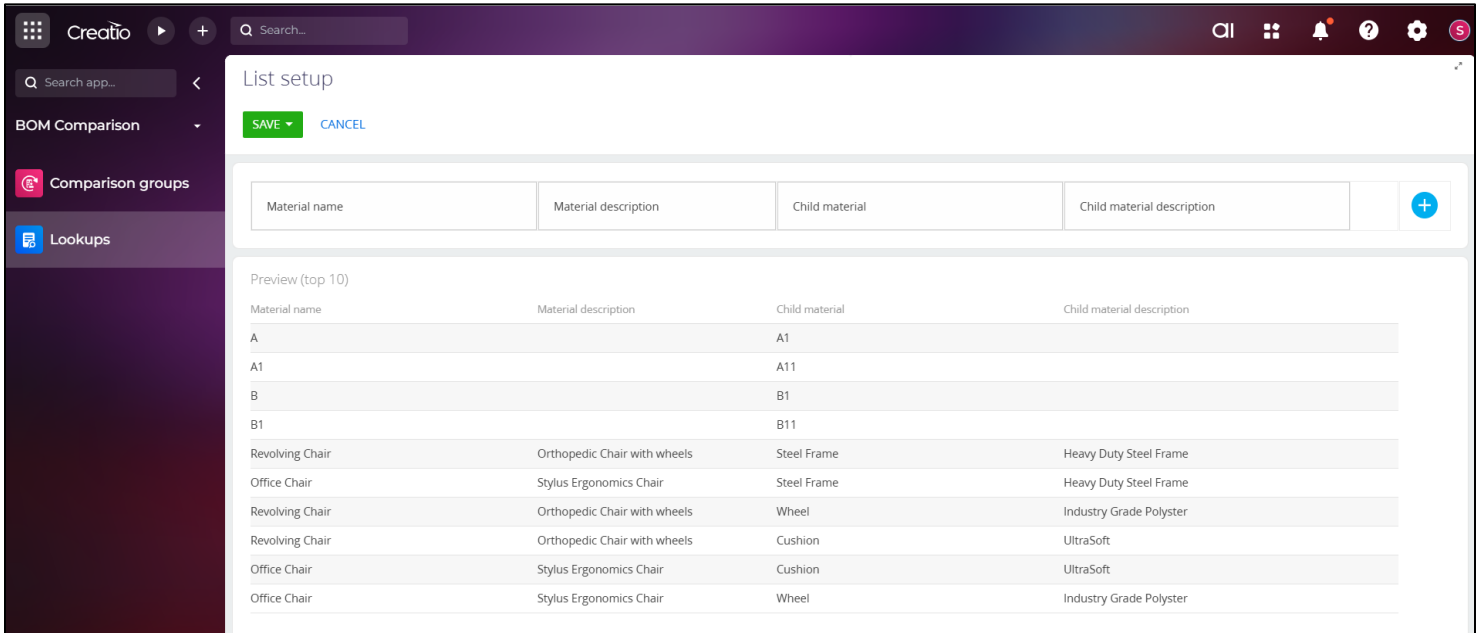
All materials must be maintained within a single unified dataset in the Material lookup.

The dataset may include assemblies, subassemblies, and individual components.

Parent materials do not need to be configured separately. Instead, users will select the required parent materials directly from this dataset when creating groups in the application.

Therefore, materials should be entered completely and accurately to ensure correct BOM generation.

Parent materials will later be selected directly from this dataset when creating groups in the application.



The screenshot shows the 'List setup' window in the Creatio application. It features a search bar at the top, a 'SAVE' button, and a 'CANCEL' button. Below these are four input fields: 'Material name', 'Material description', 'Child material', and 'Child material description', followed by a plus sign icon. A 'Preview (top 10)' section displays a table with the following data:

Material name	Material description	Child material	Child material description
A		A1	
A1		A11	
B		B1	
B1		B11	
Revolving Chair	Orthopedic Chair with wheels	Steel Frame	Heavy Duty Steel Frame
Office Chair	Stylus Ergonomics Chair	Steel Frame	Heavy Duty Steel Frame
Revolving Chair	Orthopedic Chair with wheels	Wheel	Industry Grade Polyester
Revolving Chair	Orthopedic Chair with wheels	Cushion	UltraSoft
Office Chair	Stylus Ergonomics Chair	Cushion	UltraSoft
Office Chair	Stylus Ergonomics Chair	Wheel	Industry Grade Polyester

7. How to Add Data to Lookups

Data in lookups can be added in **two different ways**.

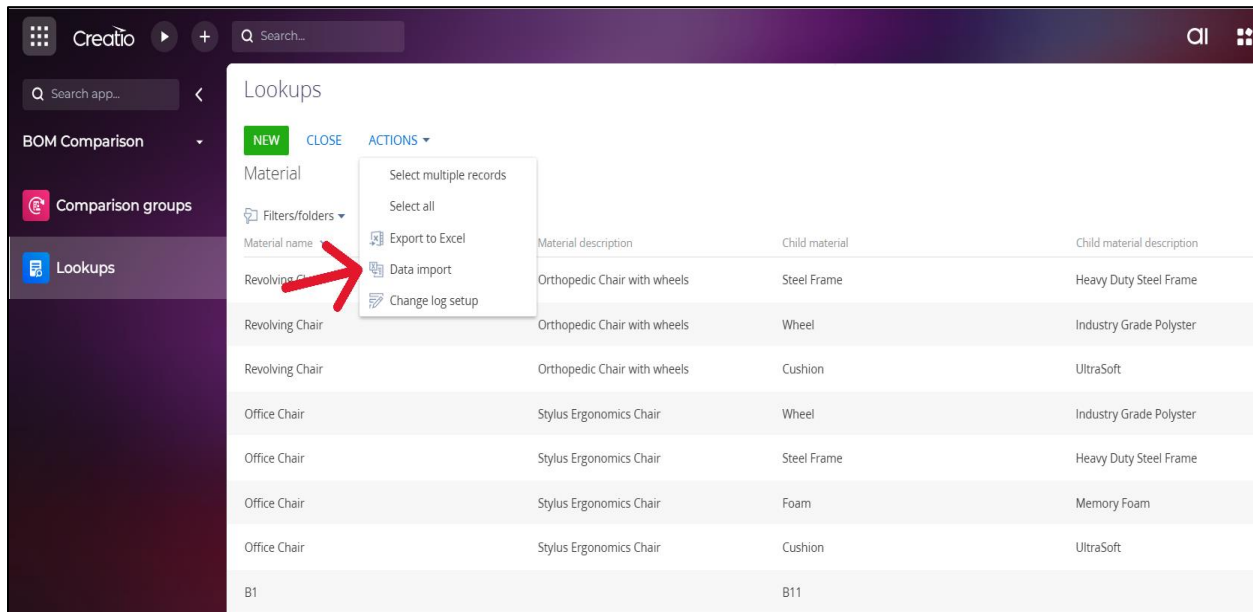
Method 1 – Import Data from Your System

If the organization already has material data stored in another system (for example Excel or ERP), the data can be imported directly into Creatio.

Steps:

1. Open the required lookup (e.g., Material or Parent Material).
2. Click **Data Import**.
3. Upload an **Excel or CSV file** containing the records.
4. Map the columns to the corresponding fields in Creatio.
5. Run the import process.

This method is useful when importing **large datasets of materials or groups**.




This will open the Data Import window, where users can upload an Excel file containing the lookup data.

After uploading the Excel file, the system will ask you to **map the columns from the Excel file to the corresponding fields in the lookup object.**

This ensures that the data from the file is inserted into the correct fields in Creatio.

Data import: Upload file


[CLOSE](#) [BACK](#) [NEXT](#)





Drag and drop file here or

Select file

Where do you want the data imported to? [SELECT TEMPLATE](#)

 CONTACT

 ACCOUNT

 MATERIAL

[NEXT](#)

Important:

The **Excel column names should match the column names in Creatio**. This allows the system to **automatically map fields during import**.

If the names do not match, users must **manually map the columns during the import process**.

Method 2 – Create Data Manually

Users can also create records manually inside the lookup. Steps:

- Open the required lookup.
- Click **New**.
- Enter the required values.

- Click **Save**.

8. Group Management

After importing the material data, users can create comparison groups directly in the Group section.

Each group represents a set of materials that will be analyzed together for BOM structure comparison.

Navigate to:

BOM → Group

This section displays a list of BOM groups.

Group name	Group description	Count of...	Group mismatched ...	Group complete mi...	Group complete m...
1 Group of As		2	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2 fgh		2		<input type="checkbox"/>	<input type="checkbox"/>
3 Group of Chairs		2		<input type="checkbox"/>	<input type="checkbox"/>
4 fghj		3		<input type="checkbox"/>	<input type="checkbox"/>
5 7		7		<input type="checkbox"/>	<input type="checkbox"/>
6 Group of Letters		2		<input type="checkbox"/>	<input checked="" type="checkbox"/>

Each group represents a product category whose BOM structure will be generated.

9. Group Form Page – Creating and Viewing BOM Structure

When a user opens a group record in the **Group section**, the **Group Form Page** is displayed. This page allows users to configure the parent material, generate the BOM structure, and view the generated Bill of Materials.

The form also contains detailed sections for BOM data.

Field	Description
Group Name	Name of the BOM group
Count	Number of materials in the group
Audit Approval	Indicates validation status
Parent Material	Parent material associated with the group
Bill of material	Displays the hierarchical structure of materials to parent material

9.1 Parent Material Section

The Parent Material section allows users to select one or more top-level materials directly from the imported material dataset.

These materials represent the assemblies whose BOM structures will be generated and compared.

Since all materials are stored in a single dataset, no separate parent material configuration is required.

User can **choose the Parent material** from the dropdown coming in the Material_name from the material master data.

The screenshot displays the 'BOM comparison workspace' interface. On the left, a 'Group details' sidebar shows 'Group name' as 'Group of chairs' and 'Count of parent material' as '2'. The main area has two tabs: 'PARENT MATERIALS' (active) and 'BILL OF MATERIALS'. Under 'PARENT MATERIALS', there is a search bar for 'Parent materials' and a table with columns 'Material' and 'Material description'. A '+ New' button is located below the table. At the top right, there are buttons for 'Create BOM', 'Save', and 'Cancel'.

9.2 Bill of Materials Section

On the right side of the form page, the **Bill of Materials detail** displays the hierarchical structure of materials related to the selected parent material.

This section will show all components and their hierarchy levels once the BOM structure is generated.

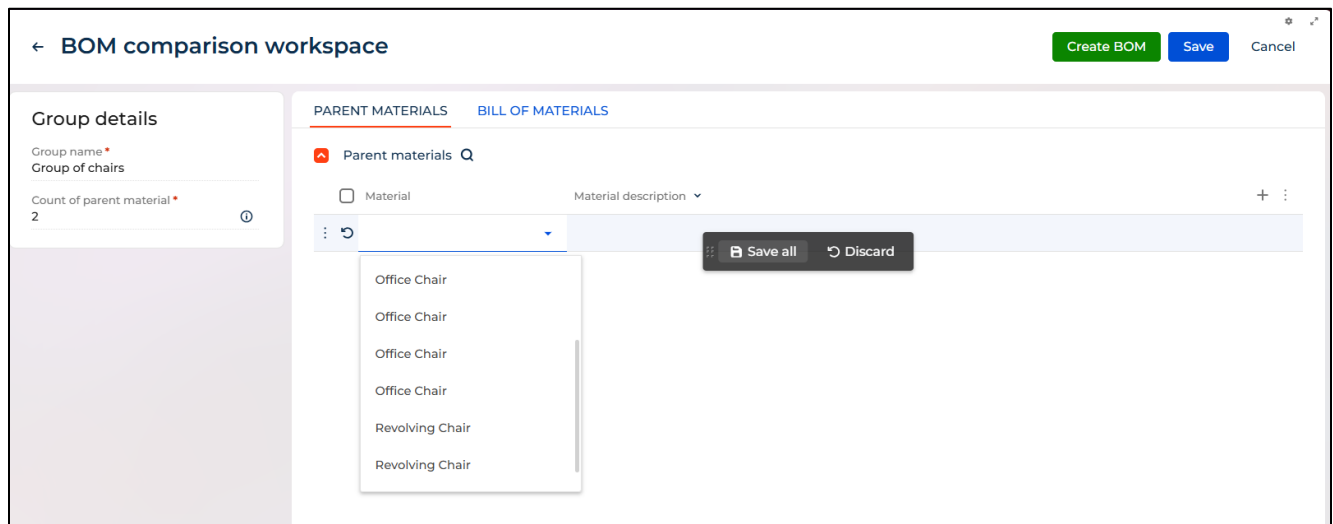
The structure is generated based on the selected parent materials.

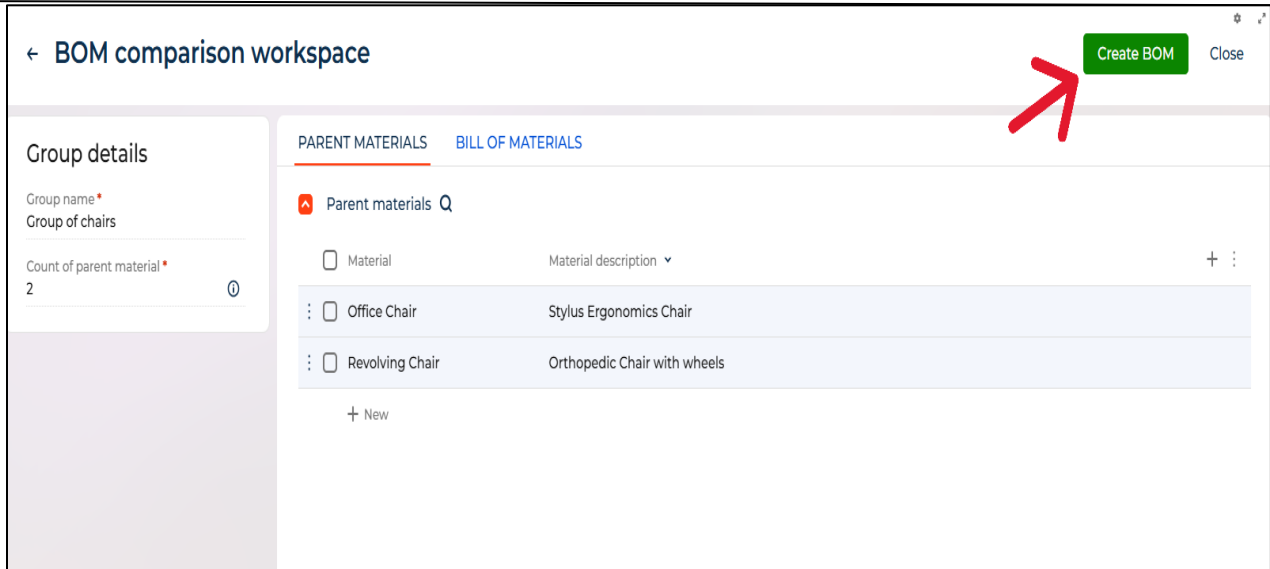
9.3 Creating the BOM Structure

To generate the BOM structure:

1. Open the required **Group record**.
2. Define the Group details (**name, count, etc.**).
3. Select one or more parent materials from the **Parent Material** section.
4. Click the **Create BOM button**.

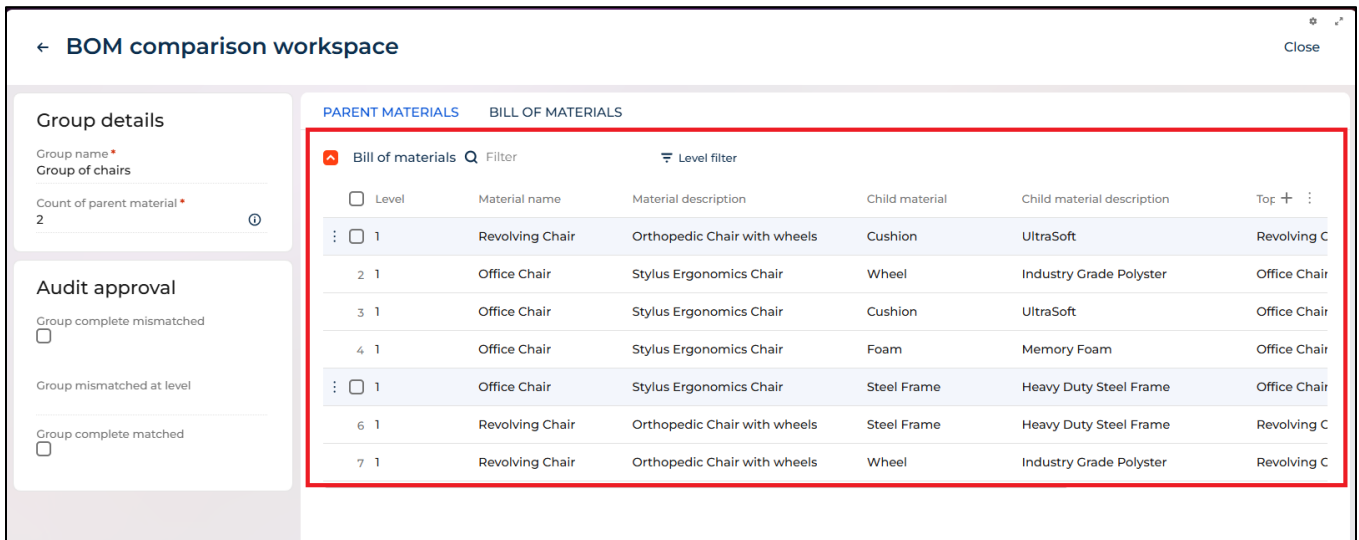
This action triggers an automated **business process** that retrieves the material hierarchy and generates the corresponding BOM records.





9.4 Viewing the Generated BOM

After the business process completes, the generated BOM records appear in the **Bill of Materials section** of the Group Form Page.



These records are automatically stored in the **Bill of Material lookup**.

10. Best Practices

To ensure optimal results:

- Material data is complete before creating groups
- Select correct Parent Materials for accurate BOM generation
- Maintain consistent material naming conventions
- Verify hierarchy levels if materials have deep structures

11. Troubleshooting

Issue: BOM records not generated

Possible causes:

- No Parent Material selected
- Materials missing in lookup
- Business process not triggered

Solution:

- Verify parent material chosen
- Ensure materials exist in lookup tables
- Run the **Create BOM** process again

12. Support

For support or questions regarding the BOMCompare application, please contact:

Bitloom Support Team

Email:

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srishti.singh@bitloom.ai