Setting Up, Selling, and Tracking Kit Records

Do you sell items that can be grouped together to create a package or kit? Perhaps you sell paint and all the related tools and supplies individually but would like to offer a "Get Started Painting" kit that includes basic tools such as brushes, rollers, and painter's tape to encourage customers to pick up more supplies.

Or maybe you'd like to sell a Playground kit that contains a slide, 2 swings, tree house and monkey bars. While you offer each of these items separately, you can offer customers a better retail price when they purchase it as a package.

Eagle offers the ability to easily set up a kit record for selling groups of items, allowing your clerks to post one SKU at Point of Sale while giving you the ability to track inventory and sales at both the kit and component levels.

Objectives

- Setting up and selling Kit Records

- Running reports to track Kit Records

Setting up and selling Kit Records

Let's open Inventory Maintenance and begin setting up a kit record.

The first step is to assign a SKU number to the kit. This is sometimes referred to as the kit header SKU. Enter the SKU you'll be using for the kit, the description, Store if necessary, and Department, then press Add.

Next, open the Codes tab and set the Kit Record flag to Yes. Remember to press Change to save this information.

Now you're ready to link the individual SKUs that make up the kit to this kit header SKU. Since you're already on the Codes tab, you can simply click the Kit Record hyperlink to open the Kit Record Maintenance window. You can access this window from the GoTo menu as well.

Notice the message here at the bottom of the window – this kit is not in your store's master file. Add a description for the kit, then press Add.

Eagle notifies you that the kit has been added and opens a window so you can enter the SKU of the first item. If the kit includes more than one of these items, change the quantity here. Press Enter to add the item to the kit. Repeat these steps until all the items in the kit are added. Then click Cancel to close the window.

Notice that, as you add items to the kit, Eagle calculates the retail price, actual gross profit percent, cost and retail value. Review this information carefully. If you'd like, you can enter your own retail price for the kit, or you can enter a GP% and have the system calculate the retail price. Remember to press Change if you make any modifications.

If you ever need to make any changes to the kit, you'll use this same window to make the change. Simply click in the Quantity required box to enter a new number. Or, if you want to delete an item, click the checkbox and press Delete. And, of course, you'll use Add to add new items to the kit.

Another handy trick if you have a multi-store system and you want to sell an existing kit in a different store is to open the kit record, change the store number, and press Add to copy the kit to the new store.

One last step before selling any kits is to determine how much detail you want to print on your invoices. In Options Configuration, open Option 110 and select N to print only the Kit SKU or Y to print the kit SKU as well as all the components. U is similar to Y, but it includes an item's unit of measure when appropriate.

Now that you have the Kit set up, you can easily sell it at POS by scanning or entering the kit header SKU. The selections you made for option 110 determine how much detail prints on the invoice.

There are a few things to keep in mind when selling a kit. Any item that can be sold by multiple units of measure, for instance, by the square foot or by the each, is always sold by the Stocking Unit of Measure. Also, as you sell kits, the system automatically updates the inventory information for each individual SKU in the kit.

Running reports to track Kit Records

Now that you know how to set a kit up and sell it, you may be wondering what report is available to help you manage and monitor your kits.

The Kit Record Report, or RKR, is the answer. With this report, you can easily find out the available quantities for each kit. You can also run it to update costs and retail prices of kits or to review the components of a particular kit.

Open the Kit Record Report from the Inventory Reports Menu or by typing RKR into the launch bar.

After reviewing the print setup, open the Options page. This is where you'll choose the purpose of the report. To review a list of all your kits, simply run the report with no options selected.

If you've changed any costs in your inventory, for instance, if you've run Item Price Change, this can affect the cost of your kits. So, you'll want to select option O to update the costs of each kit. If you want to update both the cost and the retail, select option U.

Running the report with Option Q selected updates the quantity on hand for each kit SKU based on the availability of the items in the kit.

You can run the report with more than one option selected, for instance updating both the kit Quantity on Hand and the kits' cost, but keep in mind that you cannot select both O and U.

Recap

Now that you know how to set up a kit, sell it, and monitor it, I hope that the advantages of using kits in your store are obvious. Your customers will notice the difference as they only have to wait for one SKU to be entered and receive a good package price.

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Corporate Office	**Latin America and Caribbean**	**Europe, Middle East and Africa**	**Asia**	**Australia and New Zealand**
804 Las Cimas Parkway	Blvd. Antonio L. Rodriguez #1882 Int. 104	No. 1 The Arena	238A Thomson Road #23-06	Suite 2 Level 8,
Austin, TX 78746	Plaza Central, Col. Santa Maria	Downshire Way	Novena Square Tower A	100 Pacific Highway
USA	Monterrey, Nuevo Leon, CP 64650	Bracknell, Berkshire RG12 1PU	Singapore 307684	North Sydney, NSW 2060
Toll Free: +1.888.448.2636	Mexico	United Kingdom	Singapore	Australia
Direct: +1.512.328.2300	Phone: +52.81.1551.7100	Phone: +44.1344.468468	Phone: +65.6333.8121	Phone: +61.2.9927.6200
Fax: +1.512.278.5590	Fax: +52.81.1551.7117	Fax: +44.1344.468010	Fax: +65.6333.8131	Fax: +61.2.9927.6298