

What's New 5.0 – Kits Update

CUSTOMER: Hi Kayla, I sent you the specs on the doors we need. Is there any chance you could send the moulding later, like when we're done with the installation? We want to get the painting done *before* we attach the moulding.

NARRATOR: Good news! We updated our Kit options to help you dynamically handle your customer's needs. Use the buttons to take a quick look at these new features.

Topics:

- Notes – Kit Setup
- Notes – Order Entry
- Change Kit Multiplier
- Ship Lines Separately

Notes – Kit Setup

BisTrack Release 5.0 has some updates to help keep track of Notes that are added to Kits in Kit Builder.

Let's have a look!

You can now save notes to a Kit Option that gets copied to any Works Order generated for that Kit when it's added to a Sales Order.

To add a Note to a line option in a Kit, locate it in the Find Products view.

Select the Kit, open the right-click menu, and choose Kit Builder.

Select the kit line that you want to add a note to, and then click the Properties button.

In the Kit Line Properties window,

Open the Notes tab, and enter the text in the Line Notes box.

Select OK to save the Note and close the window.

The line now shows an icon to indicate that there's a saved Note on that option of the Kit.

You can now use Kit Builder to save a note that will be copied to any Works Orders generated for that Kit.

- Open Kit builder
- Add notes on the Notes tab
- Note Icon will be added to the Kit Option

We added a Kit Builder option to require a note when a Kit option is selected on a Sales Order.

In Kit Line Properties you can enable an option to require a note be entered on a specific option if it is selected during Order Entry.

You can select this same option in the Lines tab of the Kit Builder.

You can also check the "Require Line Notes" option to require that a note be entered for a line option when it is added to a Sales Order.

With this option enabled, and while adding a Kit product to a Sales Order, BisTrack *prompts* you to enter a note for the kit line *before* letting you complete the Add Kit To Order window.

You can enable the Require Line Notes Entry checkbox in the Kit Line Properties window or the Lines tab of the Kit Builder.

These changes help insure that special instructions and requirements are not overlooked while assembling orders with Kits.

Notes – Order Entry

BisTrack copies the Notes added on Kit Options to their generated Works Orders. Select the show preview Pane icon to show the Item Details and Line Notes tabs. You will see an exclamation mark here if notes are already saved for an option. On the notes tab, enter or edit the Notes attached to this Kit Option.

BisTrack Release 5.0 has some updates to help keep track of Notes that are added to Kits during Order Entry.

Let's take a look!

Here, our clerk is adding a door kit to an order with the product code 1DOOR. She opens the Items Detail and Line Notes section by selecting the Show Preview Pane icon.

With that open, she can use the Line Notes tab to enter Notes or see if there was a Note saved when the kit was set up in Kit Builder.

BisTrack displays a warning message if she tries to complete the Add Kit to Order process without entering a required Note.

Press OK on the warning box and BisTrack returns to the kit option that required a note.

Now the clerk can enter a note and press OK.

She can now complete the Sales Order.

BisTrack automatically attaches the Notes she entered to the generated Works Order.

Required Line Notes must be entered or you will not be able to complete the Add Kit to Order process.

When you add the kit to an order and complete it, any notes on the kit options will be transferred to the Works Order generated for this Sales Order.

Change Kit Multiplier

We've added the ability to change a Kit's quantity on a complete Sales Order, and automatically create Back Orders if the customer wants the multiple of a kit to ship at different times.

You can adjust the quantity of the Kit on a completed Sales Order by using the Edit Kit feature.

Find the completed Sales Order that you want to adjust, right-click the kit and choose the Edit Kit option.

This will open the Add Kit to Order window for this line.

You can adjust the quantity of the Kit here.

Adjust the number down, and press OK to save the change.

An Order Line Quantity reduced window will appear, asking to make a Back Order for the amount the original quantity was reduced by.

Select the Create a Back Order for this many box, and press OK.

The Kit quantity line will show the new quantity you entered on the Add Kit to Order Screen.

Save and close the Order. BisTrack will create a Back Order for Kits that were removed from the total.

See the Related documents for your order to find the created Back Order.

This addition makes it easy to adjust the Kit quantity, and responding to customers' delivery needs!

To change the Kit Multiplier on a completed Sales Order.

- Right click the Kit line
- Select Edit Kit
- Adjust the Multiply quantity by field
- Press Ok

If you reduced the number, you will be given the option to create a related Back Order for that amount.

Ship Lines Separately

Now you can separate Source Material lines on a Works Order to ship and track them independently.

You can now separate Source Material lines on a Works Order to ship and track independently.

Open the Works Order for the Sales Order with the Kit you want to separate.

Select the Source Material lines you want to track separately, and from the Right-Click menu select Ship on Sales Order.

This will create a non-stock product on the Sales Order for the selected lines that can be tracked and shipped separately from the rest of the order.

To enable more control on shipping out products that are part of a Works Order, an option has been added to Ship on Sales Order letting you track part of the Works Order separate from the rest.

Navigate to the Works Order by finding the Sales Order in the Find Documents View. Right click and open Related Documents; from there open the associated Works Order.

On the Works Order window, select the Source Material tab. Highlight the lines that you want to ship separately; if you're selecting multiple lines, hold the CTRL button while selecting them.

In our example we'll select the hinges.

Scroll over to the Line Status column by default they will be Waiting for Processing.

Right click and select Ship on Sales Order to change the status of the highlighted lines to Ship on Sales Order.

This will allow the shipping of these items to be tracked separately from the rest of the Works Order.

Save and Close the Works Order.

On the Sales Order you will see that an additional Line of a non-stock product has been added that does not have a Cost or Sell Price associated with it.

The code for this product is the same as the original with the addition of “_BO” at the end of it.

This is a non-stock product that can now be tracked and shipped separately.

Going to the Picking Confirmation Screen for the Sales Order, we see that we can pick our hinges separately from the rest of the completed Works Order.

If we pick one of the lines without the other, the lines not picked automatically go on back order.

Returning to the Related Documents viewer for the Sales Order, we can see that a Back Order has been created for the line we did not mark Picked.

Being able to mark part of Works Orders to Ship on Sales Order gives more control to ship products to your customers when they need them.

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