

Kits Overview

Andrew:

“Hey Robert, we always sell these items together, is there any way we can set up a bundle to sell them as a unit?”

Robert:

“Certainly, that would be called a Kit! We can do it with either a collection of items, or a product that we make, like a door! You can even set up the Kit SKU to let you choose specifics on the Sales Order.

Pick a Menu Option, and we’ll get started!”

Topics:

Overview

Setup

Using Kits

Overview

Kits are a single Product that contain multiple items, and allow you to have a single SKU for each combination of items.

Manufactured Kits have Added Value Operations as part of their completion, and generate a works order when a Sales Order is completed.

Kits in BisTrack are Products composed of multiple items often purchased together.

This allows you to use one Product Code for a product consisting of multiple items, rather than creating separate products for each possible combination of pieces.

Standard Kits contain Products that are ready to go out the door. All you need to do is collect the items that form the Kit.

Manufactured Kits have Added Value Operations (or, AVO’s) included in them which require some element of work before the kit is ready for the customer.

Manufactured kits generate Work Orders when completing the Sales Order.

These might include products like a door which requires milling or assembly before it’s ready for the customer.

You might choose the size of a door, the type of wood used or its hinges.

When you’ve made all the required selections and completed the order, BisTrack automatically creates a Works Order for it.

Kits provide an efficient way to configure and organize complicated products in BisTrack.

Setup

Set up Kit’s by creating a Base Item, and then configure choices using Kit Builder.

Base Item Setup

A Base Item needs to be setup to be used for the Kit product. This will be the product selected on Sales Orders.

In order to be able to sell Kits in BisTrack, you'll need to start by setting up a Base Item.

Begin by select the find products view, and right click in the viewer. Select the New option to open a New Product window.

On the General tab leave the Product Type as Generic.

Change the Sub Type to Kit and enter a Product code, Description, Short description, and choose a Product Group.

On the Stock Options tab, select the default supplier.

Make sure that options Standard stock Product and Keep stock figures are *not* selected.

Select the Buying tab to set the Price Group, Tax Group, and Purchase analysis code.

You can either enter the values manually, or select an existing product to use as a basis for these options

Now open the Selling tab and enter the Price Group, Tax Group, and Sales Analysis code.

Or, like on the Buying tab, you can choose an item already in your system as the basis for the new kit..

Return to the general tab and open the Kit Builder.

BisTrack carries the Kit Code and Description over from the base product.

Set the kit type to Manufactured or Purchased. A Manufactured Kit will generate a works order when it's completed on a Sales Order.

The Document Description changes the kit's appearance on printed documents and reports.

You can override how kits are displayed to reports by selecting the Document Presentation desired for this kit.

Select a Selling Price option from the dropdown.

Choosing Use line prices adds the sum of each Kit Option's price to use as a final price.

The Lump sum price uses a single cost for the kit regardless of which kit options are chosen.

Set the options for Applies to Branches, Customers, or Customer Addresses as needed.

This is now the base item that you will build from for your Kit.

Kit Builder Setup

Use Kit Builder to configure options that will be selected during Sales Entry.

Kits can have choices, like the hinge style on a door. Setting up Choices and Options make it easy to keep track of Kit specifics.

Open Kit Builder from the Product Properties screen.

Select Other Options and choose Add Choice Start.

Enter the choice description in the New Choice Start window and press OK.

Press the Add Product button to add an Option to the Choice.

Use the Find Products window to locate products you want to add as an option.

Make a selection and then press OK.

Repeat this process to add any additional options for this Choice.

Change any details for when this product is part of this kit.

You can modify the Price or change the Quantity of this product when chosen as part of the Kit.

On the Notes tab, you can add notes, and special instructions.

Selecting the Require Line Notes entry option will require adding a note when choosing this Option on a Sales Order.

Repeat the process for each Option in this Choice.

When done, select Add Choice End from the Other Options menu.

Repeat this process for each choice you want in your Kit.

Use the Other Options menu to add a Choice start before and a Choice End after each set of Options.

You may add an Option to skip a Choice by selecting Add No Choice.

Using Kits

Select Options to add a Kit to a Sales Order. Press Show Me to see a video walkthrough.

On a Sales Order, the Add Kit to Order dialogue lets you choose Options.

Select the Show Preview Pane button to view line details, or enter notes.

After setting the quantity, complete selecting options, and press OK.

Show Me

While entering Kits on a Sales Orders, you may choose from Options using the Add Kit to Sales Order dialogue.

This lets you use a single Product Code for an item like a door that is slightly different every time you sell it.

Select a kit to add to a Sales Order.

The Add Kit To Order dialogue opens.

Enter a quantity in the Multiply Quantities by field.

This adjusts the quantity of the kit added to the Sales Order.

Use the Show Preview Pane to see more details for the selected line.

Use the Line Notes tabs to enter notes or see any notes entered when the Kit Product was setup.

Notes carry over to the Sales Order and if it's a manufactured Kit, the notes also carry over to the Works Order.

Kit Choices appear in the viewer with a hand full of options.

Select an Option for each Choice category and the next choice will appear.

Depending on how the Kit was set up, certain rules limit the options displayed to those compatible with what you selected.

If you don't see a specific Option, it's possible that it's not compatible with one of your previous selections.

Press Ok to add the kit to the sales Order after you select your Options.

Some Options may require you to add a note before adding it to a Sales Order.

A Line Notes Required prompt will direct you to the Option when you press OK.

With the Kit added to the Sales Order you may complete the Order as usual.

If you need to make changes to the Kit while it's on the Sales Order, right-click and select Edit Kit.

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