Kits: Advanced Setup

Andrew:

So Robert, Kits streamline Sales Entry, but setup has a lot of settings to pick from!

How do I know which ones I should select?

Robert:

Those make sure your kits work just how you need them to…

Let's walk through them together, and I'll help you out.

Select a topic and we'll get started!

Topics

- Rules

- Line Option Settings

- Pricing Setup

Rules

Rules on Kit options allow you to limit the Choice Options that show during Sales Order Entry based on your selections.

To view or modify Rules, open Kit Builder from the Product Properties screen of the Kit Product.

Before entering Rules for a Kit, make sure you have set up all the Choices and Options available for the Kit.

If any Rules are set on a Choice or Option, BisTrack indicates in the Rule Column.

Select the Rules column of a line and an ellipsis button will appear.

Press that button to view, edit, or add Rules for the line in the Kit Line Rules window.

Press the Add button to create a new Rule, or double-click a line to open the Rule Properties.

Select the Choice, Option, and logic components.

This logic component set to *IS* means that the option we're editing is visible on the Add Kit To Order window only if you've selected Option 1 for the Core Choice of the kit.

If we set the Logic to *Is NOT*, the option we're editing will NOT appear if you've selected Option 1 for the Core Choice.

Press OK to close Rule Properties.

When you have multiple Rules on a Choice or Option, there's an "*And OR*" available in the first column.

These logic operators allow you to have specific requirements for options available on a Kit.

The Full Description button gives you an expanded view of the logic set on this Kit Line.

To remove a Rule from a Kit line, select it and press the Remove button.

Press OK to save the changes you made to the Kit Line Rules.

Keep in mind that rearranging or copying a Kit, may change some of the Kit Line numbers that the Rules use.

This may prevent Rules logic from working correctly, so review your Kit Line Rules if you make any changes to them.

Configuring Rules for Choices and Options allows you control which selections are visible while adding a Kit to a Sales Order.

That way you can limit showing available Options to those compatible with selections

In Kit Builder you can set Rules on Kit Choices and Options. Select the ellipsis button from the line in the Rules Column and complete the Rules Logic.

Non-Product Options

Using Kit Rules you can use Choices to help you select the right products while adding a Kit to a Sales Order.

Begin by creating non-stock items for the Options.

Use these products to create Kit Line Options that do not add products to the Kit.

We'll be using the height of a door as an example.

Right-click in the Find Products view and select New.

Set the Item's type to Generic.

Select the UOM Rule *Each*.

Enter a Product code, Description, and Short Description. We'll make the non-stock product a door, with a height of 6' 10".

It's a Best Practice is to have a Product Group for these Kit items.

Select the Product Group button.

Use the find function to select the Kit Setup Product Group and press OK.

On the Stock Options Tab, you *must* enter a Default Supplier.

You can select any supplier, or create a placeholder.

Disable all of these check boxes.

On the Branch Stock Options tab, set the How Sourced Column to *Purchase, Transfer, Manufacture*.

On the Prices tab under Company Prices, set the Standard buy and sell prices to *0.00 Each*.

On the Buying tab, enter the Price Group, Tax group, and Purchase analysis code.

Do the same on the Selling tab.

Save and close the product.

In Kit Builder, you can now add this non-stock product as an Option.

When adding this product as an option in Kit Builder, make sure to set the Kit Line Properties Quantity to 1, and the Selling Price to 0.00.

When you're finished, press OK.

Use these products as Kit Options in combination with Rules to narrow Options displayed during the Add Kit to Order process without adding a product to the Kit.

Use Non-Stock Products to make Kit Line Options in order to limit options that are available based on customer specifications.

Collecting the height and width of a door will allow you to only display Options compatible with that door's dimensions.

Line Option Settings

Configure Line Option Settings in Kit Builder to streamline add Kits to Sales Orders.

Video Walk-Through

You can make some choices in Kit Builder that allow more control over the Options you select while adding a Kit to a Sales Order.

Choices include requiring line notes, enabling quantity adjustments, creating special products, and enabling prompts for products.

You can view and edit these from the Lines tab within Kit Builder.

If you want to have the Add Kit to Order window select the Option for a Choice automatically, enable the *Default* check box.

The sales clerk can change the selection manually if needed.

Enabling *Allow Quantity Entry* permits the Sales Clerk to adjust the quantity of this specific line while adding it to a Kit.

You can select this from the Lines tab, or the *Kit Line Option Properties*.

If the *Auto Create Special Product* option is enabled, the Line opens a prompt for the Special Product Details when it's added to a Sales Order.

This function requires that the item you're adding to the Kit have the *Allow specials based on this product* option on the Selling tab in product properties set to Yes.

When Prompt for Product is enabled, you can search for a Kit product, rather than using a pre-selected Option.

Here's how it works.

Create a new Choice, and add a Text Line to it.

In the New Text Line dialogue, enable the *Prompt for product* check box.

Enter the details, and press OK.

You can apply these Kit Line options to a Choice or an Option. Use them to streamline your Sales Entry process for Kits.

Require Line Notes Entry

This Option requires that a note be entered while adding it to a kit on a Sales Order.

Default

If this box is activated this Kit Option will be automatically picked for its Choice while adding it to a Sales Order.

You can manually override this when needed.

Allow Quantity Entry

With this selected you can change the quantity of this line while adding the Kit to a Sales Order.

Auto Create Special Product

This function opens a prompt for the Special Product Details when this Kit Line Option is added to a Sales Order.

Enable *Allow Specials based on this product* in the Selling tab of Product Properties.

Prompt for Product

Enable this to be able to search for a product when it is selected on a Sales Order.

Create a Text Line as a Kit Line Option, and enable the Prompt for Product box.

Pricing Setup

Select *Lump sum price* or *Use line prices* in the Kit Builder window.

Set the selling price dropdown to Use line prices to base the final price on the sum of the chosen Options.

On the Manufacturing Options tab disable *Always use the sell price of finished product*.

Use Lump sum price for simpler Kits whose cost doesn't vary much for which Options are chosen.

On the Manufacturing Options tab disable Always use the sell price of finished product.

Enable *Always use the sell price of finished product* to base the pricing on the value of the finished product.

If there are no prices set on the special order, a price can be entered when adding it to an order.

Show Me…

You have two options when setting kit prices. One method is to base the calculation on the products you choose for the kit.

The other method is to use a lump sum calculation regardless of the products chosen.

Use the Selling Price drop down to select the pricing method.

Select Lump sum price for kits that have components whose costs don't vary much. BisTrack will use this price regardless of Kit Options selected.

Enter the price.

For more complex Kits, choose Use line prices.

When selected, BisTrack replaces the price entry field with a range of possible values based on the current contents of the Kit.

This bases the total kit price on the sum of the prices for each chosen Option in the Kit.

When you want BisTrack to base pricing on the line prices or lump sum values, disable the *Always use the sell price of finished product* check box on the Manufacturing Options tab.

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Likewise, enable this check box when you want to base pricing on the value of the finished product.

If there are no prices set on the special order product, you can set them when adding the kit to a sales order.

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