Kits: Manufacturing Options and Works Orders

Andrew:

Sooo…BisTrack will automatically make a works Order for this kit! Nice that saves me some steps!

Robert:

You'll like the other ways it simplifies manufactured kits for you too!

Andrew:

Pick one of the topics, and we'll check it out!

Topics:

- Added Value Operations

- Manufacturing Options

- Sub Works Orders

Added Value Operations

Added-value operations, or AVOs, describe the manufacturing processes of a Manufactured Kit.

Kits may include multiple AVOs.

You can find and edit AVOs in Kit Builder on the Works Order Processes tab.

Select Add to open the New Works Order Process (AVO) window.

Choose a line and press the Properties button to view or edit an existing AVO.

You can choose an Operation and Option from the dropdowns.

BisTrack bases these selections on the AVOs previously setup in system manager.

Set the price and cost basis to either Source quantity or finished quantity.

You can set a special cost or price for the operation by enabling the Kit costed or Kit priced options.

You can only modify these boxes if the Kit costed and Kit priced settings are enabled.

You can set an AVO as a one-time charge. Enable the One-time fee setting to add this charge to a Sales Order only once, even if there are multiples of it on the order.

A common use would be to enable this on a setup fee.

With the One-time fee setting enabled and you added 10 doors to a sales order; BisTrack includes the fee only once.

Link AVOs to Kit source lines, so that BisTrack will include the AVO when you select the line.

In the Lines tab, choose a Kit Line and select Properties.

Open the Work Order Process tab.

Use the Work order process dropdown to select the process and select an available AVO.

Choose (None) if you don't want to connect an AVO to the line.

Choosing (All) adds every works order process to the kit works order when you select the line.

If it isn't set already, enter the Production time in minutes.

Press OK to save your changes.

You can assign Added Value Operations (AVOs) to Kit lines.

AVOs are manufacturing processes that require a works order.
If a kit line is linked to an AVO and then added to a Sales Order, a works order will be generated when the order is completed.

Manufacturing Options

Kit Product Description

Adjust how the kit displays on a Sales Order with the *Set special product description from the kit lines short descriptions* setting, and *Kit Description Override screen.*

Auto Create Works Order

If you enable this, BisTrack will create a Works Order when a kit including the linked line is on a completed Sales Order.

Create Special

You can tell BisTrack to create a Special Order when this kit is ordered by setting this to *Yes, always*.

Manufacturing Branch

Assign branches to manufacture the kit using this column. If you leave this blank, the sale branch will be assigned as the manufacturing branch.

Sometimes you need to adjust settings when creating a finished product for a kit. Do this on the Manufacturing Options tab in Kit Builder.

You generate the manufactured kit's description in one of two ways.

One way is to derive it from the short descriptions of kit selections by enabling the Set special product description from kit lines short descriptions check box.

This method creates a long and complex product description for the completed kit.

Another option is to create a shorter description with options you choose from the Kit Description Override Window.

Press Description Details, and enable the Choices to include in the kit description.

You can also change the order in which the Choices display by selecting a Choice and using the Move Up/Move Down buttons to change its position in the description.

When added to a Sales Order or Works Order, BisTrack displays the description with only the Choices you selected.

When you enable Auto Create Work Order, BisTrack automatically generates a Works Order when the Kit is part of a completed Sales Order.

BisTrack also generates any purchase orders necessary to complete the AVOs.

To have BisTrack generate a special order for the Works Order's finished goods, set the Create Special option to Yes.

The Manufacturing Branch column determines where to create and complete the Works Order

BisTrack automatically creates a transfer for the finished good to the issuing branch.

Leave this blank to assign the sales branch as the manufacturing branch.

Bill of Materials

You can set up Manufactured Kits to create a Bill of Materials (BOM) when added to a Sales Order in BisTrack.

On the Manufacturing Options tab in Kit Builder, set the Create Special setting to *Yes, use bill of materials.*

When you create a new BOM item, BisTrack checks if the *Set special product description from kit lines short descriptions* setting is enabled to determine the product description.

When you use existing BOM products, the finished item's description will be used instead.

On a Sales Order while using the Add Kit To Order window you will see a *Use bill of material setting* already enabled.

If you disable this setting, BisTrack creates a Special Order, rather than using a BOM.

When you finish adding a kit to a Sales Order, BisTrack inserts a prefix and suffix in the description.

Your administrator sets these in System Manager.

If you sell this same kit configuration again on a later order, BisTrack increases the suffix by 1.

You can use the Find Products function to locate previously created BOM products.

Search by using a BOM suffix to see a list of the BOM products previously sold.

You can add one of these to the Sales Order to sell a Kit using the same configuration.

You can set BisTrack to create a Bill of Materials when a Manufactured Kit is added to a Sales Order.

Sub Works Orders

You can tell BisTrack to pass specs from parent kit to child kit by using Choice Types.

Using this, you won't have to enter the same kit information on a sub-assembly.

If you assign a Choice Type when creating a Choice, BisTrack will automatically transfer a selection on a matching Choice Type from the parent kit.

You can import options for a choice section in Kit Builder by assigning a Choice Type and importing choice lines from another kit.

You can set up Manufactured Kits to have other Manufactured Kits as components.

BisTrack calls these sub-assemblies. You must complete the sub-assembly before you can finish the main Kit's Works Order.

BisTrack passes the specs from the main (or parent) kit to the sub (or child) kit using Choice Types set up in System Manager.

Using Choice Types saves you the time of making the same selection multiple times.

For example, when you select the wood species for a door on a parent kit, you won't need to enter it again on a child kit.

You apply Choice Types in Kit Builder when adding a New Choice Start.

Start by selecting a line, open the right click menu, and choose Add Choice Start.

Select the Choice Type button to find the Type code that you want, or enter it in the field.

Now enable the Inherit from choice type when this kit is a sub kit check box.

If this is a sub-assembly, BisTrack automatically uses the choice from a parent kit that has a matching Choice Type when added to a Sales Order.

You can also use Choice Types to streamline the process of importing Choice Lines from another kit.

With your Choice Start created, and Inherit from choice type when this kit is a sub kit enabled, select Import Choice Lines from the Other Options menu.

Use the find function to select the product to import and press OK.

BisTrack imports any line that matches the Choice Type you entered.

It also inserts the choice end for you!

Use Choice Types to streamline creating and selling kits in BisTrack.

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