KITS

Products can be organized into Kits in order to quickly and easily add multiple related products to Sales Orders all at once. In order to set up a Kit, go to Product Management > Kits > Create Kit. Once you create a kit you can then enter the Kit # in the Product # field at POS in order to add the kit to an SO. You can also assign a bar code to your kits so that you can scan kits onto Sales Orders as well. Kits can be priced based on the M price field of you choice or any price you decide to use. You can also choose to show each product on the printed invoice or group them all as a single line item with a single price.

Create and Edit Kits

Start by going to PRODUCT MANAGEMENT > KITS > CREATE KIT

Kit # - Enter the KIT number by which you will attache the KIT to a sales order.   T123
Kit Name – Enter the name by which the KIT is known.   Dennis Training Kit
Print Line Item On Invoice - The "Combine Sell Price" and "Print Line Item On Invoice" settings work together to control what is displayed on the printed Invoice.
- If "Print Line Item On Invoice" is set to Yes, then all of the items in the kit are listed on the printed Invoice. If "Combine Sell Price" is set to Yes, then the products are listed without individual pricing and only a total is shown on a single line with the Kit part. If "Combine Sell Price" is set to No, then all of the kit part prices are shown individually.

If "Print Line Item On Invoice" is set to No, then the only option for "Combine Sell Price" is Yes. This will not print the line items on the Invoice, and only show a single line with the Kit part with the total price of the kit parts.
Combine Sell Price - The "Combine Sell Price" and "Print Line Item On Invoice" settings work together to control what is displayed on the printed Invoice.
- If "Print Line Item On Invoice" is set to Yes, then all of the items in the kit are listed on the printed Invoice. If "Combine Sell Price" is set to Yes, then the products are listed without individual pricing and only a total is shown on a single line with the Kit part. If "Combine Sell Price" is set to No, then all of the kit part prices are shown individually.

If "Print Line Item On Invoice" is set to No, then the only option for "Combine Sell Price" is Yes. This
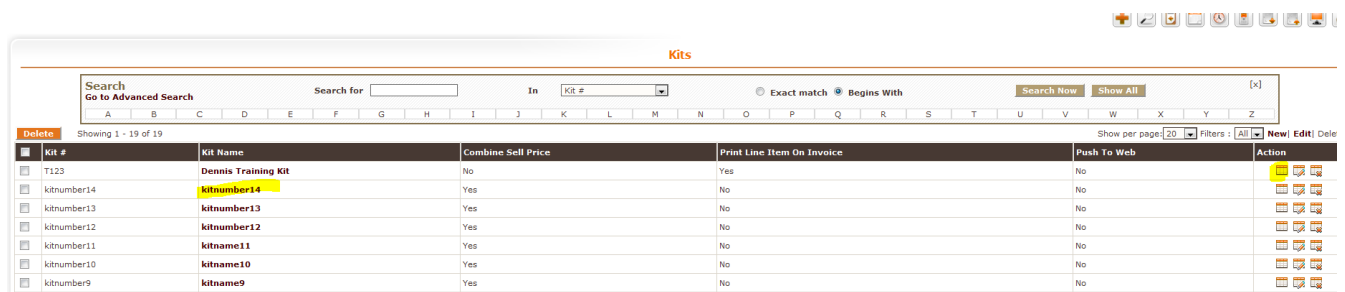
will not print the line items on the Invoice, and only show a single line with the Kit part with the total price of the kit parts.

Push to Web – This option is used if you are pushing your Kit information on Channel Advisor (can be used for additional third party integrations as well)

Kit Barcode – Attach a unique barcode the the kit.

Description - Enter a description of the Kit that will be viewable on the Kits listings page.

Once you have created a KIT you must assign parts to it. When you save you KIT it will open up the Kits Information edit screen, but you can also access it by going to PRODUCT MANAGMENT > KITS. Once clicked you will see the Kits listings page which shows all of the Kits created in your system. You can click on either the Kit Name itself, or on the View action button to access and edit the parts within the Kit.

Once you access the Kit and go to the Kits Information edit screen you can add parts and establish pricing for the Kit. At the top of the screen you will see the Kit Information that you set up when creating the Kit. This information IS editable at this point.

The next section is the Kit Web Qty – this is used in Channel Advisor when pushing whole kit inventory

Kit Web Qty

Web Qty: 0   Update

The next section is where you add parts and pricing. You can add individual parts or "Groups". Groups are used if there is a part in the kit, but it has alternate parts that you may choose to add as part of the kit instead.

Kit Web Qty

Web Qty: 0   Update

Kit Parts | ⓘ Group: -Empty- ▼   Product# (Auto Search)

The help file next to KIT PARTS is as follows, a more detailed descriptions follows.......

Use this functionality to add quick kit part in kit
- *Select "Empty" Group to add Kit Part in Kit*
- *Select Group to add kit part in Group in Kit*
- ***Search Product# and on selecting Part will be added in Kit (need to update Sell Price,Qty in edit kit)***

Kit Parts - To add an individual part to the kit that does NOT have alternates, simply enter the part number in the Product # (Auto Search) field and hit enter. If there are multiple parts that start with the same number you may have to choose from a drop down. The part will then display as part of the kit. The Group column and Default column will be blank as there is no group that this part falls under, it is essentially a part of the kit with no alternates.

Kit Web Qty

Web Qty: [0]   [Update]

Kit Parts | (?) Group: [-Empty- ▾]   Product# (Auto Search) [   ]

Group Name	Default	Linecode	Product#	Current Cost
-				
	-	TRN	Part1	$11.00

Group1

Group - If you have parts with alternates in the kit, first enter the "Group" name in the Add Group: field and hit SAVE GROUP. At this point, the group name / number that you entered will be available under the Group: drop down. Put a part in the Product# (Auto Search) and hit enter. You can then do the same thing to add an additional part into the same group or create additional groups. The Group Name column will display the name you assigned to the group and the first part added to the group will have the Default column checked. You can use the radio button under the Default column to select a different part within the same group. The part that is chosen as the Default is the part that will populate on the sales order when the kit is added. You can use the Kit button under the Action Column on a sales order to select an alternate part when creating a sales order.

M Price Field - M1- M10 = By Default Kit Sell Price will be selected M Price field while Adding Kit Parts in Kit. Empty = Need to manually add kit Sell Price. If you leave this field empty and click the EDIT KIT button, you are able to change the Qty, List Price, Sell Price, and Core Sell Price for all the parts in the kit.

Add Group: - This was referenced earlier. If you are going to have Groups in your kit, you need to add a group name, and Save Group. Once done, it will be available under the Group drop down and you can add individual parts to a group of alternatives.

KITS on the Sales Order

Kit T123 has been added to this sales order. Notice that the Kit# displays under the Barcode # column and there is a KIT button available under the Action column. If you are using Kits, you do need to ensure that the Custom Setting called Display Kit Button at POS is turned on and the appropriate roles have been given permission to view and use it.

Display Kit Button at POS	☑ ON Accounting Asst. Manager contract driver Controller Counter Fresh Meat	>>		Accounting Asst. Manager contract driver Controller Counter Fresh Meat	X

Part1 and Part4 are both added to the SO and are NOT a part of a group. Part2 has been added, but is part of a Group that includes Part3.

SALES ORDER

Barcode #	Line Code	Product #	Product Name	Related Sales Order	QoH/TA	Order Qty	Ship Qty	Core Sell Price	Sell Price	List Price	Core Ext	Sell Ext	Action
611269995564 Kit#: T123	TRN ✚ Product	Part1 📷 | ▦ | 🙂 Comment: This product is in stock	wheely bar OE#: 12345 Note:	- Select SO - $345.00 - 07/18/2013 PRR 5.38 %	5,0 ☑ WH	1	1 ☐ DS	0.00	16.50 $ SP	0.00 (+) Tax :	0.00 0.00	16.50 16.50	🗑 ☐ LS KIT
611269995563 Kit#: T123	TRN ✚ Product	Part2 📷 | ▦ | 🙂 Comment: Quantity Ordered is greater than quantity in stock	trailer hitch Note:	- Select SO - $19.50 - 08/12/2013 PRR 0 %	157,141 ☑ WH	1	1 ☐ DS	0.00	19.50 $ SP	0.00 (+) Tax :	0.00 0.00	19.50 19.50	🗑 ☐ LS KIT
611269995561 Kit#: T123	TRN ✚ Product	Part4 📷 | ▦ Comment: Part4 and Part5 are Required Related Parts	Door 1 Note:	- Select SO - $28.39 - 07/10/2013 PRR 0 %	132,112 ☑ WH	1	1 ☐ DS	0.00	25.50 $ SP	0.00 (+) Tax :	0.00 0.00	25.50 25.50	🗑 ☐ LS KIT

KIT

Group Name	Default	Linecode	Product#	Current Cost	Qty	List
-						
	-	TRN	**Part1**	$11.00	1	$0.00
	-	TRN	**Part4**	$17.00	1	$0.00
Group1						
	◉	TRN	**Part2**	$13.00	1	$0.00
	○	TRN	**Part3**	$12.50	1	$0.00

Total Ext Price: $0.00

Go To Kit List

If you click on the KIT button in the action column for ANY of the parts you will get the following pop up. You can use the radio button under the Default column to choose an alternate part from a Group. You can also change Qty, List Price, Sell Price, and Core Sell Price from this interface. If for some reason there is a part in a kit that you do NOT want to include on the sales order, you can use the trash can icon under the action column to delete an individual part.

View Kits Parts In Kit

Kit Qty For SO:	1	**Note:** By Changin Kit Qty For SO, It will give you effect of Qty,Sell Price,Core Sell Price For SO
Kit Number:	T123	
Kit Name:	Dennis Training Kit	
Print Line Item On Invoice:	No	
M Price Field:		
Combine Sell Price:	Yes	

Group Name	Default	Linecode	Product#	Current Cost	Qty	List Price	Sell Price
-							
		TRN	**Part1**	11.00	1	0.00	16.50
		TRN	**Part4**	17.00	1	0.00	25.50
Group1							
	◉	TRN	**Part2**	13.00	1	0.00	19.50
	○	TRN	**Part3**	12.50	1	0.00	18.75

Total Ext Price: $0.00 | **Sell Price** $61.50

Load Changes In SO | **Remove Kit From SO** | **Cancel**

What will the SO Invoice look like?

Print Line Item on Invoice = NO, Combine Sell Price = YES. The individual parts will NOT show up on the sales order invoice. The printed sales order invoice will just show the KIT and the cost of the

Fuse5 Training Materials

total kit.

Ord	Ship	B/O	MFR	Item #	Desc	List	Cost	Core	Ext Cost	Ext Core	Extended
1	1	-	KIT	T123	**Dennis Training Kit -**	$ 0.00	$ 61.50	$ 0.00	$ 61.50	$ 0.00	$ 61.50
											* Oversell Item.

Sample of default Sales Order Comments that will show up on all CODs and finalized SOs

Total Cost	Total Core	Total Freight	Total Labor	Total Tax	Invoice Total
$ 61.50	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 61.50

Payment Detail

Type	Date	Amount
Charge To Account	08-12-2013	$ 61.50

Received By : _____

Print Line Item on Invoice = YES, Combine Sell Price = YES. The individual parts will show up on the sales order invoice. The printed sales order invoice will show the KIT and the cost, and the individual parts with no cost.

Ord	Ship	B/O	MFR	Item #	Desc	List	Cost	Core	Ext Cost	Ext Core	Extended
1	**1**	**-**	**KIT**	**T123**	**Dennis Training Kit -**	**$ 0.00**	**$ 61.50**	**$ 0.00**	**$ 61.50**	**$ 0.00**	**$ 61.50**
1 *	1	0	TRN	Part1	wheely bar OE#: 12345	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
This product is in stock											
1	1	0	TRN	Part2	trailer hitch	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
Quantity Ordered is greater than quantity in stock											
1	1	0	TRN	Part4	Door 1	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
Part4 and Part5 are Required Related Parts											
											* Oversell Item.

Sample of default Sales Order Comments that will show up on all CODs and finalized SOs

Total Cost	Total Core	Total Freight	Total Labor	Total Tax	Invoice Total
$ 61.50	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 61.50

Payment Detail

Type	Date	Amount
Charge To Account	08-12-2013	$ 61.50

Print Line Item on Invoice = YES, Combine Sell Price = NO. The individual parts will show up on the sales order invoice. The printed sales order invoice will show the KIT and the cost, and the individual parts with cost.

Ord	Ship	B/O	MFR	Item #	Desc	List	Cost	Core	Ext Cost	Ext Core	Extended
1	1	-	KIT	T123	Dennis Training Kit -	$ 0.00	$ 61.50	$ 0.00	$ 61.50	$ 0.00	$ 61.50
1 *	1	0	TRN	Part1	wheely bar OE#: 12345	$ 0.00	$ 16.50	$ 0.00	$ 16.50	$ 0.00	$ 16.50
This product is in stock											
1	1	0	TRN	Part2	trailer hitch	$ 0.00	$ 19.50	$ 0.00	$ 19.50	$ 0.00	$ 19.50
Quantity Ordered is greater than quantity in stock											
1	1	0	TRN	Part4	Door 1	$ 0.00	$ 25.50	$ 0.00	$ 25.50	$ 0.00	$ 25.50
Part4 and Part5 are Required Related Parts											
											* Oversell Item.

Sample of default Sales Order Comments that will show up on all CODs and finalized SOs

Total Cost	Total Core	Total Freight	Total Labor	Total Tax	Invoice Total
$ 61.50	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 61.50

Payment Detail

Type	Date	Amount
Charge To Account	08-12-2013	$ 61.50