eTurns

Kits

Help documentation

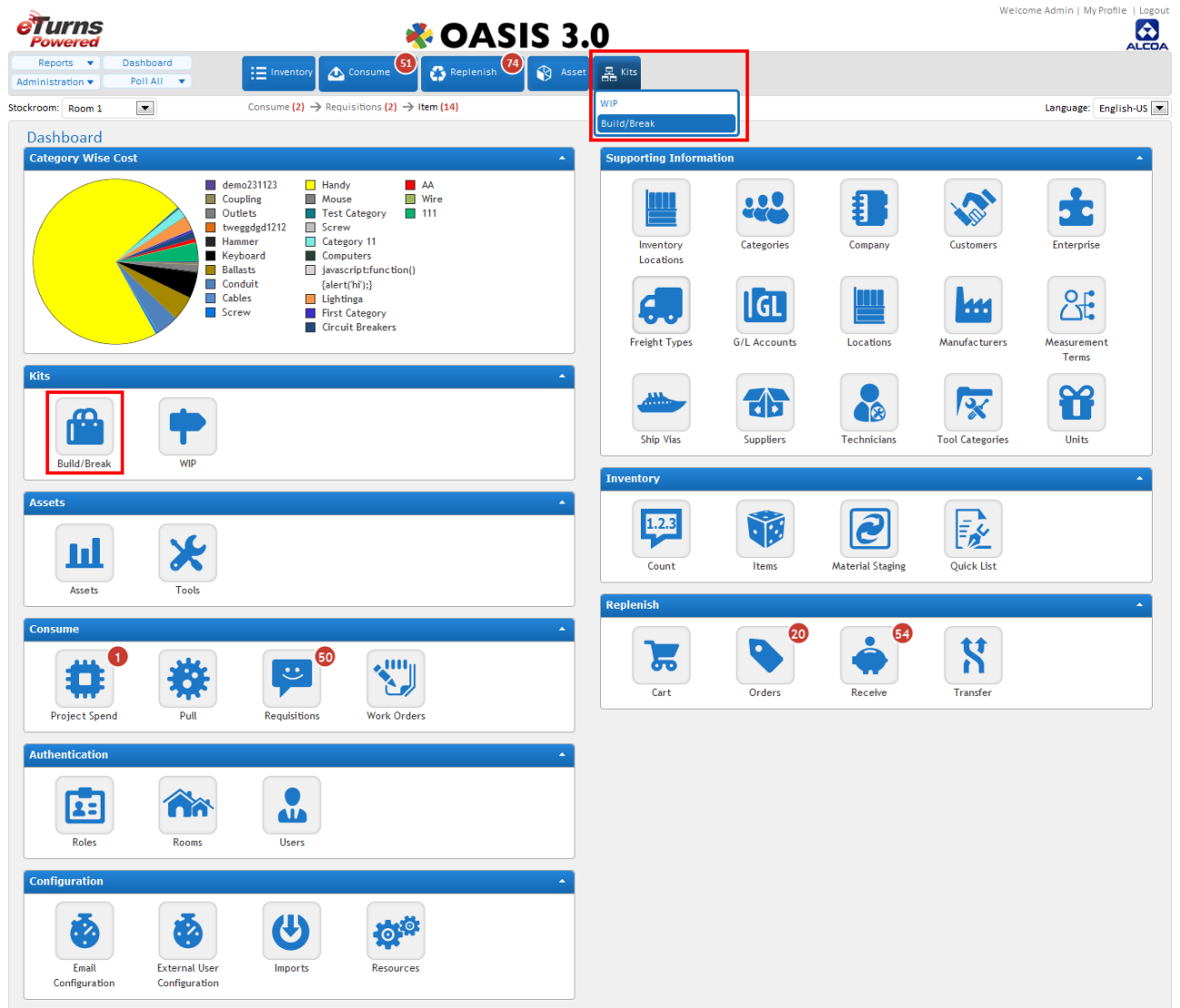# Contents

A kit consists similar featured items of various quantities, combined together to form an entity for user convienence, to be pulled or ordered together at different occasions.

Guidelines

a. Open Kits:

To open Kits, user may either select Build/Break from Kits dropdown or simply click the Build/Break icon listed under Kits on Dashboard.

The following page appears on screen:

Figure 2

b. Add new items to Kit:

To add new items to Kits, click on the New tab on left hand side of the panel or right click and select 'New' from the list.

- Enter the particulars and hit "Save" button, then click on "Add New Item" button and a pop up appears on screen, displaying Kitting grid on screen, to add new items to the kit.

Figure 3

Note: The critical quantity entered should be greater than the minimal quantity.

Figure 4

- The "Add New Item" button opens a pop up, for user to enter required quantity of item in Quantity box in front of it and then click "Add". The user may also enter various quantities together and then hit the "Add All" button at the bottom of the page. To close the selection, hit "Close".
- The items to be added in the kit can be filtered by:

a. Supplier: This filter contains list of all suppliers. Check/uncheck the name of supplier to be displayed on screen.

b. Manufacturer: This filter contains list of all manufacturers. Check/uncheck the name of manufacturer to be displayed on screen.

c. Category: This filter lists all the categories items are termed under. To select a particular category to be displayed on page, check the checkbox in front of it. Uncheck the check box to view all the categories on screen. User may check number of categories.

d. Cost: This dropdown allows user to filter the items on basis of their cost, i.e., items of particular cost range are only displayed for user convenience. User may check/uncheck the filter to be implemented.

e. Stock Status: This dropdown allows user to filter items to be included in list based on their present status of stock. User may check/uncheck the filter to be implemented.

f. Item Type: This filter allows filtering the type of item to be entered in the kit. User may check/uncheck Item, Quick list, Kit or Labor to be displayed on screen.

- Once the Close button is hit, only then the entries from the pop up grid are entered in the main New Items grid. The grid can also be closed by click on ⊗ icon.
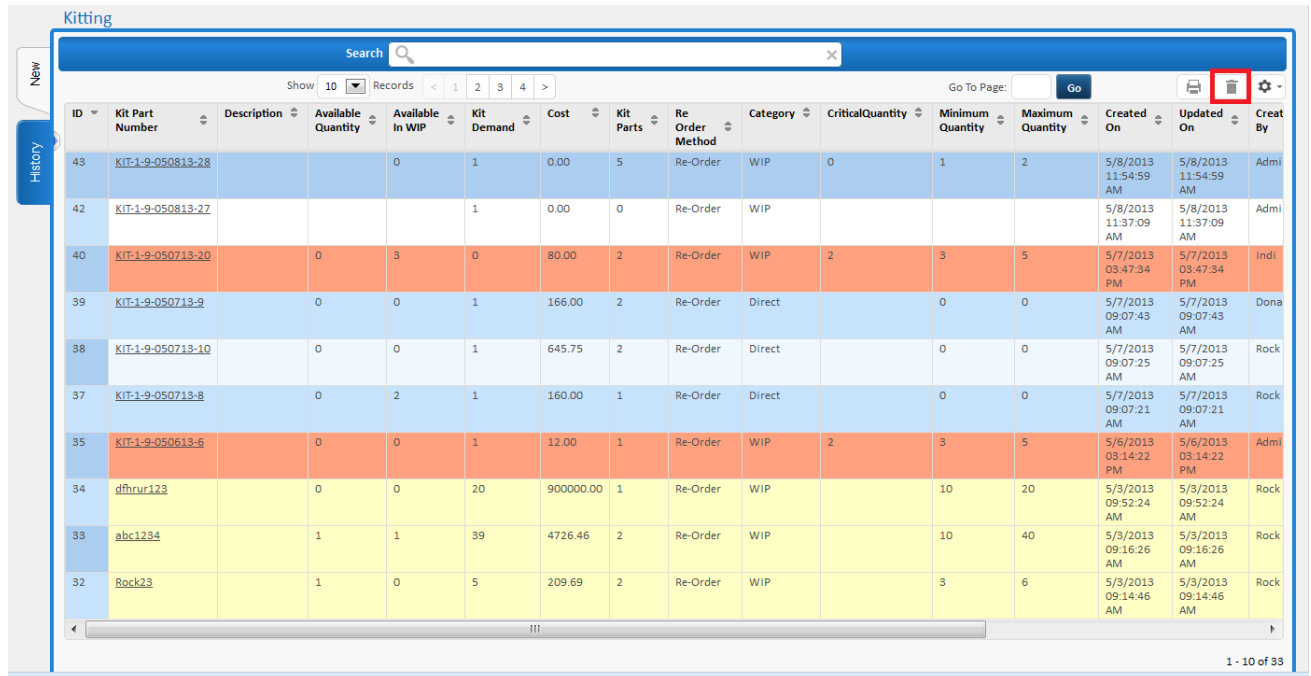
  Note: Kits Build/Break provides an option to preserve the values entered next time user visits the page, by checking the check box provided at end of new Kits Build/Break page. REFER Figure 3

c. Edit/Update Kits:

To edit an existing Kit record, click on the Kit name and new screen appears on screen. The quantity limit of item may be updated; also new items can be added to kit as well as deleted. To edit any item in list the user must have the required authorization.

d. Delete a Kit:

To delete a Kit, select the record and then click on Delete icon [trash] or press Delete key on your keyboard. The user may also delete the selected or multiple records. A pop up verifies your selection and then deletes the selected records.
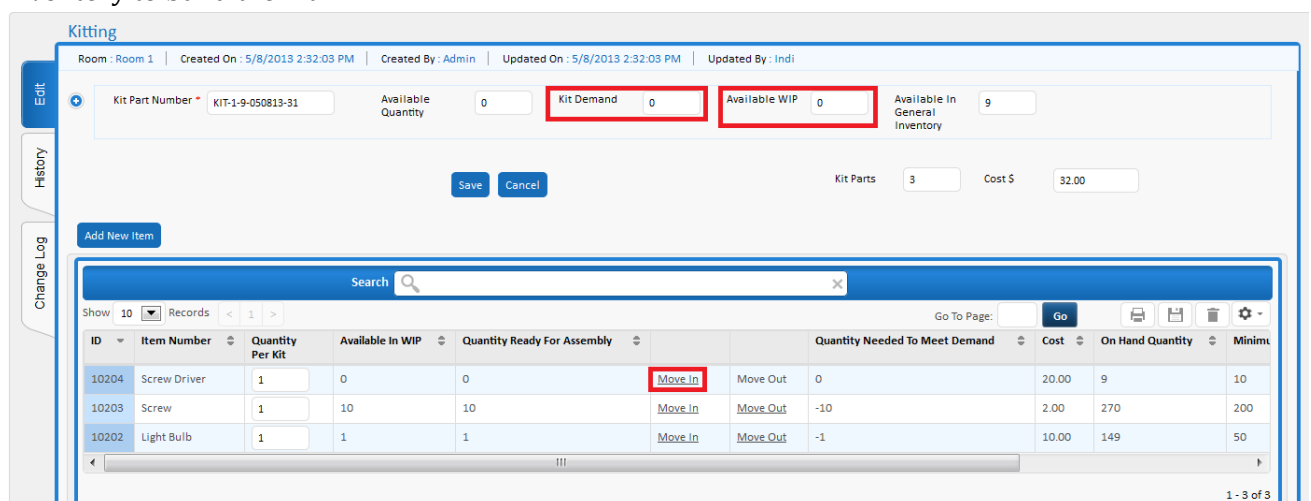

Figure 5

e. Build Kit:

To build a kit from existing items, click on **Move In** link of the item in the sub grid. The quantity displayed in *Available WIP* and *Available Quantity* is "0". Thus user needs to move in items from the inventory to build the kit.

Figure 6

The following pop up appears on screen:

Figure 7

- Select Item location from Location dropdown, enter *Quantity* in the text box and then click "Add". The changes are reflected in grid below. Then hit "Save" button.

- Similarly Move in quantities of all items required to make a kit. Click on ⊞ icon.

- When the required quantity to build a kit is acquired, the Available WIP shows number of kits that can be built, also *Enter Quantity* text box appears with *Build, Save* and *Cancel* buttons.

Figure 8

- Enter the quantity of kits to be built in text box and hit "Build".
- The *Available quantity* reflects the kits built and the *Available WIP* becomes "0". Thus the Kit is built.

Figure 9

f. Break kit:

If the user wishes Break an existing kit, and Move out its items back to the inventory, then user may proceed in following manner:

- The *Available Quantity* should be more than the number of kit to be broken.
- To break an existing kit, enter kit quantity in the Enter Quantity text box and hit "Break". The kit gets broken.

Figure 10

- The **Move Out** link gets activated only when once an item is moved in. To move out an item, click on *Move Out* link in front of the item. The following pop up appears on screen:

- Enter the details of item in Move item quantity pop up and hit "Save". Thus the item is moved out and is reflected in the Main items grid.

g. Export the page:

Export functionality enables user to export the page. Click on the Export icon on top right of the screen and then user may choose to export the page through any of the following mediums:

a) Print: It prints the selected page.
b) Excel: It converts the page to excel sheet.
c) CSV: It converts the page to CSV sheet.
d) PDF: It converts the page to PDF document.
e) Copy: It copies the page to Clipboard.

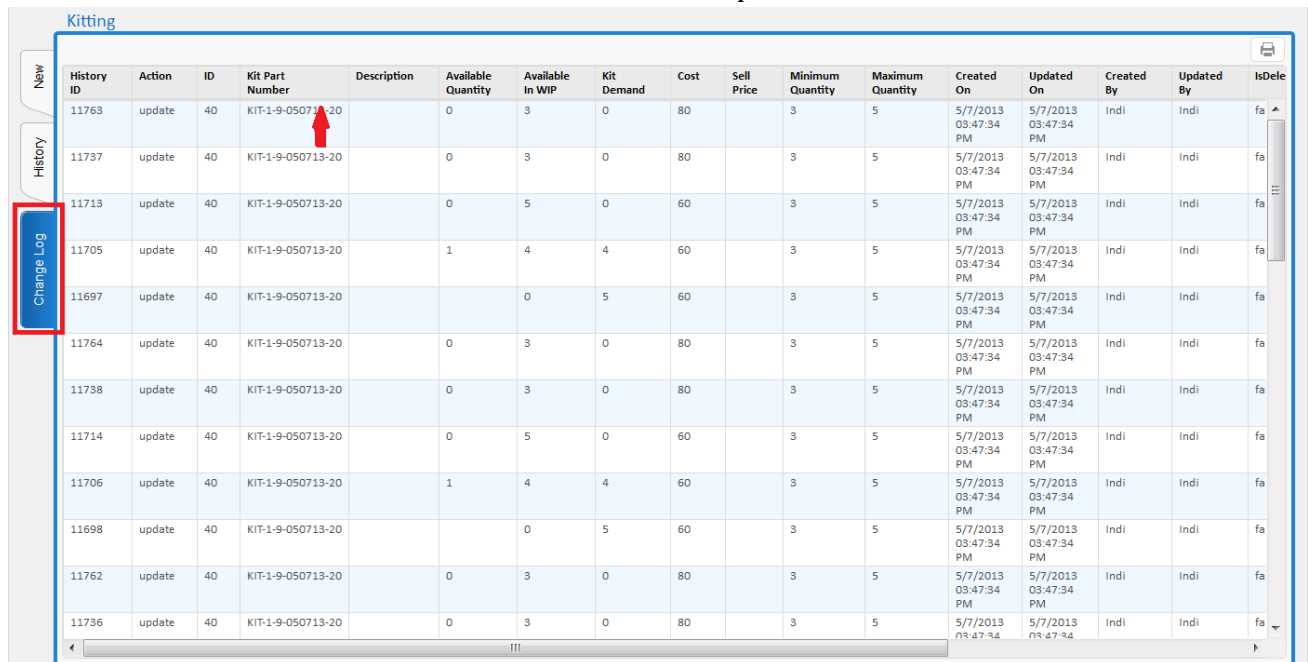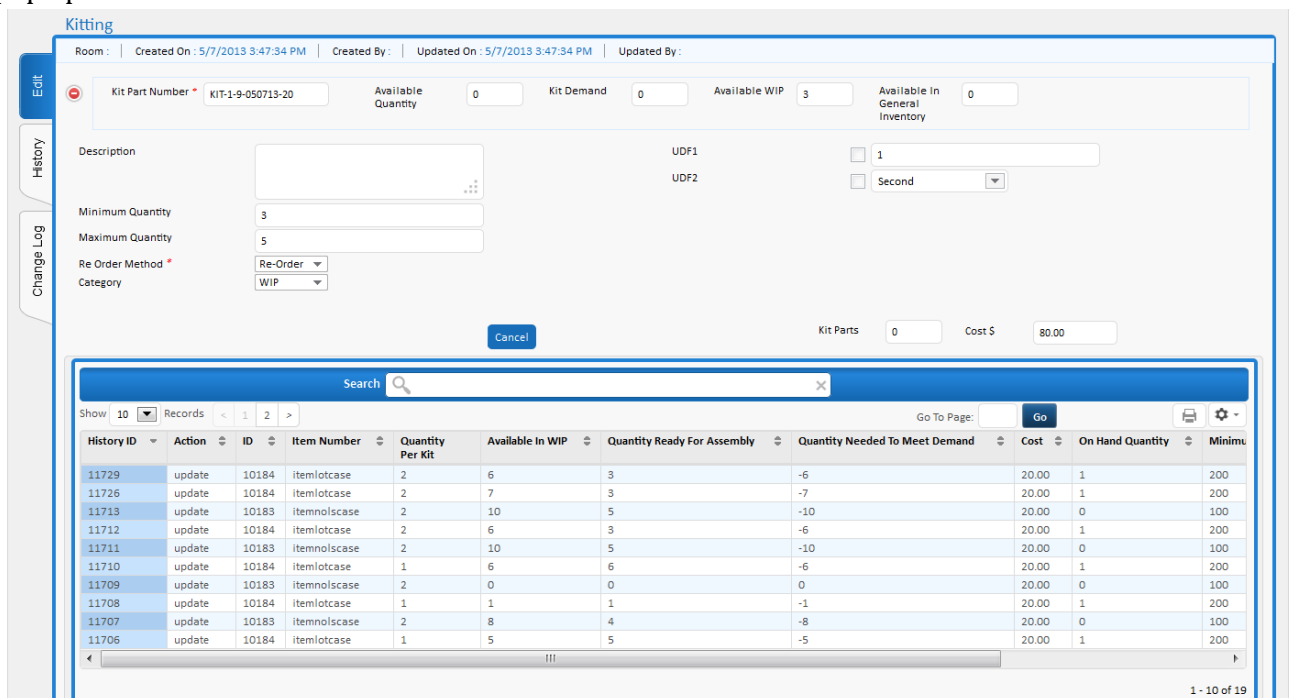## h. View change log:

To view the updated history of a Kit, select the Kit Part number and click on Change log tab. It displays when the Kit was created and the number of times it was updated.

History ID	Action	ID	Kit Part Number	Description	Available Quantity	Available In WIP	Kit Demand	Cost	Sell Price	Minimum Quantity	Maximum Quantity	Created On	Updated On	Created By	Updated By	IsDele
11763	update	40	KIT-1-9-050713-20		0	3	0	80		3	5	5/7/2013 03:47:34 PM	5/7/2013 03:47:34 PM	Indi	Indi	fa
11737	update	40	KIT-1-9-050713-20		0	3	0	80		3	5	5/7/2013 03:47:34 PM	5/7/2013 03:47:34 PM	Indi	Indi	fa
11713	update	40	KIT-1-9-050713-20		0	5	0	60		3	5	5/7/2013 03:47:34 PM	5/7/2013 03:47:34 PM	Indi	Indi	fa
11705	update	40	KIT-1-9-050713-20		1	4	4	60		3	5	5/7/2013 03:47:34 PM	5/7/2013 03:47:34 PM	Indi	Indi	fa
11697	update	40	KIT-1-9-050713-20			0	5	60		3	5	5/7/2013 03:47:34 PM	5/7/2013 03:47:34 PM	Indi	Indi	fa
11764	update	40	KIT-1-9-050713-20		0	3	0	80		3	5	5/7/2013 03:47:34 PM	5/7/2013 03:47:34 PM	Indi	Indi	fa
11738	update	40	KIT-1-9-050713-20		0	3	0	80		3	5	5/7/2013 03:47:34 PM	5/7/2013 03:47:34 PM	Indi	Indi	fa
11714	update	40	KIT-1-9-050713-20		0	5	0	60		3	5	5/7/2013 03:47:34 PM	5/7/2013 03:47:34 PM	Indi	Indi	fa
11706	update	40	KIT-1-9-050713-20		1	4	4	60		3	5	5/7/2013 03:47:34 PM	5/7/2013 03:47:34 PM	Indi	Indi	fa
11698	update	40	KIT-1-9-050713-20			0	5	60		3	5	5/7/2013 03:47:34 PM	5/7/2013 03:47:34 PM	Indi	Indi	fa
11762	update	40	KIT-1-9-050713-20		0	3	0	80		3	5	5/7/2013 03:47:34 PM	5/7/2013 03:47:34 PM	Indi	Indi	fa
11736	update	40	KIT-1-9-050713-20		0	3	0	80		3	5	5/7/2013 03:47:34	5/7/2013 03:47:34	Indi	Indi	fa

Figure 13

To view the log for individual item of the Kit, click on item name and items change log is displayed in a pop up.

Figure 14

Note: The Change log is displayed in View only mode.

i. Search Kits for keyword:

There are two types of search available to look for any keyword or filter the content of the module:

i. Main Search: To search the document for any particular keyword, the Main search is used. Enter the keyword in the search box on top of screen and the keyword gets highlighted on the screen.

Figure 15

ii. Narrow Search by: As the name suggests this function is used to filter or narrow down the scope of search for user convenience. It is an alternate search to the Search functionality and much detailed one.

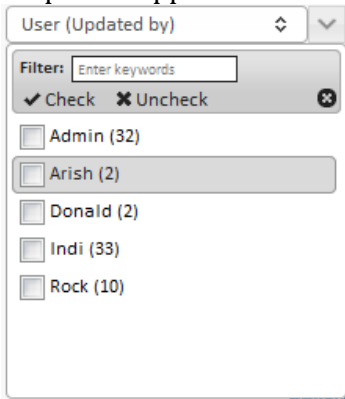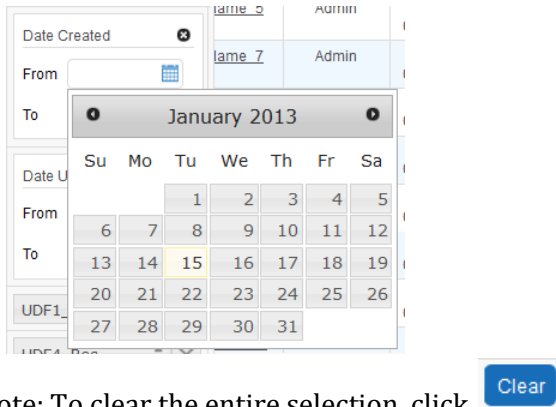- To open Narrow search, click on the small Triangular icon on the top left corner of the screen.
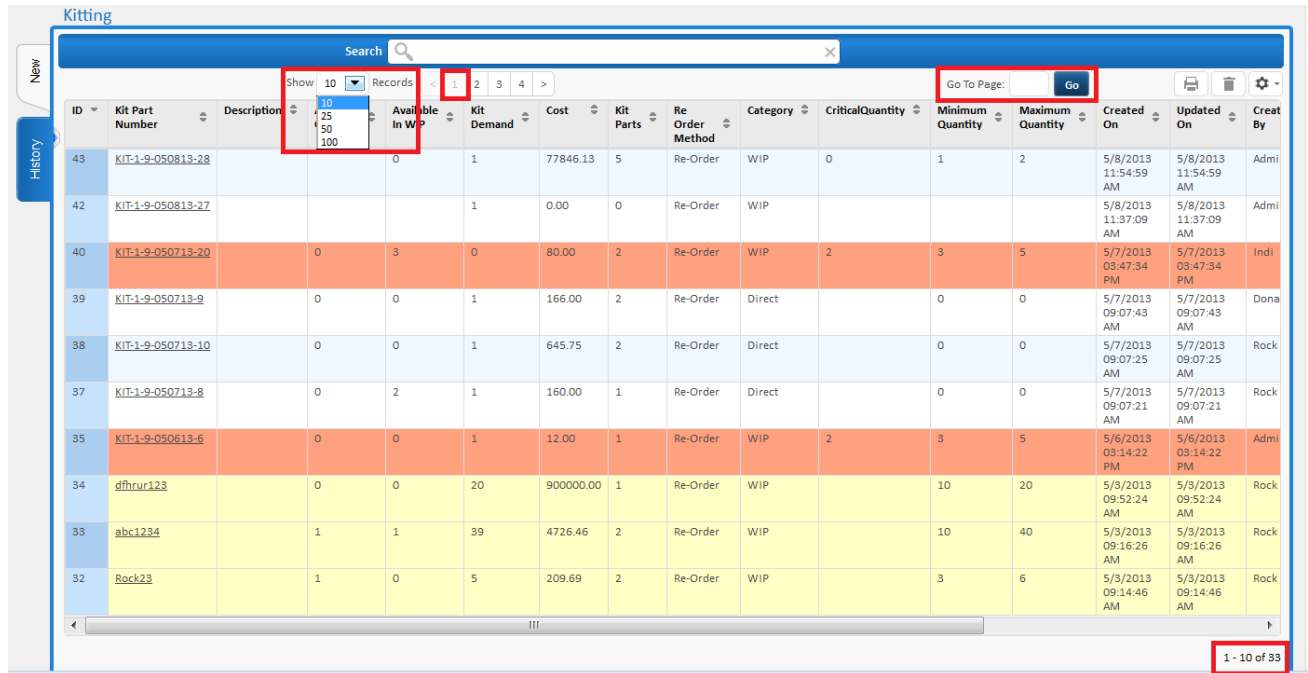- The following screen appears:

Figure 16

Field	Description
User Created by	It is used to filter the module for the 'Created by' field. Click on up-down arrow key. Dropdown appears: User (Created by) Filter: Enter keywords ✔ Check ✘ Uncheck ☐ Admin (16) ☐ Arish (5) ☐ Donald (2) ☐ Indi (45) ☐ Rock (11) User can select or unselect all of the items of the list using Check or Uncheck button. The module reflects the filter selections made.
User Updated by	It is used to filter the module for the 'Updated by' field. Click on up-down arrow key. Either checks the pre-defined search filter or enter a new keyword in the Filter box and then click on Check. The module reflects the filter selections made. Dropdown appears: User (Updated by) Filter: Enter keywords ✔ Check ✘ Uncheck ☐ Admin (32) ☐ Arish (2) ☐ Donald (2) ☐ Indi (33) ☐ Rock (10) **Note:** To cancel the selections made at any point of time, click ⊗.
Date Created and Date Updated	They are used to filter the 'Created On' and 'Updated On' fields respectively. User may enter the date manually or select from the calendar pop-up. Enter 'From-To' time period to be filtered. The module reflects the search results for the selected time period. Date Created ⊗ From To January 2013 Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 Note: To clear the entire selection, click **Clear**

Note: At point of time only one of the either searches will work.

j. View records and Go to specific page:

The user is enabled to view particular records on the page and go to any page number directly. These functionalities can be accessed simply selecting number of records from the drop down and entering the page number to be displayed and click "Go".

Figure 17

k. Implement various settings:

The user may choose from the below functionalities to be implemented on the module:

a) Refresh: This option refreshes the module and displays the latest changes implemented.

b) Auto Refresh: This option automatically refreshes the screen in specified time.

c) Only Deleted: This option reflects only the deleted fields of the module on screen. To select it, check the checkbox in front of the option.

d) Only Archived: This option reflects only the archived fields of the module on screen. To select it, check the checkbox in front of the option.

e) Reorder: This option enables user to reorder the columns of the module.

- User can also select which field to appear on screen and which remains to be hidden.
- Check or uncheck the checkbox in front of the field to display or hide the fields respectively.
- User may also drag and drop fields to be arranged in order of choice.
- After the selection is completed, click "Reorder".

Figure 18

l. Miscellaneous settings:

Grid in History tab may have few of following functionality depends on requirements:

1) Resizing of columns
2) Re-ordering of columns using drag & drop of column header
3) Single column and multi column sorting (using shift key)
4) In-line editing

Multi selection of rows by clicking each row