bisTrack Kits — Use Instructions

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Progressive Solutions Inc

Document Control

Revision History

Date	By	Version	Description
5Nov2008	JJS	1.0	• Original Version
09Jun2009	Jjs	1.1	• Updated to bT 2.5

Confidentiality

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Contents

Prerequisites

The bisTrack kits module must be licensed and installed, and kits must be set up as products in bisTrack. (See the bisTrack Kits -- Setup Instructions for details.) The procedures below also assume that you have already set up bisTrack customers and are generally familiar with sales order entry.

If your kits include any manufacturing component, the procedures below assume that AVO process operations and options have been set up as part of kit setup and you have a general familiarity with work order creation and processing.

Introduction

Kits are any collection of items or items and added-value operations (AVOs) that are commonly sold together. Examples include doors and related components such as hanging hardware; flooring tiles and installation supplies; or the wood, fasteners, and finishing materials for small projects such as a dog house or storage shed.

bisTrack's kit functionality allows you to sell kits much like you would any other product, including the ability to:

- Indicate item choices, when options are available, during order entry.
- Place non-manufactured kits on call-off orders.
- Sell fractional kits (e.g., 1.5 kits), when appropriate and when the kits have been set up for that option. (For example, pre-mixed concrete formulas may be set up as kits.)
- Negotiate pricing with full information about kit and/or component costs.
- See product information about kit options (when that information exists in bisTrack) in a preview pane to assist in making selections.
- Automatically generate pick lists and delivery notes or labels for the kit and kit items.
- Automatically generate work orders and any necessary purchase orders when the kit includes AVOs.
- Add a kit as a source line on a work order.
- Look up stock availability of all kit components and any shortages.
- Generate a report of product kits and kit components or choices.

View or Change Kit Information

Access to kit information in the Kit Builder requires permission. Only users with read or read/update permission can use this procedure.

Go to System Manager ➜ Products ➜ Products. Use Find to find and select the kit you want.

Right-click and click Kit Builder. (Or double-click the product to open Product Properties, then click Kit Builder on the General tab.)
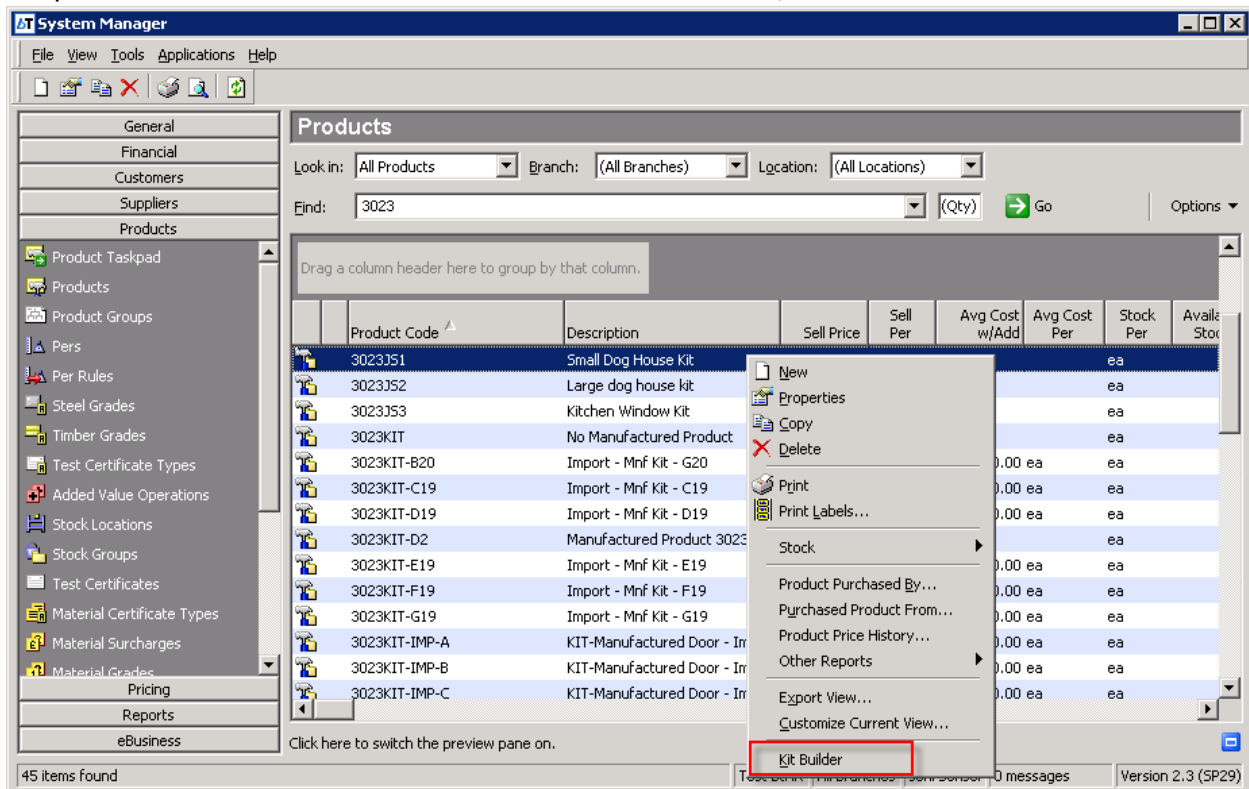
Kit information displays and may be changed. See the bisTrack Kits – Setup Instructions for details about creating or change kit items and other characteristics.

Place a Kit on a Quote or Sales Order

bisTrack Operations and Counter Sales order entry both support kits. Kits without AVOs may be placed on quotes or any type of sales order, including templates and call-offs. (They may not be placed on a price enquiry, however, so use a quote instead for that purpose.) Kits that involve manufacturing may *not* be placed on template or call-off orders, Collect Now orders, or Mixed orders, only regular Collect Later or Delivered orders.

Create a sales order, including selecting the customer, as usual. Click the Lines tab.
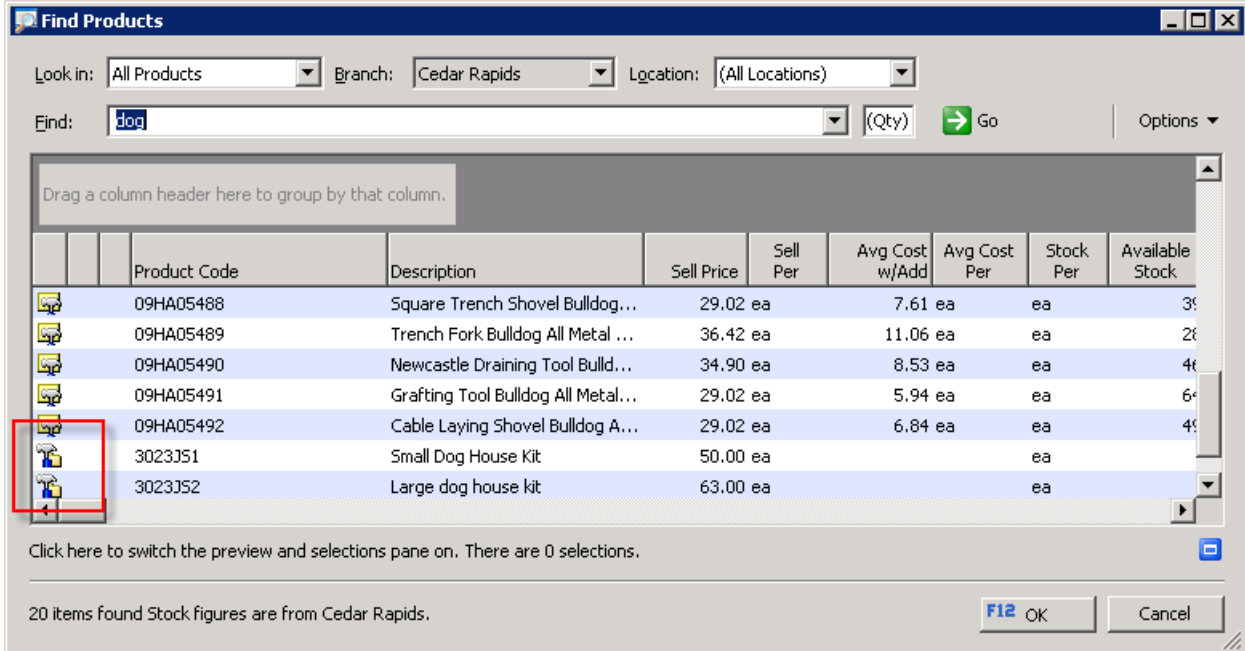
Select the kit you want to enter from the product list, using the Quick entry or other Find options as desired. Note that kits appear in product listings with a blue hammer in the product icon to distinguish them from non-kit products. Click OK.

The Add Kit to Order window appears. Change the number of kits you want as needed.
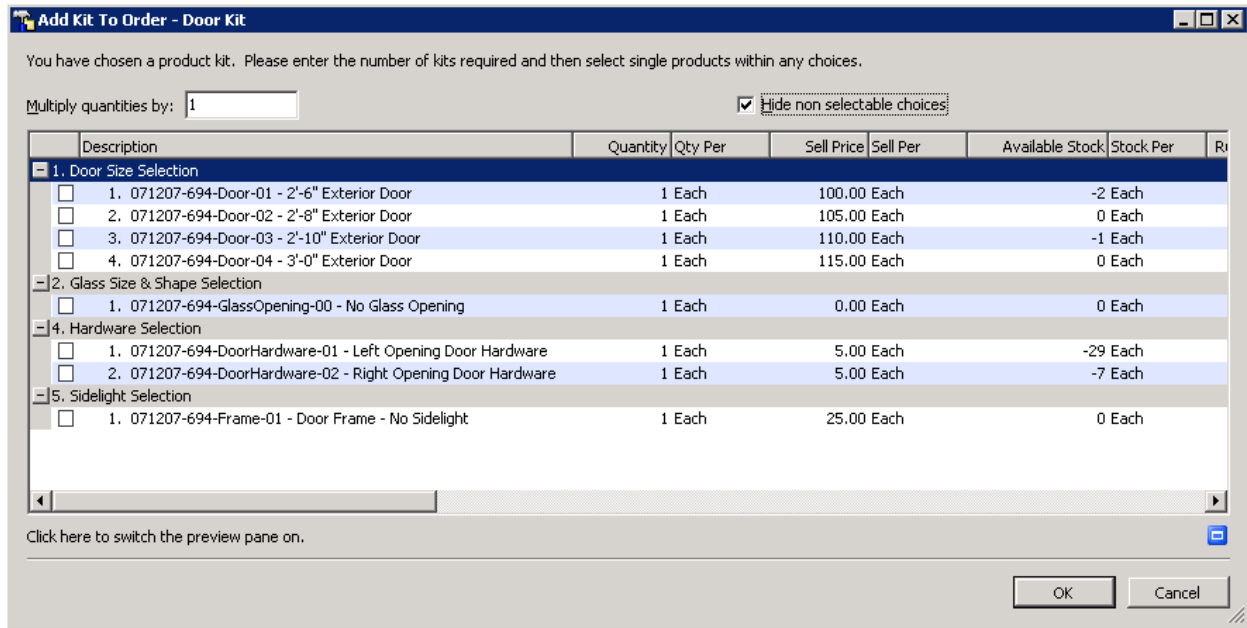
If your kit includes item options, the Add Kit to Order window also includes available choices for you to make. If the kit includes many options, you can click [−] to collapse each for convenient viewing.

Select a kit quantity and review the item options, including any default selections, if any.

If the kit includes choices that are not available because they've been ruled out by previous choices (or required choices haven't yet been made), they'll appear as strikethrough text -- or not at all if "Hide non-selectable choices" is selected.

Such choices may only be selected if the choice upon which they depend is changed (or made). Toggle "Hide non-selectable choices" as desired. bisTrack remembers your preferences for hiding by user.
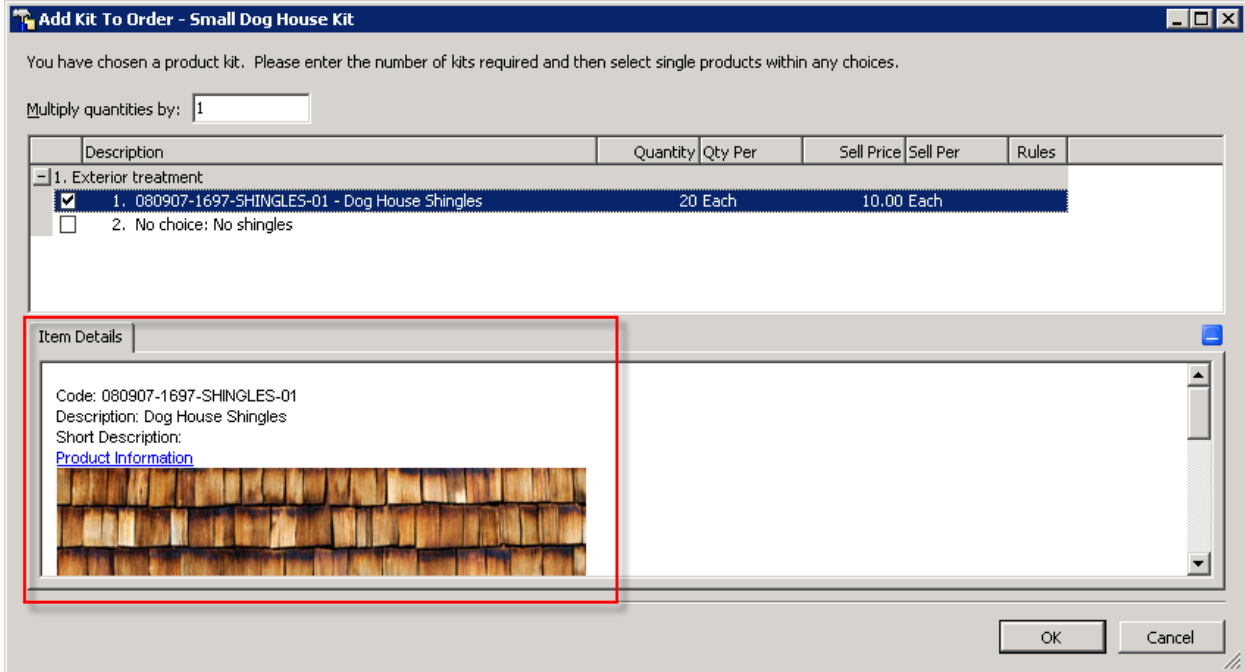
Click ⬇ in the Rule column to view the rule for a choice for which rules apply. The Rule Information window opens. Click OK to close it.
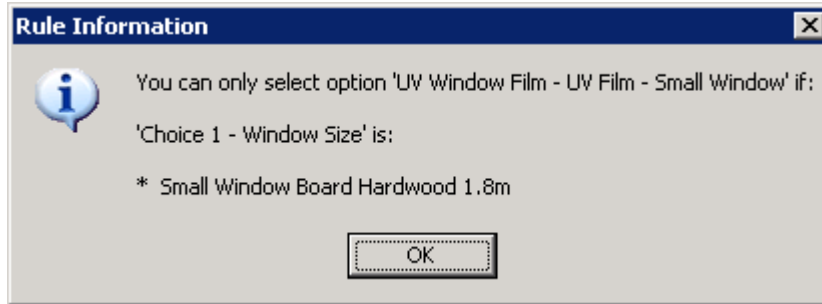
To view product information for a choice, click "Click here to switch preview pane on" in the lower left of the Add Kit to Order window.
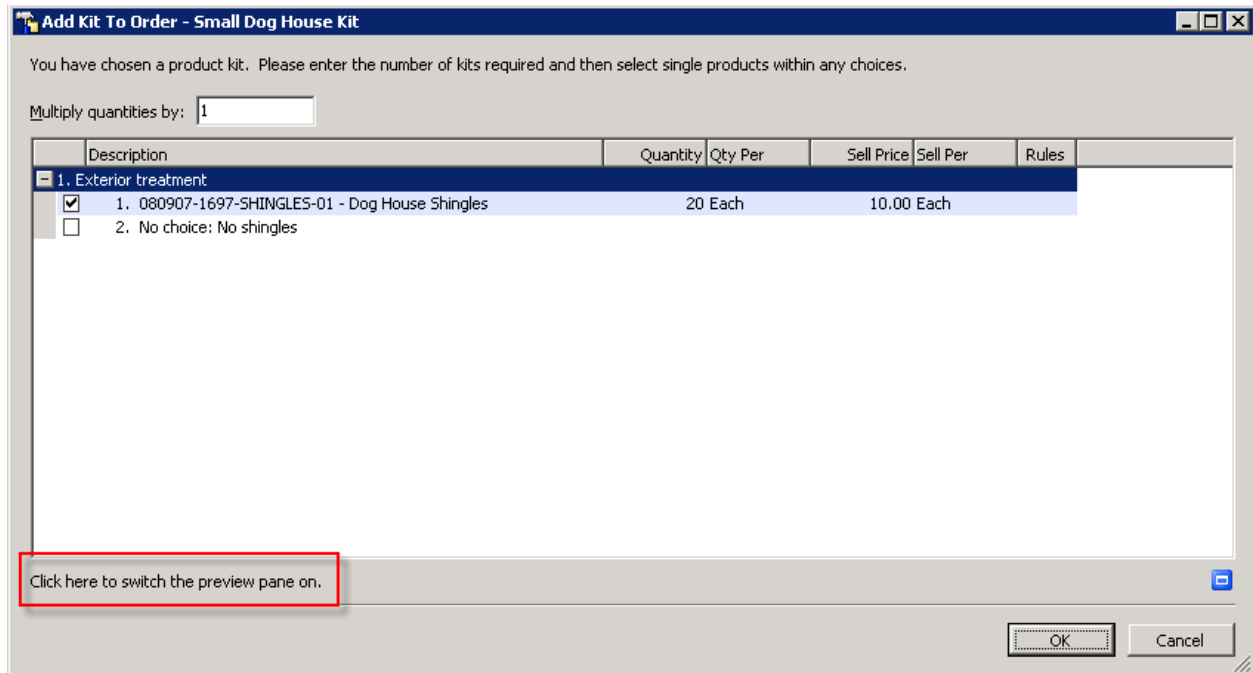
The Item Details tab appears in a preview pane. When you select a kit option, product information in the system (if any) is displayed. Click [−] at the far right to close the Item Details preview pane.
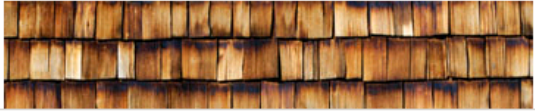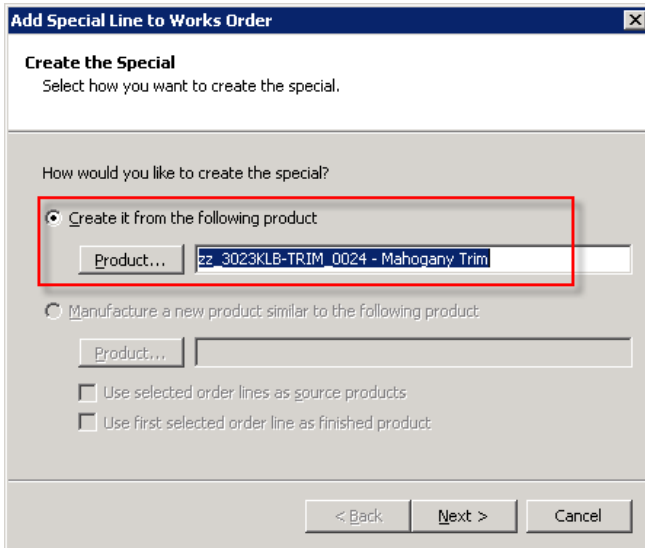
When you have confirmed the kit quantity and made all necessary selections, click OK.

If the kit is set up to create a special item as the finished goods, the Add Special Line to Works Order window will open. Confirm or override the special item code, description, and other information. This special item will display on the sales order.
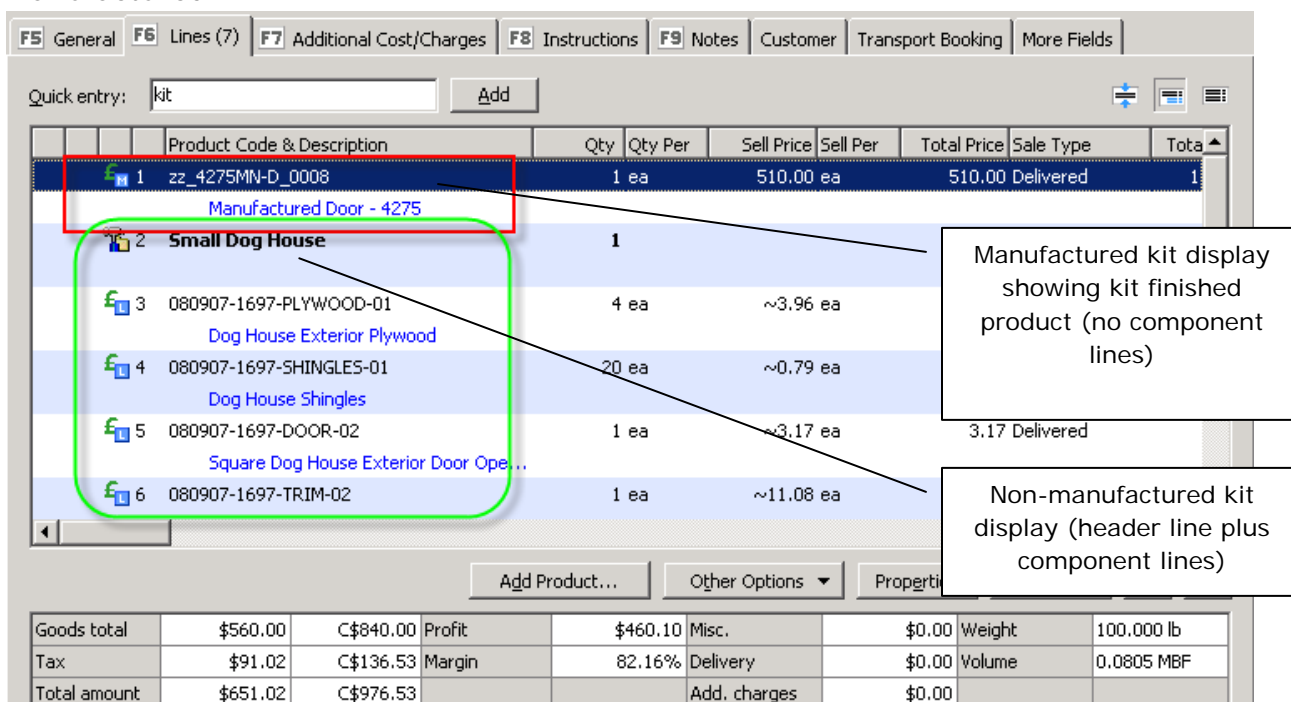
If there's insufficient stock for any kit component, you'll receive an Out of Stock warning with options, including ordering stock. Otherwise (or once you handle the warning), the kit appears on the sales order. Manufactured kits display differently from non-manufactured kits.

Manufactured kits are displayed on the sales order as a single line item (e.g., the finished good(s) resulting from the manufacturing process, such as ready-to-hang doors, the special item resulting from the manufacturing process, or the name of the kit itself, depending on how the kit is set up. The line icon includes M for Manufactured.

Non-manufactured kits display as a kit name text header followed by separate lines for all of the kit's components. The line icon for the header line is the Product Kit icon. The icon for the component lines includes an L for Line.

Review kit pricing or change it as desired. When the kit has been set up for lump sum pricing, the sell price displayed for each component is estimated based on the total kit price. Such estimates are indicated with ~.

Otherwise, line pricing will apply and be displayed and summed at the kit level.

| F5 General | F6 Lines (3) | F7 Additional Cost/Charges | F8 Instructions | F9 Notes | Customer | Transport Booking | More Fields |

Quick entry: dog [Add]

	Product Code & Description	Qty	Qty Per	Sell Price	Sell Per	Total Price	Sale Type	Tota
1	**Kitchen Window Kit**	**1**				**100.00**		
2	-> 01HM05991 Small Window Board Hardwood 1.8m	3 m		~20.48 m		61.44	Delivered	
3	-> UV Window Film UV Film - Small Window	1 RL		~38.56 RL		38.56	Delivered	

This kit uses lump sum pricing, so the sell price for each component is estimated, as indicated with ~. Otherwise, line pricing will apply and be summed at the kit header level.

[Add Product...] [Other Options ▼] [Properties] [Remove]

Goods total	$100.00	C$150.00	Profit	$100.00	Misc.	$0.00	Weight	0.000 lb
Tax	$16.25	C$24.38	Margin	100.00%	Delivery	$0.00	Volume	0.2031 MBF
Total amount	$116.25	C$174.38			Add. charges	$0.00		

Proceed with order information and completion as usual. You may substitute items for kit component lines, add an AVO to the line, copy lines, etc. as you would with any other product. **Caution**: Be careful when moving kit lines on a sales order. Moving a line that is part of a kit out of that kit may have unintended impacts, such as a change in sum pricing, for instance. bisTrack will warn you and ask for confirmation if you try to move or delete a line that is part of a kit.

Remove Lines

⚠ Your selection contains a line that is part of a kit.

Are you sure you want to continue?

[Yes] [No]

When you complete the sales order, any needed work orders or purchase orders are automatically generated (according to how the kit was set up). **Note**: Automatic generation of work orders is supported only for orders entered in Operations, not Counter Sales.

New Purchase Orders Created

The following purchase orders have been generated for your processes:

08069 - Bedford Timber Supplies

OK

Works Order Created

The following works order has been generated:

1519

OK
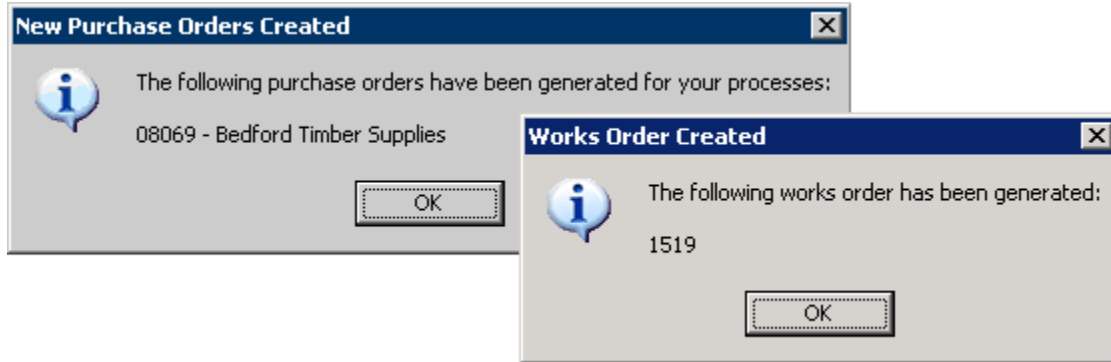
Print documents as desired (depending on your document control settings and bisTrack prompts) and proceed with any work order processing as usual.
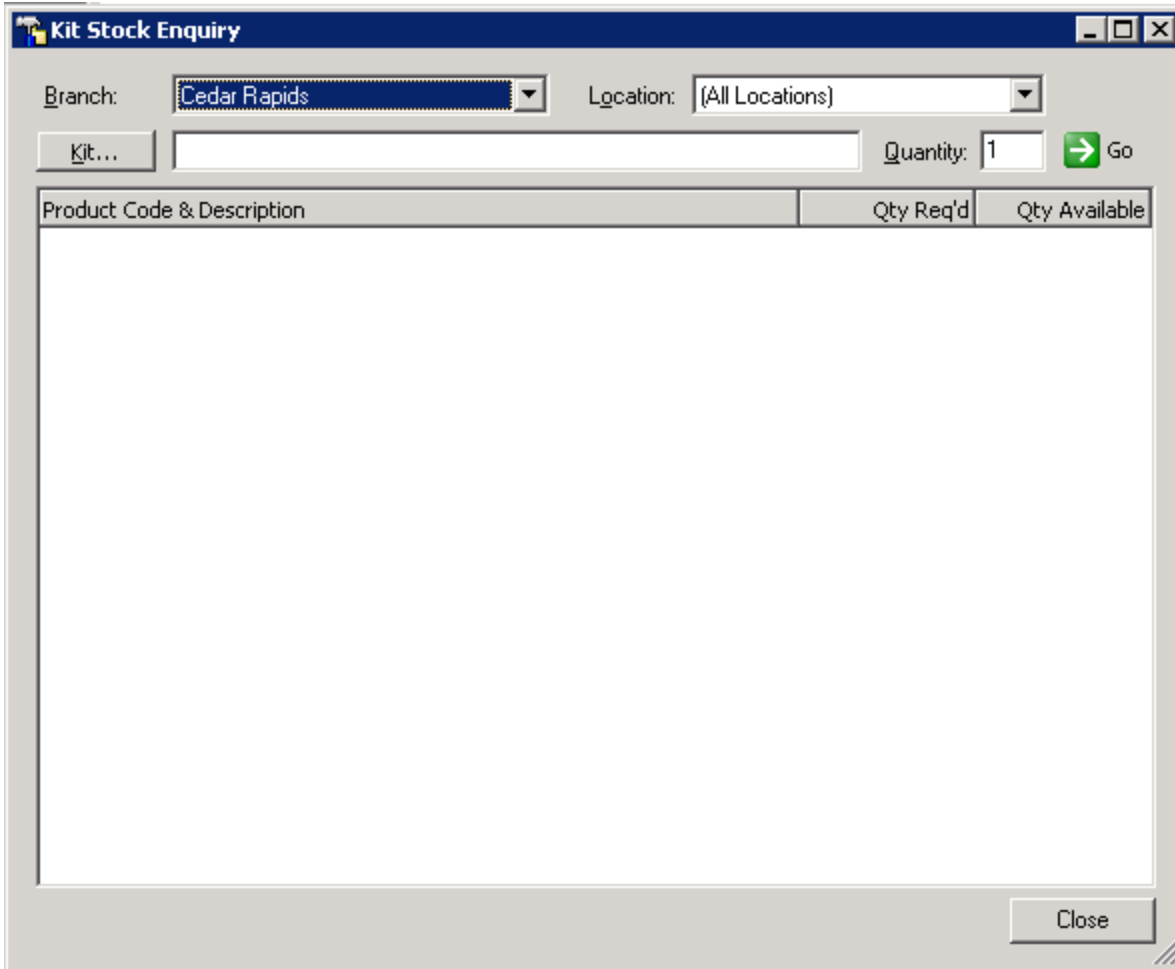
Look up Kit Stock Availability

As with regular items, when you enter a kit on a sales order, bisTrack will alert you to low-stock conditions for any kit component and open a Stock Options window so you can choose how to respond. You can also look up stock availability for all kit items at once.

Go to Operations ➔ Stock Taskpad and click Kit Stock Inquiry.
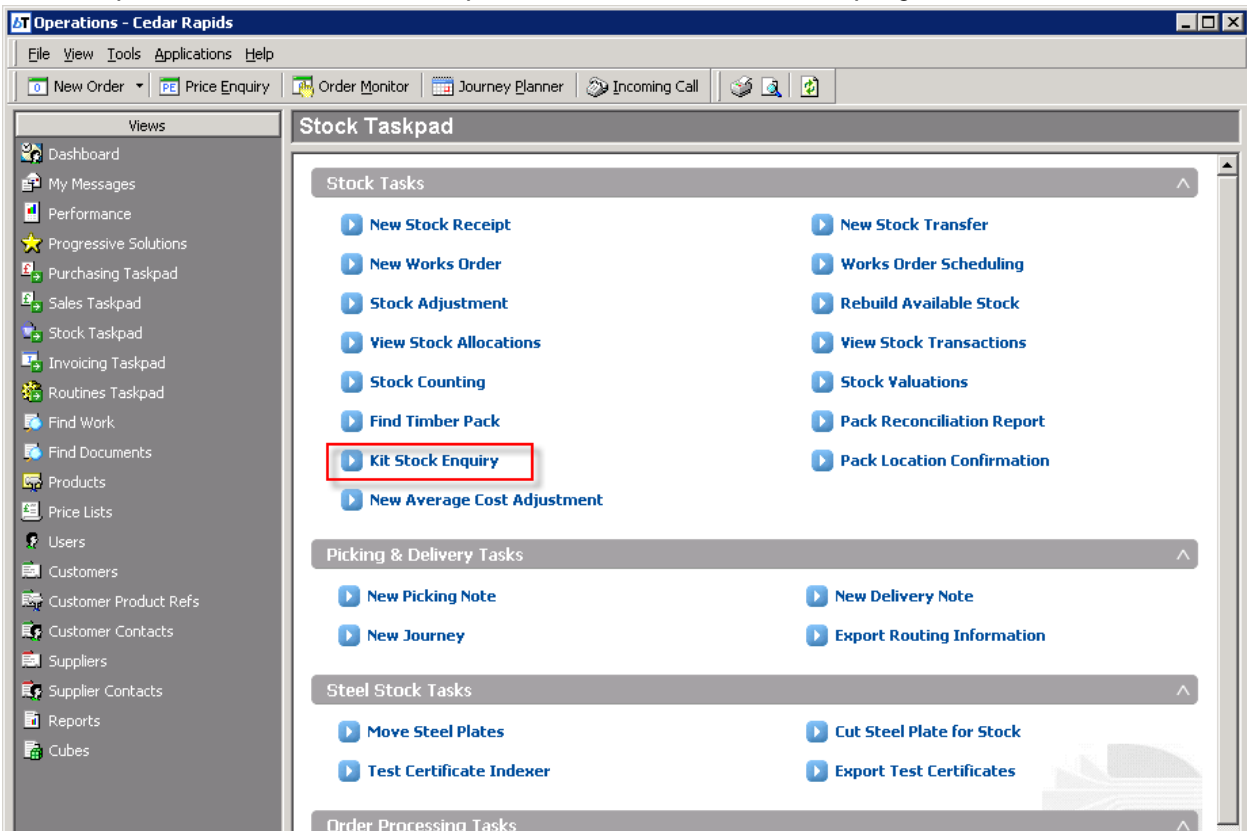
The Kit Stock Enquiry window opens.

Select specify product search criteria as desired and click Kit… as necessary to find and select the kit you want (or enter the product code).

Confirm or change the Quantity of that kit you want to check on, then click Go.

bisTrack will display all kit components, including all options for item choices, with current item availability. Items with inadequate availability are highlighted in red.
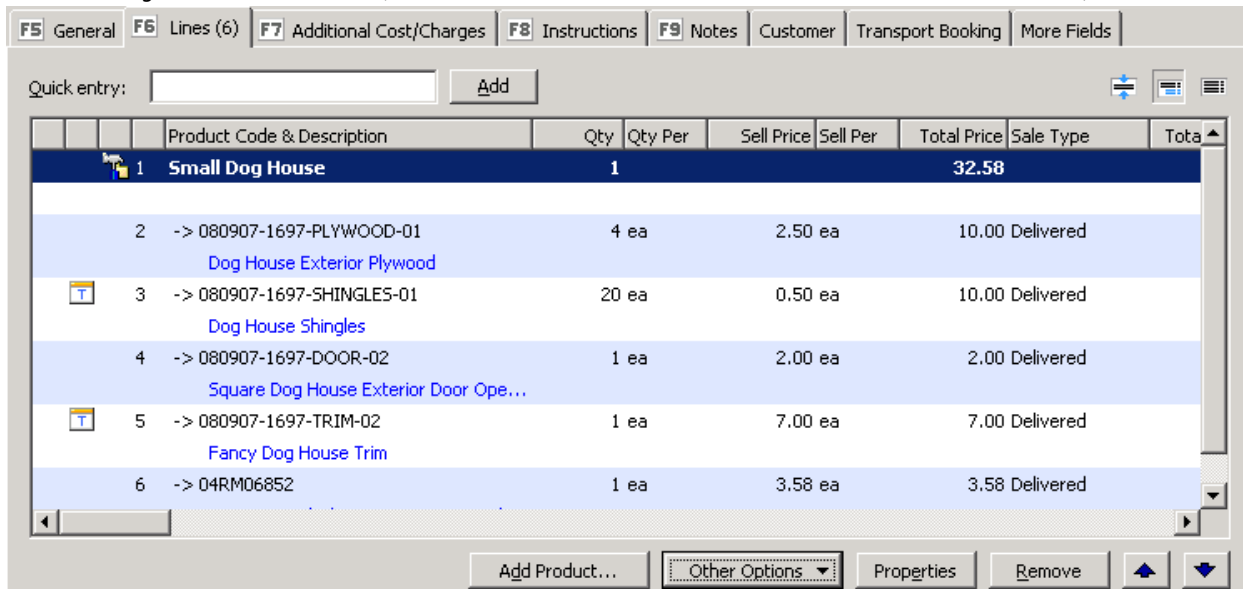
Click Close.

Adding a Product to a Kit on a Sales Order

You can add items to a kit. Create a sales order and add the kit as usual.

Select any line in the kit (either a header line, a text line, or an item line).
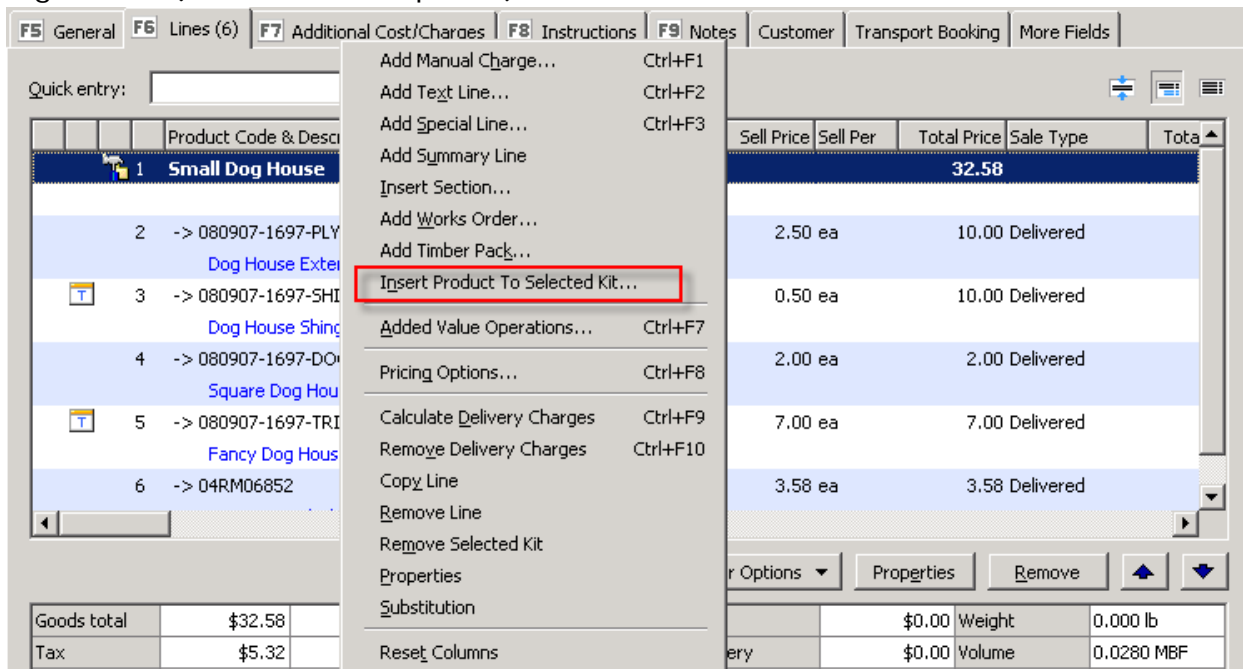

Right-click (or click Other Options) and click Insert Product to Selected Kit….

Select the product you want and click OK. The item will be added immediately following the selected kit line and the kit price is updated (regardless of whether the original kit price was a lump sum or calculated from the sum of kit lines). bisTrack will consider the line part of the kit and give appropriate warnings if you subsequently remove it from the order.


Complete the order as usual.

Removing a Kit from a Sales Order

Kit component lines or the kit header may be removed from the order, if desired, without removing the remaining component lines -- but doing so may have an impact pricing (such as in the case of kit lump-sum pricing) that will require you to adjust the result. To remove just one line, select the line and clicking Remove.

But to remove the entire kit and all component lines, select any kit line (either the header or a kit component line). Click Other Options… then click Remove Selected Kit.
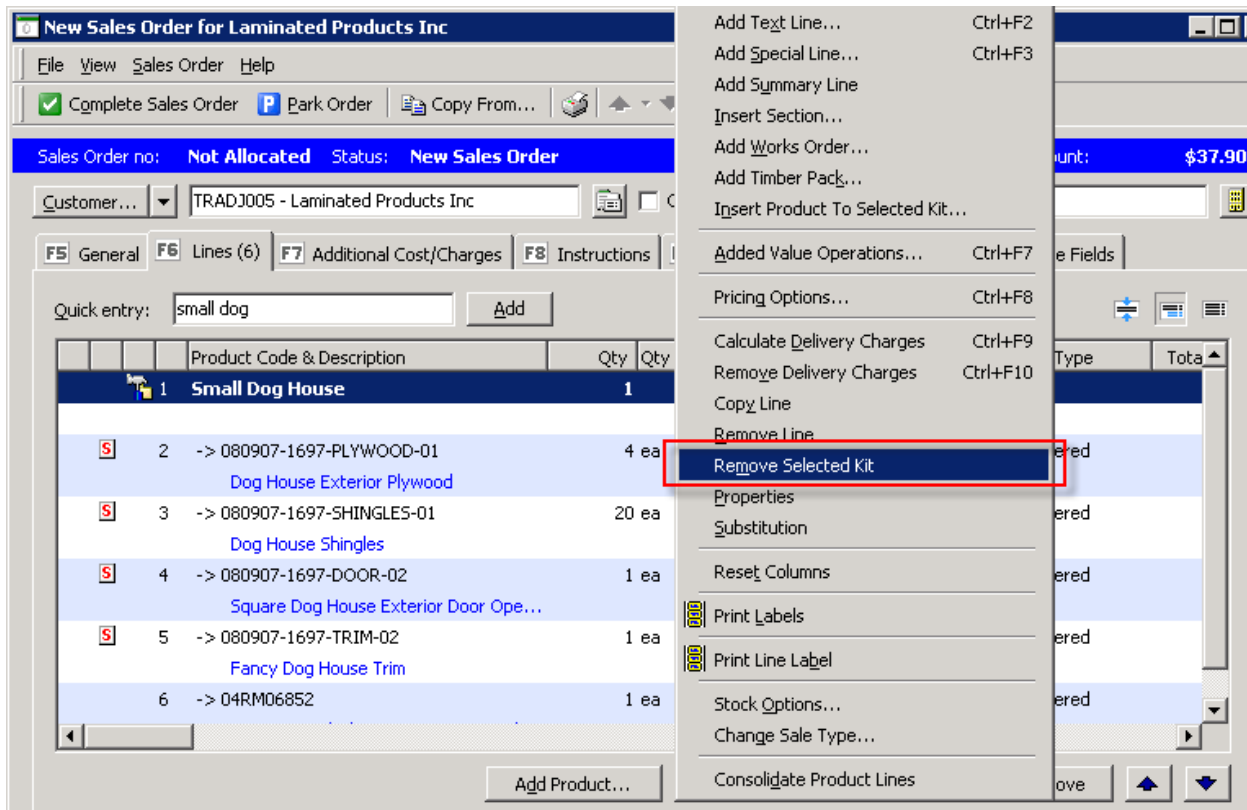
bisTrack will ask you to confirm.
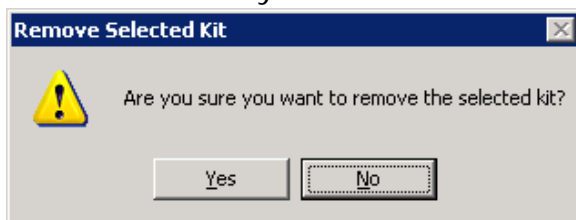
Click Yes. The kit and all its components will be removed from the order.

Add a Kit as a Source Line on a Work Order

Kits may be identified as work order source lines (but not finished product lines).

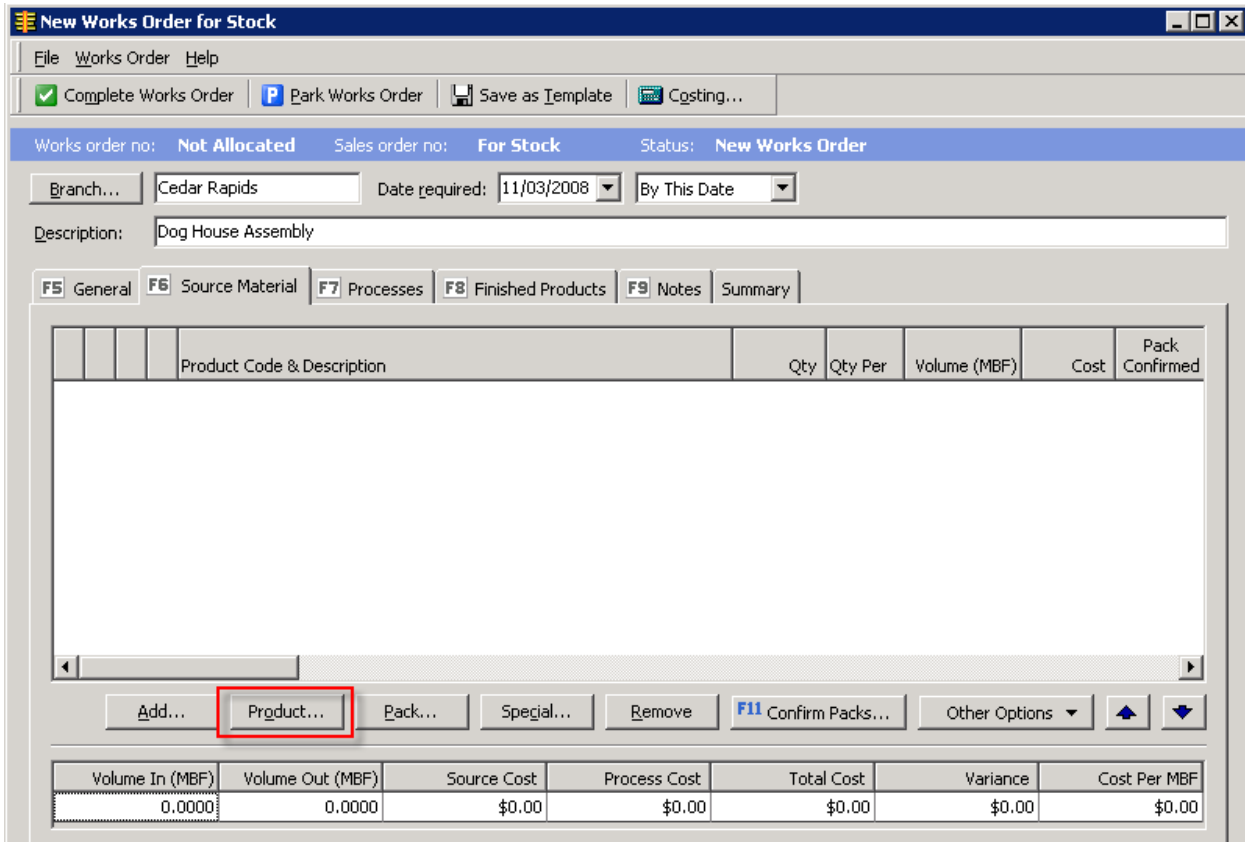Begin creating a work order as usual. On the Source Material tab, click Product… (*not* Add…)

Select the kit you want and click OK. Both non-manufactured and manufactured kits may be selected.

If the kit involves any item options, the Add Kit to Works Order window appears. Make any needed choices and click OK.

All kit items appear on the work order, without the kit header. (The exception is if a stock warning screen appears and is cancelled so that stock cannot be allocated.)
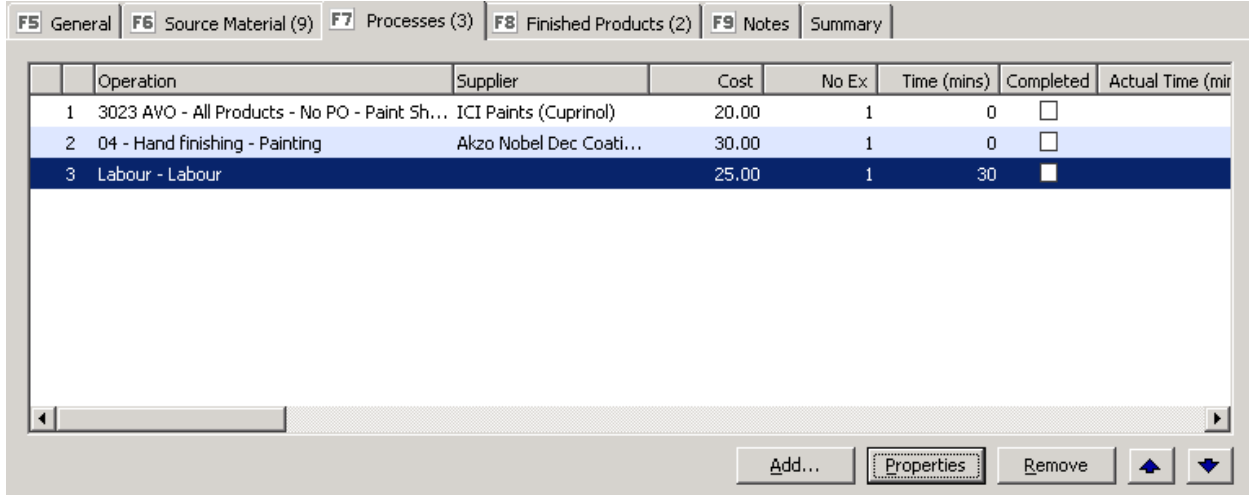
Click the Processes tab. If the kit you have placed on the work order is a manufactured kit, any AVO processes associated with that kit will appear. Confirm, change, or remove them.

Click Add... and add additional AVO processes as necessary.

Finish creating the work order, including identifying Finished Products, and complete it as usual. Once the work order has been completed, the Product... button will be disabled.

Releasing Kit Lines on Call-off Orders

Non-manufactured kits may be added to call-off orders just as you would add them to regular sales orders. Create the call-off order as usual, including selecting item options as needed, and mark it as open.

When releasing lines on a call-off order that includes a kit, you have the option of adding any or all of the kit components to the resulting sales order.

Open the call-off order, select a kit line (either the header or a kit component line) and click Call Off Lines. The Call Off Order Lines window opens, showing the kit header and all components.

Enter the quantity of each line that you want to call off (or select a line and click Call Off Selected to call off the total quantity for that line). *You must indicate quantities for the component lines*, not just the kit header – if you call off only a header line, the resulting sales order will include the header only, without price or quantity information, and no product items.

Click OK. bisTrack creates a sales order with the called-off items and quantities.

View the Product Kit Listing Report
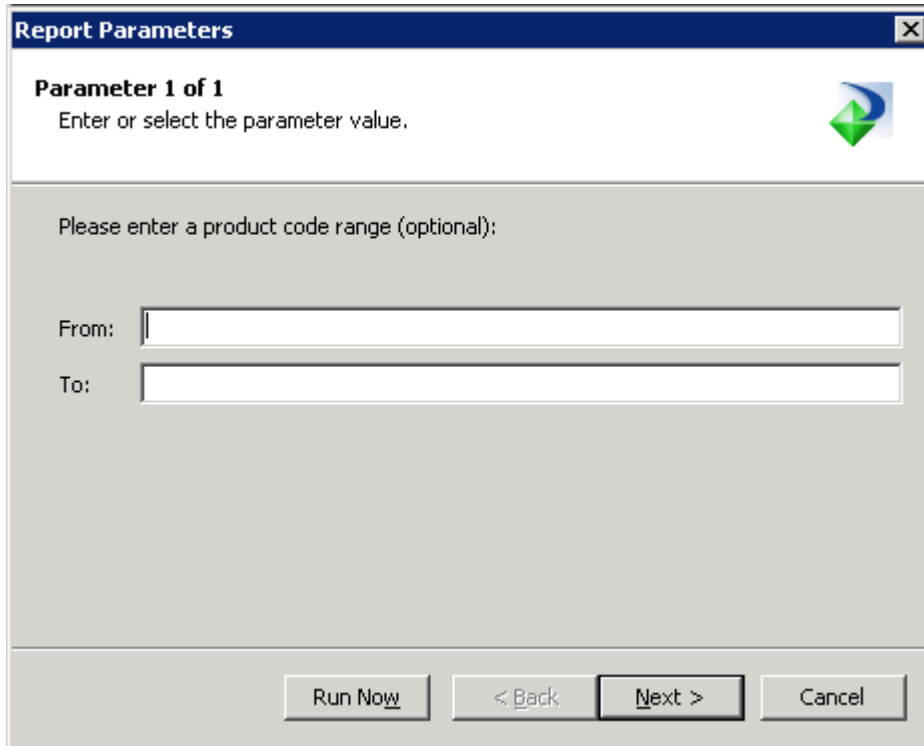
A product kit listing report is provided with other bisTrack report templates and must be set up in the System Manager. For details, see the bisTrack Kits – Setup Instructions document.

The report may generated or schedule for automatic generation like any other report. To generate the report, go to Operations ➔ Reports (or System Manager ➔ Reports ➔ Reports).
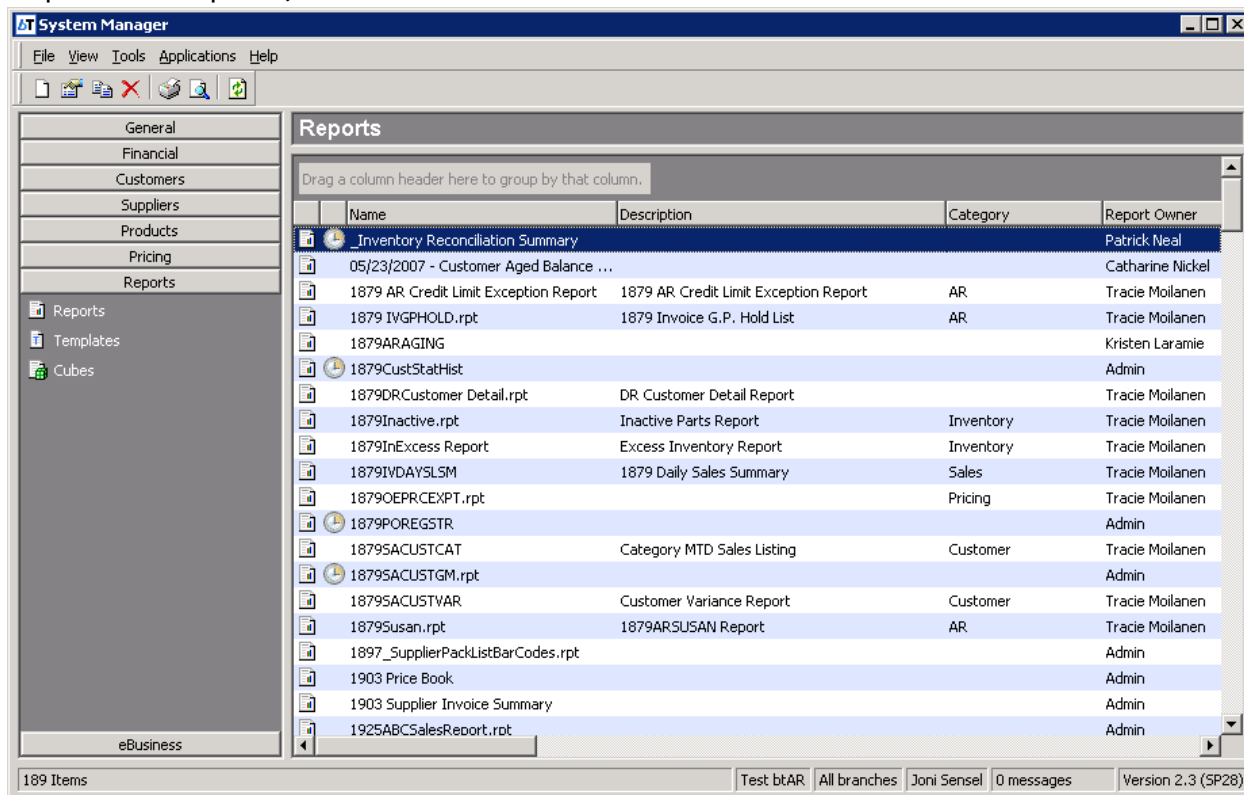
Scroll to the Product Kit Listing report. Double-click it.

The Report Parameters window opens.

Enter a product code range as indicated, then click Next>, then Finish. (Or click Run Now to run the report for all kit product codes.)

The report lists the product code and description, items, choices, quantities, sell price per item, sell pers, total price per item, and total kit price.

Product Kit Listing

Kit : 3023ST - 3023ST

Product Code & Description	Qty	Qty Per	Sell Price	Sell Per	Total Price
Choice start – Sand Color					
3336-Sand-50B - 3336-Sand-50-Black	4.00	BAG50	$5.00	BAG50	$20.0
3336-Sand-50R - 3336-Sand-50-Red	4.00	BAG50	$5.00	BAG50	$20.0
3336-Sand-50 - 3336-Sand-50-White	4.00	BAG50	$5.00	BAG50	$20.0
Choice end					
Choice start – Aggregate					
04KP06179 - 100mm 440x215 Aglite 4.2N Lightweight Aggregate Block	12.00	ea	$10.32	ten	$12.3
04KP06180 - 100mm 440x215 Fibolite 3.5N Lightweight Aggregate Block	12.00	ea	$11.27	ten	$13.5
Choice end					
Choice start – Cement					
06MS04724 - 0.5kg Black Cement Colouring Sealotone Powder (BS1014)	16.00	ea	$5.83	ea	$93.2
06MS04726 - 0.5kg Brown Cement Colouring Sealotone Powder (BS1014)	16.00	ea	$5.83	ea	$93.2
06MS04730 - 0.5kg Red Cement Colouring Sealotone Powder (BS1014)	16.00	ea	$6.26	ea	$100.1
Choice end					
				Total Price (specified)	$500.0

Kit : 3023K-A - 3023 Manufactured Test A

Product Code & Description	Qty	Qty Per	Sell Price	Sell Per	Total Price
Choice start – Hardware					
071207-694-DoorHardware-01 - Left Opening Door Hardware	1.00	ea	$5.00	ea	$5.0
071207-694-DoorHardware-02 - Right Opening Door Hardware	1.00	ea	$5.00	ea	$5.0
Choice end					
Choice start – Facing					
df2414 - 2x4-14 #2 & Bet. Fir	1.00	ea	$650.00	MBF	$6.0
DW2414 - 2x4-14 #2 & Bet. Spruce	1.00	ea	$614.00	MBF	$5.7
Choice end					
Choice start – Color					
06PG02695 - Permoglaze Paint Gloss Black 1.0 litre	1.00	ea	$9.14	ea	$9.1
06PU02864 - Permoglaze Paint Undercoat White 1.0 litre	1.00	ea	$8.29	ea	$8.2
06PG02758 - Permoglaze Paint Gloss White 1.0 litre	1.00	ea	$8.29	ea	$8.2