

bisTrack Kits — Setup Instructions

November 2008

Progressive Solutions Inc

Document Control

Revision History

Date	By	Version	Description
10Nov2008	JJS	1.0	<ul style="list-style-type: none">Original Version

Confidentiality

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Prerequisites

The bisTrack kits module must be licensed and installed. The procedures below also assume that you have already set up bisTrack customers and products, including all products that will become kit components.

If your kits will include any manufacturing component, the related procedures assume that AVO process operations and options have been set up and you have a general understanding of works orders and AVOs.

Introduction

Kits are any collection of items, or items and internal or external added-value operations (AVOs), that are commonly sold together. There are two basic types of Kits; manufactured kits and standard kits.

Standard kits: With a standard, non-manufactured kit, you are essentially selling the group of components in the kit, and the kit is simply an easy way to group and select the appropriate items. An example of a standard kit would be the collection of components to build a doghouse, shed, or deck, but for which you are not doing any manufacturing.

Manufactured kits: An example of a manufactured kit would be a door that you are manufacturing, including the door slab and related components such as hanging hardware.

Thus a kit is a collection of goods that are either sold, or manufactured and sold.

bisTrack's Kit Builder functionality allows you to set up kits by selecting products from your products database as components of the kit. You can:

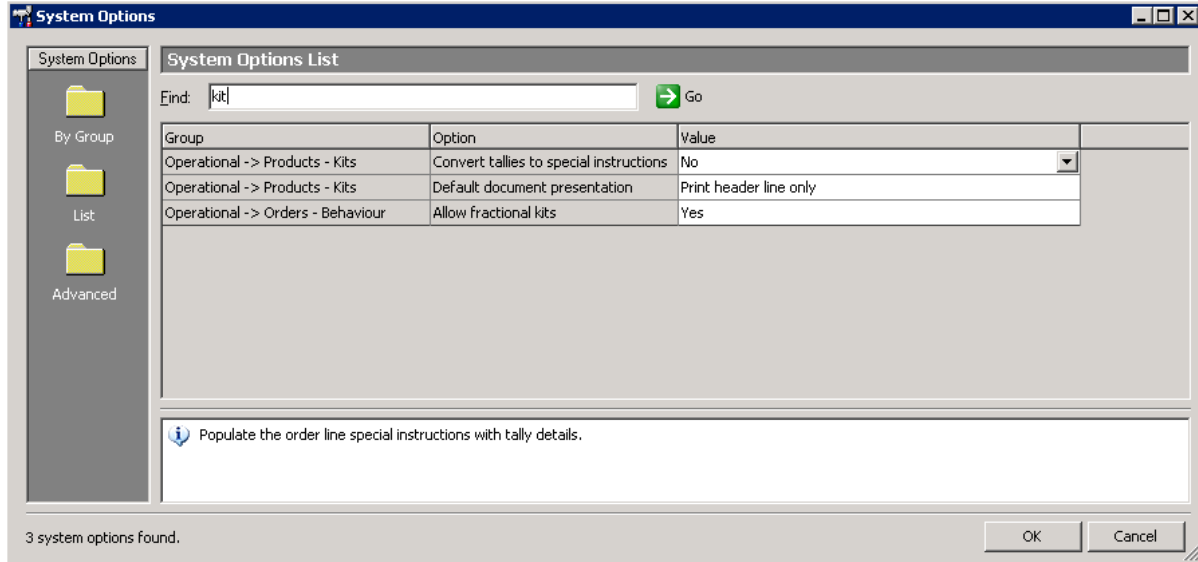
- Include customer options or alternatives and acceptable substitutions right in the kit record, so sales reps can see at a glance which choices to offer customers and enter them immediately.
- Create rules about which choices are compatible with other choices to speed order entry and prevent the selection of mutually exclusive options.
- Incorporate multiple added-value operations for manufactured kits.
- Identify lump-sum kit pricing or calculate the kit price based on the sum of all component lines, retaining all of the negotiation and pricing management options available for regular products.

Once set up, you can sell kits much like you would any other product, including the ability to:

- Indicate choices, when options are available, during order entry.
- 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 for manufactured kits and automatically generate any necessary purchase orders when the kit includes external 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.

Set up Kit System Options

Go to System Manager → Tools → System Options. Click List. Type Kit and click Go.



System Options List

Find:

Group	Option	Value
Operational -> Products - Kits	Convert tallies to special instructions	No
Operational -> Products - Kits	Default document presentation	Print header line only
Operational -> Orders - Behaviour	Allow fractional kits	Yes

Populate the order line special instructions with tally details.

3 system options found.

Set the options as follows:

- Convert tallies to special instructions: The default is "No," and this option should be left as No for most standard clients. But select "Yes" if you will include tallies and want the tally to appear as special instructions on the order.
- Default document presentation: This system option controls printing on the standard sales order and invoice documents that ship with bisTrack. It may be overridden as desired for individual kits when setting up the kit. Select "Print header line only" to show only the kit header on reports. Select "Print header and components" to show everything on documents, or select "Print header with components as text" to show components as subordinate text rather than line items on reports.
- Allow fractional kits: Set this option to Yes if you want to sell kits by fractions (e.g., .5 or 1.5 kits), based on the quantity of components. (E.g. for a concrete formula that made one cubic yard, you could select 1.5 kits to deliver materials for 1.5 cubic yards.) *This option only works when the input per and sell per of all kit components are the "unit" type, and the product type of all components is "generic."*

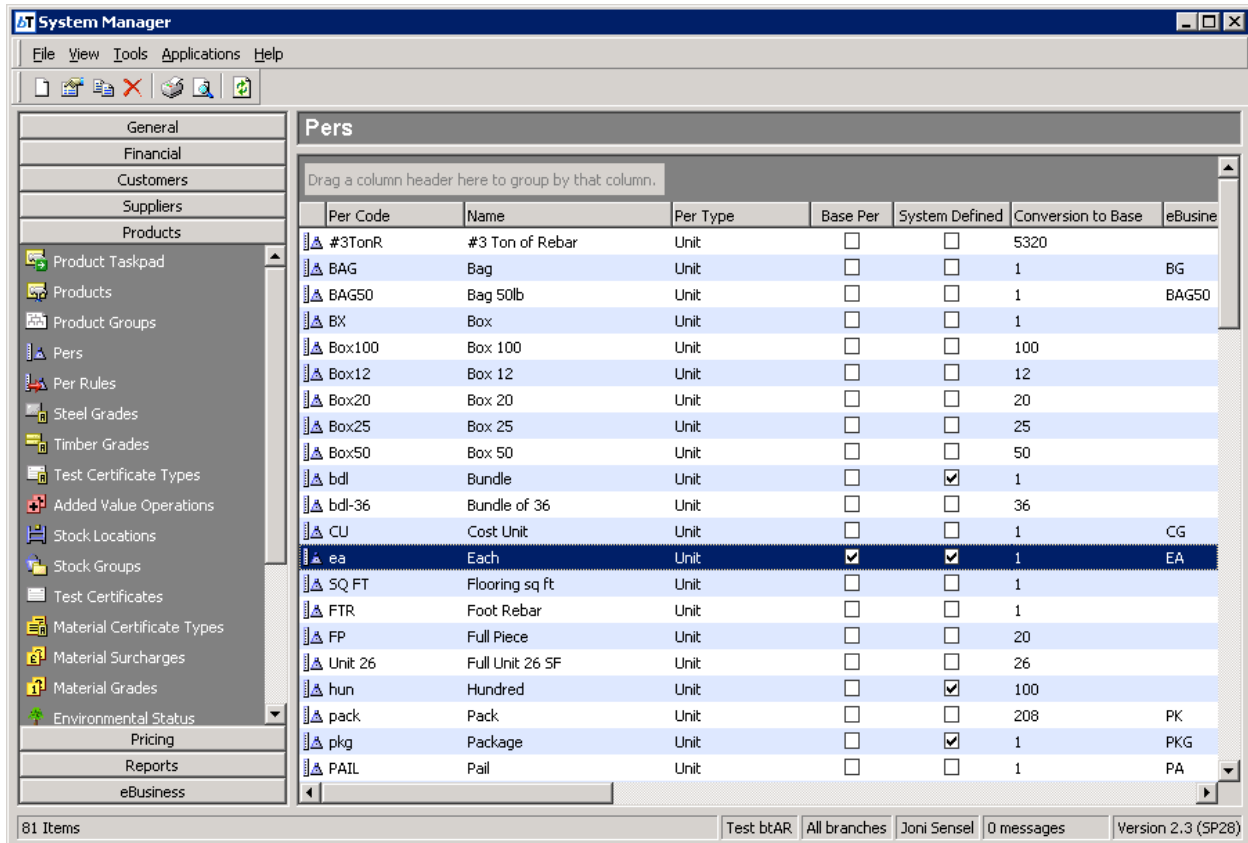
Click OK.

Verify or Set up Per Rules

When setting up kits, you can only select a per rule that uses "Each" for each of the pers and "unit" for the per type. Verify that you already have an "Each" per rule that uses no other pers, or create a new one (e.g., Kit Each) that does.

Go to System Manager → Products → Pers.

In the list of pers, find the Each per and verify that the per type is Unit. (It's likely that such a per already exists, but if not, create a new Each per for the purposes of kits with a Unit per type.)

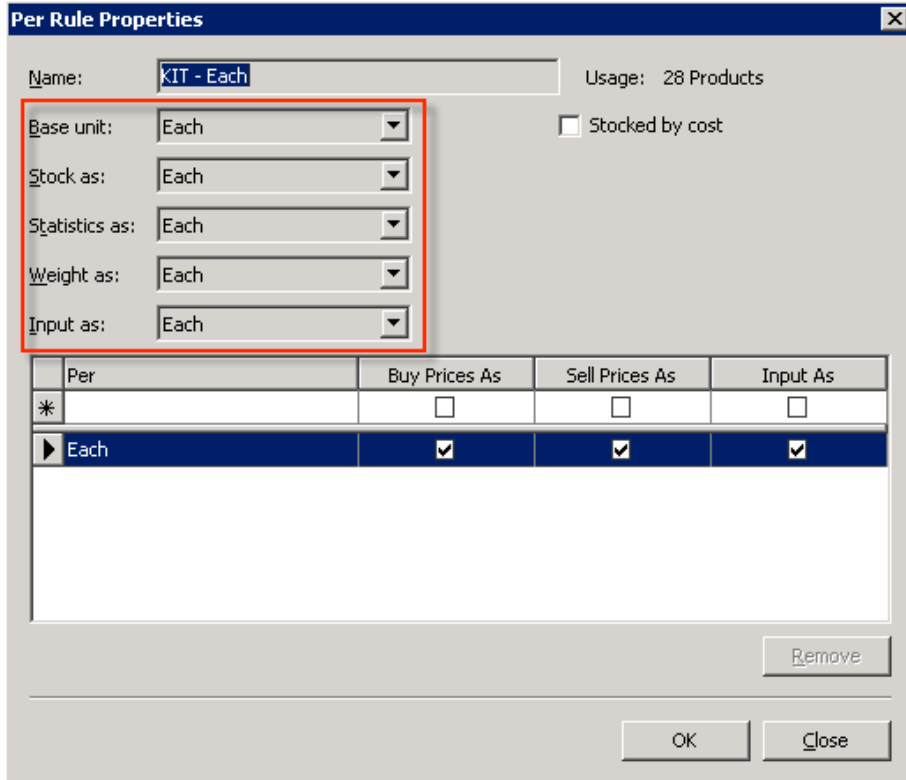


Per Code	Name	Per Type	Base Per	System Defined	Conversion to Base	eBusine
#3TonR	#3 Ton of Rebar	Unit	<input type="checkbox"/>	<input type="checkbox"/>	5320	
BAG	Bag	Unit	<input type="checkbox"/>	<input type="checkbox"/>	1	BG
BAG50	Bag 50lb	Unit	<input type="checkbox"/>	<input type="checkbox"/>	1	BAG50
BX	Box	Unit	<input type="checkbox"/>	<input type="checkbox"/>	1	
Box100	Box 100	Unit	<input type="checkbox"/>	<input type="checkbox"/>	100	
Box12	Box 12	Unit	<input type="checkbox"/>	<input type="checkbox"/>	12	
Box20	Box 20	Unit	<input type="checkbox"/>	<input type="checkbox"/>	20	
Box25	Box 25	Unit	<input type="checkbox"/>	<input type="checkbox"/>	25	
Box50	Box 50	Unit	<input type="checkbox"/>	<input type="checkbox"/>	50	
bdl	Bundle	Unit	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1	
bdl-36	Bundle of 36	Unit	<input type="checkbox"/>	<input type="checkbox"/>	36	
CU	Cost Unit	Unit	<input type="checkbox"/>	<input type="checkbox"/>	1	CG
ea	Each	Unit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	EA
SQ FT	Flooring sq ft	Unit	<input type="checkbox"/>	<input type="checkbox"/>	1	
FTR	Foot Rebar	Unit	<input type="checkbox"/>	<input type="checkbox"/>	1	
FP	Full Piece	Unit	<input type="checkbox"/>	<input type="checkbox"/>	20	
Unit 26	Full Unit 26 SF	Unit	<input type="checkbox"/>	<input type="checkbox"/>	26	
hun	Hundred	Unit	<input type="checkbox"/>	<input checked="" type="checkbox"/>	100	
pack	Pack	Unit	<input type="checkbox"/>	<input type="checkbox"/>	208	PK
pkg	Package	Unit	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1	PKG
PAIL	Pail	Unit	<input type="checkbox"/>	<input type="checkbox"/>	1	PA

Go to System Manager → Products → Per Rules.

In the list, find the Each per rule and double-click it to open Properties. (Or create a new one if necessary for the purpose of kits.)

Verify that every per in the per rule is Each (or the “kit each” you created).



The dialog box titled "Per Rule Properties" shows the configuration for a rule named "KIT - Each". The "Usage" is "28 Products". The "Base unit", "Stock as", "Statistics as", "Weight as", and "Input as" are all set to "Each". The "Stocked by cost" checkbox is unchecked. Below these fields is a table with columns: Per, Buy Prices As, Sell Prices As, and Input As. The table has two rows: one with an asterisk (*) and one with a right-pointing triangle (▶) and the word "Each". The "Each" row has checkmarks in the "Buy Prices As", "Sell Prices As", and "Input As" columns. At the bottom right are buttons for "Remove", "OK", and "Close".

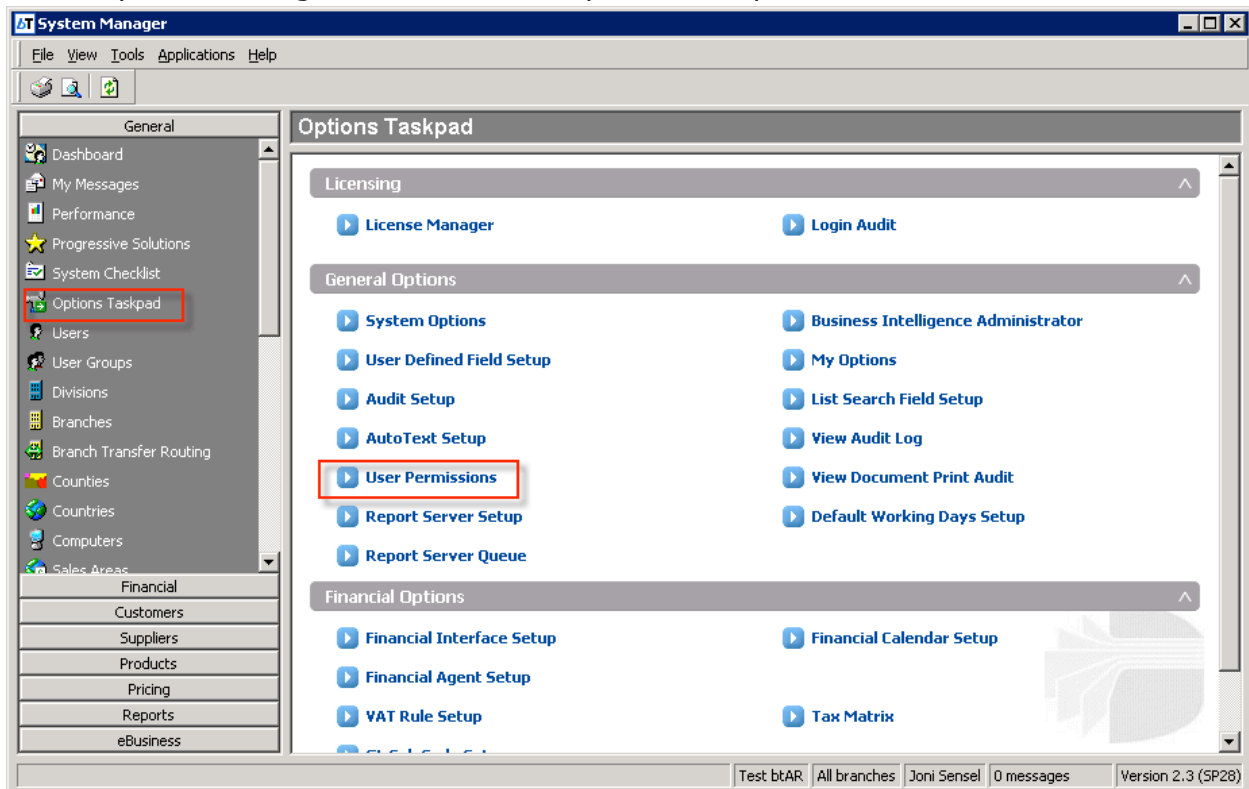
Per	Buy Prices As	Sell Prices As	Input As
*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ Each	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Click OK.

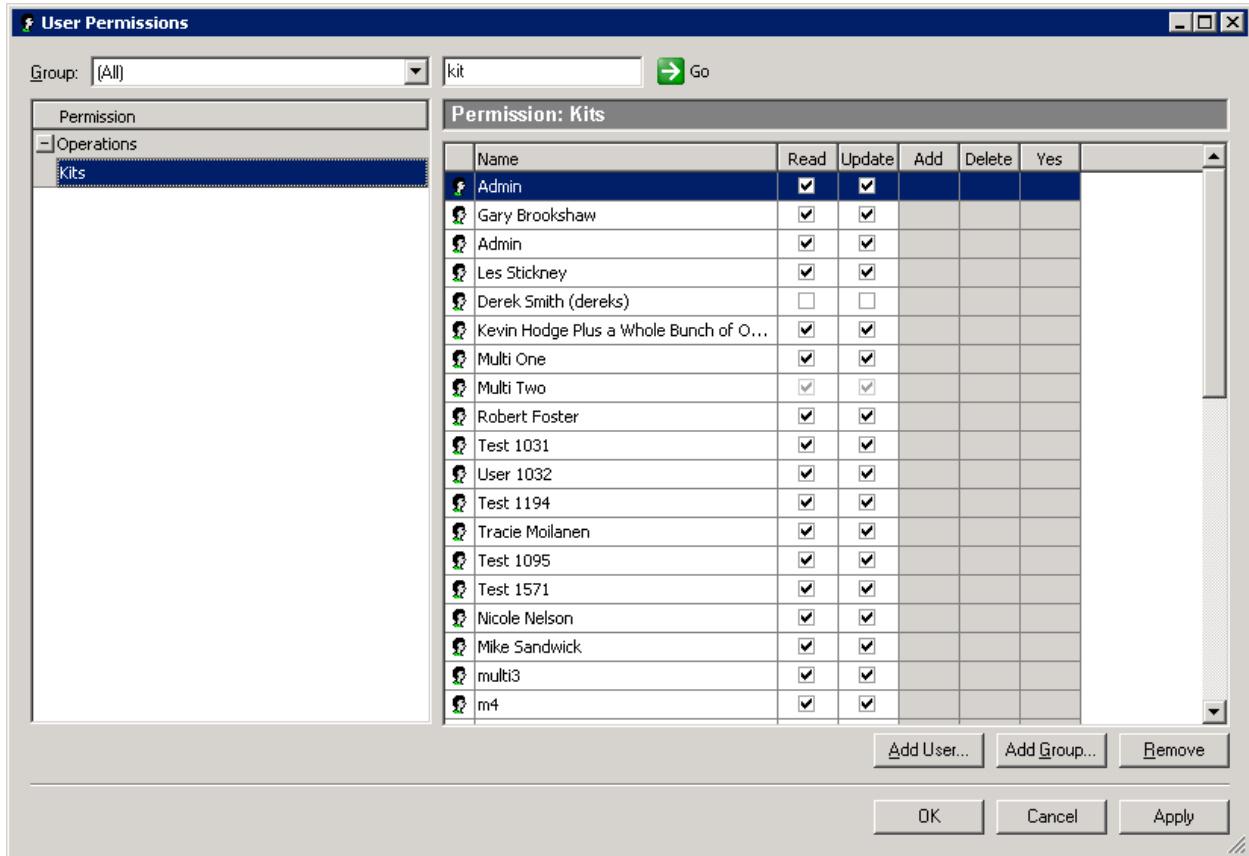
Set up Permissions for the Kit Builder

User access to the Kit Builder is controlled by permissions settings. Users may be given read-only access or the ability to also update kits.

Go to System Manager → General → Options Taskpad → User Permissions.



Type kit in the search field and click go. (Or click Operations and scroll down to Kits). Select Kits.



User Permissions

Group: [All] kit

Permission: Kits

Name	Read	Update	Add	Delete	Yes
Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Gary Brookshaw	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Les Stickney	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Derek Smith (dereks)	<input type="checkbox"/>	<input type="checkbox"/>			
Kevin Hodge Plus a Whole Bunch of O...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Multi One	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Multi Two	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Robert Foster	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Test 1031	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
User 1032	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Test 1194	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Tracie Moilanen	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Test 1095	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Test 1571	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Nicole Nelson	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Mike Sandwick	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
multi3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
m4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			

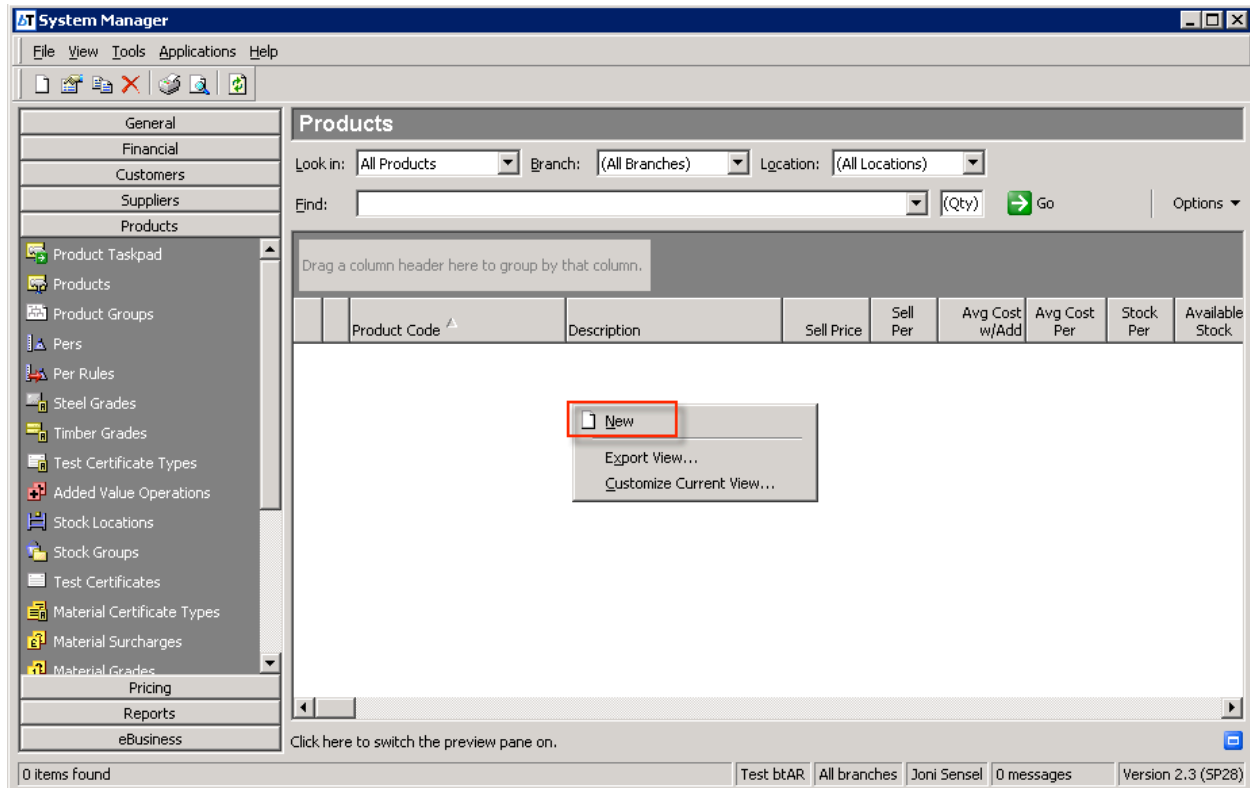
Find the user you want in the list, or add them as needed.

Select the permission (Read only or Update) you wish to assign to this user. Click OK.

Create a Non-Manufactured Kit

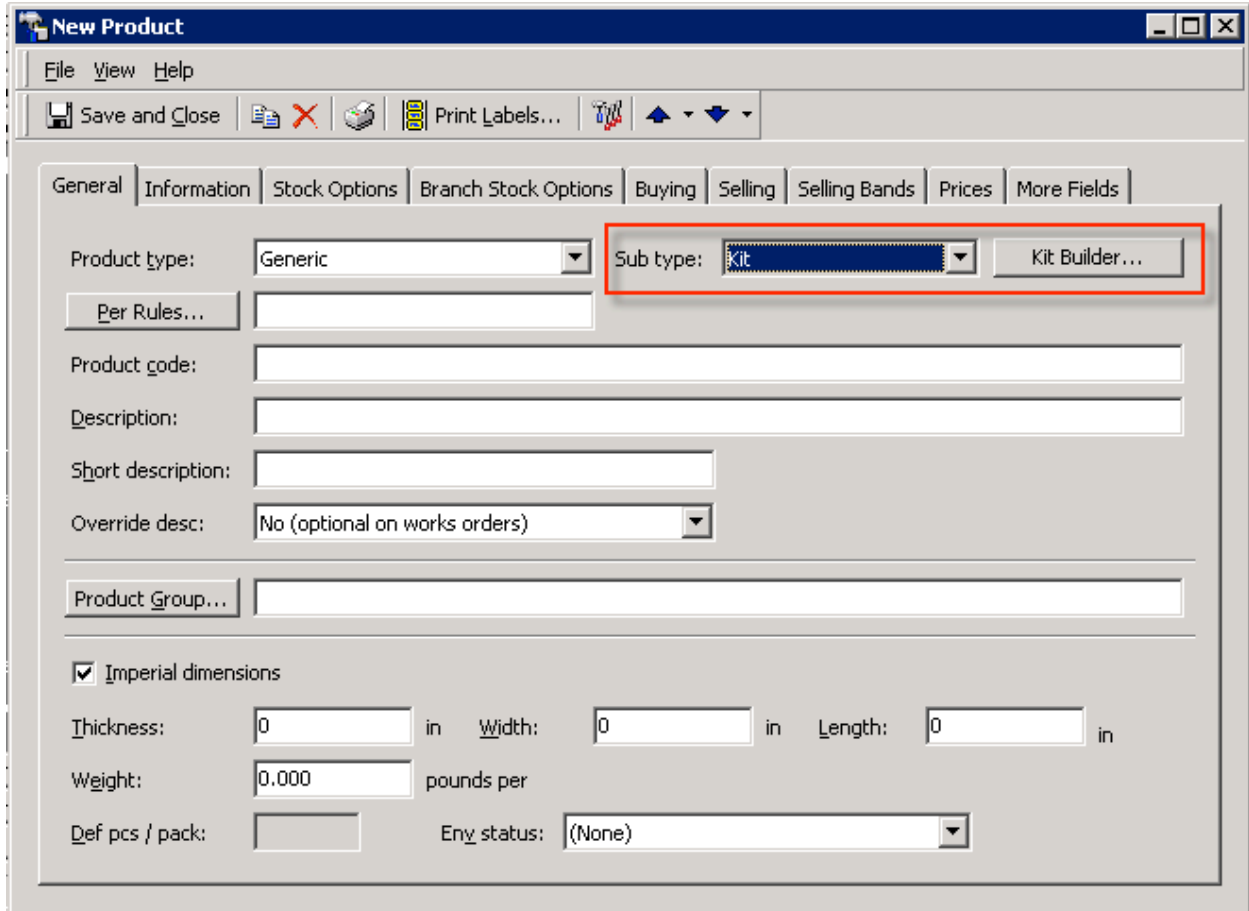
With a standard, non-manufactured kit, you are essentially selling the group of components in the kit, and the kit is simply an easy way to group and select the appropriate items.

Go to System Manager → Products → Products. Right-click and click New.



Leave the Product type on the default, Generic. Click Sub type and select Kit.

The Kit Builder button appears. Click it.



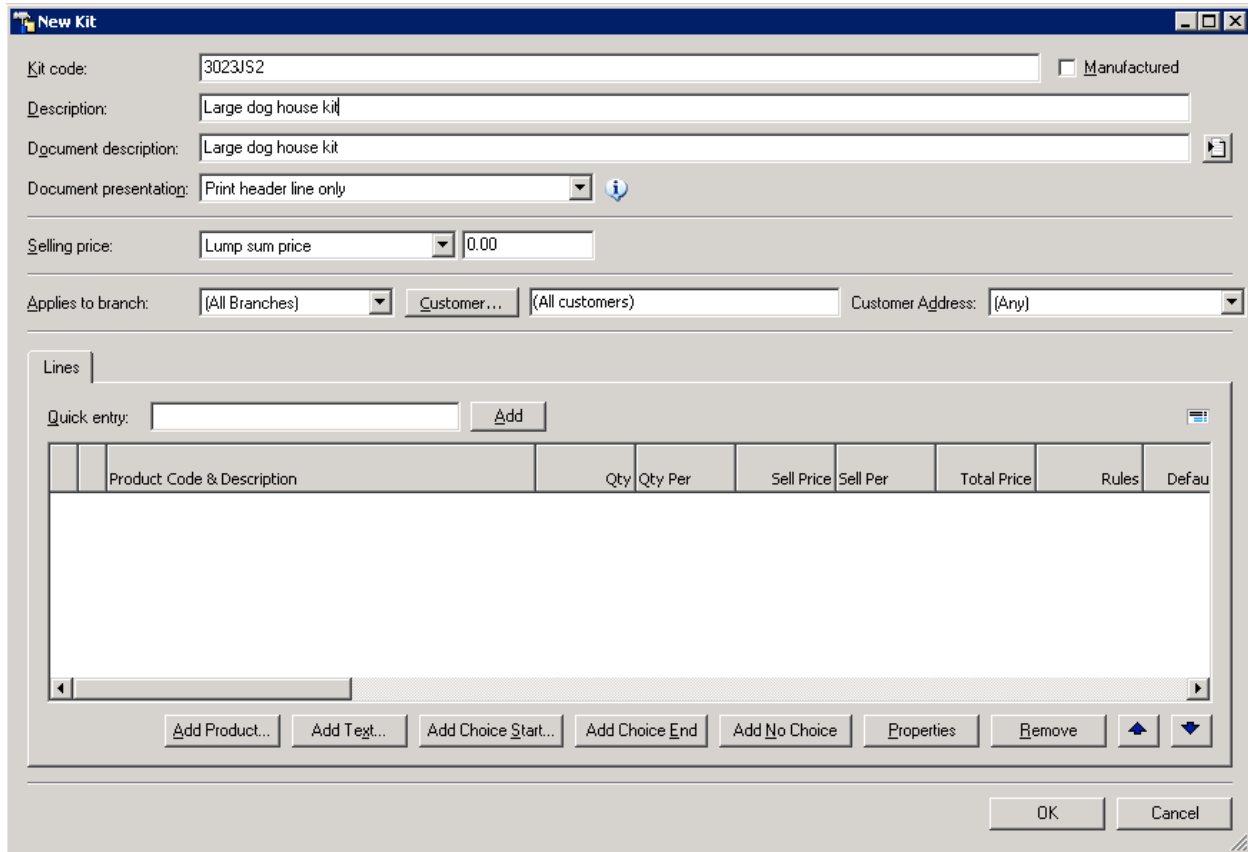
The screenshot shows the 'New Product' window with the following fields and options:

- Product type:** Generic
- Sub type:** Kit (highlighted with a red box)
- Kit Builder...** (button highlighted with a red box)
- Per Rules...** (button)
- Product code:** (text field)
- Description:** (text field)
- Short description:** (text field)
- Override desc:** No (optional on works orders)
- Product Group...** (text field)
- ☒ **Imperial dimensions**
- Thickness:** 0 in
- Width:** 0 in
- Length:** 0 in
- Weight:** 0.000 pounds per
- Def pcs / pack:** (text field)
- Env status:** (None)

A New Kit window opens.

In the New Kit window, enter the Kit's product Code and Description (or name). Change the Description you want to appear on documents if needed.

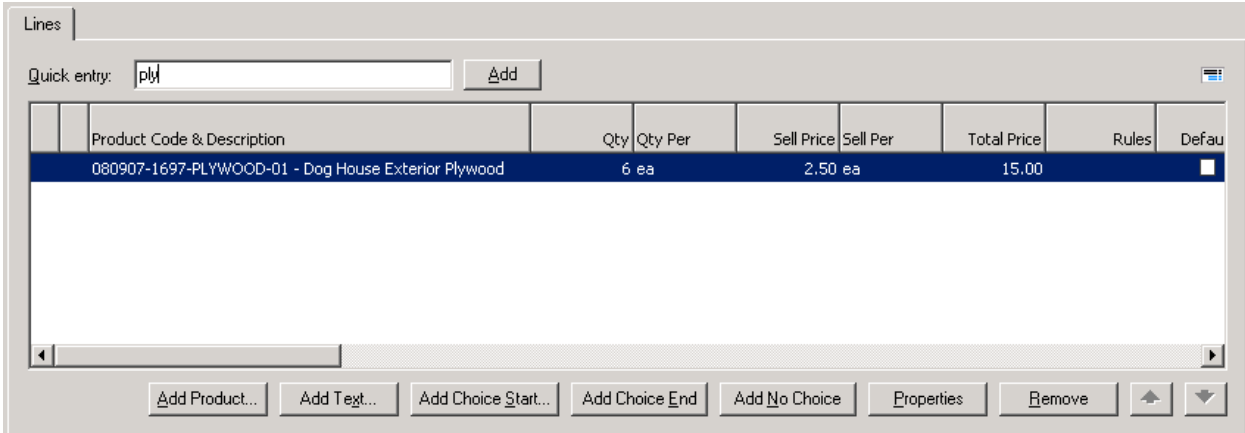
If you want to override the system option that controls how kits are displayed on reports, select the Document presentation option you want for this kit.



Select the Selling price method you want, either a Lump Sum amount that you also enter or the sum of the line prices.

If this kit will be a product only for certain branches, customers, or both, identify them. Otherwise, proceed to the Lines tab.

In the Lines tab, use the Quick Entry search field or Add Product button (which opens a Find Product window) to add items that should be part of this kit. See the following procedure for additional instructions if you want to include customer options in the kit items.)

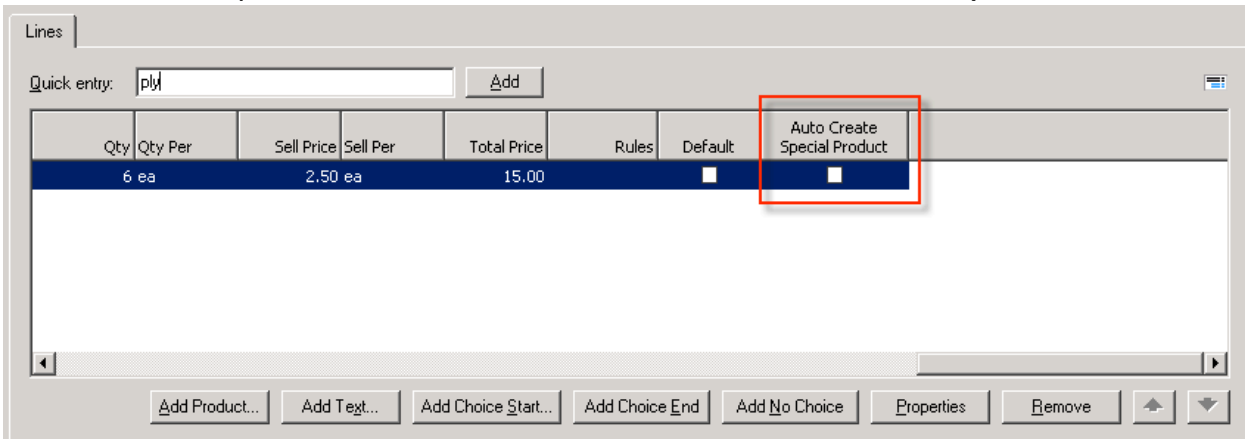


Lines

Quick entry:

Product Code & Description	Qty	Qty Per	Sell Price	Sell Per	Total Price	Rules	Defau
080907-1697-PLYWOOD-01 - Dog House Exterior Plywood	6	ea	2.50	ea	15.00		

Scroll right to review item information and select Auto Create Special as desired. (This selection will automatically create this item as a special order and create a PO when this kit is placed on a sales order and the order is released.)



Lines

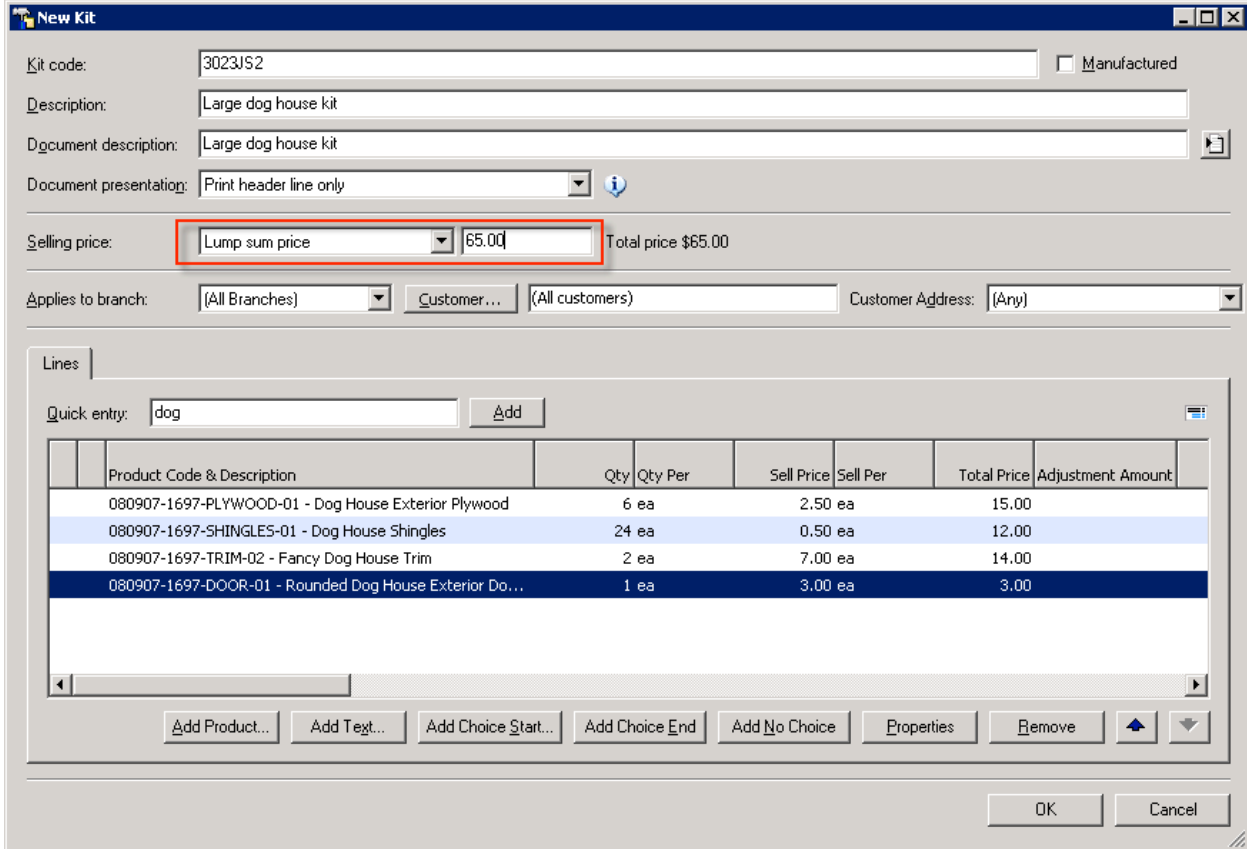
Quick entry:

Qty	Qty Per	Sell Price	Sell Per	Total Price	Rules	Default	Auto Create Special Product
6	ea	2.50	ea	15.00			<input checked="" type="checkbox"/>

If desired, rearrange the order of items in the kit (as they will appear on documents) by clicking the line and clicking the up or down arrows.

Add additional kit items as needed. (See the following procedure for identifying kit item choices.)

Review the Sell Price of the kit items to ensure that your kit price will provide the margin you want. (If you selected Lump Sum price before, you can click Use line price for a quick subtotal.) Adjust pricing as needed.



New Kit

Kit code: 3023JS2 ☐ Manufactured

Description: Large dog house kit

Document description: Large dog house kit

Document presentation: Print header line only

Selling price: Lump sum price 65.00 Total price \$65.00

Applies to branch: (All Branches) Customer: (All customers) Customer Address: (Any)

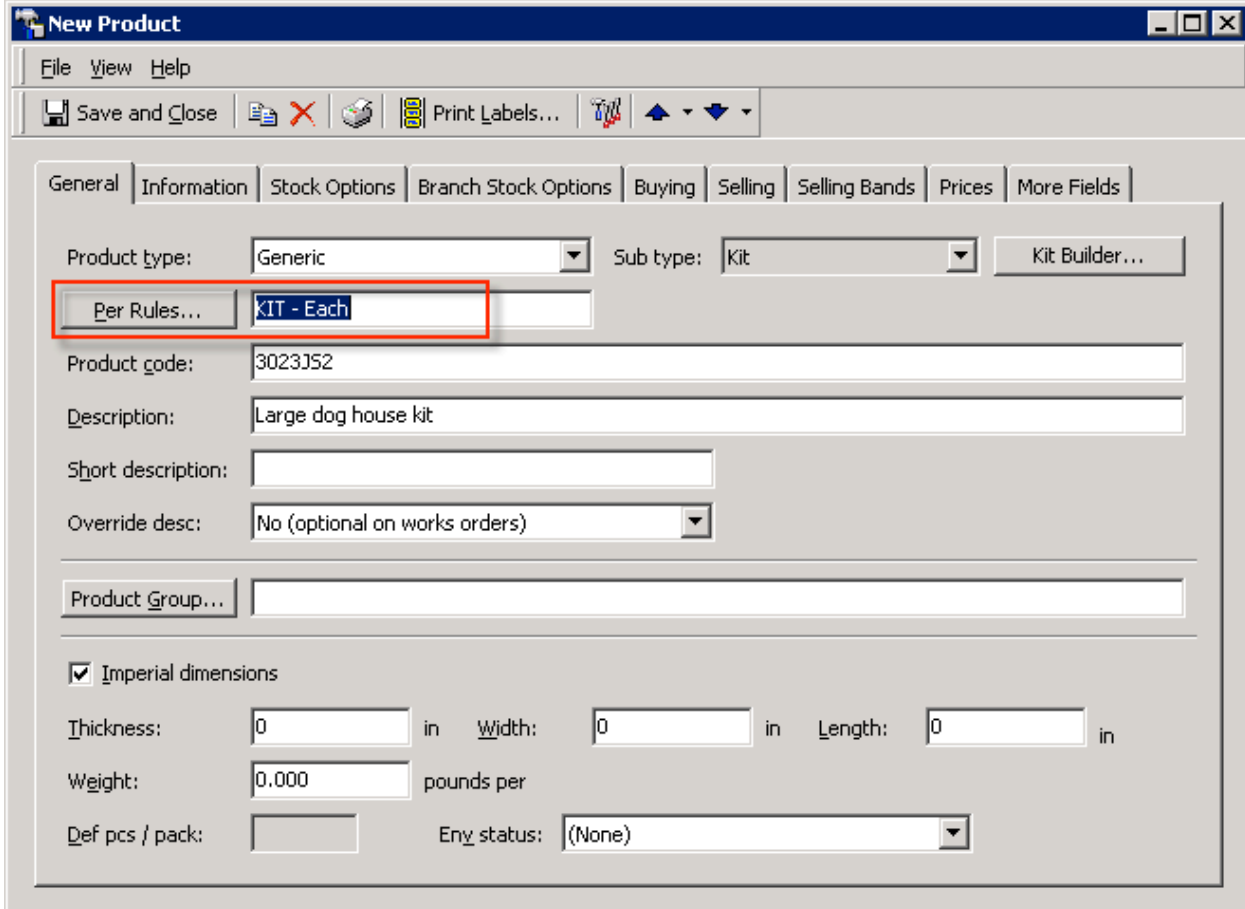
Lines

Quick entry: dog

Product Code & Description	Qty	Qty Per	Sell Price	Sell Per	Total Price	Adjustment Amount
080907-1697-PLYWOOD-01 - Dog House Exterior Plywood	6	ea	2.50	ea	15.00	
080907-1697-SHINGLES-01 - Dog House Shingles	24	ea	0.50	ea	12.00	
080907-1697-TRIM-02 - Fancy Dog House Trim	2	ea	7.00	ea	14.00	
080907-1697-DOOR-01 - Rounded Dog House Exterior Do...	1	ea	3.00	ea	3.00	

When you have added all items to the kit and priced it as desired, click OK to return to the New Product screen.

Select the kit Per rule that uses Each as the per for every option in the per rule.
(Most likely this will either be Each, or a special Kit Each you create that uses Each pers for all buying, selling, and stock options.)



New Product

File View Help

Save and Close Print Labels...

General Information Stock Options Branch Stock Options Buying Selling Selling Bands Prices More Fields

Product type: Generic Sub type: Kit Kit Builder...

Per Rules... KIT - Each

Product code: 3023352

Description: Large dog house kit

Short description:

Override desc: No (optional on works orders)

Product Group...

☒ Imperial dimensions

Thickness: 0 in Width: 0 in Length: 0 in

Weight: 0.000 pounds per

Def pcs / pack: Env status: (None)

Select other product characteristics and information on the various tabs as desired, including required information, which includes:

- General tab: Product Group
- Stock Options tab: Default Supplier is required. "Standard stock product" and "Keep stock figures" may NOT be selected.
- Buying tab: Buying Price Group, Tax group, Purchase analysis code
- Selling tab: Selling Price Group, Tax group, Sales analysis code

Click Save and Close.

Kits will appear in product listings with a blue hammer in the product icon to distinguish them from non-kit products.

Products

Look in: Branch: Location:

Find:

Drag a column header here to group by that column.

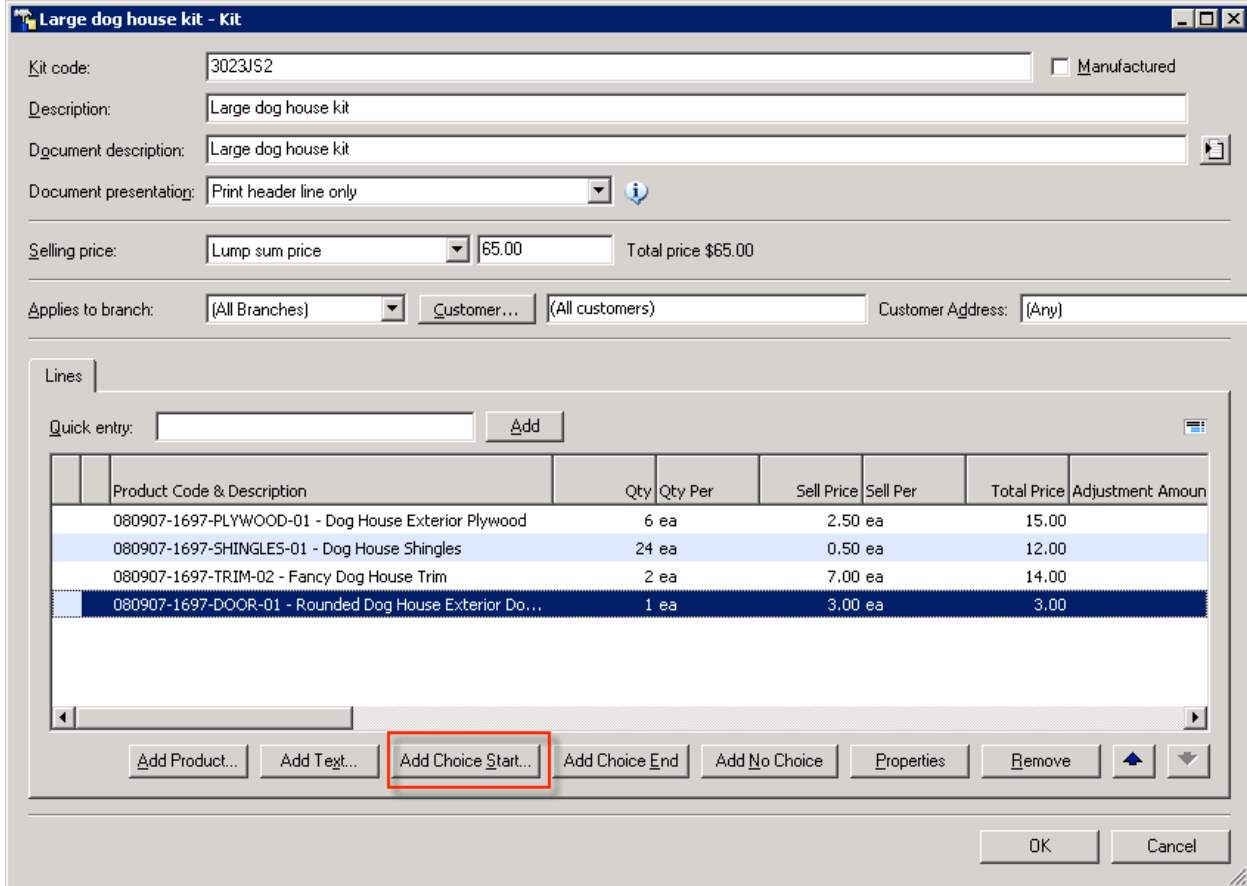
	Product Code	Description	Sell Price	Sell Per	Avg Cost w/Add	Avg Cost Per	Stock Per	Availa Stor
	080907-1697-TT	2x4x36 Tallied Dog House Tim...	600.00	MBF	300.00	MBF	bf	
	080907-1697-WINDOW-01	12x12 Dog House Window	20.00	ea	5.00	ea	ea	
	09HA05117	No 1 Square Mouth Shovel Bul...	15.37	ea	2.95	ea	ea	
	09HA05485	No:2 Square Mouth Shovel Bu...	13.10	ea	2.33	ea	ea	
	09HA05486	No:2 Square Mouth Shovel Bu...	15.37	ea	2.69	ea	ea	
	09HA05487	No:2 Square Mouth Shovel Bu...	19.45	ea	5.03	ea	ea	
	09HA05488	Square Trench Shovel Bulldog...	28.02	ea	7.61	ea	ea	
	09HA05489	Trench Fork Bulldog All Metal ...	35.42	ea	11.06	ea	ea	
	09HA05490	Newcastle Draining Tool Bulld...	33.90	ea	8.53	ea	ea	
	09HA05491	Grafting Tool Bulldog All Metal...	28.02	ea	5.94	ea	ea	
	09HA05492	Cable Laying Shovel Bulldog A...	28.02	ea	6.84	ea	ea	
	3023J51	Small Dog House Kit	50.00	ea			ea	
	3023J52	Large dog house kit	65.00	ea			ea	

Once a kit has been set up, you can access the Kit Builder to review or change kit information by right-clicking on the kit product in the list.

Identify Choices and Options for Kit Items

A kit may include all required items, all item options from which a choice must be made, or some of both.

Follow the above procedure to begin kit creation. Add any required items as desired. Then, with the Kit Builder open, click Add Choice Start....



Large dog house kit - Kit

Kit code: 3023JS2 ☐ Manufactured

Description: Large dog house kit

Document description: Large dog house kit

Document presentation: Print header line only

Selling price: Lump sum price 65.00 Total price \$65.00

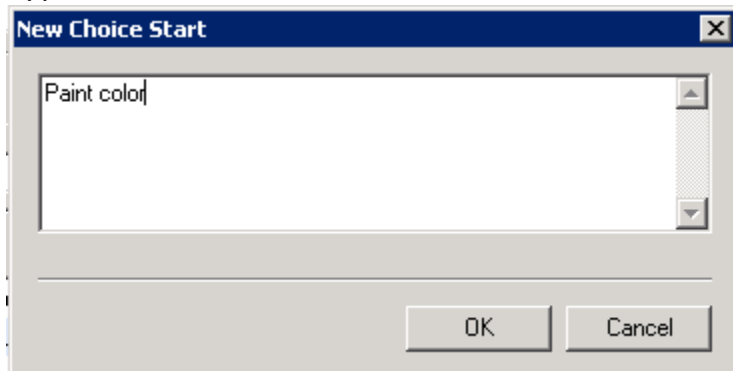
Applies to branch: (All Branches) Customer: (All customers) Customer Address: (Any)

Lines

Quick entry:

Product Code & Description	Qty	Qty Per	Sell Price	Sell Per	Total Price	Adjustment Amount
080907-1697-PLYWOOD-01 - Dog House Exterior Plywood	6	ea	2.50	ea	15.00	
080907-1697-SHINGLE5-01 - Dog House Shingles	24	ea	0.50	ea	12.00	
080907-1697-TRIM-02 - Fancy Dog House Trim	2	ea	7.00	ea	14.00	
080907-1697-DOOR-01 - Rounded Dog House Exterior Do...	1	ea	3.00	ea	3.00	

Type text that will describe the choices to follow.

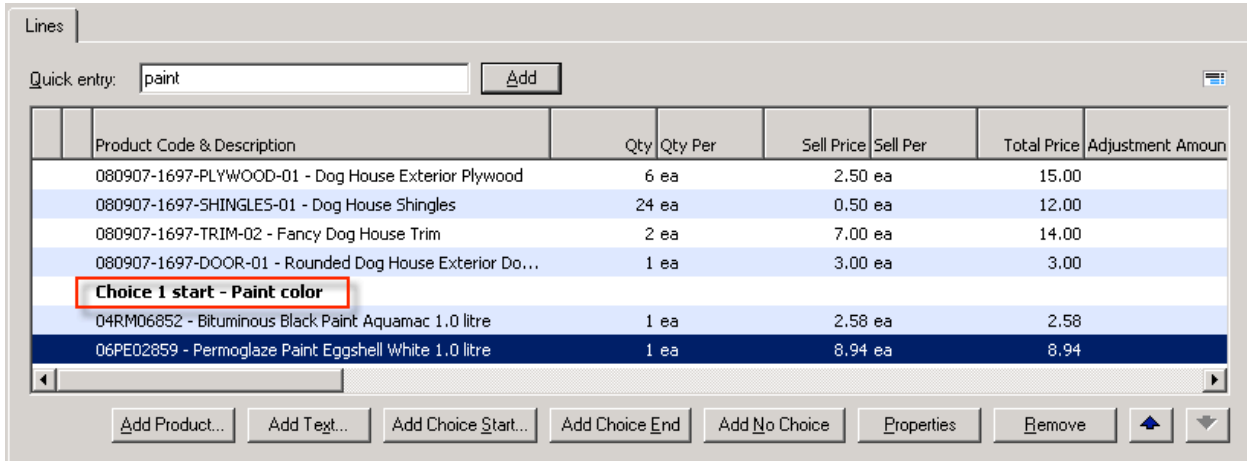


New Choice Start

Paint color

Click OK.

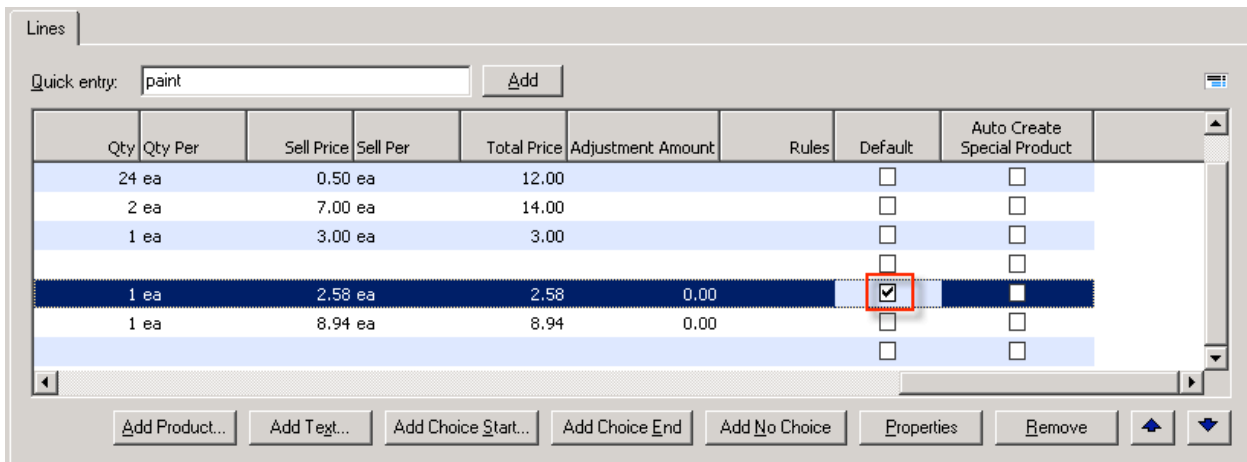
The Choice start line appears. Add all items from which the customer may choose for this item.



Product Code & Description	Qty	Qty Per	Sell Price	Sell Per	Total Price	Adjustment Amount
080907-1697-PLYWOOD-01 - Dog House Exterior Plywood	6	ea	2.50	ea	15.00	
080907-1697-SHINGLES-01 - Dog House Shingles	24	ea	0.50	ea	12.00	
080907-1697-TRIM-02 - Fancy Dog House Trim	2	ea	7.00	ea	14.00	
080907-1697-DOOR-01 - Rounded Dog House Exterior Do...	1	ea	3.00	ea	3.00	
Choice 1 start - Paint color						
04RM06852 - Bituminous Black Paint Aquamac 1.0 litre	1	ea	2.58	ea	2.58	
06PE02859 - Permoglaze Paint Eggshell White 1.0 litre	1	ea	8.94	ea	8.94	

Click Add Choice End.

After you have added the Choice end line, you can optionally scroll right and select which choice, if any, you wish to appear as the default choice on the sales order. (You will still be able to change the default when the kit is added to the order.)



Qty	Qty Per	Sell Price	Sell Per	Total Price	Adjustment Amount	Rules	Default	Auto Create Special Product
24	ea	0.50	ea	12.00			<input type="checkbox"/>	<input type="checkbox"/>
2	ea	7.00	ea	14.00			<input type="checkbox"/>	<input type="checkbox"/>
1	ea	3.00	ea	3.00			<input type="checkbox"/>	<input type="checkbox"/>
1	ea	2.58	ea	2.58	0.00		<input checked="" type="checkbox"/>	<input type="checkbox"/>
1	ea	8.94	ea	8.94	0.00		<input type="checkbox"/>	<input type="checkbox"/>

Add additional choice items as desired.

Note that when you have identified choice items and select “Use line prices,” bisTrack provides the range of prices, depending on the customer’s potential choices.

Selling price: Use line prices From \$46.58 to \$52.94

Applies to branch: (All Branches) Customer... (All customers) Customer Address: (Any)

Lines

Quick entry: paint Add

Product Code & Description	Qty	Qty Per	Sell Price	Sell Per	Total Price	Rules
080907-1697-PLYWOOD-01 - Dog House Exterior Plywood	6	ea	2.50	ea	15.00	
080907-1697-SHINGLES-01 - Dog House Shingles	24	ea	0.50	ea	12.00	
080907-1697-TRIM-02 - Fancy Dog House Trim	2	ea	7.00	ea	14.00	
080907-1697-DOOR-01 - Rounded Dog House Exterior Do...	1	ea	3.00	ea	3.00	
Choice 1 start - Paint color						
1. 04RM06852 - Bituminous Black Paint Aquamac 1.0 litre	1	ea	2.58	ea	2.58	
2. 06PE02859 - Permoglaze Paint Eggshell White 1.0 litre	1	ea	8.94	ea	8.94	

Add Product... Add Text... Add Choice Start... Add Choice End Add No Choice Properties Remove ▲ ▼

To make an entire choice group optional (that is, to sell the kit without any item in that choice category), select a line within the Choice and Add No Choice.

Type explanatory text as desired and enter any selling price adjustment that will apply to the kit price for the “No choice” option. Click OK.

Selling price: Lump sum price 65.00 From \$63.00 to \$65.00

Applies to branch: (All Branches) Customer... (All customers) Customer Address: (Any)

Lines

Quick entry: paint Add

Product Code & Description	Qty	Qty Per	Sell Price	Sell Per	Total Price	Adjustment Amount
080907-1697-TRIM-02 - Fancy Dog House Trim	2	ea	7.00	ea	14.00	
080907-1697-DOOR-01 - Rounded Dog House Exterior Do...	1	ea	3.00	ea	3.00	
Choice 1 start - Paint color						
1. 04RM06852 - Bituminous Black Paint Aquamac 1.0 litre	1	ea	2.58	ea	2.58	0.00
2. 06PE02859 - Permoglaze Paint Eggshell White 1.0 litre	1	ea	8.94	ea	8.94	0.00
3. No Choice - Unpainted						-2.00
Choice 1 end						

Add Product... Add Text... Add Choice Start... Add Choice End Add No Choice Properties Remove ▲ ▼

You can also add text lines with explanations or additional information. To do so, click Add Text.... Type the text you want and click OK.

If desired, rearrange the order of items within a choice group by clicking the line and clicking the up or down arrows. Note that any choices must always remain between Choice start and Choice end lines.

Add additional choices and choice items to the kit as desired. When you are done, click OK to return to the New Product screen and complete the kit product information as detailed in the previous procedure.

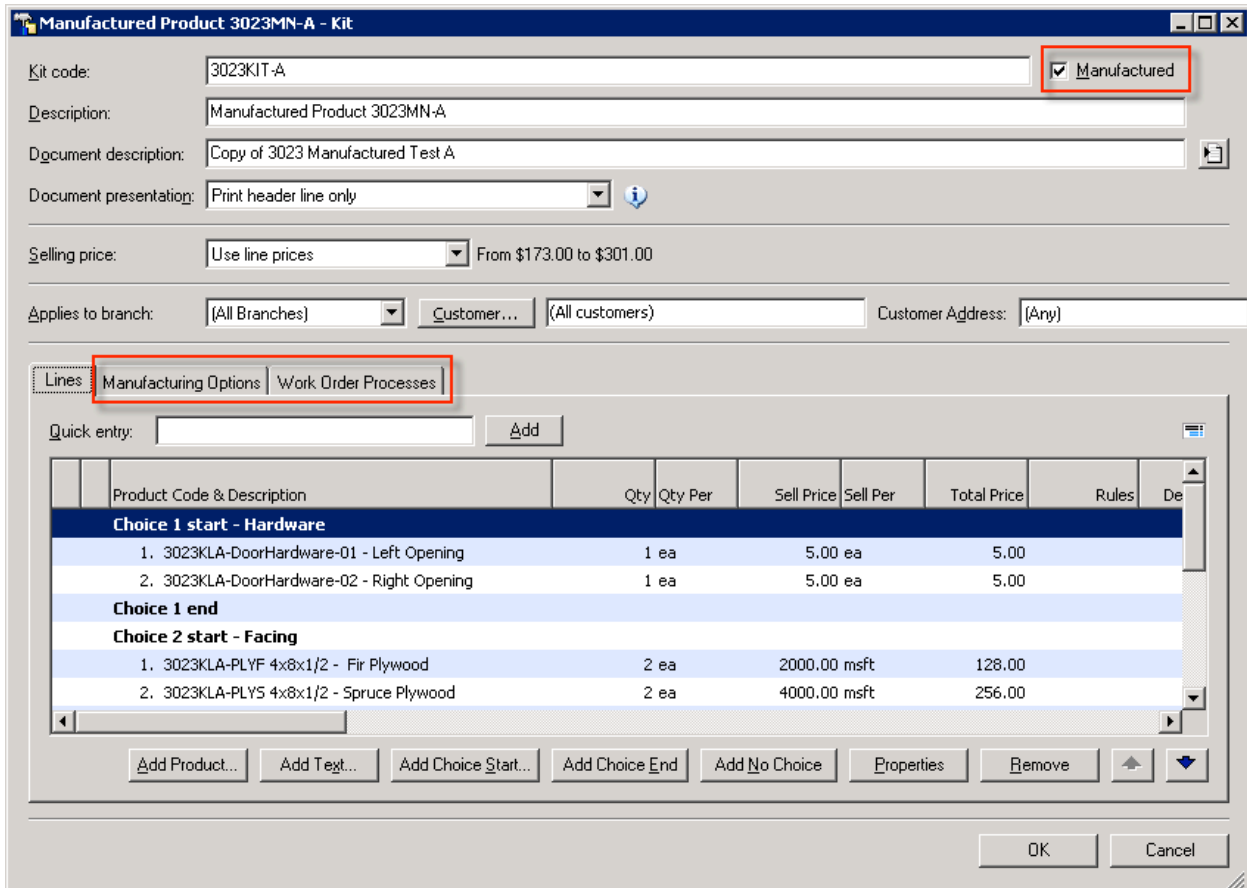
Note: If you create choices and later try to delete the Choice Start or Choice end line, all options within the choice will also be deleted.

Create a Manufactured Kit

Manufactured kits show on the sales order as a single line item (e.g., the name of the kit, which is likely going to be the finished good(s) resulting from the manufacturing process, such as ready-to-hang doors). Manufactured kits can include choices that are selected at the time the sales order is placed on the kit, but that do not display on the sales order itself.

Open the Kit Builder and begin creating a new kit as previously described, including the addition of items to the kit. Include items that will be the source materials for the processes you specify. Select **Manufactured Item**.

Two additional tabs appear alongside the **Lines** tab.



Manufactured Product 3023MN-A - Kit

Kit code: 3023KIT-A ☒ **Manufactured**

Description: Manufactured Product 3023MN-A

Document description: Copy of 3023 Manufactured Test A

Document presentation: Print header line only

Selling price: Use line prices From \$173.00 to \$301.00

Applies to branch: (All Branches) Customer: (All customers) Customer Address: (Any)

Lines **Manufacturing Options** Work Order Processes

Quick entry: Add

	Product Code & Description	Qty	Qty Per	Sell Price	Sell Per	Total Price	Rules	De
Choice 1 start - Hardware								
1.	3023KLA-DoorHardware-01 - Left Opening	1	ea	5.00	ea	5.00		
2.	3023KLA-DoorHardware-02 - Right Opening	1	ea	5.00	ea	5.00		
Choice 1 end								
Choice 2 start - Facing								
1.	3023KLA-PLYF 4x8x1/2 - Fir Plywood	2	ea	2000.00	msft	128.00		
2.	3023KLA-PLYS 4x8x1/2 - Spruce Plywood	2	ea	4000.00	msft	256.00		

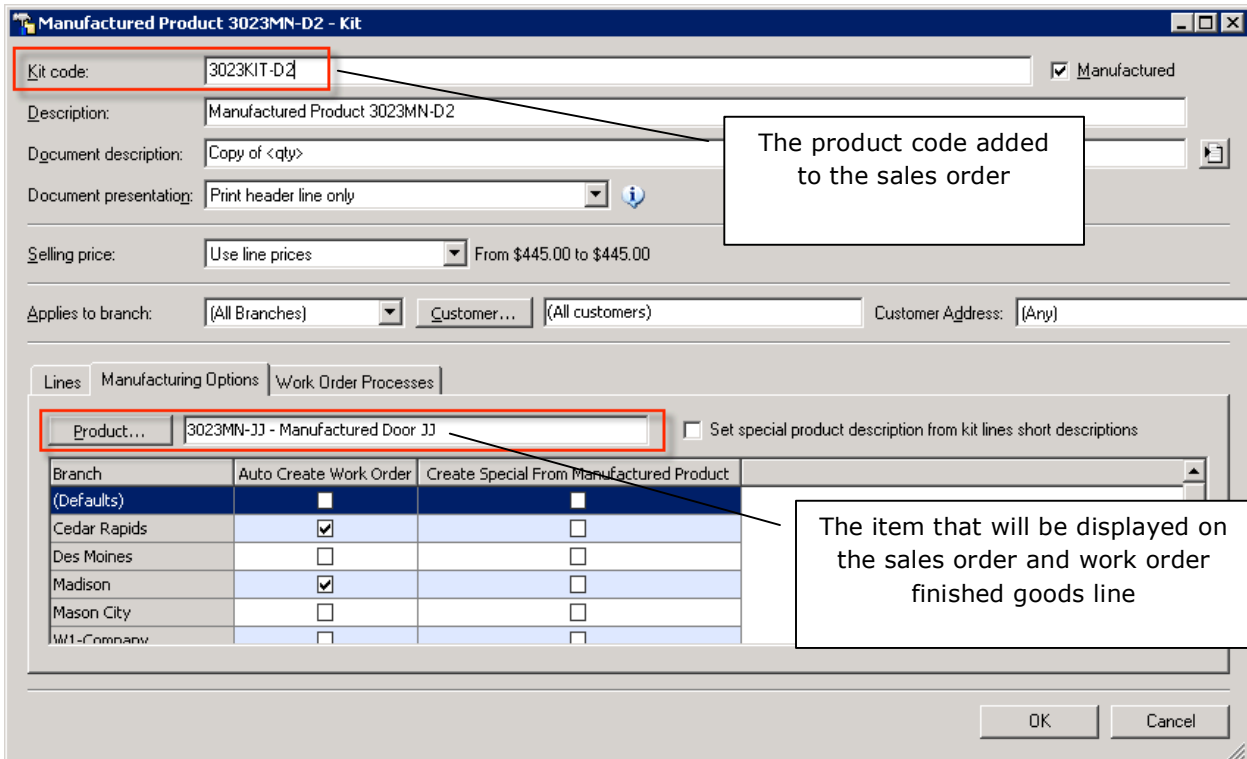
Add Product... Add Text... Add Choice Start... Add Choice End Add No Choice Properties Remove

OK Cancel

Click the **Manufacturing Options** tab.

First, identify the Product that will result from the manufacturing.

- If the manufactured kit involves no choices and/or the finished goods will be a standard stock item, click Product... and select the item that will result from the manufacturing. This is the product item number and description that will be displayed on the sales order line. (See screenshot below.)
- If the manufactured kit involves choices and/or the finished goods will be sold as a special order item, leave the Product field blank and proceed to the next step.



Manufactured Product 3023MN-D2 - Kit

Kit code: 3023KIT-D2 ☒ Manufactured

Description: Manufactured Product 3023MN-D2

Document description: Copy of <qty>

Document presentation: Print header line only

Selling price: Use line prices From \$445.00 to \$445.00

Applies to branch: (All Branches) Customer... (All customers) Customer Address: (Any)

Lines Manufacturing Options Work Order Processes

Product... 3023MN-JJ - Manufactured Door JJ ☐ Set special product description from kit lines short descriptions

Branch	Auto Create Work Order	Create Special From Manufactured Product
(Defaults)	<input type="checkbox"/>	<input type="checkbox"/>
Cedar Rapids	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Des Moines	<input type="checkbox"/>	<input type="checkbox"/>
Madison	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mason City	<input type="checkbox"/>	<input type="checkbox"/>
W1-Company	<input type="checkbox"/>	<input type="checkbox"/>

OK Cancel

Select whether (and/or where) the sale of this kit should automatically create a work order, with the manufactured kit (or kit item) as the finished goods line, using the added-value operations that you will specify in a moment. Such a work order will use the Product you selected (if any) as the finished goods line, or you may create a special order item as the finished goods line when putting the kit on an order.

When you select Auto Create Work Order (and specify AVOs per the steps described later), bisTrack will also automatically generate any necessary POs for the AVOs.

Lines Manufacturing Options Work Order Processes

Product... 3023MN-JJ - Manufactured Door JJ ☒ Set special product description from kit lines short descriptions

Branch	Auto Create Work Order	Create Special From Manufactured Product
(Defaults)	<input type="checkbox"/>	<input type="checkbox"/>
Cedar Rapids	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Des Moines	<input type="checkbox"/>	<input type="checkbox"/>
Madison	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mason City	<input type="checkbox"/>	<input type="checkbox"/>
WW1-Company	<input type="checkbox"/>	<input type="checkbox"/>

If you have selected Auto create work order, you can also select whether work order completion should also create a new special order item from the finished manufactured product:

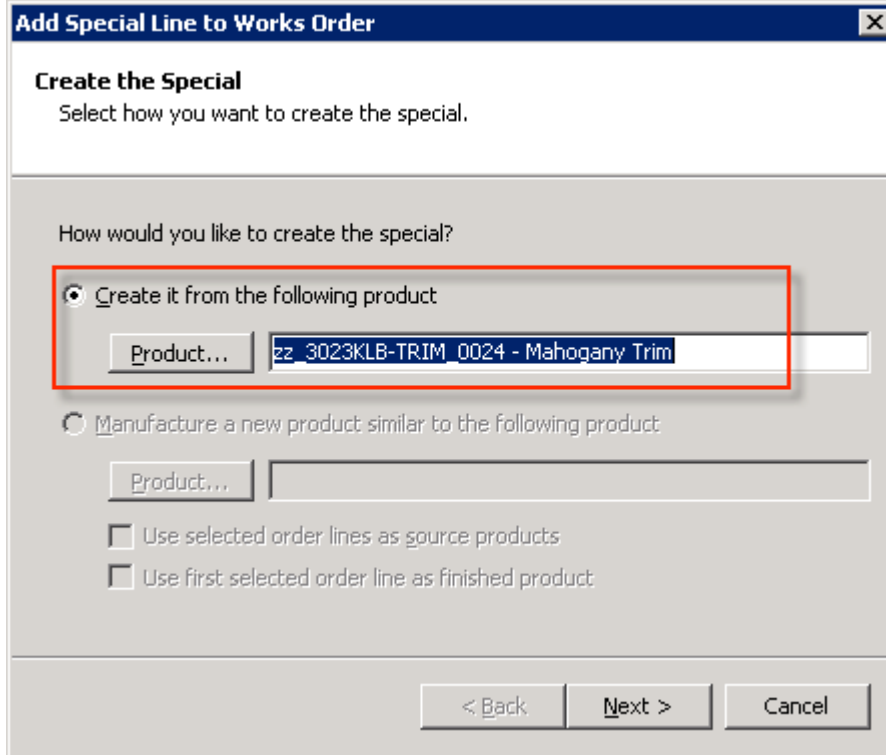
- If the manufactured kit involves choices between components that will become work order source items, or process choices such as finishing process options, and/or you want to sell the finished goods as a special order item, choose "Create Special From Manufactured Product" to create a unique special order item from the work order's finished goods.

Lines Manufacturing Options Work Order Processes

Product... ☐ Set special product description from kit lines short descriptions

Branch	Auto Create Work Order	Create Special From Manufactured Product
(Defaults)	<input type="checkbox"/>	<input type="checkbox"/>
Cedar Rapids	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Des Moines	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Madison	<input type="checkbox"/>	<input type="checkbox"/>
Mason City	<input type="checkbox"/>	<input type="checkbox"/>
WW1-Company	<input type="checkbox"/>	<input type="checkbox"/>

When “Create Special From Manufactured Product” is selected for a kit, and that kit is placed on an order, bisTrack will prompt you to create a special item that will result. You can confirm or override the default special item information as needed.



Add Special Line to Works Order

Create the Special
Select how you want to create the special.

How would you like to create the special?

☒ Create it from the following product

Product...

☐ Manufacture a new product similar to the following product

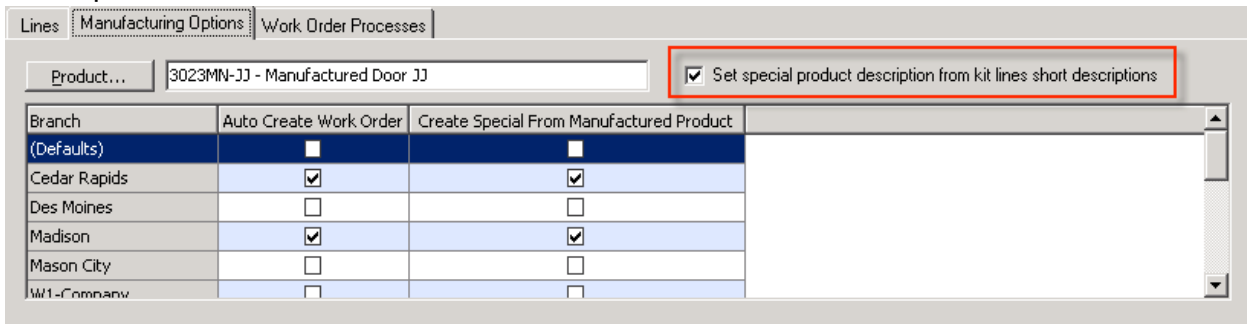
Product...

☐ Use selected order lines as source products

☐ Use first selected order line as finished product

< Back Next > Cancel

When “Create Special From Manufactured Product” is selected for a kit and you want to identify the special order item’s description using the short descriptions from the kit lines, click “Set special product description from kit lines short descriptions.”



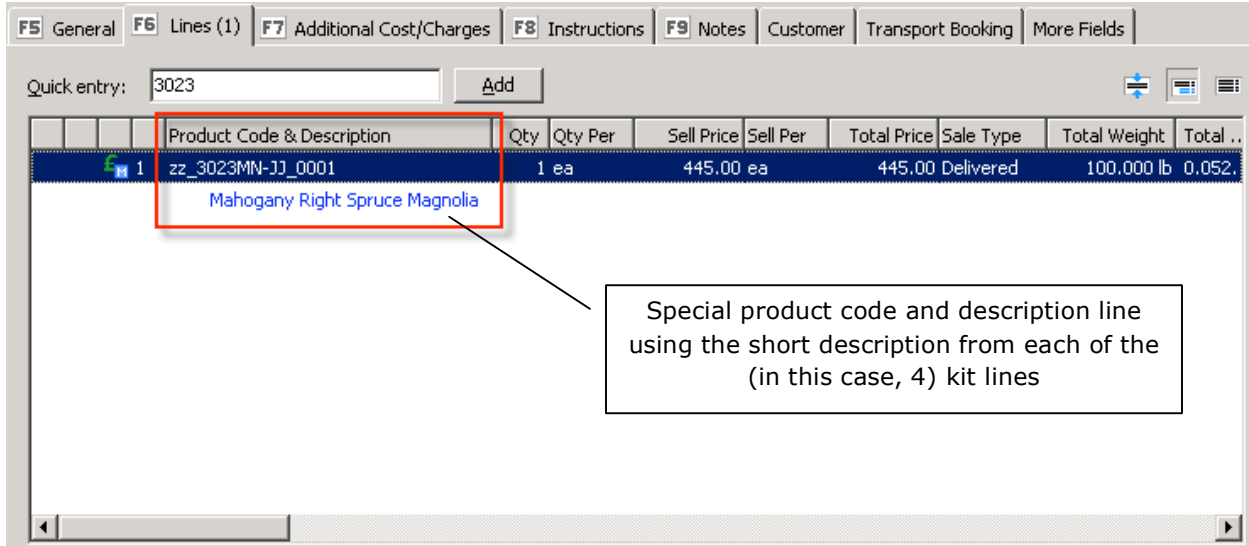
Lines Manufacturing Options Work Order Processes

Product...

☒ Set special product description from kit lines short descriptions

Branch	Auto Create Work Order	Create Special From Manufactured Product
(Defaults)	<input type="checkbox"/>	<input type="checkbox"/>
Cedar Rapids	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Des Moines	<input type="checkbox"/>	<input type="checkbox"/>
Madison	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mason City	<input type="checkbox"/>	<input type="checkbox"/>
WW1-Company	<input type="checkbox"/>	<input type="checkbox"/>

When the “Set special product description from kit lines short descriptions” option is selected and the kit is added to an order, bisTrack will use the short descriptions for each of the kit component lines (with a space between each) as the finished goods product description.

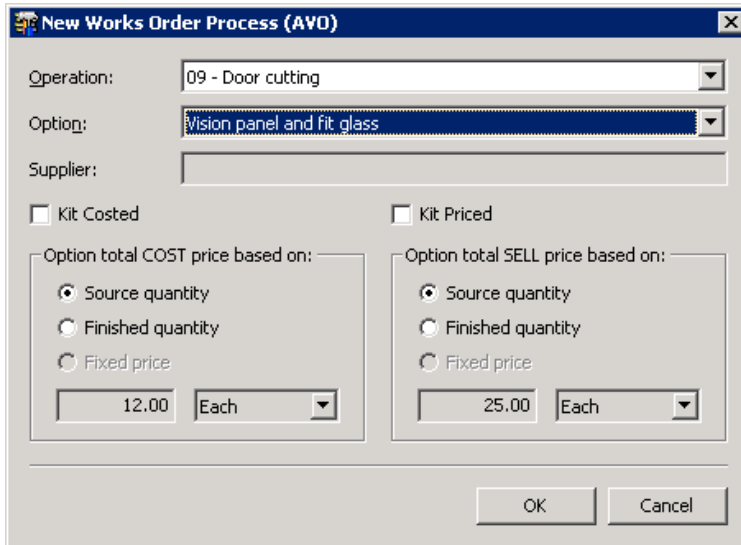


The screenshot shows the 'Lines (1)' tab in the bisTrack software. A table displays product information for line 1. A red box highlights the 'Product Code & Description' column, which contains the text 'zz_3023MN-J1_0001' and 'Mahogany Right Spruce Magnolia'. A callout box points to this text with the following text:

Special product code and description line using the short description from each of the (in this case, 4) kit lines

	Product Code & Description	Qty	Qty Per	Sell Price	Sell Per	Total Price	Sale Type	Total Weight	Total ..
1	zz_3023MN-J1_0001 Mahogany Right Spruce Magnolia	1	ea	445.00	ea	445.00	Delivered	100.000 lb	0.052.

When you're done with the Manufacturing Options tab, click the Work Order Processes tab and click Add. Select the work order Operation and Option you want.

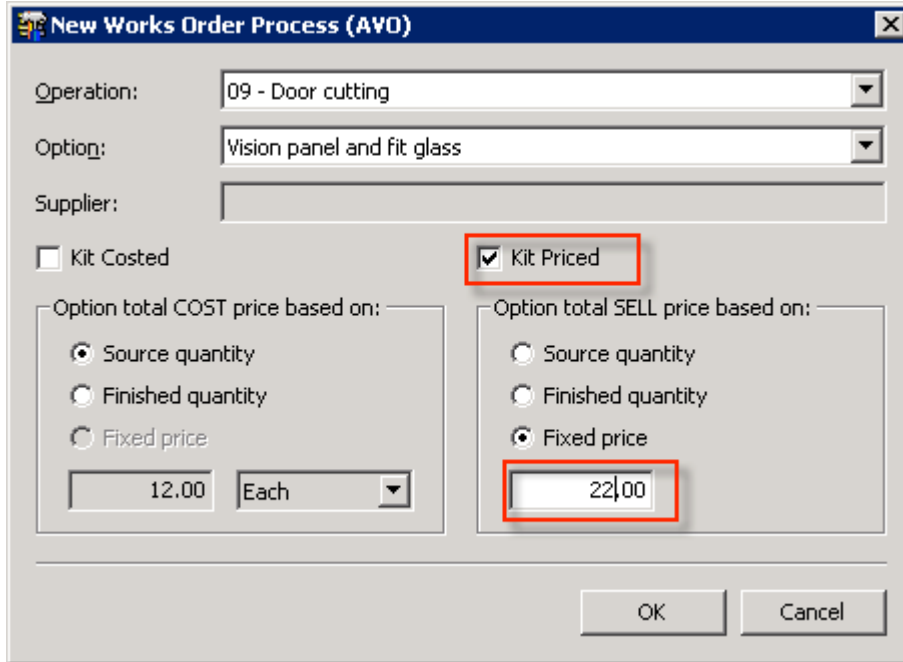


The screenshot shows the 'New Works Order Process (AVO)' dialog box. It contains the following fields and options:

- Operation:** 09 - Door cutting
- Option:** Vision panel and fit glass
- Supplier:** (empty field)
- ☐ Kit Costed
- ☐ Kit Priced
- Option total COST price based on:**
 - ☒ Source quantity
 - ☐ Finished quantity
 - ☐ Fixed price
- Option total SELL price based on:**
 - ☒ Source quantity
 - ☐ Finished quantity
 - ☐ Fixed price
- Price/Quantity fields: 12.00 Each (for cost) and 25.00 Each (for sell)
- Buttons:** OK, Cancel

Default costs and prices display based on the established properties of the selected added value operation. Change the price and cost basis to finished quantities as desired. Or, to specify a special cost or price for this operation for the kit, click Kit Costed or Kit Priced.

The price field will become available for editing. Change the price base and amount as desired.



The dialog box titled "New Works Order Process (AVO)" contains the following fields and options:

- Operation:** 09 - Door cutting
- Option:** Vision panel and fit glass
- Supplier:** (empty field)
- Kit Costed:** ☐ (unchecked)
- Kit Priced:** ☒ (checked, highlighted with a red box)
- Option total COST price based on:**
 - ☒ Source quantity
 - ☐ Finished quantity
 - ☐ Fixed price
 - Value: 12.00
 - Unit: Each
- Option total SELL price based on:**
 - ☐ Source quantity
 - ☐ Finished quantity
 - ☒ Fixed price
 - Value: 22.00 (highlighted with a red box)
- Buttons:** OK, Cancel

When you're done confirming or adjusting process information, click OK. The process will appear in the list. Add additional processes as needed for this kit.

Lines

Manufacturing Options

Work Order Processes

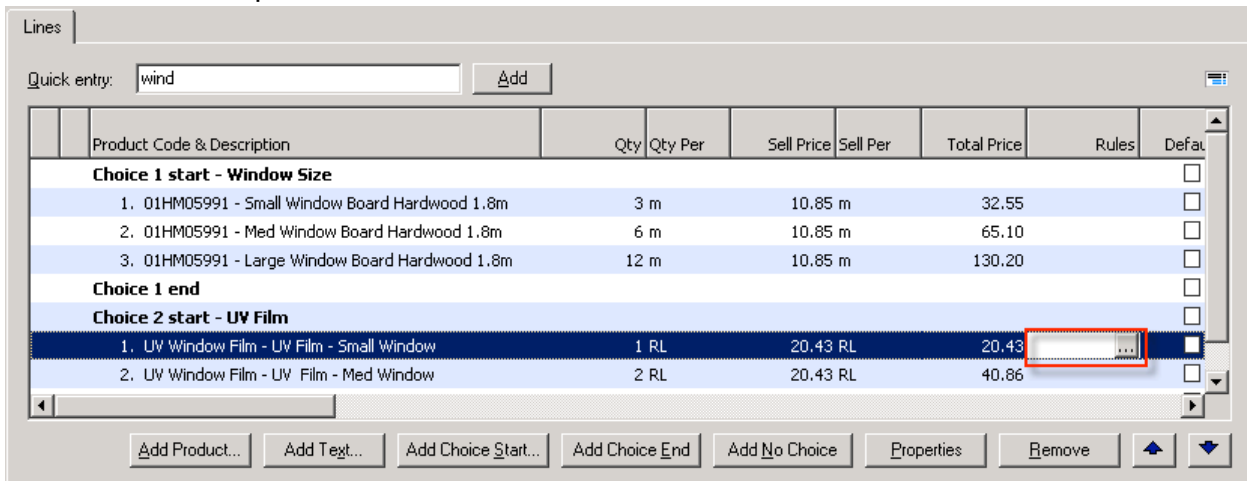
AVO Option	Supplier	Total Cost Price Based On	Kit Costed	Cost Price	Cost Per	Total Sell Price Based On	Kit Priced	Sell Price	Sell Per
09 - Door cutting - Visio...		Source Quantity	<input checked="" type="checkbox"/>	10.00	Each	Source Quantity	<input checked="" type="checkbox"/>	20.00	Each
04 - Hand finishing - Ap...	Bedford Ti...	Finished Quantity	<input checked="" type="checkbox"/>	5.00	Each	Finished Quantity	<input checked="" type="checkbox"/>	10.00	Each

Create Rules for Item Selection

When you set up a kit and the customer options that are part of that kit, you can specify rules for those options so that the selection of one option eliminates other options. Rules can speed order entry and help prevent the selection of mutually exclusive choices. For example, if you have window components set up as a kit, the customer's size selection may eliminate some or all choices related to a glazing option, an opening option, or a grills option.

Create or open a kit in the Kit Builder and identify the items and options in the Lines tab, including all choice start and choice end lines. Make sure you have all the items options you want in a choice, in the order you want them, before creating rules.

Select the line for which you want to create a rule. To make the rule apply to every choice in the line, select the Choice start line. Rules may be created at both the Choice and the option level.

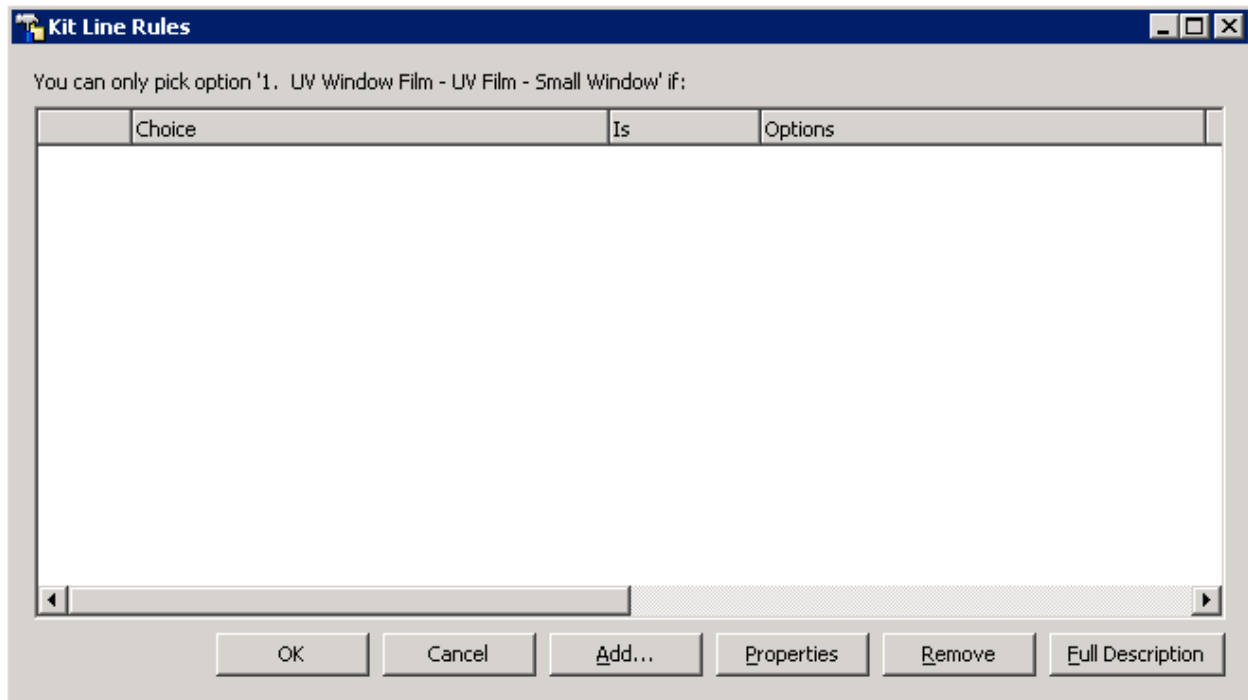


The screenshot shows the 'Lines' tab in the bisTrack Kits software. At the top, there is a 'Quick entry' field with the text 'wind' and an 'Add' button. Below this is a table with the following columns: Product Code & Description, Qty, Qty Per, Sell Price, Sell Per, Total Price, Rules, and Default. The table contains several rows, including 'Choice 1 start - Window Size' and 'Choice 2 start - UV Film'. The 'Choice 2 start - UV Film' line is highlighted in blue, and a red box is drawn around the 'Rules' column for this line, which contains a small icon with three dots. At the bottom of the window, there are several buttons: 'Add Product...', 'Add Text...', 'Add Choice Start...', 'Add Choice End', 'Add No Choice', 'Properties', 'Remove', and two arrow buttons.

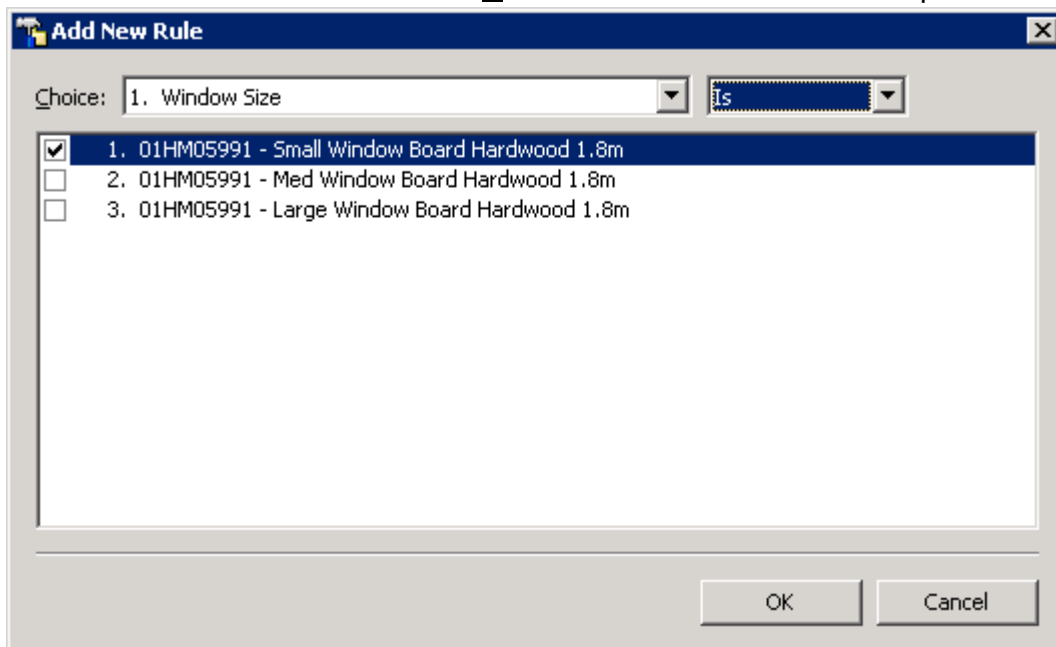
Product Code & Description	Qty	Qty Per	Sell Price	Sell Per	Total Price	Rules	Default
Choice 1 start - Window Size							<input type="checkbox"/>
1. 01HM05991 - Small Window Board Hardwood 1.8m	3	m	10.85	m	32.55		<input type="checkbox"/>
2. 01HM05991 - Med Window Board Hardwood 1.8m	6	m	10.85	m	65.10		<input type="checkbox"/>
3. 01HM05991 - Large Window Board Hardwood 1.8m	12	m	10.85	m	130.20		<input type="checkbox"/>
Choice 1 end							<input type="checkbox"/>
Choice 2 start - UV Film							<input type="checkbox"/>
1. UV Window Film - UV Film - Small Window	1	RL	20.43	RL	20.43		<input checked="" type="checkbox"/>
2. UV Window Film - UV Film - Med Window	2	RL	20.43	RL	40.86		<input type="checkbox"/>

Click the line in the Rules column, then click .

The Kit Line Rules window opens.



Click Add.... Select the other kit Choice that this choice will depend on.



Select whether this rule will apply when the selected Choice Is or Is Not the one you will specify in the rule. Click to select one or more customer options that this choice depends on.

Click OK.

Add more dependencies for this line as needed. The relationship between the rules on a line can be 'AND' or 'OR'. For example, the rules on Choice 3 could be set up so that "Choice 1 is X" AND "Choice 2 is Y." Or they could be "Choice 1 is X" OR "Choice 2 is Y." The use of is/is not allows you to set up nearly any combination, but you cannot currently have one rule that uses both AND *and* OR.

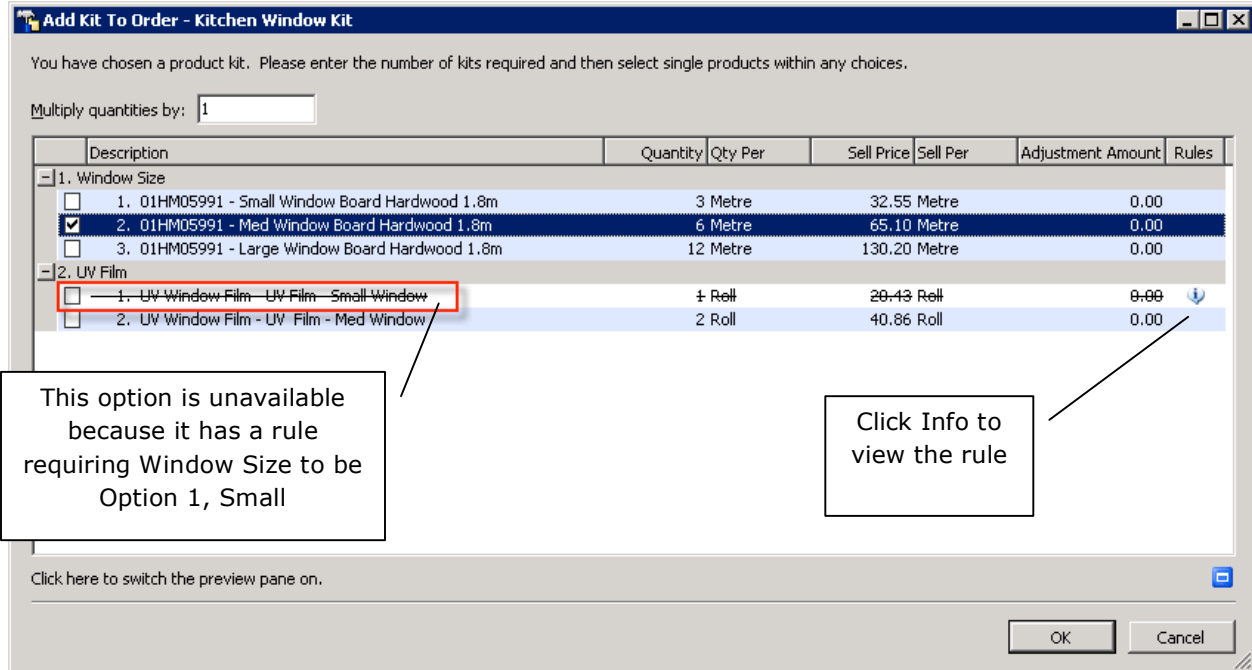
Click OK. The rule is noted on the line.

Lines

Quick entry:

	Product Code & Description	Qty	Qty Per	Sell Price	Sell Per	Total Price	Rules	Defau
Choice 1 start - Window Size								
1.	01HM05991 - Small Window Board Hardwood 1.8m	3	m	10.85	m	32.55		<input type="checkbox"/>
2.	01HM05991 - Med Window Board Hardwood 1.8m	6	m	10.85	m	65.10		<input type="checkbox"/>
3.	01HM05991 - Large Window Board Hardwood 1.8m	12	m	10.85	m	130.20		<input type="checkbox"/>
Choice 1 end								
Choice 2 start - UV Film								
1.	UV Window Film - UV Film - Small Window	1	RL	20.43	RL	20.43	1 rule	<input checked="" type="checkbox"/>
2.	UV Window Film - UV Film - Med Window	2	RL	20.43	RL	40.86		<input type="checkbox"/>

When the kit is placed on a sales order, any options that require specific choices not yet been made, or that have been ruled out by previous choices, still appear, but with strikethrough text. Strikethrough options may only be selected if the choice upon which they depend is changed (or made).



Add Kit To Order - Kitchen Window Kit

You have chosen a product kit. Please enter the number of kits required and then select single products within any choices.

Multiply quantities by:

Description	Quantity	Qty Per	Sell Price	Sell Per	Adjustment Amount	Rules
1. Window Size						
<input type="checkbox"/> 1. 01HM05991 - Small Window Board Hardwood 1.8m	3	Metre	32.55	Metre	0.00	
<input checked="" type="checkbox"/> 2. 01HM05991 - Med Window Board Hardwood 1.8m	6	Metre	65.10	Metre	0.00	
<input type="checkbox"/> 3. 01HM05991 - Large Window Board Hardwood 1.8m	12	Metre	130.20	Metre	0.00	
2. UV Film						
<input type="checkbox"/> 1. UV Window Film - UV Film - Small Window	4	Roll	20.43	Roll	0.00	
<input type="checkbox"/> 2. UV Window Film - UV Film - Med Window	2	Roll	40.86	Roll	0.00	

Click here to switch the preview pane on.

OK Cancel

Note that if you create rules for a kit line, or the line is referenced in rules for other items, and later try to delete the kit line, bisTrack will give you a warning. If you proceed to delete the item anyway, the item and all referenced rules will be deleted.

Additionally, moving a kit line up or down in the item list or adding new choices to a kit it may invalidate any rules set up for that line. You can, however, add additional choices above or below choices (or options) with rules.

Finally, copying a kit will copy rules as well, but since the lines on the copy may be changed or get new line ID numbers, the rules on the copy will need to be reviewed and possibly reset.

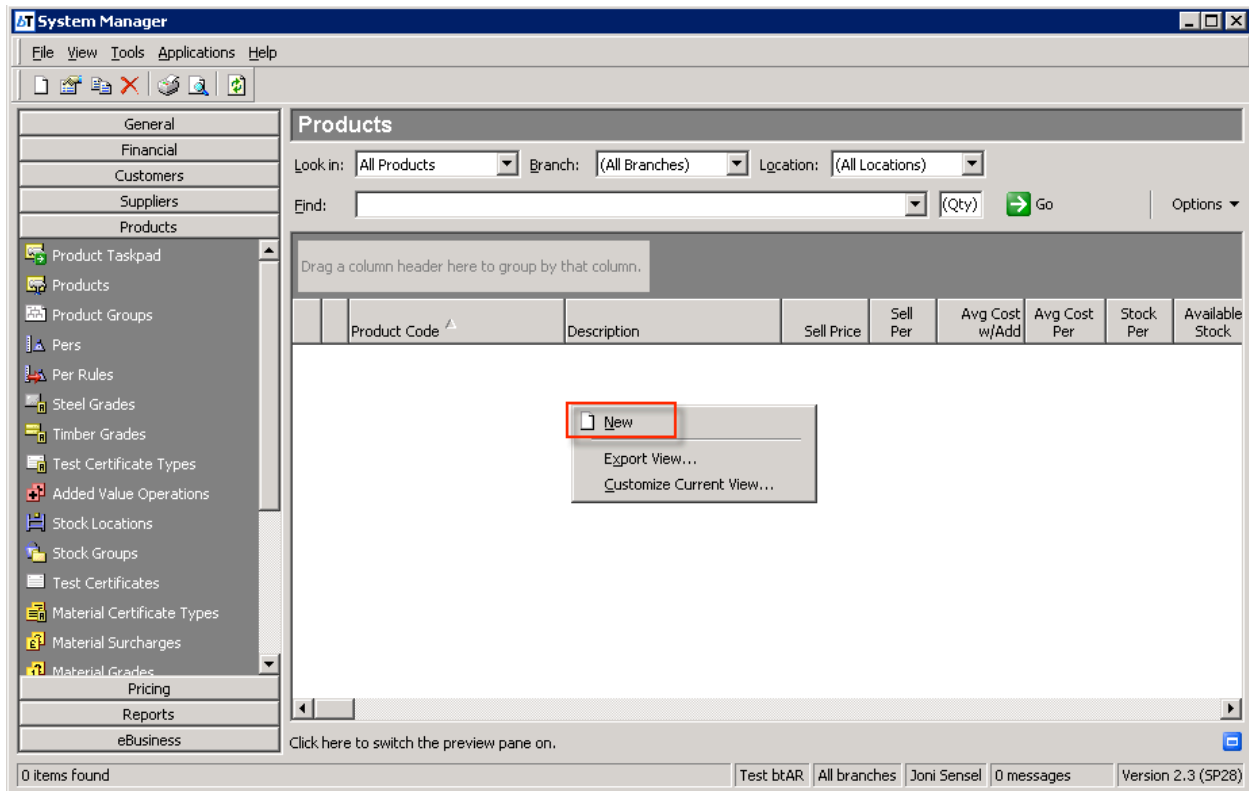
Use Dummy SKUs and Rules to Streamline Kit Order Entry

When you have a large number of potential kit components and want to streamline order entry for those kits, you can create “dummy product” or “choice” SKUs for categorical choices. For instance, you could create one Interior Single Door Kit that might have dozens of potential style, component, and hardware combinations. (The advantage to this approach is that you only have set up one kit, not dozens.) If you then create dummy SKUs for basic choices such as left-swing or right-swing doors, the answers to such questions can be used to narrow down subsequent choices for actual products, so choice selections become more fool-proof.

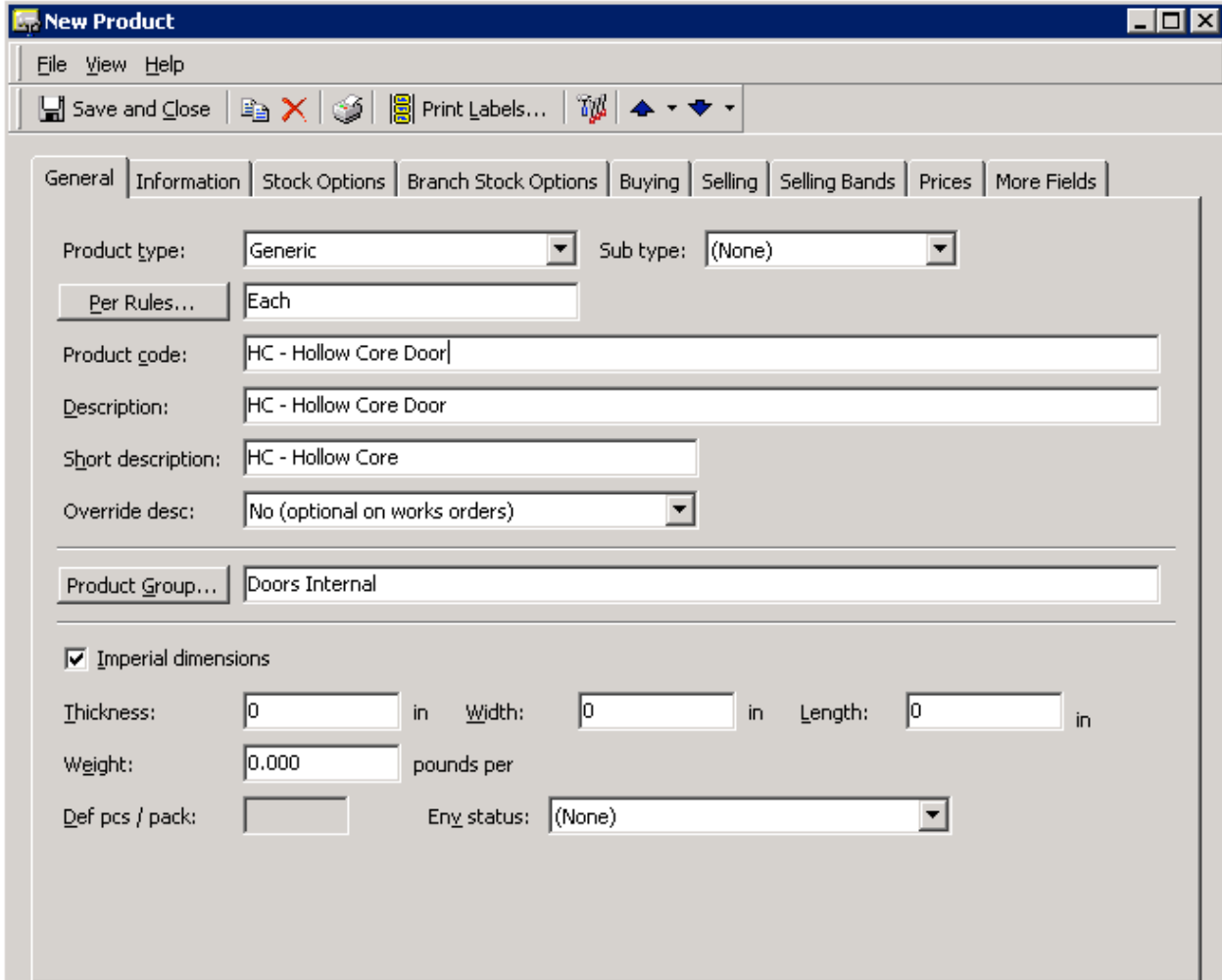
For door kits specifically, useful dummy SKUs can include the following, since the answers to these questions greatly impact other item and accessory options:

- Door style.
- Core type.
- Clear or finger-jointed trim and jambs.
- Right-hand swing or left-hand swing.

To create a dummy SKU for kit use, go to System Manager → Products → Products. Right-click and click New.



Leave the Product type on the default, Generic, and enter basic information for identifying this choice.



New Product

File View Help

Save and Close Cancel Print Labels...

General Information Stock Options Branch Stock Options Buying Selling Selling Bands Prices More Fields

Product type: Generic Sub type: (None)

Per Rules... Each

Product code: HC - Hollow Core Door

Description: HC - Hollow Core Door

Short description: HC - Hollow Core

Override desc: No (optional on works orders)

Product Group... Doors Internal

☒ Imperial dimensions

Thickness: 0 in Width: 0 in Length: 0 in

Weight: 0.000 pounds per

Def pcs / pack: Env status: (None)

Click the Stock Options tab.

The screenshot shows the 'New Product' window with the 'Stock Options' tab selected. The 'Default Supplier...' field is set to 'Boise Buiding Materials Distribution'. Below this, there are input fields for 'Quantity per Inner' (0), 'Box50', 'Outer' (0), 'Box50', 'Pallet' (0), and 'Box50'. There are also input fields for 'Bar code for Inner', 'Outer', and 'Pallet'. A red box highlights the following checkboxes:

- ☐ Standard stock product
- ☐ Must be picked
- ☐ Vendor Managed Inventory
- ☐ Keep stock figures
- ☐ QA inspection required
- ☐ Min/Max levels by length
- ☐ Stock control by length
- ☐ Own brand product
- ☐ Stocked by cost

Select a default supplier (who you select is irrelevant; an entry is simply required in this field). Make sure that no checkboxes are selected.

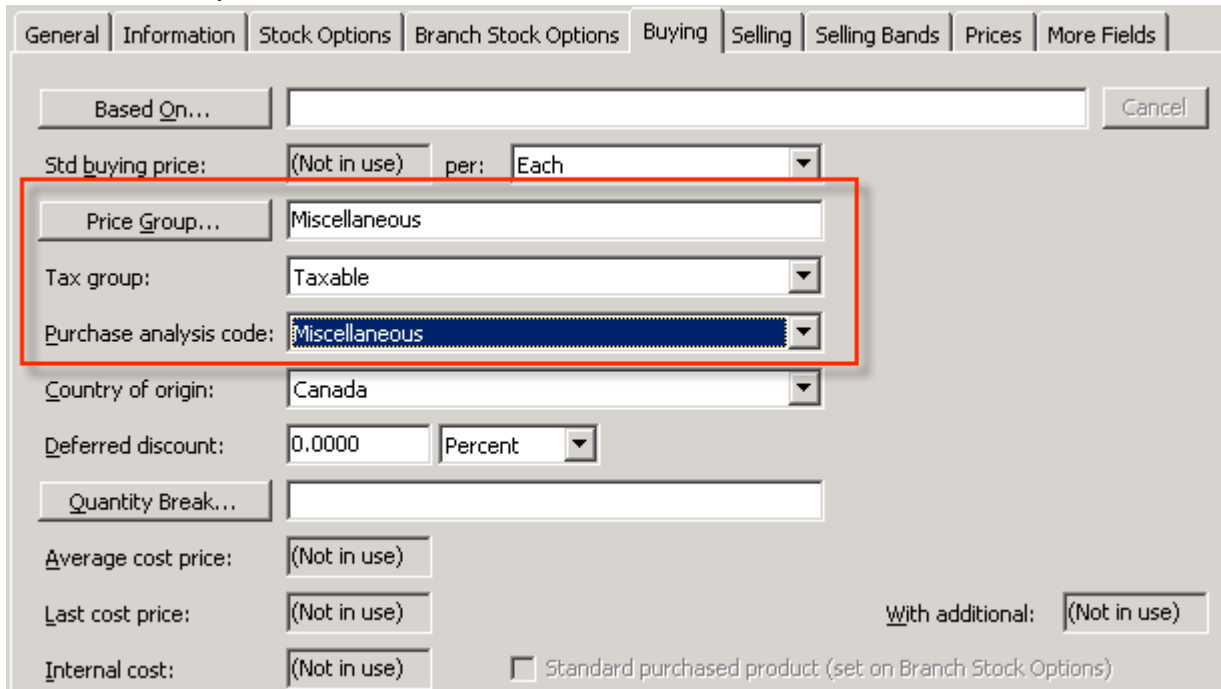
Click the Branch Stock Options tab. For How Sourced, select "Purchase, Transfer, Manufacture" in all cases.

The screenshot shows the 'New Product' window with the 'Branch Stock Options' tab selected. The table below shows the 'How Sourced' column highlighted with a red box.

Branch	Stocked	Auto PO	Stock Class	How Sourced	Purc Trans
(Defaults)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	U - Unranked	Purchase, Transfer, Manufacture	
Cedar Rapids	<input checked="" type="checkbox"/>	<input type="checkbox"/>	U - Unranked	Purchase, Transfer, Manufacture	
Des Moines	<input checked="" type="checkbox"/>	<input type="checkbox"/>	U - Unranked	Purchase, Transfer, Manufacture	
GL Test Branch	<input checked="" type="checkbox"/>	<input type="checkbox"/>	U - Unranked	Purchase, Transfer	
Madison	<input checked="" type="checkbox"/>	<input type="checkbox"/>	U - Unranked	Purchase, Transfer	
Mason City	<input checked="" type="checkbox"/>	<input type="checkbox"/>	U - Unranked	Purchase, Transfer	
TB Mills-M1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	U - Unranked	Purchase, Transfer	
TB Mills-M2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	U - Unranked	Purchase, Transfer	
TempTestBranch	<input checked="" type="checkbox"/>	<input type="checkbox"/>	U - Unranked	Purchase, Transfer	

At the bottom of the window, there is a checkbox labeled 'Show full stock turn, age and GMROI'.

Click the Buying tab and complete the required fields: Price Group, Tax Group, and Purchase Analysis Code.



General | Information | Stock Options | Branch Stock Options | **Buying** | Selling | Selling Bands | Prices | More Fields

Based On... Cancel

Std buying price: (Not in use) per: Each

Price Group... Miscellaneous

Tax group: Taxable

Purchase analysis code: Miscellaneous

Country of origin: Canada

Deferred discount: 0.0000 Percent

Quantity Break...

Average cost price: (Not in use)

Last cost price: (Not in use)

Internal cost: (Not in use)

With additional: (Not in use)

☐ Standard purchased product (set on Branch Stock Options)

Click the Selling tab and complete the required fields: Price Group, Tax Group, and Sales Analysis Code. Then make sure that all Options are set to No.

General | Information | Stock Options | Branch Stock Options | Buying | **Selling** | Selling Bands | Prices | More Fields

Based On... 0 products are based on me

Std selling price: (Not in use) per: Each

Price Group... Miscellaneous

Tax group: Taxable

Sales analysis code: General Sales

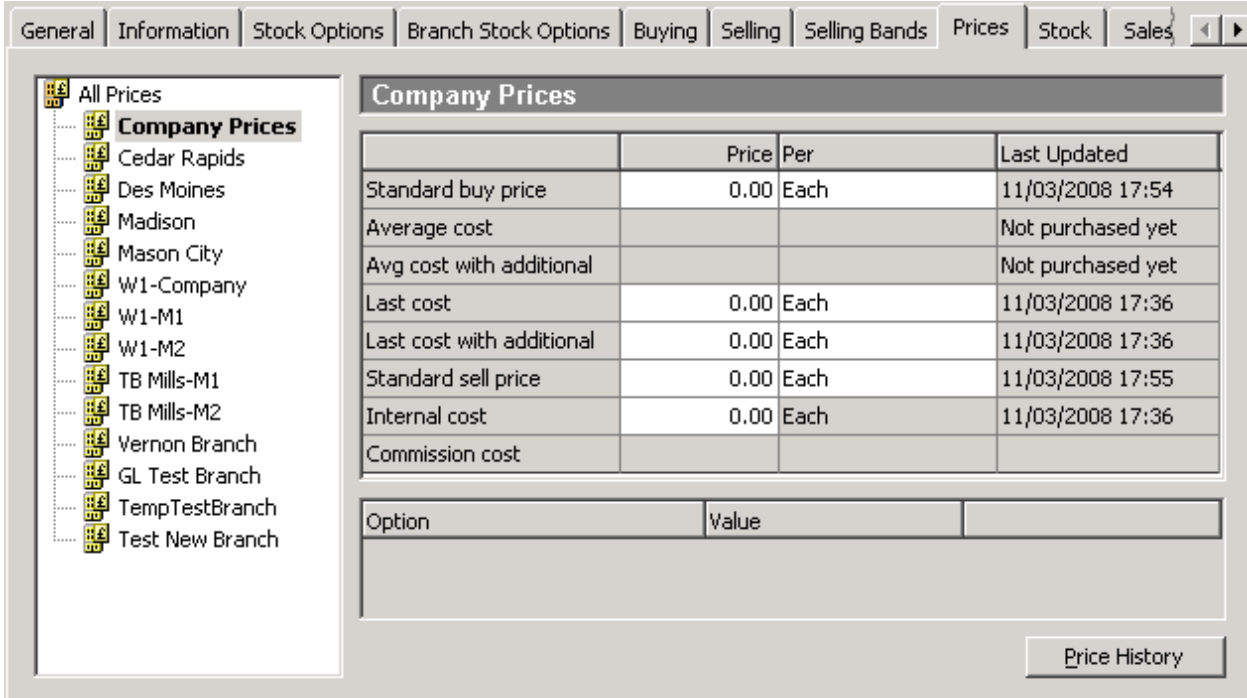
Quantity Break...

Margin low collected: 0 Low delivered: 0 Low direct: 0 High: 0

Points per \$1 spent: Collect sales: Delivered sales: Direct sales:

Option	Value
Allow settlement discount	No
Apply delivery charges/costs	No
Prompt for quantity on orders	No
Allow price negotiation	No
Allow cost override on orders	No
Allow specials based on this product	No

Click the Prices tab and confirm that all price information, including Standard buy price and Standard sell price, is 0.00.



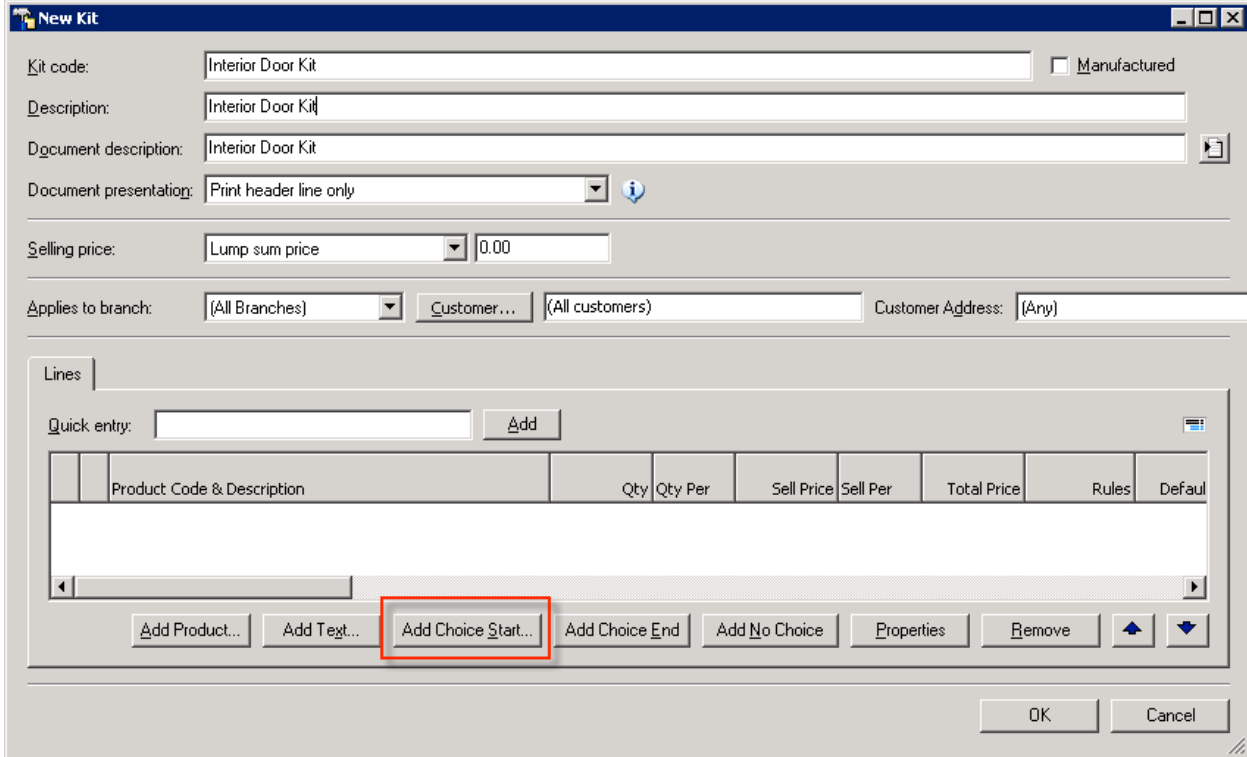
The screenshot shows the 'Prices' tab selected in the top navigation bar. The sidebar on the left lists various locations under 'All Prices', with 'Company Prices' highlighted. The main area displays a table of price information for the selected location.

Company Prices			
	Price	Per	Last Updated
Standard buy price	0.00	Each	11/03/2008 17:54
Average cost			Not purchased yet
Avg cost with additional			Not purchased yet
Last cost	0.00	Each	11/03/2008 17:36
Last cost with additional	0.00	Each	11/03/2008 17:36
Standard sell price	0.00	Each	11/03/2008 17:55
Internal cost	0.00	Each	11/03/2008 17:36
Commission cost			

Below the table is a section with two columns: 'Option' and 'Value'. A 'Price History' button is located at the bottom right of the main area.

Click Save and Close. The dummy or choice SKU will appear in the product list.

Once you have created two or more dummy SKUs representing the choices that might influence kit options, open the kit builder and begin to create a new kit as usual (or open the Kit Builder for an existing kit to edit it).

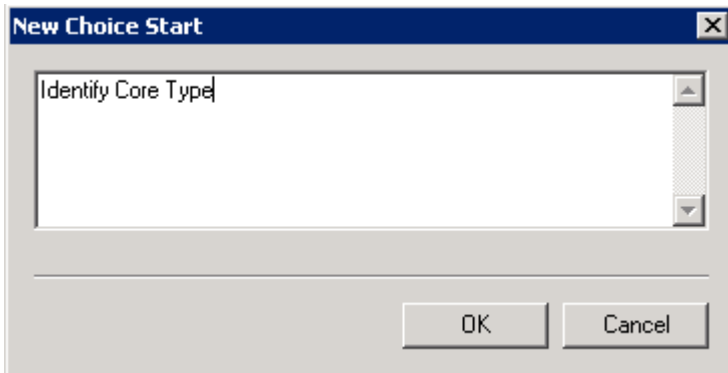


The "New Kit" dialog box is shown with the following fields and controls:

- Kit code:** Interior Door Kit
- Description:** Interior Door Kit
- Document description:** Interior Door Kit
- Document presentation:** Print header line only
- Selling price:** Lump sum price, 0.00
- Applies to branch:** (All Branches)
- Customer:** (All customers)
- Customer Address:** (Any)
- Lines tab:**
 - Quick entry:** [Text Field] [Add]
 - Table:**

	Product Code & Description	Qty	Qty Per	Sell Price	Sell Per	Total Price	Rules	Default
[Empty Row]								
 - Buttons:** Add Product..., Add Text..., **Add Choice Start...** (highlighted with a red box), Add Choice End, Add No Choice, Properties, Remove, [Up Arrow], [Down Arrow]
- Bottom Buttons:** OK, Cancel

On the Lines tab, click Add Choice Start...

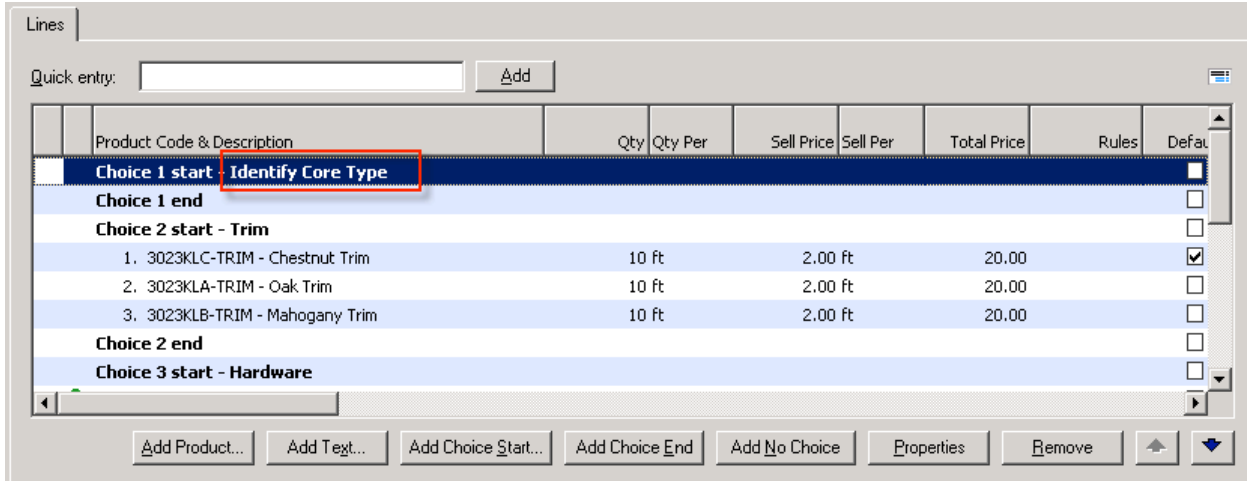


The "New Choice Start" dialog box is shown with the following fields and controls:

- Text Field:** Identify Core Type
- Buttons:** OK, Cancel

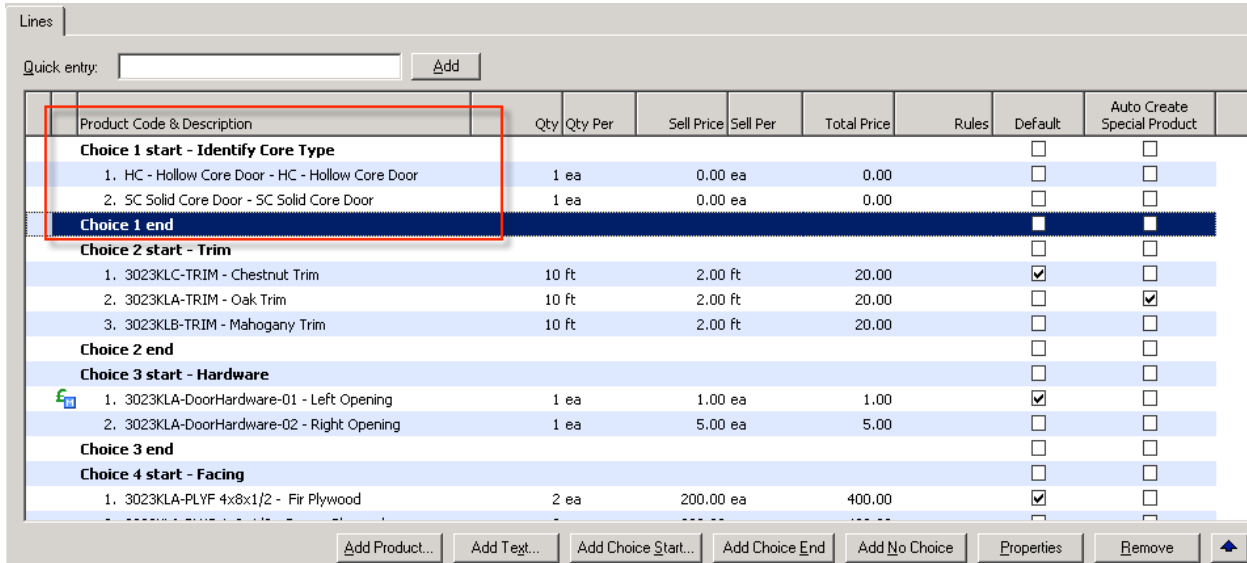
Enter a name for the choice related to the dummy SKU. Note: To eliminate confusion, use consistent terminology such as "Identify" or "Choose" for dummy SKU choices, and terminology such as "Select" or "Decide on" for actual product SKU selections. Click OK.

The choice header line appears.



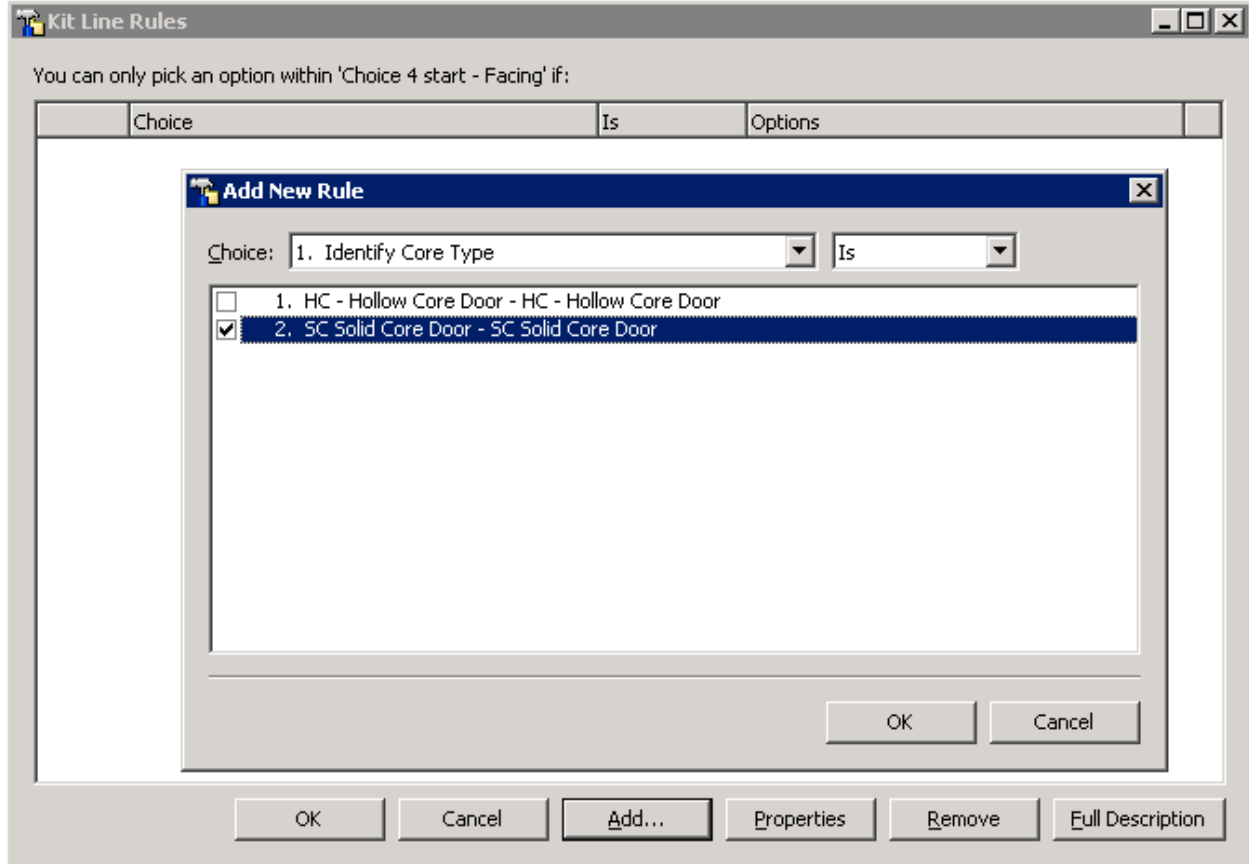
Product Code & Description	Qty	Qty Per	Sell Price	Sell Per	Total Price	Rules	Default
Choice 1 start - Identify Core Type							<input type="checkbox"/>
Choice 1 end							<input type="checkbox"/>
Choice 2 start - Trim							<input type="checkbox"/>
1. 3023KLC-TRIM - Chestnut Trim	10 ft		2.00 ft		20.00		<input checked="" type="checkbox"/>
2. 3023KLA-TRIM - Oak Trim	10 ft		2.00 ft		20.00		<input type="checkbox"/>
3. 3023KLB-TRIM - Mahogany Trim	10 ft		2.00 ft		20.00		<input type="checkbox"/>
Choice 2 end							<input type="checkbox"/>
Choice 3 start - Hardware							<input type="checkbox"/>

Click Add Product..., select the dummy SKU, and click OK. Repeat for additional dummy SKUs related to this choice. Be sure to also click Add Choice End.



Product Code & Description	Qty	Qty Per	Sell Price	Sell Per	Total Price	Rules	Default	Auto Create Special Product
Choice 1 start - Identify Core Type							<input type="checkbox"/>	<input type="checkbox"/>
1. HC - Hollow Core Door - HC - Hollow Core Door	1 ea		0.00 ea		0.00		<input type="checkbox"/>	<input type="checkbox"/>
2. SC Solid Core Door - SC Solid Core Door	1 ea		0.00 ea		0.00		<input type="checkbox"/>	<input type="checkbox"/>
Choice 1 end							<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Choice 2 start - Trim							<input type="checkbox"/>	<input type="checkbox"/>
1. 3023KLC-TRIM - Chestnut Trim	10 ft		2.00 ft		20.00		<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. 3023KLA-TRIM - Oak Trim	10 ft		2.00 ft		20.00		<input type="checkbox"/>	<input checked="" type="checkbox"/>
3. 3023KLB-TRIM - Mahogany Trim	10 ft		2.00 ft		20.00		<input type="checkbox"/>	<input type="checkbox"/>
Choice 2 end							<input type="checkbox"/>	<input type="checkbox"/>
Choice 3 start - Hardware							<input type="checkbox"/>	<input type="checkbox"/>
1. 3023KLA-DoorHardware-01 - Left Opening	1 ea		1.00 ea		1.00		<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. 3023KLA-DoorHardware-02 - Right Opening	1 ea		5.00 ea		5.00		<input type="checkbox"/>	<input type="checkbox"/>
Choice 3 end							<input type="checkbox"/>	<input type="checkbox"/>
Choice 4 start - Facing							<input type="checkbox"/>	<input type="checkbox"/>
1. 3023KLA-PLYF 4x8x1/2 - Fir Plywood	2 ea		200.00 ea		400.00		<input checked="" type="checkbox"/>	<input type="checkbox"/>

You can now create rules for subsequent choices based on which of the dummy SKUs is picked during order entry, so that choices that do not correctly apply are unavailable during order entry. Follow the previous procedure for creating rules.



The image shows a screenshot of the 'Kit Line Rules' dialog box. At the top, it says 'You can only pick an option within 'Choice 4 start - Facing' if:'. Below this is a table with columns 'Choice', 'Is', and 'Options'. An 'Add New Rule' sub-dialog is open, showing a list of rules. The first rule is '1. HC - Hollow Core Door - HC - Hollow Core Door' with an unchecked checkbox. The second rule is '2. SC Solid Core Door - SC Solid Core Door' with a checked checkbox. The 'Add New Rule' dialog has 'OK' and 'Cancel' buttons. The main 'Kit Line Rules' dialog has 'OK', 'Cancel', 'Add...', 'Properties', 'Remove', and 'Full Description' buttons.

Choice	Is	Options
<div><div>Add New Rule</div><div>Choice: 1. Identify Core Type Is</div><div><input type="checkbox"/> 1. HC - Hollow Core Door - HC - Hollow Core Door</div><div><input checked="" type="checkbox"/> 2. SC Solid Core Door - SC Solid Core Door</div></div> <div><div>OK</div><div>Cancel</div></div>		

OK

Cancel

Add...

Properties

Remove

Full Description

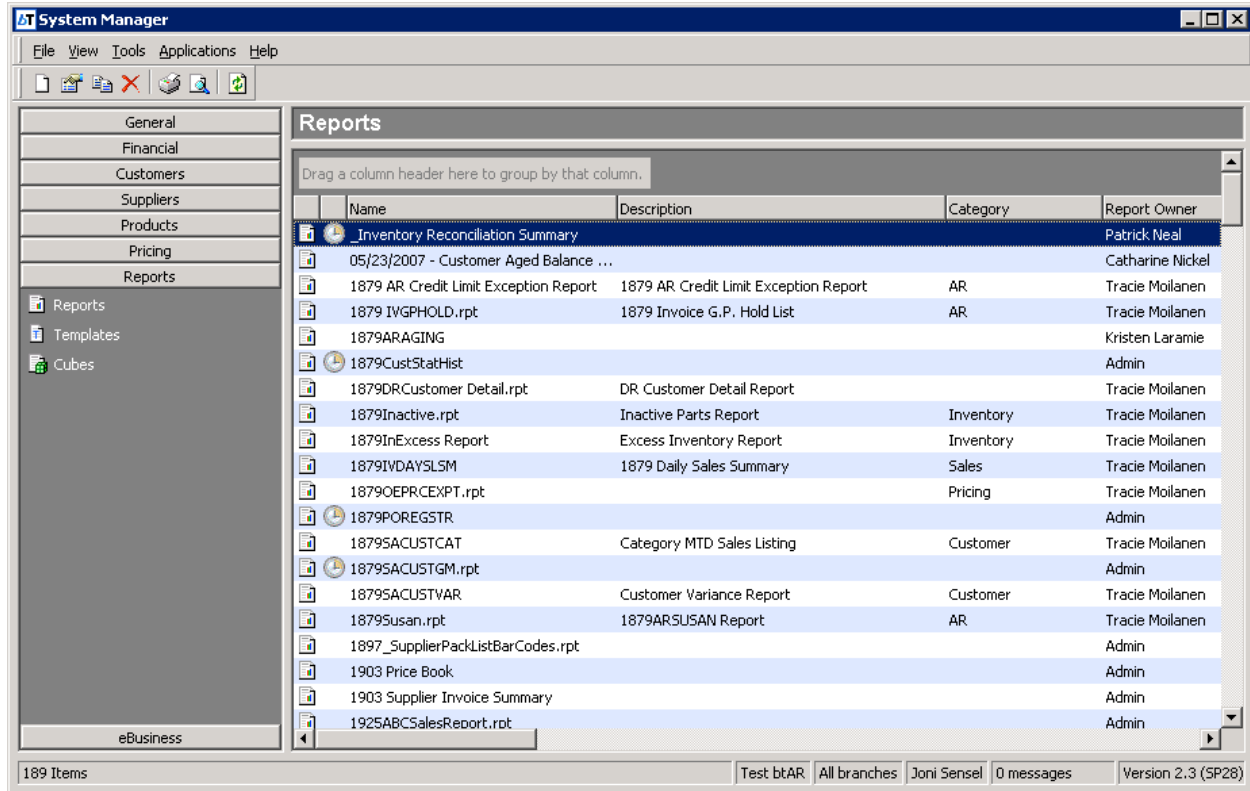
Dummy SKUs that are chosen will appear on the sales order, but with 0.00 price and no impact on stock or inventory.

Quick entry:

	Product Code & Description	Qty	Qty Per	Sell Price	Sell Per	Total Price	Sale Type	Total
1	Custom Made Door	1				441.00		
2	-> SC Solid Core Door SC Solid Core Door	1 ea		0.00 ea		0.00	Delivered	
3	-> 3023KLC-TRIM Chestnut Trim	10 ft		2.00 ft		20.00	Delivered	
4	-> 3023KLA-DoorHardware-01 Left Opening	1 ea		1.00 ea		1.00	Delivered	
5	-> 3023KLA-PLYS 4x8x1/2 Spruce Plywood	2 ea		200.00 ea		400.00	Delivered	
6	-> 3023KLA-PAINT BLK	2 ea		10.00 ea		20.00	Delivered	

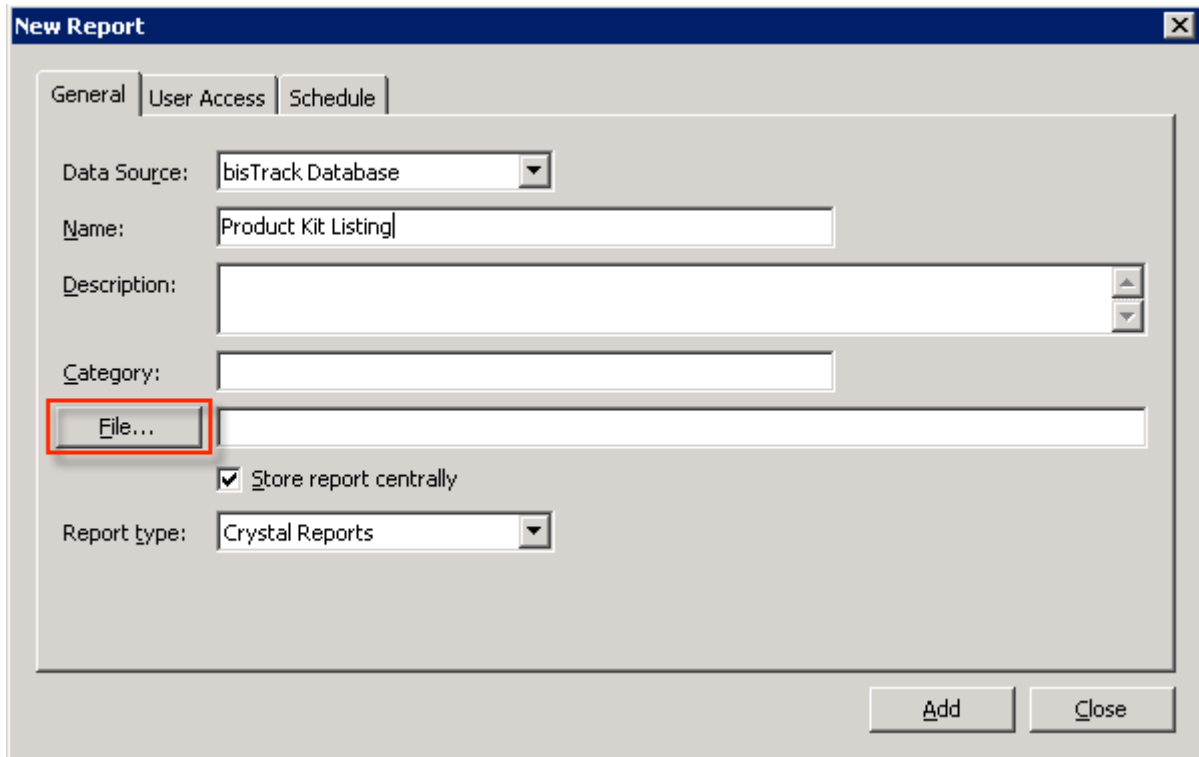
Set up the Product Kit Listing Report

A product kit listing report is provided with other bisTrack report templates. To make it available to users, go to System Manager → Reports → Reports.



Right-click in the grid and click New.

Type the name you want to use for the report and click File.



The image shows a 'New Report' dialog box with a dark blue title bar and a close button (X). It has three tabs: 'General' (selected), 'User Access', and 'Schedule'. The 'General' tab contains the following fields and controls:

- Data Source:** A dropdown menu showing 'bisTrack Database'.
- Name:** A text box containing 'Product Kit Listing'.
- Description:** A large text area with up and down arrow buttons on the right.
- Category:** A text box.
- File...** A button highlighted with a red rectangle, located next to a text box.
- Store report centrally:** A checked checkbox.
- Report type:** A dropdown menu showing 'Crystal Reports'.

At the bottom right of the dialog are two buttons: 'Add' and 'Close'.

In the Reports file, navigate to Product Kit Listing.rpt. Select it and click Open. Click Add.

The report becomes available for running as scheduled or manually. Users can select a range of product codes as desired.

When it is run, 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-SD B - 3336-Sand-SD-Black	4.00	BAG50	\$5.00	BAG50	\$20.0
3336-Sand-SD R - 3336-Sand-SD-Red	4.00	BAG50	\$5.00	BAG50	\$20.0
3336-Sand-SD - 3336-Sand-SD-White	4.00	BAG50	\$5.00	BAG50	\$20.0
Choice end					
Choice start - Aggregate					
D4KP06179 - 100mm 440x215 Ag Lite 4.2N Lightwe ght Aggregate Block	12.00	ea	\$10.32	ea	\$12.3
D4KP06180 - 100mm 440x215 Fibo lite 3.5N Lightwe ght Aggregate Block	12.00	ea	\$11.27	ea	\$13.5
Choice end					
Choice start - Cement					
D6MSD4724 - 0.5kg Black CementColoring Sealable Powder (BS1014)	16.00	ea	\$5.83	ea	\$93.2
D6MSD4726 - 0.5kg Brown CementColoring Sealable Powder (BS1014)	16.00	ea	\$5.83	ea	\$93.2
D6MSD4730 - 0.5kg Red CementColoring Sealable Powder (BS1014)	16.00	ea	\$6.26	ea	\$100.1
Choice end					
					Total Price @per cline d) \$500.1
Kit : 3023K-A - 3023 Manufactured Test A					
Product Code & Description	Qty	Qty Per	Sell Price	Sell Per	Total Price
Choice start - Hardware					
D71207-694-DoorHardware-D1 - Left Opening Door Hardware	1.00	ea	\$5.00	ea	\$5.00
D71207-694-DoorHardware-D2 - Right Opening Door Hardware	1.00	ea	\$5.00	ea	\$5.00
Choice end					
Choice start - Facing					
d2414 - 2x4-14 #2 & Bet. Fir	1.00	ea	\$650.00	M B F	\$6.07
DW2414 - 2x4-14 #2 & Bet. Spruce	1.00	ea	\$614.00	M B F	\$5.77
Choice end					
Choice start - Color					
D6PG02695 - Pemogaze Paint Gloss Black 1.0 litre	1.00	ea	\$9.14	ea	\$9.1
D6PU02964 - Pemogaze Paint UndercoatWhite 1.0 litre	1.00	ea	\$8.29	ea	\$8.2
D6PG02758 - Pemogaze Paint Gloss White 1.0 litre	1.00	ea	\$8.29	ea	\$8.2