

bisTrack Kits — Use Instructions

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Progressive Solutions Inc

Document Control

Revision History

Date	By	Version	Description
5Nov2008	JJS	1.0	<ul style="list-style-type: none">Original Version
09Jun2009	Jjs	1.1	<ul style="list-style-type: none">Updated to bT 2.5

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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:

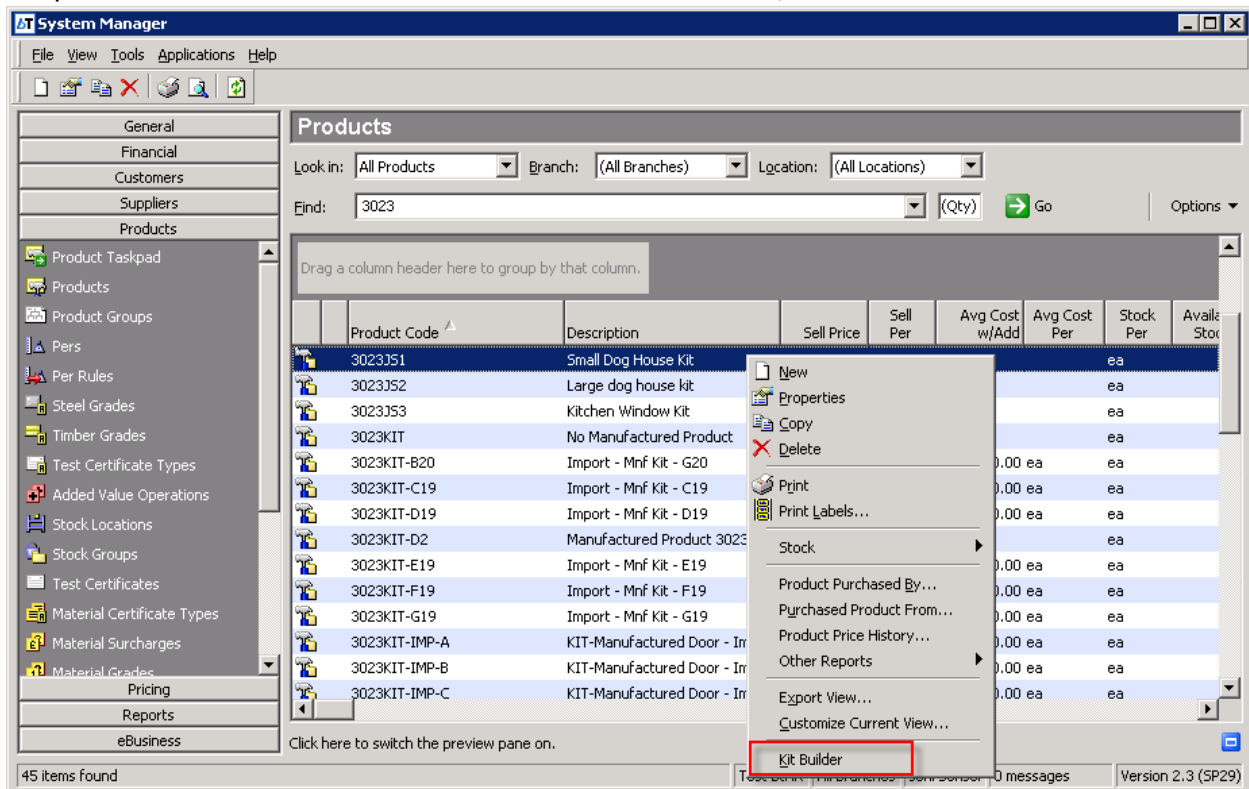
- Indicate item choices, when options are available, during order entry.
- Place non-manufactured kits on call-off orders.
- Sell fractional kits (e.g., 1.5 kits), when appropriate and when the kits have been set up for that option. (For example, pre-mixed concrete formulas may be set up as kits.)
- 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.

Small Dog House Kit - Kit

Kit code: ☐ Manufactured

Description:

Document description:

Document presentation: 

Selling price: From \$31.58 to \$31.58

Applies to branch: Customer Address:

Lines

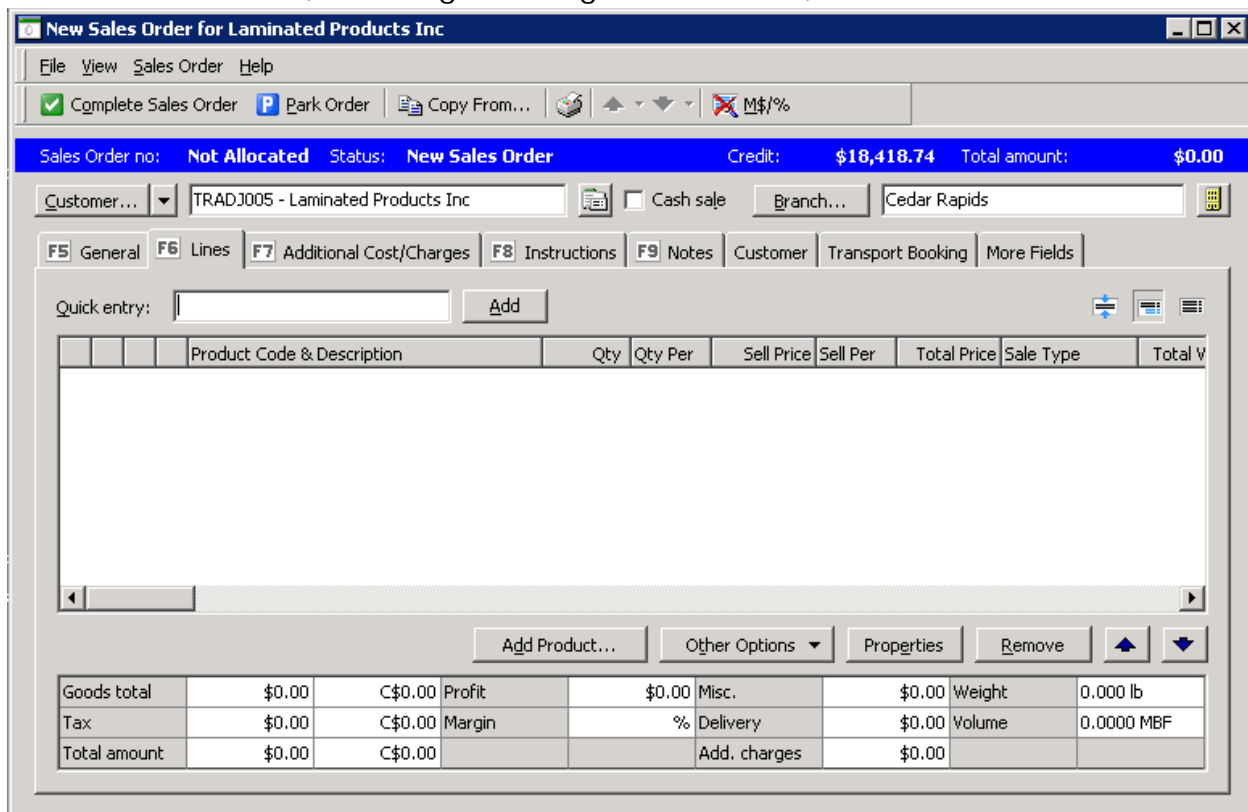
Quick entry:

	Product Code & Description	Qty	Qty Per	Sell Price	Sell Per	Total Price	Rules	Default
	080907-1697-PLYWOOD-01 - Dog House Exterior Plywood	4	ea	2.50	ea	10.00		<input type="checkbox"/>
	Choice 1 start - Exterior treatment							<input type="checkbox"/>
1.	080907-1697-SHINGLES-01 - Dog House Shingles	20	ea	0.50	ea	10.00		<input checked="" type="checkbox"/>
2.	No Choice - No shingles							<input type="checkbox"/>
	Choice 1 end							<input type="checkbox"/>
	080907-1697-DOOR-02 - Square Dog House Exterior Door ...	1	ea	2.00	ea	2.00		<input type="checkbox"/>
	080907-1697-TRIM-02 - Fancy Dog House Trim	1	ea	7.00	ea	7.00		<input type="checkbox"/>
	04RM06852 - Bituminous Black Paint Aquamac 1.0 litre	1	ea	2.58	ea	2.58		<input type="checkbox"/>

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.



New Sales Order for Laminated Products Inc

File View Sales Order Help

☒ Complete Sales Order ☐ Park Order

Sales Order no: **Not Allocated** Status: **New Sales Order** Credit: **\$18,418.74** Total amount: **\$0.00**

Customer... ☐ Cash sale Branch...

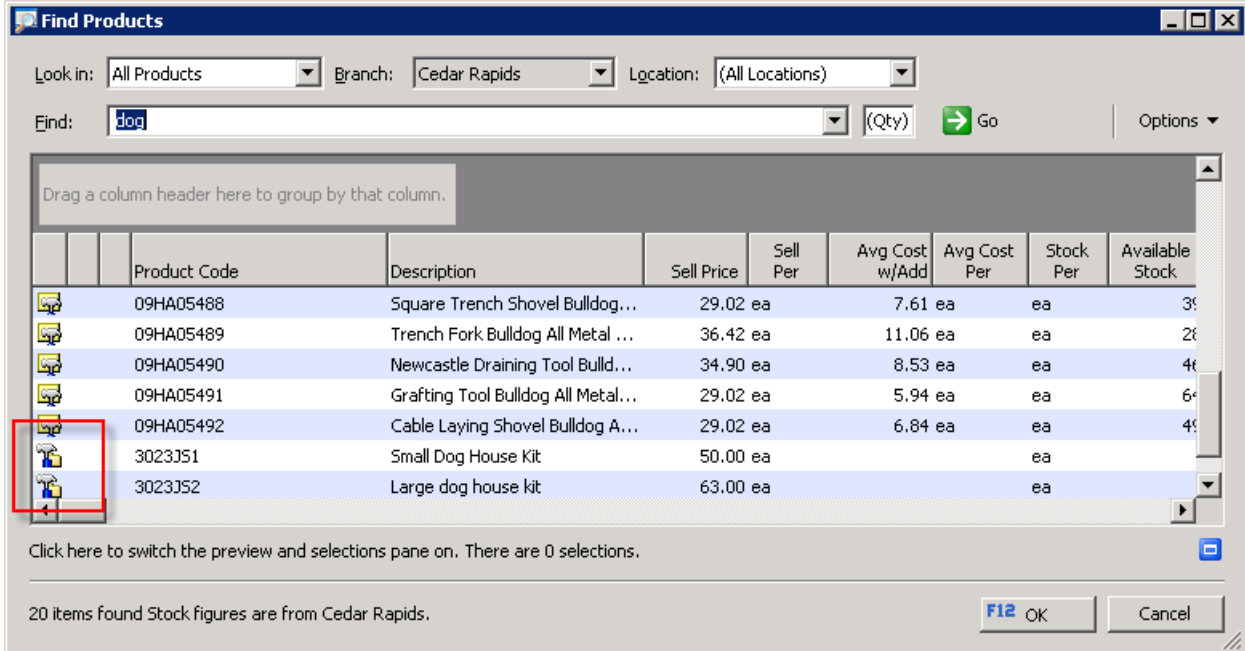
F5 General **F6** Lines **F7** Additional Cost/Charges **F8** Instructions **F9** Notes Customer Transport Booking More Fields

Quick entry:

	Product Code & Description	Qty	Qty Per	Sell Price	Sell Per	Total Price	Sale Type	Total V


Goods total	\$0.00	C\$0.00	Profit	\$0.00	Misc.	\$0.00	Weight	0.000 lb
Tax	\$0.00	C\$0.00	Margin	%	Delivery	\$0.00	Volume	0.0000 MBF
Total amount	\$0.00	C\$0.00			Add. charges	\$0.00		

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.











Find Products

Look in: All Products Branch: Cedar Rapids Location: (All Locations)


Find: dog (Qty)  Go Options ▾

Drag a column header here to group by that column.

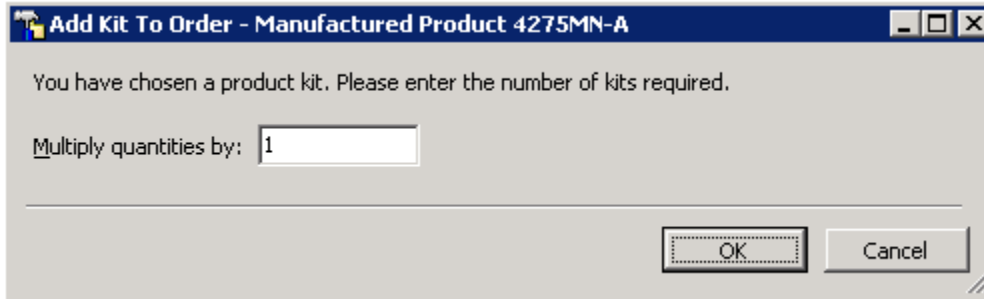
	Product Code	Description	Sell Price	Sell Per	Avg Cost w/Add	Avg Cost Per	Stock Per	Available Stock
	09HA05488	Square Trench Shovel Bulldog...	29.02 ea		7.61 ea	ea		39
	09HA05489	Trench Fork Bulldog All Metal ...	36.42 ea		11.06 ea	ea		28
	09HA05490	Newcastle Draining Tool Bulld...	34.90 ea		8.53 ea	ea		46
	09HA05491	Grafting Tool Bulldog All Metal...	29.02 ea		5.94 ea	ea		64
	09HA05492	Cable Laying Shovel Bulldog A...	29.02 ea		6.84 ea	ea		49
	3023J51	Small Dog House Kit	50.00 ea			ea		
	3023J52	Large dog house kit	63.00 ea			ea		

Click here to switch the preview and selections pane on. There are 0 selections. 

20 items found Stock figures are from Cedar Rapids.

 OK Cancel

The Add Kit to Order window appears. Change the number of kits you want as needed.




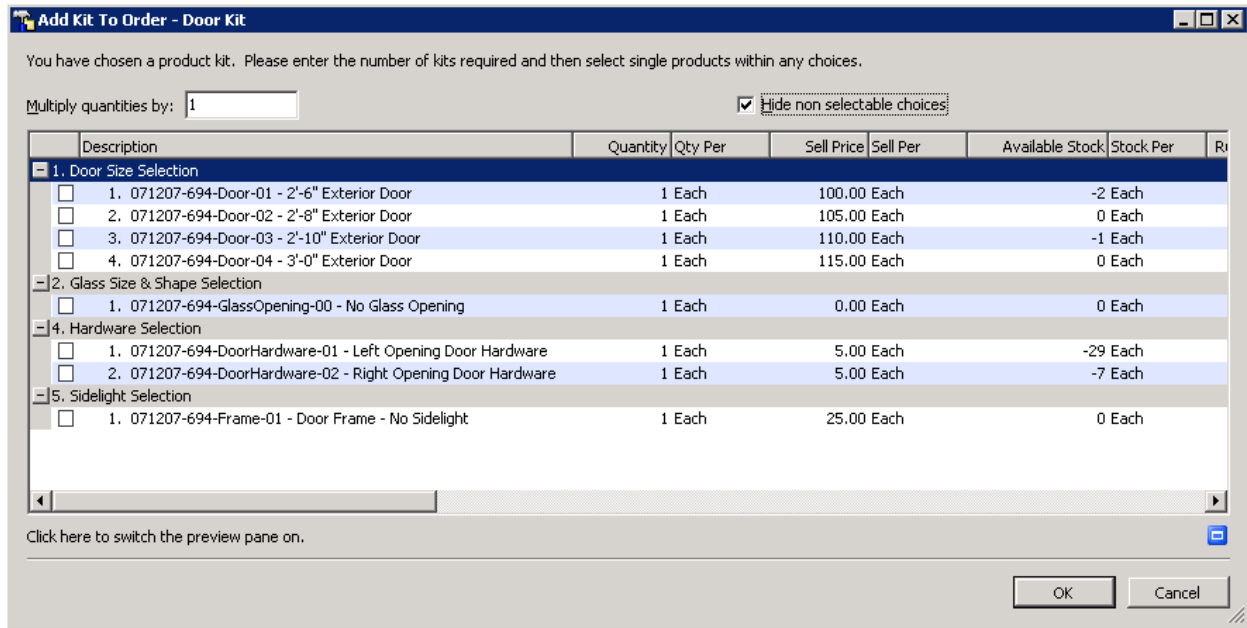
Add Kit To Order - Manufactured Product 4275MN-A

You have chosen a product kit. Please enter the number of kits required.

Multiply quantities by:

OK Cancel


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.



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

Multiply quantities by: ☒ Hide non selectable choices

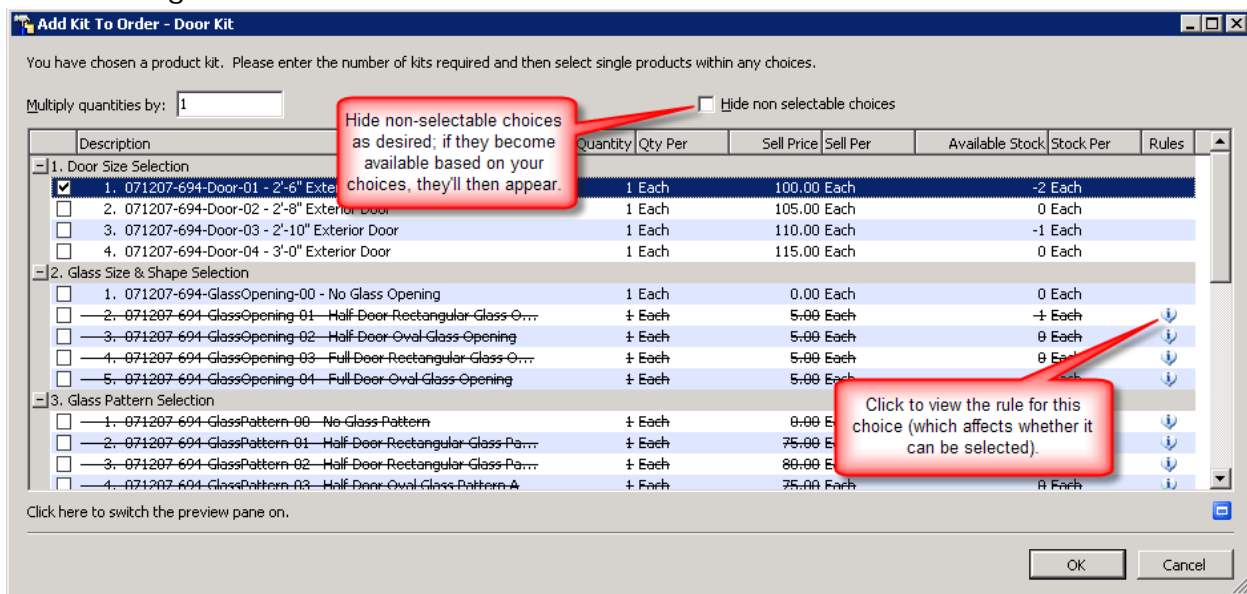
Description	Quantity	Qty Per	Sell Price	Sell Per	Available Stock	Stock Per	Rules
1. Door Size Selection							
<input type="checkbox"/> 1. 071207-694-Door-01 - 2'-6" Exterior Door	1	Each	100.00	Each	-2	Each	
<input type="checkbox"/> 2. 071207-694-Door-02 - 2'-8" Exterior Door	1	Each	105.00	Each	0	Each	
<input type="checkbox"/> 3. 071207-694-Door-03 - 2'-10" Exterior Door	1	Each	110.00	Each	-1	Each	
<input type="checkbox"/> 4. 071207-694-Door-04 - 3'-0" Exterior Door	1	Each	115.00	Each	0	Each	
2. Glass Size & Shape Selection							
<input type="checkbox"/> 1. 071207-694-GlassOpening-00 - No Glass Opening	1	Each	0.00	Each	0	Each	
4. Hardware Selection							
<input type="checkbox"/> 1. 071207-694-DoorHardware-01 - Left Opening Door Hardware	1	Each	5.00	Each	-29	Each	
<input type="checkbox"/> 2. 071207-694-DoorHardware-02 - Right Opening Door Hardware	1	Each	5.00	Each	-7	Each	
5. Sidelight Selection							
<input type="checkbox"/> 1. 071207-694-Frame-01 - Door Frame - No Sidelight	1	Each	25.00	Each	0	Each	

Click here to switch the preview pane on. 

OK Cancel

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.




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

Multiply quantities by: ☐ Hide non selectable choices

Hide non-selectable choices as desired; if they become available based on your choices, they'll then appear.


Description	Quantity	Qty Per	Sell Price	Sell Per	Available Stock	Stock Per	Rules
1. Door Size Selection							
<input checked="" type="checkbox"/> 1. 071207-694-Door-01 - 2'-6" Exterior Door	1	Each	100.00	Each	-2	Each	
<input type="checkbox"/> 2. 071207-694-Door-02 - 2'-8" Exterior Door	1	Each	105.00	Each	0	Each	
<input type="checkbox"/> 3. 071207-694-Door-03 - 2'-10" Exterior Door	1	Each	110.00	Each	-1	Each	
<input type="checkbox"/> 4. 071207-694-Door-04 - 3'-0" Exterior Door	1	Each	115.00	Each	0	Each	
2. Glass Size & Shape Selection							
<input type="checkbox"/> 1. 071207-694-GlassOpening-00 - No Glass Opening	1	Each	0.00	Each	0	Each	
<input type="checkbox"/> 2. 071207-694-GlassOpening-01 - Half Door Rectangular Glass Opening	1	Each	5.00	Each	-1	Each	
<input type="checkbox"/> 3. 071207-694-GlassOpening-02 - Half Door Oval Glass Opening	1	Each	5.00	Each	0	Each	
<input type="checkbox"/> 4. 071207-694-GlassOpening-03 - Full Door Rectangular Glass Opening	1	Each	5.00	Each	0	Each	
<input type="checkbox"/> 5. 071207-694-GlassOpening-04 - Full Door Oval Glass Opening	1	Each	5.00	Each	0	Each	
3. Glass Pattern Selection							
<input type="checkbox"/> 1. 071207-694-GlassPattern-00 - No Glass Pattern	1	Each	0.00	Each	0	Each	
<input type="checkbox"/> 2. 071207-694-GlassPattern-01 - Half Door Rectangular Glass Pattern	1	Each	75.00	Each	0	Each	
<input type="checkbox"/> 3. 071207-694-GlassPattern-02 - Half Door Rectangular Glass Pattern	1	Each	80.00	Each	0	Each	
<input type="checkbox"/> 4. 071207-694-GlassPattern-03 - Half Door Oval Glass Pattern	1	Each	75.00	Each	0	Each	

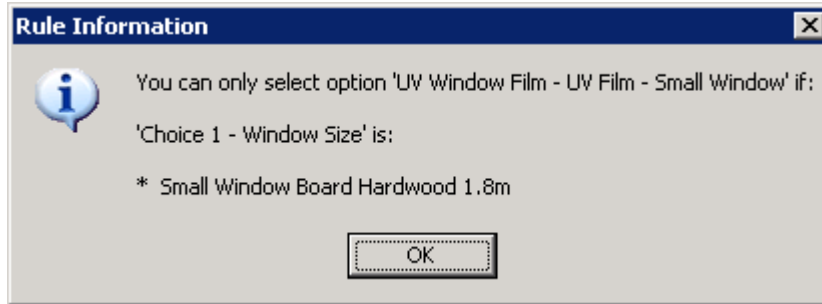
Click here to switch the preview pane on. 

Click to view the rule for this choice (which affects whether it can be selected).

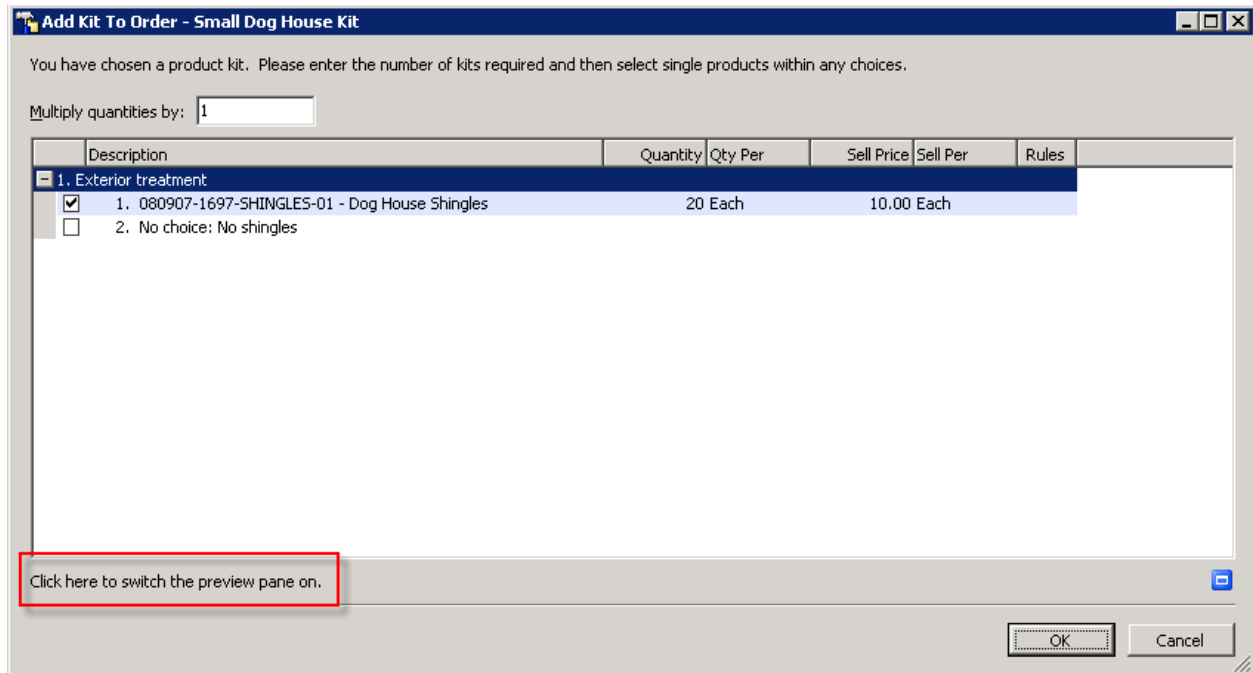
OK Cancel


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.

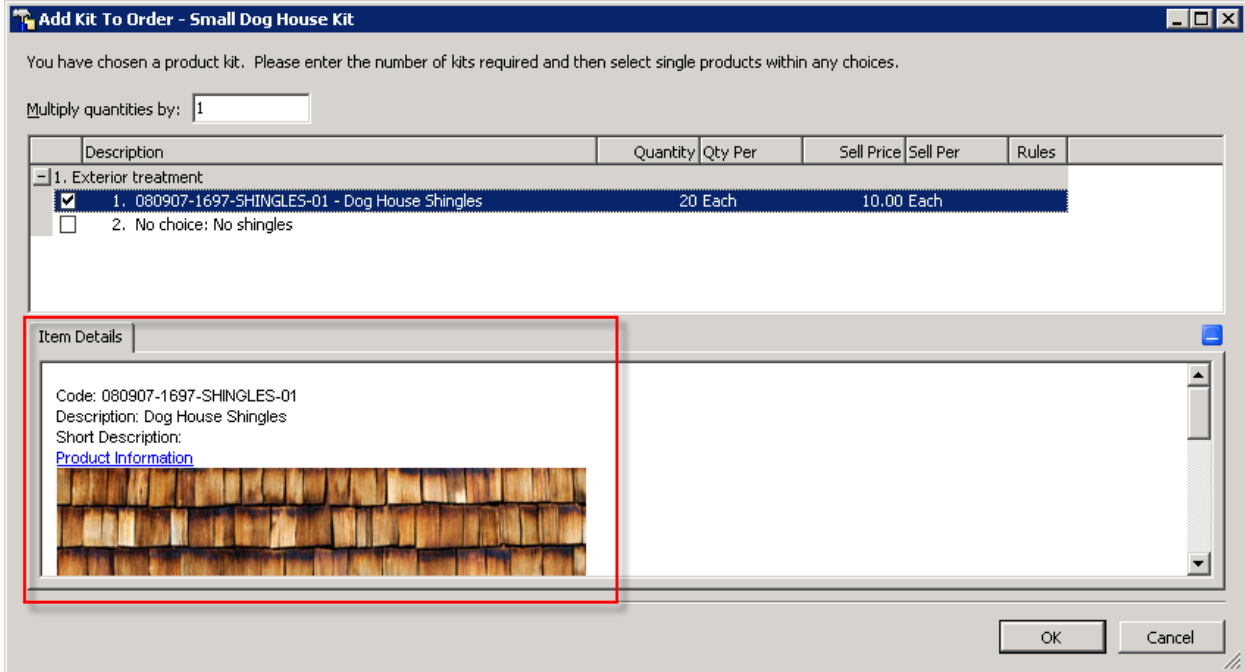
Click  in the Rule column to view the rule for a choice for which rules apply. The Rule Information window opens. Click OK to close it.



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.



Add Kit To Order - Small Dog House Kit

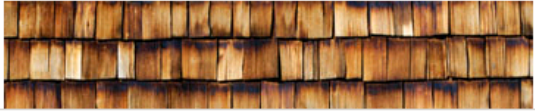
You have chosen a product kit. Please enter the number of kits required and then select single products within any choices.

Multiply quantities by:

Description	Quantity	Qty Per	Sell Price	Sell Per	Rules
- 1. Exterior treatment					
<input checked="" type="checkbox"/> 1. 080907-1697-SHINGLES-01 - Dog House Shingles	20	Each	10.00	Each	
<input type="checkbox"/> 2. No choice: No shingles					

Item Details

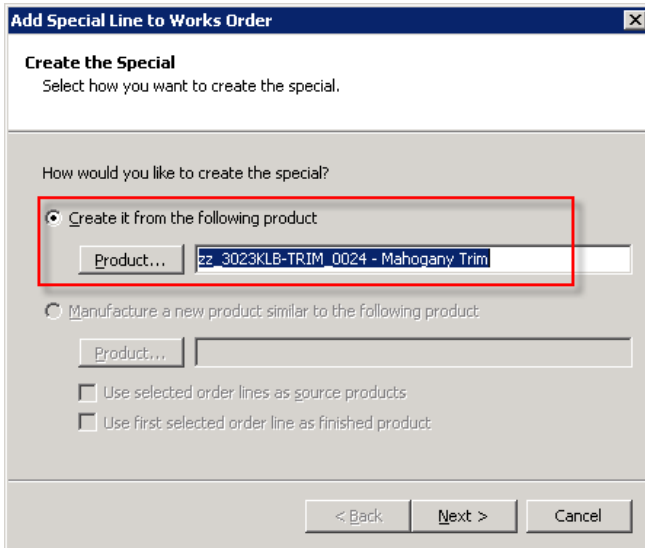
Code: 080907-1697-SHINGLES-01
 Description: Dog House Shingles
 Short Description:
[Product Information](#)



OK Cancel

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.



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

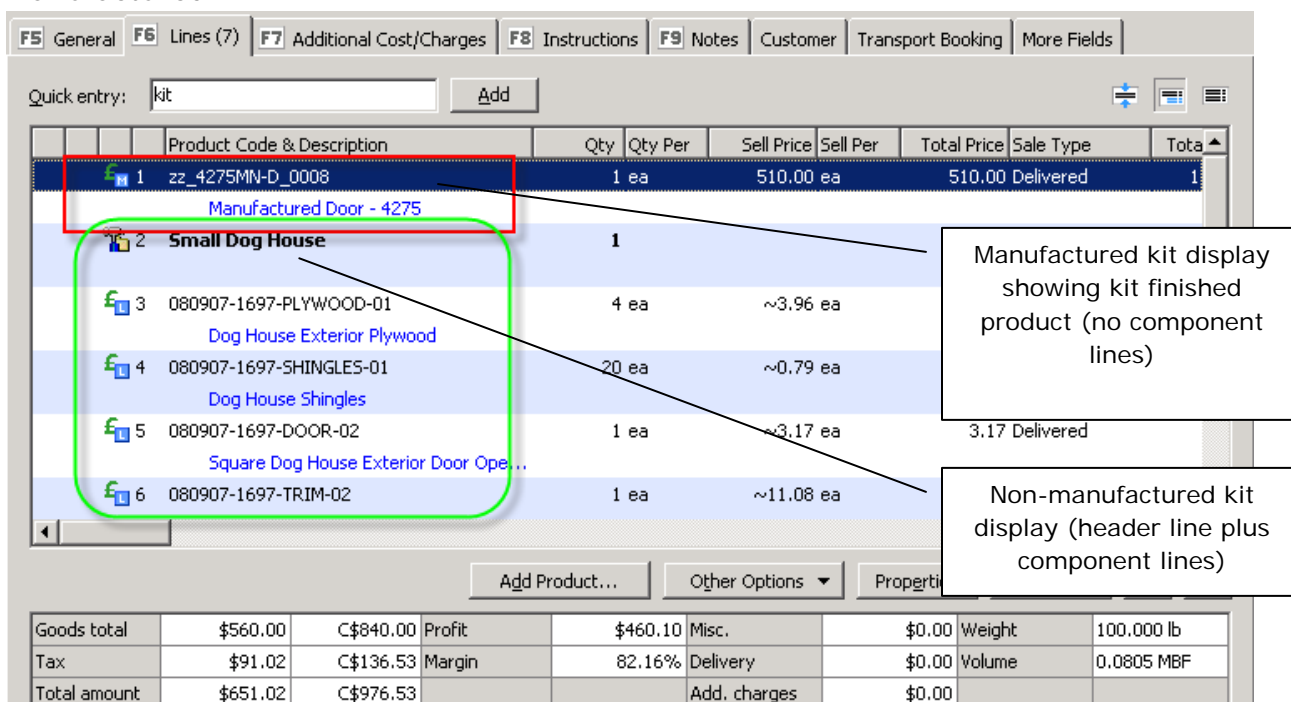
Product...

☐ Use selected order lines as source products
☐ Use first selected order line as finished product

< Back Next > Cancel

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.



The screenshot displays the bisTrack software interface for a sales order. The top menu bar includes tabs for F5 General, F6 Lines (7), F7 Additional Cost/Charges, F8 Instructions, F9 Notes, Customer, Transport Booking, and More Fields. Below the menu is a 'Quick entry' field with the text 'kit' and an 'Add' button. The main table lists line items with columns for Product Code & Description, Qty, Qty Per, Sell Price, Sell Per, Total Price, Sale Type, and Total. Line 1 is a manufactured kit, 'zz_4275MN-D_0008', with a quantity of 1 ea and a total price of 510.00. Line 2 is 'Small Dog House', with a quantity of 1. Lines 3 through 6 are components of the kit: '080907-1697-PLYWOOD-01' (4 ea, ~3.96 ea), '080907-1697-SHINGLES-01' (20 ea, ~0.79 ea), '080907-1697-DOOR-02' (1 ea, ~3.17 ea), and '080907-1697-TRIM-02' (1 ea, ~11.08 ea). A red box highlights line 1, and a green box highlights lines 3 through 6. Callout boxes provide additional information: 'Manufactured kit display showing kit finished product (no component lines)' points to line 1, and 'Non-manufactured kit display (header line plus component lines)' points to line 2. At the bottom, a summary table shows 'Goods total' (\$560.00), 'Tax' (\$91.02), and 'Total amount' (\$651.02).

Product Code & Description	Qty	Qty Per	Sell Price	Sell Per	Total Price	Sale Type	Total
1 zz_4275MN-D_0008 Manufactured Door - 4275	1	ea	510.00	ea	510.00	Delivered	1
2 Small Dog House	1						
3 080907-1697-PLYWOOD-01 Dog House Exterior Plywood	4	ea	~3.96	ea			
4 080907-1697-SHINGLES-01 Dog House Shingles	20	ea	~0.79	ea			
5 080907-1697-DOOR-02 Square Dog House Exterior Door Op...	1	ea	~3.17	ea			
6 080907-1697-TRIM-02	1	ea	~11.08	ea			

Goods total	\$560.00	C\$840.00	Profit	\$460.10	Misc.	\$0.00	Weight	100.000 lb
Tax	\$91.02	C\$136.53	Margin	82.16%	Delivery	\$0.00	Volume	0.0805 MBF
Total amount	\$651.02	C\$976.53			Add. charges	\$0.00		

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.

Quick entry:


	Product Code & Description	Qty	Qty Per	Sell Price	Sell Per	Total Price	Sale Type	Total
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.

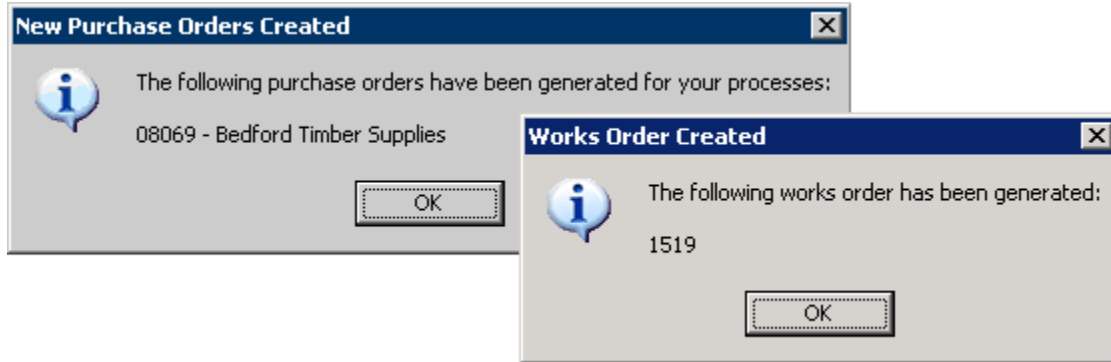
Goods total	\$100.00	C\$150.00	Profit	\$100.00	Misc.	\$0.00	Weight	0.000 lb
Tax	\$16.25	C\$24.38	Margin	100.00%	Delivery	\$0.00	Volume	0.2031 MBF
Total amount	\$116.25	C\$174.38			Add. charges	\$0.00		

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?

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.

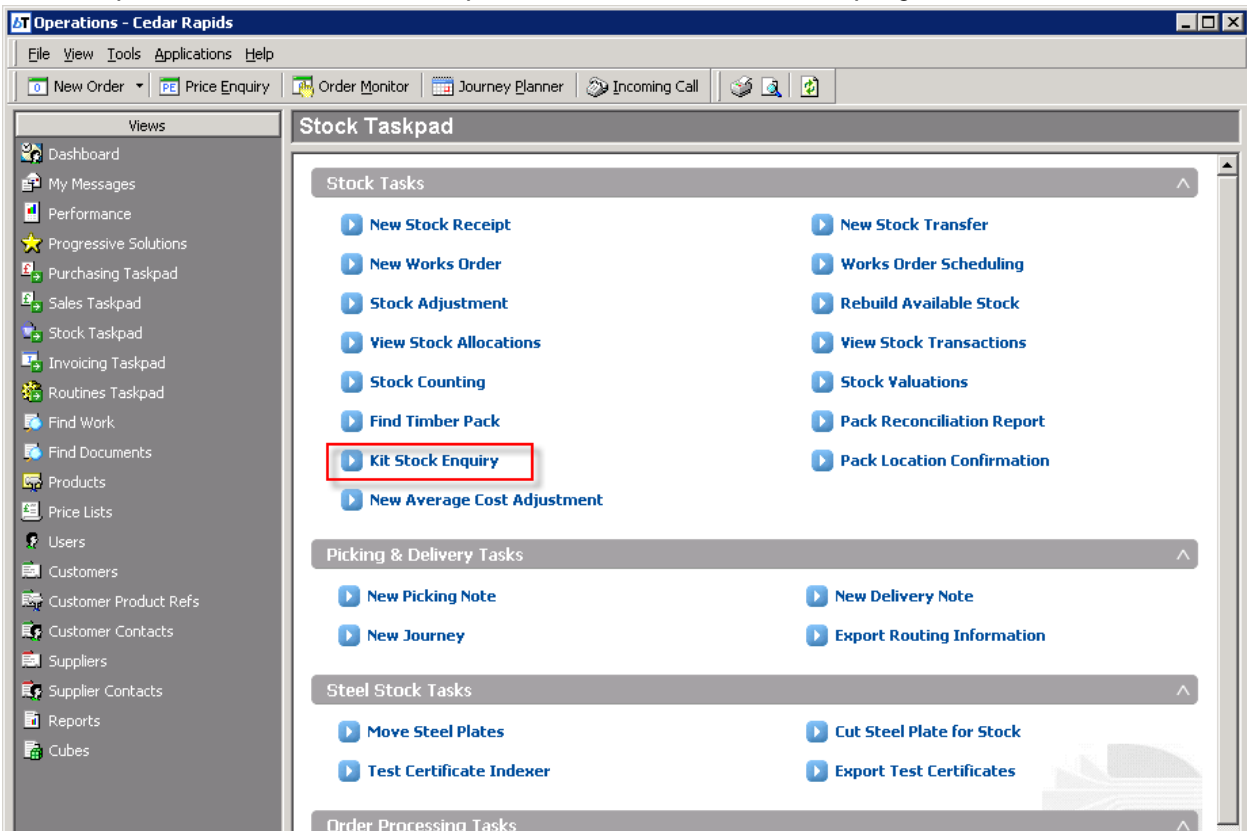


Print documents as desired (depending on your document control settings and bisTrack prompts) and proceed with any work order processing as usual.

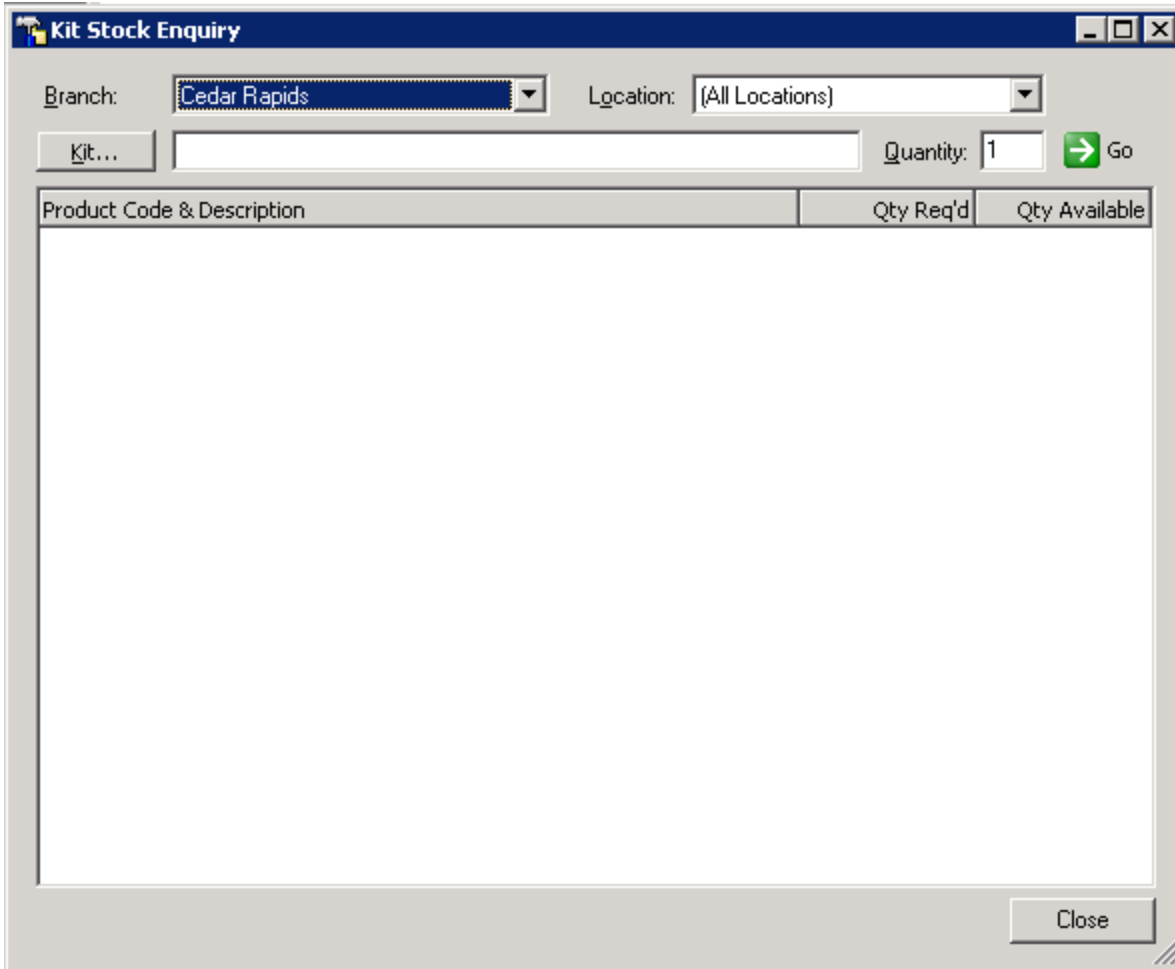
Look up Kit Stock Availability

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.



Product Code & Description	Qty Available
----------------------------	---------------

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.

Kit Stock Enquiry

Branch: Location:

Kit... Quantity:

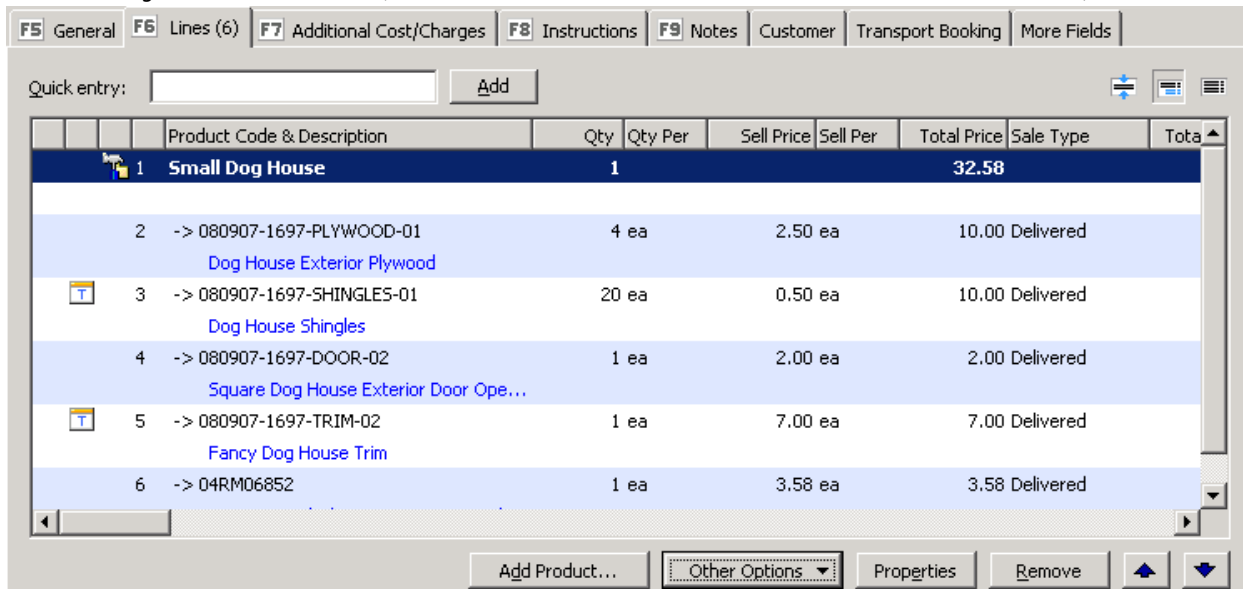
Product Code & Description	Qty Req'd	Qty Available
080907-1697-PLYWOOD-01 - Dog House Exterior Plywood	6	-16
080907-1697-SHINGLES-01 - Dog House Shingles	24	-80
080907-1697-TRIM-02 - Fancy Dog House Trim	2	-4
080907-1697-DOOR-01 - Rounded Dog House Exterior Door Opening	1	0
Choice 1 start - Paint color		
1. 04RM06852 - Bituminous Black Paint Aquamac 1.0 litre	1	5
2. 06PE02859 - Permoglaze Paint Eggshell White 1.0 litre	1	32
3. No Choice - Unpainted		
Choice 1 end		

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).

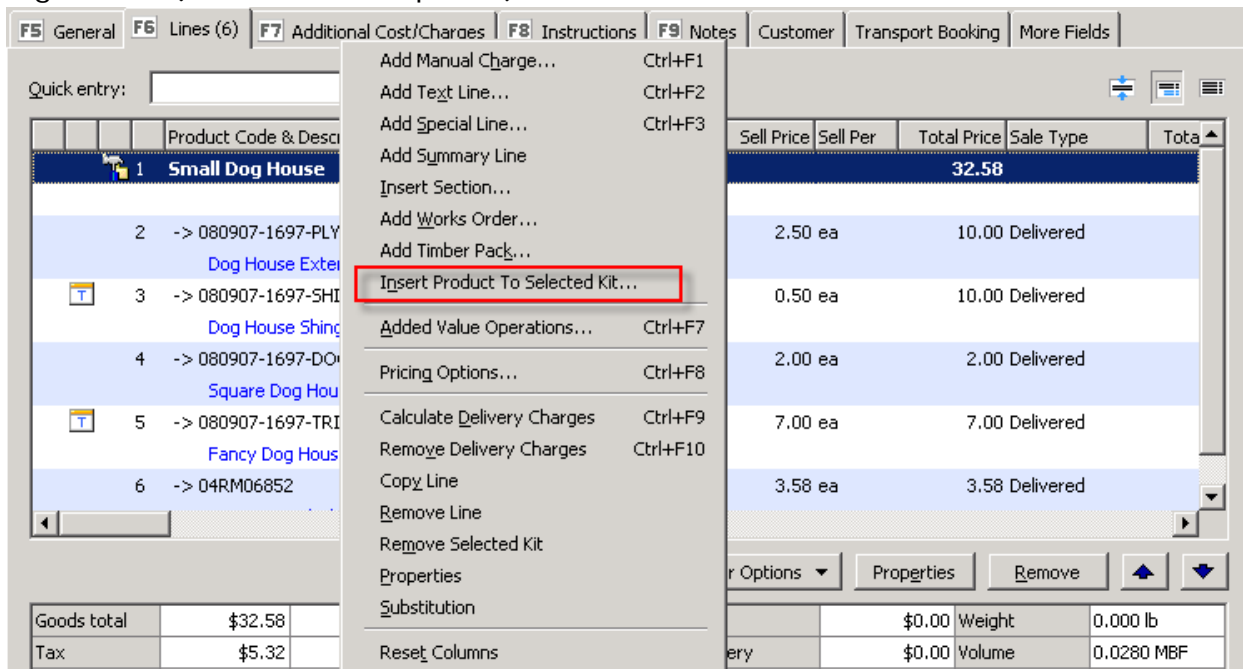


The screenshot shows the 'bisTrack Kits' software interface. The 'Lines (6)' tab is active, displaying a list of items for a 'Small Dog House' kit. The items are listed with their product codes, descriptions, quantities, and prices.

Product Code & Description	Qty	Qty Per	Sell Price	Sell Per	Total Price	Sale Type	Total
1 Small Dog House	1				32.58		
2 -> 080907-1697-PLYWOOD-01 Dog House Exterior Plywood	4 ea		2.50 ea		10.00	Delivered	
3 -> 080907-1697-SHINGLES-01 Dog House Shingles	20 ea		0.50 ea		10.00	Delivered	
4 -> 080907-1697-DOOR-02 Square Dog House Exterior Door Ope...	1 ea		2.00 ea		2.00	Delivered	
5 -> 080907-1697-TRIM-02 Fancy Dog House Trim	1 ea		7.00 ea		7.00	Delivered	
6 -> 04RM06852	1 ea		3.58 ea		3.58	Delivered	

Buttons at the bottom: Add Product..., Other Options, Properties, Remove.

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



The screenshot shows the 'bisTrack Kits' software interface with the 'Lines (6)' tab active. A right-click context menu is open over the 'Small Dog House' line. The menu includes options for adding manual charges, text lines, special lines, summary lines, sections, works orders, and timber packs. The option 'Insert Product To Selected Kit...' is highlighted with a red box. Other options include 'Added Value Operations...', 'Pricing Options...', 'Calculate Delivery Charges', 'Remove Delivery Charges', 'Copy Line', 'Remove Line', 'Remove Selected Kit', 'Properties', 'Substitution', and 'Reset Columns'.

Product Code & Description	Qty	Qty Per	Sell Price	Sell Per	Total Price	Sale Type	Total
1 Small Dog House	1				32.58		
2 -> 080907-1697-PLYWOOD-01 Dog House Exterior Plywood	4 ea		2.50 ea		10.00	Delivered	
3 -> 080907-1697-SHINGLES-01 Dog House Shingles	20 ea		0.50 ea		10.00	Delivered	
4 -> 080907-1697-DOOR-02 Square Dog House Exterior Door Ope...	1 ea		2.00 ea		2.00	Delivered	
5 -> 080907-1697-TRIM-02 Fancy Dog House Trim	1 ea		7.00 ea		7.00	Delivered	
6 -> 04RM06852	1 ea		3.58 ea		3.58	Delivered	

Buttons at the bottom: Other Options, Properties, Remove.

Summary table at the bottom left:

Item	Amount
Goods total	\$32.58
Tax	\$5.32

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.

Quick entry:

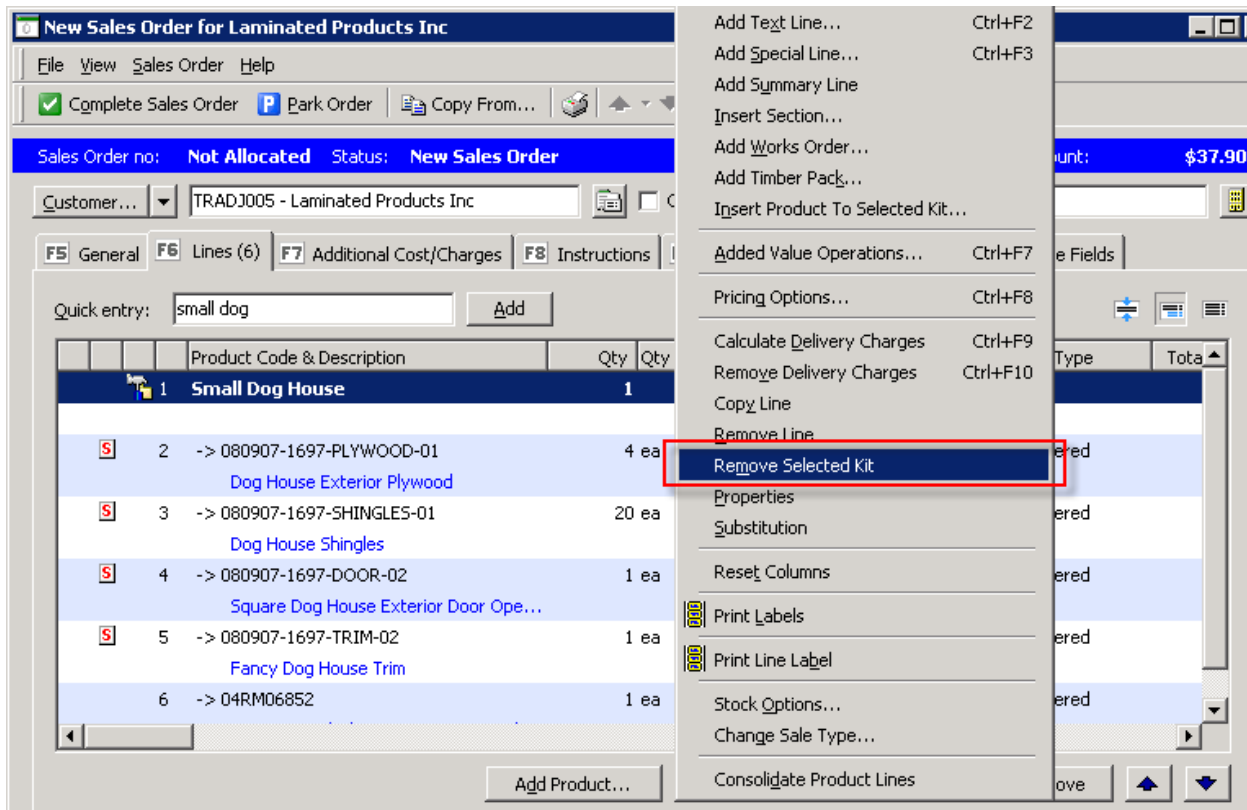
	Product Code & Description	Qty	Qty Per	Sell Price	Sell Per	Total Price	Sale Type	Total
1	Small Dog House	1				153.15		
2	-> 09ED06063 550 Watt Makita Percussion Drill 240v...	1 ea		120.57 ea		120.57	Delivered	
3	-> 080907-1697-PLYWOOD-01 Dog House Exterior Plywood	4 ea		2.50 ea		10.00	Delivered	
4	-> 080907-1697-SHINGLES-01 Dog House Shingles	20 ea		0.50 ea		10.00	Delivered	
5	-> 080907-1697-DOOR-02 Square Dog House Exterior Door Ope...	1 ea		2.00 ea		2.00	Delivered	
6	-> 080907-1697-TRIM-02	1 ea		7.00 ea		7.00	Delivered	

Complete the order as usual.

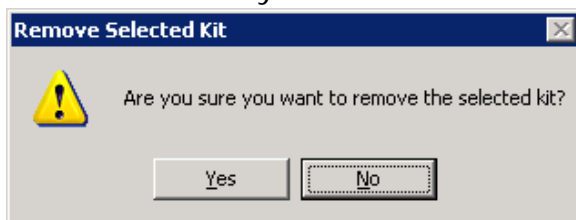
Removing a Kit from a Sales Order

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.

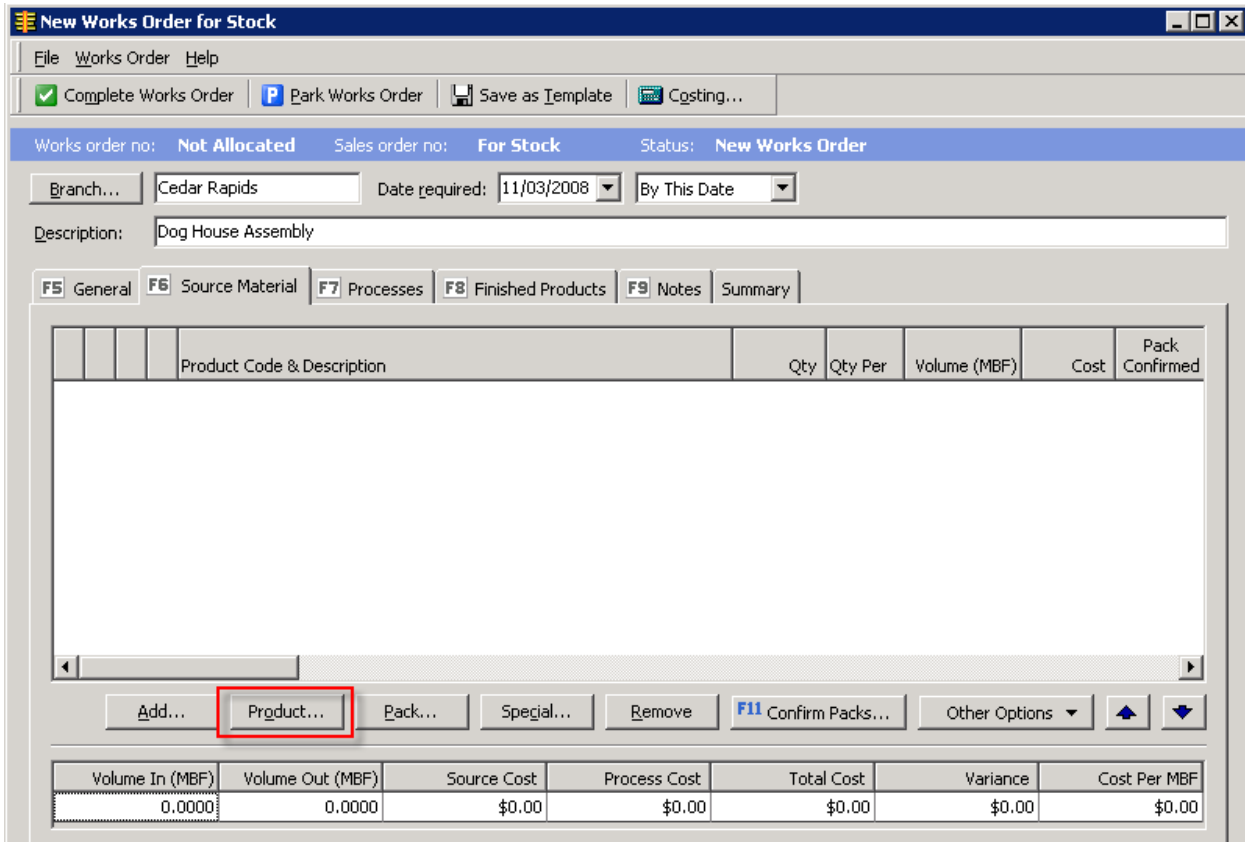


Click Yes. The kit and all its components will be removed from the order.

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...)



New Works Order for Stock

File Works Order Help

☒ Complete Works Order ☐ Park Works Order ☐ Save as Template ☐ Costing...

Works order no: **Not Allocated** Sales order no: **For Stock** Status: **New Works Order**

Branch... Cedar Rapids Date required: 11/03/2008 By This Date

Description: Dog House Assembly

F5 General **F6 Source Material** F7 Processes F8 Finished Products F9 Notes Summary

Product Code & Description	Qty	Qty Per	Volume (MBF)	Cost	Pack Confirmed

Add... **Product...** Pack... Special... Remove F11 Confirm Packs... Other Options

Volume In (MBF)	Volume Out (MBF)	Source Cost	Process Cost	Total Cost	Variance	Cost Per MBF
0.0000	0.0000	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

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.

Add Kit To Works Order - Large dog house 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. Paint color							
<input type="checkbox"/>	1. 04RM06852 - Bituminous Black Paint Aquamac 1.0 litre	1	Each	2.58	Each	0.00	
<input type="checkbox"/>	2. 06PE02859 - Permoglaze Paint Eggshell White 1.0 litre	1	Each	8.94	Each	0.00	
<input checked="" type="checkbox"/>	3. No choice: Unpainted					-2.00	

Click here to switch the preview pane on. 

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.)

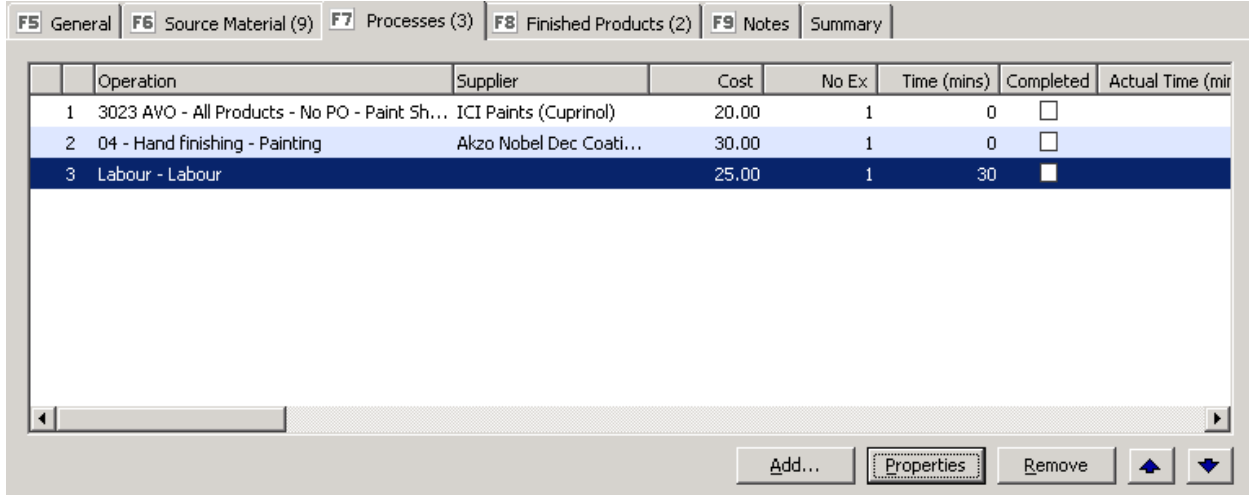
F5 General F6 Source Material (5) F7 Processes F8 Finished Products F9 Notes Summary

		Product Code & Description	Qty	Qty Per	Volume (MBF)	Cost	Pack Confirmed
		1 080907-1697-PLYWOOD-01 - Dog House Exterior Plywood	6	ea	0.0090	0.00	<input checked="" type="checkbox"/>
		2 080907-1697-SHINGLES-01 - Dog House Shingles	24	ea	0.0160	0.00	<input type="checkbox"/>
		3 080907-1697-TRIM-02 - Fancy Dog House Trim	2	ea	0.0013	0.00	<input type="checkbox"/>
		4 080907-1697-DOOR-01 - Rounded Dog House Exterior Door Opening	1	ea	0.0080	0.00	<input type="checkbox"/>
		5 04RM06852 - Bituminous Black Paint Aquamac 1.0 litre	1	ea	0.0000	0.00	<input type="checkbox"/>

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.



The screenshot shows the 'Processes' tab in the bisTrack Kits software. The interface includes a tab bar at the top with options: F5 General, F6 Source Material (9), F7 Processes (3), F8 Finished Products (2), F9 Notes, and Summary. The 'Processes' tab is selected, displaying a table with the following data:

	Operation	Supplier	Cost	No Ex	Time (mins)	Completed	Actual Time (min)
1	3023 AVO - All Products - No PO - Paint Sh...	ICI Paints (Cuprinol)	20.00	1	0	<input type="checkbox"/>	
2	04 - Hand finishing - Painting	Akzo Nobel Dec Coati...	30.00	1	0	<input type="checkbox"/>	
3	Labour - Labour		25.00	1	30	<input checked="" type="checkbox"/>	

Below the table, there is a horizontal scrollbar. At the bottom right of the window, there are buttons for 'Add...', 'Properties', 'Remove', and two arrow buttons (up and down).

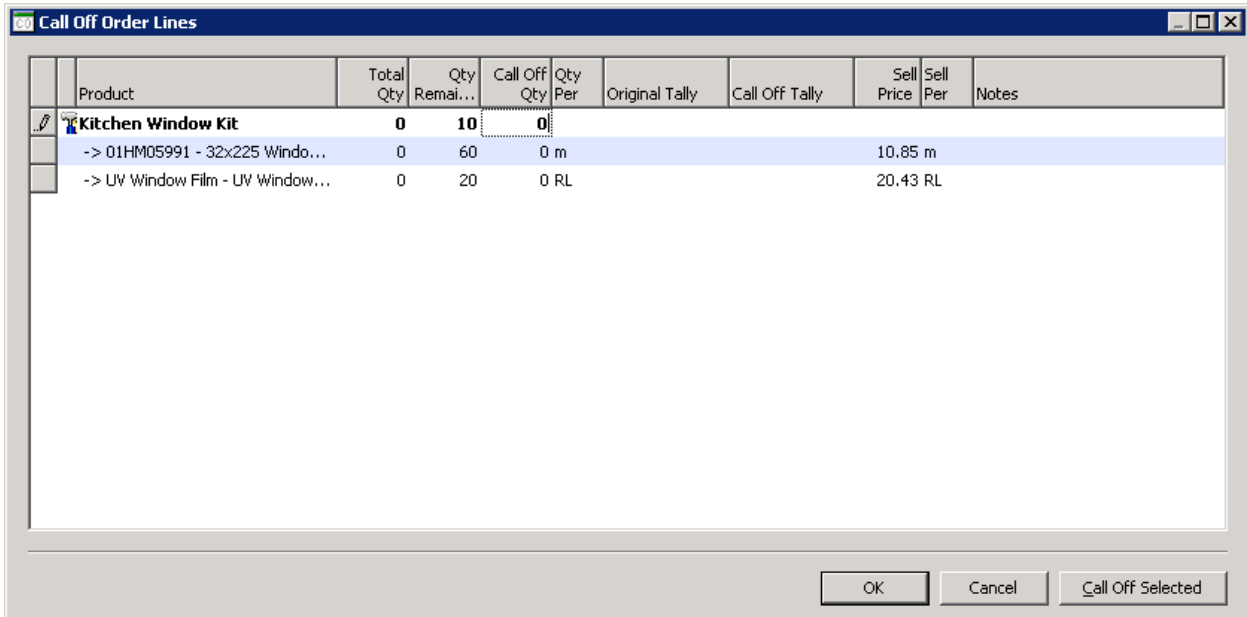
Finish creating the work order, including identifying Finished Products, and complete it as usual. Once the work order has been completed, the Product... button will be disabled.

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.



The screenshot shows the 'Call Off Order Lines' window. It contains a table with the following data:

Product	Total Qty	Qty Remai...	Call Off Qty	Qty Per	Original Tally	Call Off Tally	Sell Price	Sell Per	Notes
Kitchen Window Kit	0	10	0						
-> 01HM05991 - 32x225 Windo...	0	60	0	m			10,85	m	
-> UV Window Film - UV Window...	0	20	0	RL			20,43	RL	

At the bottom of the window are three buttons: OK, Cancel, and Call Off Selected.

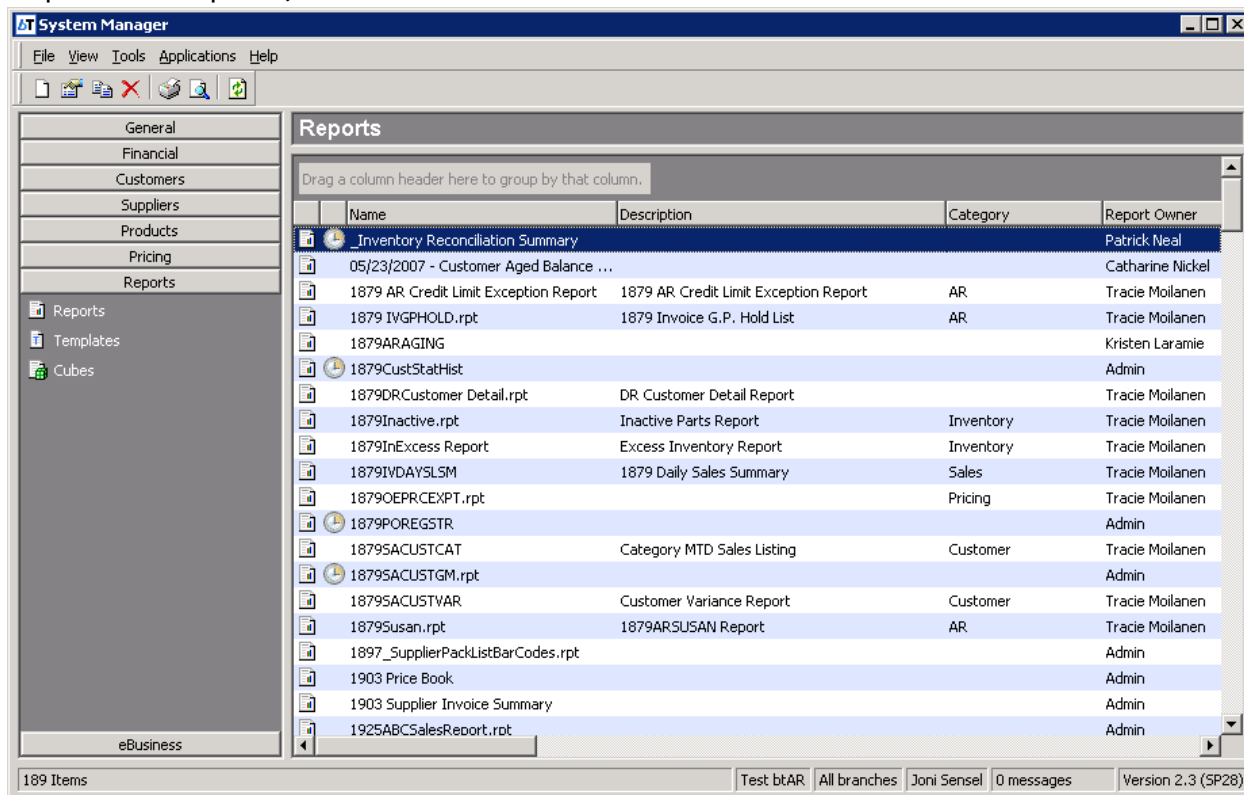
Enter the quantity of each line that you want to call off (or select a line and click Call Off Selected to call off the total quantity for that line). *You must indicate quantities for the component lines*, not just the kit header – if you call off only a header line, the resulting sales order will include 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

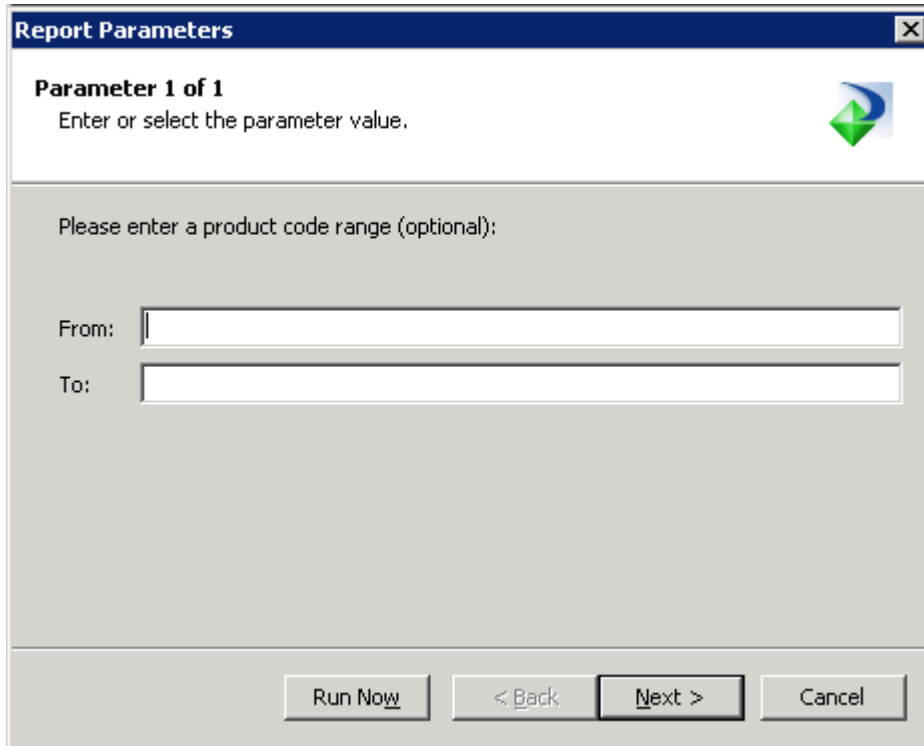
A product kit listing report is provided with other bisTrack report templates and must be set up in the System Manager. For details, see the bisTrack Kits – Setup Instructions document.

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.



The screenshot shows a window titled "Report Parameters" with a close button (X) in the top right corner. The window has a dark blue header bar. Below the header, the text "Parameter 1 of 1" is displayed in bold, followed by the instruction "Enter or select the parameter value." To the right of this text is a green diamond icon with a blue arrow pointing upwards. Below this section, the text "Please enter a product code range (optional):" is displayed. Underneath this text are two input fields: "From:" and "To:". At the bottom of the window, there are four buttons: "Run Now", "< Back", "Next >", and "Cancel".

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-SD B - 3336-Sand-SD-Black	4.00	BAGSD	\$5.00	BAGSD	\$20.0
3336-Sand-SD R - 3336-Sand-SD-Red	4.00	BAGSD	\$5.00	BAGSD	\$20.0
3336-Sand-SD - 3336-Sand-SD-White	4.00	BAGSD	\$5.00	BAGSD	\$20.0
Choice end					
Choice start - Aggregate					
D4KPD6179 - 100mm 440x215 Ag Lite 4.2N Lightwe ght Aggregate Block	12.00	ea	\$10.32	ea	\$12.3
D4KPD6180 - 100mm 440x215 Fbo 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 @pe cified \$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 - Faching					
d2414 - 2x4-14 #2 & Bet. Fir	1.00	ea	\$650.00	NBF	\$6.0
DW2414 - 2x4-14 #2 & Bet. Spruce	1.00	ea	\$614.00	NBF	\$6.7
Choice end					
Choice start - Color					
D6PG02695 - Pem ogaze Paint Gloss Black 1.0 litre	1.00	ea	\$9.14	ea	\$9.1
D6PUD2864 - Pem ogaze Paint Uide coatWhite 1.0 litre	1.00	ea	\$8.29	ea	\$8.2
D6PG02758 - Pem ogaze Paint Gloss White 1.0 litre	1.00	ea	\$8.29	ea	\$8.2