Kit Maintenance

Definition

Kits

A **KIT** is defined as either a **COUNTER KIT**: one that is created at the time of sale, or a **MANUFACTURED KIT**, one that is created and placed on the shelf ready for sale. A **COUNTER KIT** has no inventory on hand, a **MANUFACTURED KIT** does.

A kit item may belong to any category, or a separate category may be created for manufactured kits, if desired. There is no difference between a regular category record and one that is created for kit items.

Processing

Add the Kit Part Number

Identifying a kit item involves two steps. First, enter [**K**] (not displayed as an option) in the **REORDER FIELD** on the item record in **INVENTORY > DATA MAINTENANCE > MASTER FILES > PRODUCT MASTER**. Then differentiate the item as a **COUNTER** [**C**] kit or a **MANUFACTURED** [**M**] kit in the **KIT TYPE** field directly below. The remainder of the fields may be set up as usual.

If the part is being manufactured in one branch only the reorder type can be changed by branch in the **MAINTAIN BRANCH INFO** screen. This scenario would not apply to Counter kits.

Attach Components to the Kit

Once the kit item has been created and [**F1**] accepted, the user is prompted with **MAINTAIN KIT DEFINITION**? If [**N**], the function is complete and the user is able to add a new kit number. The kit definition will have to be set up at a later date using the **CHANGE PRODUCT** menu option. If the response to **MAINTAIN KIT DEFINITION?** Is [**Y**], a secondary input screen is presented for entry.

The user will enter the category/part number combination for each product that will be used in the manufacture of this new item and the quantity that will be used. If the kit type is [**M**], the default for the **SUB** field will be [**N**] and may not be changed. If the kit type is [**C**], then the **SUB** field is available for entry and may be either [**Y**] or [**N**].

A **SUB** refers to the user's ability to substitute another item for the one listed in the kit definition at the time of sale. Since a manufactured [**M**] kit is created and assembled prior to sale, no substitutions are permitted. However, a counter [**C**] kit is assembled at the time of sale and by its nature, requires the ability to sub out items on the fly.

The **HIDE** field refers to whether or not to hide the component items on the printed invoice. If the items are hidden on the printed invoice, then only the kit item will appear as with a normal item. When the items are not hidden on the printed invoice, then the kit item is printed as usual, and the component items are listed underneath. No pricing information is printed for the component items.

How Kit components print on an invoice may differ based on custom invoice developed for certain customers.

Inventory Considerations

As stated previously, no inventory is held on hand for counter [**C**] kits. The components are subtracted from inventory at the time of the sale, just as if each individual item was sold separately. Reporting of the sales demand and cardex entries for parts included in a counter kit are shown on the individual components.

> Customer back order should not be used for Counter Kits.

Manufactured [**M**] kits are held on the shelf ready for sale and therefore must be received prior to being able to be sold. Increases in inventory levels for [**M**] type kit items are done through **PURCHASING > PURCHASE ORDER RECEIPTS > RUSH RECEIVING**. As the inventory of the full good is increased, the inventory of the component items is reduced.

The changes in on hand quantity all happens in the branch the product is received in.

Type [**M**] kits can also be added to a purchase order either from a suggested order or manually to be used for requesting assemble of the kits. This purchase order would then be received **PURCHASING > PURCHASE ORDER RECEIPTS > P.O. RECEIPTS INPUT** and the component inventory would be removed from stock and the assembled kit part would be added to inventory.

Sales of the components will be recorded at the time the [**M**] kit is received into inventory

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