

Orders with kits or configurations

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Adding to quotes and orders

All Orders allows you to offer your customers selections and options when ordering kit items or configurable bill of materials. Once you have created them you can add them to a quote or sales order using the drop down of item in the grid. When you select an item that is a kit or a configuration, you will get a dialog that looks like the following.

Kit Configuration

Kit qty: 100 Price Per: 2.75

Kit Components

Short Name	Type	Description
Pencils	Fixed	Must pick the pencils
Note pads	Fixed	
Eraser	Variable	Suggest blue eraser.
Optional items	Yes/No	

Component Details Total: \$275.00

Check one of the following.

Item	Sales Description	Qty Per	Price	One Time
<input checked="" type="checkbox"/> ER1	Pink Eraser	1	0.25	<input type="checkbox"/>
<input type="checkbox"/> ER2	Blue Eraser	1	0.26	<input type="checkbox"/>

Help OK Cancel

I can now scroll through all the components and pick my options by checking the appropriate item. I can also change the Qty Per, Item price on a per item basis or change the kit qty and price per for the kit as a whole. As a result the Total will change to reflect the total price to the customer. (Note: If you are an item that is a configuration instead of a kit, the price per will not be displayed as this can be changed directly on the sales order). After you have completed your edits, press 'OK'. The kit along with all of the selected components will be shown on the sales order (Note: If you are an item that is a configuration instead of a kit, only the non-configured items will be displayed). You can collapse the kit items under the kit by CHECKING 'Allow collapsing/expanding on kit lines' in Sales Order Preferences.

Home | Item List | Inventory Item | **Sales Order**

Save | Reset | Cancel | Print | Sales Order | Fill | Activities | Email | Custom Fields | Record Info

Customer: Bonnie | Ship To Address: Store #88 | Ship From Location: []

Sales Order
 Order # 334 | Order Date 11/20/2008
 Allow Back Orders
 Exg Rt: 1

Term: [] | Sales Rep: [] | FOB: [] | Class: [] | Promise Date: 11/20/2008

Item	Description	Ordered	Shipped/Com...	Back Order	Avail...	U...	Pric...	Tota...	Kit	Clear	Det...
BTS	Back to school kit.	100		N/A			2.75	275.00		<input type="checkbox"/>	▼
H2 ...	Doz. H2 Pencils	100	0	0	0	BX	1.51	150.55		<input type="checkbox"/>	▼
NPD	Lined not pad	100	0	0	0	EA	0.99	99.36		<input type="checkbox"/>	▼
ER1	Pink Eraser	100	0	0	0	EA	0.25	25.09		<input type="checkbox"/>	▼

Discount: [] 0.00 % | Ship Method: [] | Tax Code: FL (6%)

Subtotal 275.00 | Discount \$ 0.00 | Freight \$ 0.00 | Pre-Tax Total 275.00 | Tax 16.50 | Total 291.50

You expand or collapse the kit by clicking the + or - signs next to the kit item. To reload the kit wizard, click the kit icon under the 'Kit' columns on the sales order.

Forms to use

Now that you created the quote or sales order which forms should you use to send your customer the appropriate order acknowledgement?

- Sales Order Kit: Shows the kit with all of its sub-items
- Sales Order Kit Rollup: Shows only the kit but no sub-items
- Sales Order Configured BOM: Shows the assembly with variable and yes/no options and selections.

Creating the work order for configurations

Now that you have created sales order for the configured item, you need to produce it using a work order. If you create a new work order without reference to the selections and options your customer's just made, then the work order will just show the default bill of materials. However if you create the work order directly from the sales order, All Orders will swap the default components with the customer's selections and options.