

# Kit and Configurable Bill of Materials

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## Overview

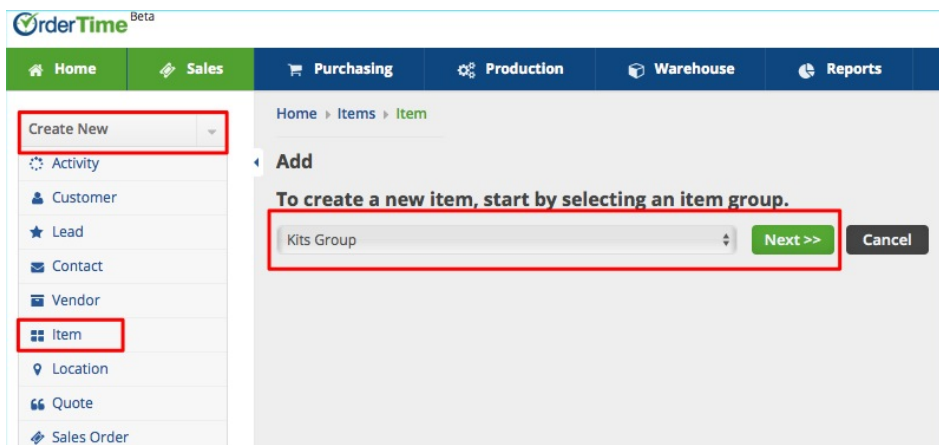
\* A Kit and an Assembly are not interchangeable. Please see [Kits vs Assemblies](#) for details. \*

*Kits* are combining two or more items to send to a customer. The Kit itself is NOT an item.

## Kits

The purpose of creating a kit is to offer the customer choices of what is included in the kit at the order time.

1. To create a Kit, click on the **Create New** drop-down menu and select **Item**. This will lead you to the **Add Item** page.
2. Select **Kits Group** from the *Item Group* drop-down.
3. Click the **Next>>** button.



- Alternatively, you can click on the **Open Full** List drop-down menu and select **Items** . Click the **+New Items** button from the *Item List* page. This will also lead you to the **Add Item** page.
4. In the *New Kit Item* screen, you have the ability to either manually enter a name for your kit, or automatically generate one by pressing **Next Item No**.
  5. Select the *Unit Of Measure* that corresponds to the kit.
  6. If the Kit is *Active*, click the box to check it.
  7. You also have the option of entering a *Description* and *Notes* about the Kit.
  8. Finally, you can enter specifics about the Kit by clicking on the *Custom* Tab.
  9. Click **Save**.

OrderTime Beta

Project021

Home Sales Purchasing Production Warehouse Reports

Create New Open Full List

Recent Records

- Emailto
- styletest
- Bell Inc.
- Service Provider 1 PITM

Home > Items > Item

Item - Next Item No. Save Reset

General

Group Kits Group

Name

Other

Active ☒

General Notes Custom

Description

## Add Components and Selections

After the Kit is created, you can select the Kit from the Item menu and then Add Components and Selections.

- Open the Kit record and click **Edit Kit**. Once the *Edit Kit* screen opens, click the +Add button next to the corresponding area.
- The *Kit Component* pop-up allows you to enter the Component's Name, Type, Description and select if it is 'Active'.
  - Kit Component Types
    - Fixed: The component listed will always be on the kit. Only one item will be shown in the kit selection area.
    - Variable: These components will be options that you can select from. The component that is marked as the "Is Default" will be the standard choice.
    - Yes/No: These are optional components that can be included in the kit
- The *Selections* pop-up allows you to enter the Item Name, Price, Quantity, and select if it is being used only One Time and if the Selection is 'Active'.

**You cannot delete components from a kit that has been used for a transaction. You can only make those components inactive.**

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All Orders Demo

Home Sales Purchasing Production Warehouse CRM Center Reports

Create New Open Full List

Recent Records

- Back to School
- 89578902370
- 175
- 171
- 179
- Alexandria Professional
- 21st Century
- 3950
- 3951

Home > Items > Kit

Back to School EDIT NULLS

Description

Back to School supplies

Other

Price 0

Component

+ Add

Active Inactive Both

NAME TYPE DESCRIPTION ACTIVE ACTIONS

Selection

+ Add

Active Inactive Both

ITEM DESCRIPTION

Kit Component

Name

Type

Description

Fixed Variable Yes/No

Active ☒

Save Cancel

After completing the information requested, click Save.

## Kit Rules

You can restrict the options in the Kit depending on what was selected in the previous kit option. You can accomplish this using the Kit Rules. To use the Kit Rules you will need to enable under the **Item Preferences**.

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Home Sales Purchasing Production Warehouse Reports

Home > Items > Kit

K15 **EDIT** **RULES**

Description: Other Price: 295.00

Component

**Add**

NAME	TYPE	DESCRIPTION	ACTIVE	ACTIONS
Basic	Fixed	This component will always be on the kit.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Options	Variable	These components will be options to select from. The selection marked as the "Default" is the standard choice and can be changed.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Yes or No	Yes/No	These are optional components that can be included in the kit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>

Selection

**Add**

ITEM	DESCRIPTION	PRICE PER	QTY PER	ONE TIME	ACTIVE	IS DEFAULT	ACTIONS
A02	Item A02	100.00	1.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
B02	Item B02	20.00	1.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
D02	Item D02	150.00	1.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>

The following logic applies when using the Kit Rules:

- Kit rules can only be applied to a component based on a preceding component. Rules will not apply to the first component listed.
- Kit rules can not be applied to or based on fixed type of components.
- The rules that apply to a certain component can only be based on a preceding variable type.

Click on the "Rules" Button to manage the kit rules you want to apply to your kit.

1. In the "Selections of" drop down, select the component options that your rule will be based on.
2. In the "Depends of" drop down, select the component that your selections depend on.

When users are adding a kit to an order and are presented with selection options for the Selections Of components, they will only be allowed to select items that based on the rules that are defined, are available based on the items selected in the Depends On component.

OrderTime

Home Sales Purchasing Production Warehouse Reports

Home > Items > Kit

K15 **EDIT** **RULES**

Description: Other Price: 295.0000

Component

**Add**

NAME	TYPE	DESCRIPTION	ACTIVE	ACTIONS
Base Components			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Selections			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Depends			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>

Selection

**Add**

ITEM	DESCRIPTION
A01	Item A01

**Rules**

Selections of: Depends  
Depends on: Selections

Selection of Selections

A02
B02
D02

Selection of Depends

123
V Item
F02

Limit to these selections

123
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**Save** **Delete** **Cancel**

## More about Inventory Control with Order Time