

demand**bridge**[™]

db distributor[™]

**KIT MANAGEMENT
DOCUMENTATION**

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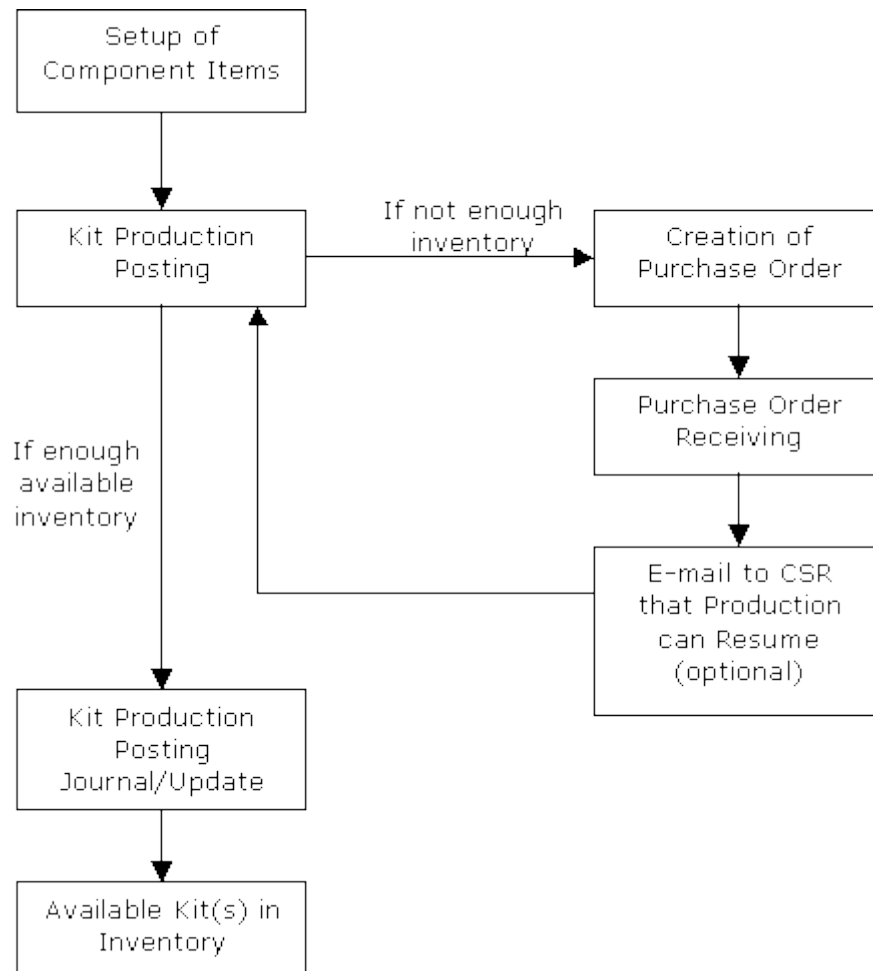
Welcome to the DB Distributor Kit Management text documentation. DB Distributor's Kit Management module is used to expedite the process of transacting inventory records when assembling kit items for sale. The module can also create PO's to vendors if you have run out of inventory for any of your component items.

To see a general diagram for the flow of Kit Production, see below.

Where applicable, each topic in this help system provides a path to the related panel in the DB Distributor Graphical User Interface (GUI) application, with the path to the Character-Based User Interface (CHUI) panel presented in parentheses. For example:

DB Distributor Optional Modules > Kit Management > Setup > Components (KIT S1)

» KIT PRODUCTION - GENERAL FLOW



KIT MANAGEMENT SETUP

The setup of the Kit Management module consists simply of setting up the Kit Parameters, and adding the component items to the main kit item. Select a link to learn more about a particular item.

Setup

[Parameters](#)

[Kit Component Items](#)

KIT PARAMETERS

DB Distributor Optional Modules > Kit Management > Setup > Parameters (KIT S2)

The Kit Parameters will need to be setup in order to control the functionality of the module.

Please answer the following parameters:

1. Always default warehouse code in Kit Component Setup to: _____
Enter a warehouse code. When setting up your Kit components, this is the warehouse that will default to pull the components from.
2. Disable entry of selling price in Kit Production Posting?
If set to "yes", the program will not allow access to the selling price field.
3. Accumulate unit quantity for Inventory Control stats as "K" rather than "U" type?
If set to "yes", the statistics kept in the inventory record for the component item will be kept as "Kit Sales" instead of as "Unit Sales".
4. Enable backorder fill feature from kit production?
If set to "yes", then an existing backorder for a kit item could be filled by producing a kit item through Production Posting, instead of being filled by PO Receiving only.
5. Default to I/C Base Price for Price during Production Entry?
If set to "yes", then the base price on the lot for the created kit item will default to the base price that is set on the inventory record of the kit item.

The press **Save** to exit and save the changes.

KIT COMPONENTS

DB Distributor Optional Modules > Kit Management > Setup > Components (KIT S1)

The Component Setup panel is used to add or update component items that help build your final Kit item.

Follow these steps to complete this panel:

1. If you are setting up a kit item that is customer specific, enter in a customer code. If the kit item is for general inventory, you will leave the customer code blank.
2. Enter in the main kit item code.

3. Select "yes" or "no" for the Create PO question. This relates to the component item that you are about to add or modify. Setting this answer to "yes" will cause the system to automatically create a PO for the component item if there is not enough available when you are trying to produce the main kit item during the Production Posting process. *Note:* this option is not available if your component type is a special charge.
4. Select if the component line type is **Inventory** or a **Special Charge**. Follow the instructions below based upon your answer.

Steps if your component item is a **Special Charge**:

5. Enter the special charge code to be included in the kit. *Note:* Special charges are internal only. They will never create a PO to an outside vendor. This is a good way to include your labor cost into the kit.
6. Enter in the unit of measure for the special charge (typically per each). If this is a variable unit of measure, then you will need to enter in the quantity per that unit of measure as well.
7. Enter in the quantity required of this component for the kit. (This is based upon your unit of measure. If your unit of measure is box, then enter the number of boxes, etc.)
8. Enter in your price per unit of measure.
9. Press **Save**.

Note: The sales distribution G/L interface codes in A/R have been updated to include a field for kit production. Any postings related to a special charge used as part of a kit will post to this g/l account.

Steps if your component item is **Inventory**:

5. If you are setting up a component that is customer specific, enter in a customer code. If the component item is from general inventory, you will leave the customer code blank.
6. Enter in the component item code. *Note:* if you are viewing a component item that had insufficient supply during an earlier attempt to create the kit, and you have chosen to let the system auto generate a PO to order the item, then a button will be displayed that shows the open PO number, and gives you access to view the open order.
7. Enter in the warehouse code the component should be pulled from.
8. Enter in the unit of measure for the component item. If this is a variable unit of measure, then you will need to enter in the quantity per that unit of measure as well.
9. Enter in the quantity required of this component for the kit. (This is based upon your unit of measure. If your unit of measure is box, then enter the number of boxes, etc.)
10. Optionally, enter in a Customer Service Representative code. If a PO is automatically created for this component item during the Production Posting process, due to a lack of inventory, then the CSR entered here will receive an e-mail confirmation when the component item is later received onto the system. This will alert them that they can then complete the kit production process.
11. Press **Save**.

COMPONENT LISTING REPORT

DB Distributor Optional Modules > Kit Management > Reports > Component Listing (KIT R1)

Use the Component Listing Report to view the detailed information about what component items are used to build any of your Kit items.

Follow these steps to run this report:

1. This report will run by Customer and Item. Select a range of customers and/or item codes if you would like to limit your report to a specific range.
2. Review the Output Options.
3. Click **Print Report**.

KIT PRODUCTION PROCESS

The Kit Production Process consists of two panels that you must complete in the order presented below. Click the following links to see the procedure you need to perform on each panel.

- [Production Posting](#)
- [Production Posting Journal & Update](#)

KIT PRODUCTION POSTING

DB Distributor Optional Modules > Kit Management > Transaction Processing > Production Posting (KIT T1)

The Kit Production occurs using the batch process. After creating a new batch, or using an existing batch, you will be brought to the Kit Production Posting panel. You will use this panel to tell the system how many kits you would like to produce, for a selected item, or for multiple items. You will notice that this process is similar to creating lots through the Inventory Transaction Process. Follow the steps below to complete the panel:

1. For a customer specific kit item, enter in a customer code. For a stock kit item, leave the customer code blank.
2. Enter in the kit item code that you would like to produce.
3. Enter in the warehouse code that you would like the finished kit to be put in to.
4. Enter in a receipt date and a sequence number. (This is usually the current date and sequence 01. However, the sequence option allows you to store the kits in more than one bin location, or if you have different packaging requirements.) At this point you will need to confirm with the system that you want to add the record.
5. Optionally, you can add information to the following fields if you would like it to appear on the kit lot record: Receiving Report, PO Number, PO Date, Factory Job Num, Vendor, Plant Code, Bin Location, and Starting and Ending numbers.
6. Enter or confirm your primary unit of measure.
7. If you have sub-packaging, enter in the sub-pack unit of measure, the number of sub-packs within the primary unit, and the quantity contained within the sub-pack. If you don't have sub-packaging, you will simply need to enter the quantity contained within your primary unit.
8. Enter in the quantity you would like to create of the primary unit of measure. *Note:* if you are repeating this process, due to lack of inventory from an earlier attempt to create the kit, the initial quantity that you tried to create will be displayed next to this field.
9. If the parameter allows access to the selling price field, only enter a selling price if you plan on charging this price to anyone that purchases this finished item.
10. Optionally, you will then be able to enter in a customer PO for the lot, a lot comment, assign a fixed product code and/or commission code with this lot, and you can also set a standard unit cost if desired.
11. You will then click **Save** and proceed to update your kit production using the [Journal and Update](#) screen.

Note: When saving the record, you will be notified if there is insufficient stock of any of the component items. You will not be able to continue the processing until the situation is resolved. For any of your component items that have been marked to create a PO, a PO will automatically be created to order the amount that is lacking. When PO Receiving is done to bring in an adequate supply of the component item, if a CSR was entered on that component item, an e-mail will be sent to the CSR to notify them that

processing is ready to continue. *Note:* When PO Receiving is performed on an order that is auto-generated by the Kit process, the received inventory will be automatically committed to the kit transaction.

This entire process can be done manually as well, if you have chosen not to have a PO automatically created. You also have the option of going through this process again, and lowering the quantity that you are trying to create in step 8.

For additional information on the Order Entry or PO Receiving processes, please refer to our Order Processing text documentation.

KIT PRODUCTION JOURNAL AND UPDATE

DB Distributor Optional Modules > Kit Management > Transaction Processing > Prod Posting Journal/Update (KIT T2)

Use the Kit Production Journal and Update Panel to print out your production journal and then update the batch.

Follow these steps to complete the panel:

1. Choose your batch from the batch query. The Kit Production Journal and Update Panel is displayed.
2. Enter the fiscal year and period that the postings should be made to.
3. Optionally, select if you would like to have the bin location of the component items print on the report.
4. Click **Output Options** to review the printer configuration, making changes as necessary.
5. Click **Print Report**.
6. If the journal report is correct, you can choose to Update the data. If the report has errors, you should exit the update and make any corrections. The program will not let you update unless there is enough stock of all component items. This can be remedied by either receiving in additional stock of the components, or by lowering the quantity of kits to be produced in the [Production Posting Panel](#).

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