



### Kits on the Item Record

- On the Item record, there is a dropdown for the Linked Kits to allow users to add Items to Kits or move Items across existing Kits as shown in the sample below.

Item Management

<b>Item # *</b>	<b>description caption test 1 *</b>	<b>Status</b>
<input type="text" value="ACY0004"/>	<input type="text" value="Air Cylinder O-ring P/N 6395895"/>	<input type="text" value="Active"/>
<b>Item Type *</b>	<b>Item Class *</b>	<b>alt part 1 test 2</b>
<input type="text" value="Inventory"/>	<input type="text" value="Air Cylinder Kits / Parts"/>	<input type="text" value="Belt Press CYL O-Ring"/>
		<b>alt part 2 test</b>
		<input type="text"/>

Item Master

General Info

<b>Manufacturer</b>	<b>mfg part # caption test</b>	
<input type="text" value="Please select or type..."/>	<input type="text"/>	
<b>Print Label Upon Receipt</b>	<b>Label Field 1</b>	<b>Label Field 2</b>
<input type="text" value="Never"/>	<input type="text" value="Please select..."/>	<input type="text" value="Please select..."/>
<b>Cycle Frequency</b>	<b>GL Account</b>	<b>Linked Kits</b>
<input type="text" value="A"/>	<input type="text" value="Please select..."/>	<input type="text" value="KIT002 - Pump Repair Kit"/>

### Issuing Kits

- Users can select from existing Kits on the Issue Items screen by typing the Kit ID or name in the existing Items search box. When selecting a Kit, all of the Items in that Kit will be pulled into the Issue record as shown in the sample below. By default, the Kit will only get pulled in if all of the Items in the Kit have enough On Hand qty.
  - There is a secondary system configuration allowing users to add partial Kits. This will allow some of the Items in a Kit to be added that have enough On Hand qty even if some of the Items do not have enough.

Issue Items

**Stock Location \***

**Issued By**

**Issued To \***

**Work Order #**

**Asset**

**Comments**

**Original Ship Date**

Item #	KIT002: Pump Repair Kit	Price	Extended	Current O...	Location

## Purchasing Kits

- Users can select from existing Kits on the Purchase Order creation screen by typing the Kit ID or name in the existing Items search box. When selecting a Kit, all of the Items in that Kit will be pulled into the PO record as shown in the sample below.

Purchase Order Entry

<b>PO #</b>	<b>Status</b>	<b>Type</b>	<input type="checkbox"/> <b>Create as Blanket</b>
<input type="text" value="01#####"/>	<input type="text" value="Being Built"/>	<input type="text" value="Purchase Order"/>	
<b>Vendor *</b>	<b>Vendor Quote #</b>	<b>Cost Center</b>	<b>test1</b>
<input type="text" value="A.M Service Company"/>	<input type="text"/>	<input type="text" value="Please select..."/>	<input type="text" value="Please select..."/>
<b>2</b>	<b>4</b>	<b>8</b>	
<input type="text" value="Please select..."/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> <b>9</b>	<input type="checkbox"/> <b>10</b>		

Purchase Order Details

Line Items

General Info

Vendor Info

Line Items

<b>Stock Location</b>	<b>GL Acct</b>	<b>Date Expected</b>
<input type="text" value="Main Stockroom"/>	<input type="text" value="Please select..."/>	<input type="text" value="2/7/2021"/>

x
🔍
+ Add Line
⚙️ Create Item

Item #	Item	Qty Order...	Unit Cost	UM	Tax
	KIT002: Pump Repair Kit				

### Transferring Inventory of Kits

- Users can select from existing Kits on the Inventory Transfer screen by typing the Kit ID or name in the existing Items search box. When selecting a Kit, all of the Items in that Kit will be pulled into the Inventory Transfer record as shown in the sample below. By default, the Kit will only get pulled in if all of the Items in the Kit have enough On Hand qty.
  - There is a secondary system configuration allowing users to add partial Kits. This will allow some of the Items in a Kit to be added that have enough On Hand qty even if some of the Items do not have enough.

Inventory Transfer

**Transfer Type**  
 Request ⓘ  Immediate ⓘ

**Initiating Stock Location \*** **Destination Stock Location \***  
Main Stockroom Atlanta Plant ✎

**Placed By** **Date Entered**  
System Administrator 2/3/2021 5:44 PM 📅 ⌚

**Date Expected**  
📅

1
Pump Repair ✕
🔍

Li...	Item	Description caption test 1	Available ...	Transfer Qty	From Bin	mfg part...
	KIT002: Pump Repair Kit					

### Non-PO Receiving of Kits

- Users can select from existing Kits on the Non PO Receiving screen by typing the Kit ID or name in the existing Items search box. When selecting a Kit, all of the Items in that Kit will be pulled into the record as shown in the sample below.

Non Purchase Order Receiving

Vendor Id

Please select...

Stock Location

Main Stockroom

Received By

System Administrator

Last Received

2/3/2021

Vendor Invoice #

misc cost caption test 1

\$0.00

Received Freight

\$0.00

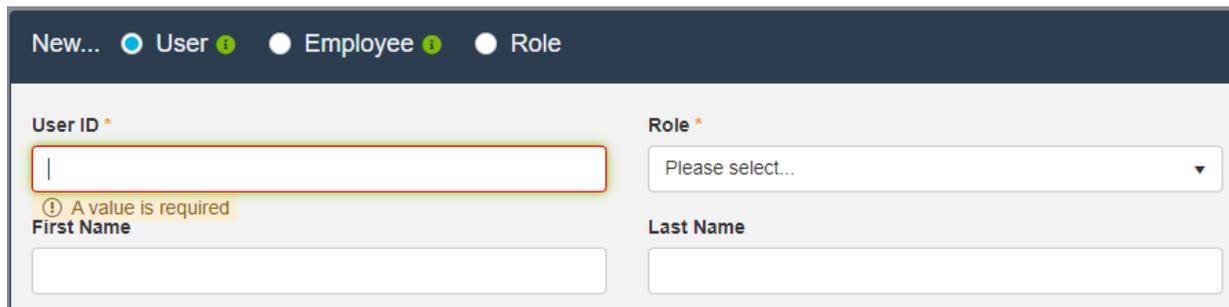
Line #	Qty Rec	Cost	Bin	Lot #
1				

Pump Repair | x

KIT002: Pump Repair Kit

## User Management

- The create User screen has changed to use radio buttons to choose between a New User, Employee, or Role as shown in the sample below.



New...  User  Employee  Role

**User ID \***  
  
! A value is required

**Role \***

**First Name**

**Last Name**