

Parts kits are used to group parts that are used together for a particular service. A parts kit can contain up to 29 parts, and the parts may be from multiple inventory sources.

While the parts kits are similar to pre-built lists you create on the Parts Queries screen, parts kits allow you to control the pricing for the kit and allow you to set a time frame for the kit usage. Parts kits are used for customer pay and internal sales. You can create multiple parts kits that are used for the same service but set different pricing for each pay type as needed. At the time of sale, you would pull the corresponding pay-type kit to the document.

The parts kits you create here are available throughout the Parts Inventory module. You can pull parts kits directly to counter slips and repair orders from the Counter Sales and Service Sales screens. In addition, you can pull parts kits to the Parts Queries screen. Once pulled to the Parts Queries screen, you can “dump” the list to a counter slip, repair order, quote, purchase order, or order que.

Creating Parts Kits

Parts kits are created in the Special Inventories. You must create the parts kits in order to be able to pull them to other areas of the program.

Adding a Kit

1. Click **Special Inventories** on the Parts main menu.
2. Click **Parts Kits** on the Special Inventories menu.
3. Type the ID you want to assign the kit in the **Part Kit ID** field. This field holds up to six alphanumeric characters. The kit ID appears on all documents to which you assign the parts kit.
4. Use the **Description** field to type a description for the list.
5. Type the **Customer Class** and **Discount Level** for the kit. If you will not be setting a specific price for the kit, these fields allow you to control the kit pricing based on the pricing set for the selected customer class and discount level.
6. In **Update Cost Automatically**, indicate if you want the part cost automatically updated based on the current price tape information. If you type **Y** for yes, the cost automatically updates when you run the monthly inventory update. If you type **N** for no, you will have to use the **Update Cost for Kit** button to manually update the cost as needed.
7. Specify the **Start Date** and **End Date** for the kit. This is an optional entry. If you set a time frame for the kit, the system will prompt you if you try to use a kit after the set date. You will still be able to use the kit outside of the specified time frame.
8. The **Ovr/Sale** field allows you to override the total sale so you can create a kit with a pre-set sales value, regardless of the accumulated sales values of the individual parts. Type **Y** in this field, and specify the sale price in the **Total Sale** field. The sale amount you set also overrides any pricing that would have applied if you assigned a customer class and discount level.

9. In the **Part** field, type the part number for the part you want to add to the kit. The **Description**, **Cost**, **List**, **C** (Core), **S** (source), and **Loc** (Location) fields automatically fill in with the information from the part's master inventory record.
10. In **Qty** , type the quantity of the part you want to add to the kit. For example, if you were building a list of parts used for a particular service, you could use this field to indicate the quantity of each part used during the service.
11. If you selected to use the accumulated sale for the kit rather than specifying a sale total, you can edit the price for each part as you add it to the kit. If you set an overriding sale amount, the **Price** field will be unavailable for editing.
12. Press ENTER until the part line is filed in the part window on the bottom of the screen.
13. Continue to add parts to the kit as needed.
14. The **Total Cost**, **Total Sale**, and **Gross Profit** fields automatically update as you add parts to the kit. Note that the gross profit does not include cores.
15. Click **Save** to save the kit.

Editing an Existing Kit

1. Click **Parts Kit List**. A list of part kits appears.
2. Click the kit you want to edit. The information entered for the kit fills in on the screen.
3. Click in a field, and edit the information as needed.
4. Click **Save** to save the changes.

Removing a Part

1. Select the part kit as needed.
2. Click the part line.
3. Type **0** (zero) as the quantity, and press ENTER.
4. Click **OK** when prompted to verify you want to remove the part from the kit.

Printing individual Parts Kits

1. Click **Parts Kit List**.
2. Click the parts kit you want to print. The list loads on the Enter Parts Kits screen.
3. Click **Print Kit**.
4. When prompted to verify your printer is ready, click to select **To Printer** to print the information or **To Screen** to view the information on your screen.
5. Once you select your print type, click **Print**.

Printing all Parts Kits

When printing the complete list of parts kits, you have the option of printing a summary list or detailed list. The summary list includes the part kit ID, description, total cost, total sale, and gross profit percentage for each kit. The detailed list includes the part kit ID, description, total cost, total sale, gross profit percentage, and the part number, quantity, description, location, cost, and sale for each part in the kit. An asterisk (*) in front of a part number indicates that the core has been set to be included with the part.

1. Click **Parts Kits List**.
2. Click **Print List** on the list screen.
3. Specify the type of list to print. Type S for summary or D for detailed.
4. When prompted to verify your printer is ready, click to select **To Printer** to print the information or **To Screen** to view the information on your screen.
5. Once you select your print type, click **Print**.

Deleting a Kit

1. Select the part kit.
2. Click **Delete Kit**.
3. Click **OK** when prompted to verify you want to delete the record.

Pulling Parts Kits to Counter Slips

You can pull parts from a part kit to the counter slip. You must pull the parts kit before you select the customer for the counter slip.

Pulling a Kit

1. Click **Counter Sales** on the Parts main menu.
2. Click **Lists** on the bottom of the Counter Parts Sales screen.
3. Click **Parts Kits** on the Pull Order Que Order screen.
4. Click the kit you want to pull. The screen displays the detail for the kit. (Click **Sort** to display the list of part kits again as needed.)
5. Click **Pull To Invoice** to pull the kit to the counter slip.
6. Click **OK** when prompted to verify you want to pull the order.
7. The part(s) will be added to the counter slip screen. The **Price** for the individual parts will be 0.00. The part kit ID will display as the last part line and display the total price for the kit.
8. Enter any additional customer information and parts as needed, or select an existing slip to add the parts to that slip.
9. Generate the order.

Removing a Single Part from a Kit

1. Click the part in the list to bring the part information to the working line.
2. Type **0** (zero) as the quantity, and press ENTER.
3. This removes the part from the list. The parts kit price will be reduced by the cost of the part you removed from the kit.

Removing an Entire Kit

1. Click the part kit line in the part list. This line displays the part kit ID as the part number and lists the price for the total parts kit.
2. Type **0** (zero) as the quantity for the kit, and press ENTER.
3. This removes the parts kit from the list.

Crediting a Kit

1. Pull the parts kit to the counter slip screen.
2. Select the customer, or type the customer's information.
3. Click the part kit line in the part list. This line displays the part kit ID as the part number and lists the price for the total parts kit.
4. Type -1 as the return quantity in the **Qty** field.
5. Generate the order.

Pulling Parts Kits to Repair Orders

You can pull parts from a part kit to the repair order. You must pull the parts kit before you select the repair order.

Pulling a Kit

1. Click **Service Sales** on the Parts Inventory main menu.
2. Click **Line Parts** on the Service R/O Parts menu.
3. Click **Lists** on the bottom of the Service R/O Parts screen.
4. Click **Parts Kits** on the Pull Order Que Order screen.
5. Click the kit you want to pull. The screen displays the detail for the kit. (Click **Sort** to display the list of parts kits again as needed.)
6. Click **Pull To Invoice** to pull the kit to the counter slip.
7. Click **OK** when prompted to verify you want to pull the order.
8. Type the repair order number, or use the **R/O List** button to select the repair order.
9. When prompted, type the repair number for the repair that requires the parts.
10. Enter the Salesman Code, Price Code, Discount Level, and Special Parts Discount.
11. When the cursor advances to the **Part Number** field, the parts on the kit will be added to the repair order. The **Price** for the individual parts will be 0.00. The part kit ID will display as the last part line and display the total price for the kit.
12. The **W** field for parts kits parts displays **&** to help quickly identify parts kit parts. Parts kits parts do not need to be processed individually like parts added through the Service module (parts that display **#** in the **W** field). The parts are automatically processed when the parts kit is pulled to the repair order.
13. Add any additional parts as needed.

Removing a Single Part from a Kit

1. Click the part in the list to bring the part information to the working line.
2. Type **0** (zero) as the quantity, and press ENTER.
3. This sets the quantity to 0. The parts kit price will be reduced by the cost of the part you removed from the kit. The part will be removed from the list when you save the R/O.

Removing an Entire Kit

1. Click the part kit line in the part list. This line displays the part kit ID as the part number and lists the price for the total parts kit.
2. Type **0** (zero) as the quantity for the kit, and press ENTER.
3. This sets the parts kit quantity to 0. The kit will be removed from the R/O when you save it.

Pulling Parts Kits to the Parts Queries Screen

Uses the **Parts Kits** button on the Queries screen to view available parts kits and pull parts kit to the Queries screen. You can then treat the parts kit list as you do any other list pulled to the Queries screen.

Pulling a Kit

1. Click **Queries** on the Parts Inventory main menu.
2. Click **Parts Kits**. A list of parts kits displays.
3. Click **+** to view the detail for a parts kit in the list.
4. Click the parts kit you want to pull, and click **Open Kit**.
5. The parts kit fills in on the Parts Queries screen.
6. You can add additional parts to the displayed list, remove parts from the displayed list, or edit quantities as needed.

Dumping a Kit

Once you pull a parts kit to the Parts Queries screen, you can use the Dump To button to move the parts kit to a counter slip, a repair order, the Order Que, an outside purchase order, or a quote.

1. Select the parts kit.
2. Click **Dump To**. The Dump To screen appears and displays the parts on the list.
3. Click a part in the list to change its order status from “Order” to “In Stock” or from “In Stock” to “Order.”
4. Click the button on the left side of the screen that corresponds to where you want to move the order.
 - Click **Dump To Counter Slip** to move the order to a counter slip. The system advances you to the Counter Parts Sales screen so you can complete the counter slip.
 - Click **Dump To R/O** to move the order to a repair order. The system advances you to the Service R/O Parts screen so you can select the repair order.
 - Click **Dump To Order Que** to move the order to the order que. The system will advance you to the Order Que screen so you can create the order.
 - Click **Dump To Outside PO** to move the order to a purchase order. The system prompts you to indicate if you want to start a new purchase order or if you want to add the parts to an existing purchase order. Click **New** or **Existing** accordingly. If you select to add the parts to an existing purchase order, a list of purchase orders appears. Click the purchase order you want to select. The system advances you to the Parts Purchase Orders screen so you can create the purchase order.
 - Click **Dump To Quote** to move the order to a customer quote. The system advances you to the Customer Quote screen so you can create the quote.
5. Enter the necessary information on the screen that opens to finish the order.

Printing the Daily Parts Summary

Parts from parts kits are flagged with # on the Daily Parts Sales Summary. These parts will not have a sale, core, or extended value since they are considered part of a kit and not individual parts. The part kit line displays the part kit ID. This line will display the sale and extended price for the kit.

1. Click **End Of Day** on the Parts Inventory main menu.
2. Click **Daily Parts Sales Summary**.
3. When prompted to verify your printer is ready, select your print criteria.