

Introduction:

What are kits? Kits are logical groupings of items such as tables and chairs to make a dining set that can be shipped together in one box or in separate boxes. A kit can be added as a regular part number on Sales Orders and Commerce Quotations.

How to Configure it:

To create a kit in your Magaya system, follow these steps:

- 1) Go to Inventory Item Definitions, click Add and select "Add Kit Item".

CERVELOS3	Cervelo S3	Stock Item	S3
BK-ZZ	Adidas soccer shoes	Stock Item	Mens
BD_LE750	Edger Black & Decker LE750	Stock Item	Grass
BAM199	Bamboo Poles 10 pack	Stock Item	1 in x
AP2744	AutoLite Spark Plug	Stock Item	Platini
AM-441	Nike AirMax running shoes	Stock Item	AirMa:
7w5389	Air Filter	Stock Item	Model
		Stock Item	Hypor
	Plug	Stock Item	Platini
	s Mountain Bikes	Stock Item	Santa
		Stock Item	Better

Add Inventory Item...  
Add Resalable Inventory Item...  
Add Kit Item...

+

Add

✎

Edit

✕

Delete

🔍

Filter

🔍

Unfilter

★

Actions

🔍

Detail

- 2) Enter general information on the first screen in the dialog box such as the part number, description and model name or number.

If this item is for one customer, select them from the dropdown menu. To sell this kit to all your customers, leave this field blank.

Create Kit Item Wizard

General Information

Enter the Part Number, Description and the price of the item.

Item Definition

Part Number: RT4

Description: Rattan Coffee Table and 2 Chair Set

Model: Sky

Client:

☒ My company sells this item

Sales Price: USD

Generated Items and Services (Sales Item)

Code: RT4-INC

Description: Rattan Coffee Table and 2 Chair Set

Account: Inventory Income

< Back

Next >

Cancel

Help

- 3) Enter the sales price for the kit (if you sell it): Use this field to set a price different from the totals of the individual items such as a discount. If you leave this field blank, the system will calculate the kit price based on the price of each item in the kit.
- 4) Click "Next." In the next screen, click "Add" to add items to the kit and the quantity of each item. When selecting an item, the system pulls from your list of existing Inventory Item Definitions. Add new ones in the dropdown menu if needed.

Checkboxes:

- Add kit items ungrouped on Sales Orders: By checking this, the individual items will be added to a Sales Order, not the kit. This can speed up the selection of individual items on SO. When this is checked, the second checkbox is grayed out.
- Display kit items in documents: By checking this, the kit's items will display by default in the Sales Order document and be visible to the end customer when tracking orders online.

View Kits in the Inventory Item Definitions List:

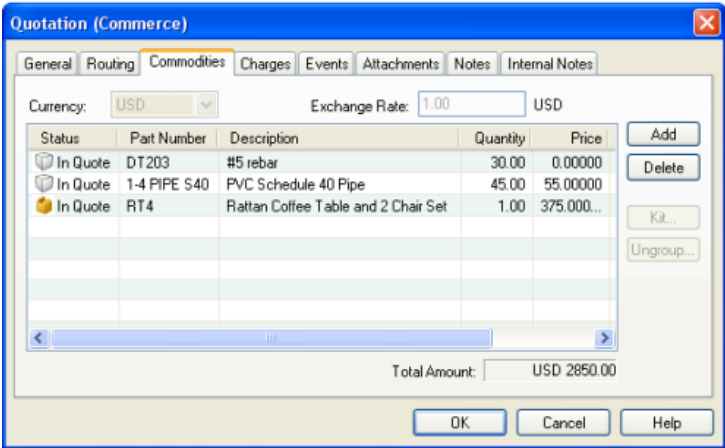
To view kits or items inside (the Bill of Materials), click the “Details” button and select the panel option from the dropdown menu.

Notes:

- After an item is included in a kit, the item cannot be deleted from the system.
- Kits are non-stock items, therefore inventory is not kept for the kit itself, and kits are not added on cargo operations such as Pickup Orders, Warehouse Receipts, Cargo Releases, Shipments, etc. Only the individual items can be added to these operations transactions, so the items can be picked and packed in the warehouse in any order.

Add a Kit to a Commerce Quote

To add kits to a Commerce Quotation, create the quote as you normally would. On the Commodities tab, enter the kits by clicking the “Add” button. Note that the kit icon is different from a regular item (the icon is in the “Status” column). Also note the kit price.



Options:

- To view items inside a kit, select the kit and click the “Kit” button.
- To ungroup items from the kit, click “Ungroup.” The prices of individual items will be displayed. Note: A kit item cannot be ungrouped after it is invoiced or after the kit charge is created on a Cargo Release or Shipment.

After the quote is completed, it can be converted as usual to many other transactions such as an Invoice, Purchase Order, Sales Order, Pickup Order, Warehouse Receipt and Shipment.

When an invoice is created, the kit price is displayed, not the individual item prices.

When a Sales Order is created from a Commerce Quote, the SO shows the kit. The system searches for the items in the available inventory and in arriving items. It creates backordered items if no items are on hand or arriving (and if the Configuration is set to enable this step). If the items cannot be resolved, the SO will not be created.

### Add a Kit to a Sales Order

Create a Sales Order (SO) as usual, and add the kits to the Commodity tab.

Sales Order

GeneralCommoditiesChargesEventsAttachmentsNotesInternal Notes

Currency: USDExchange Rate: 1.00USD

Status	Part Number	Description	Qua...	Price
Backordered	LAPTOP TEST KIT	Laptop Test kit	2.00	100.000...
On Hand	1-4 PIPE S40	PVC Schedule 40 Pipe	20.00	55.00000

Total Amount: USD 1300.00

OKCancelHelp

Add...Browse...DeleteKit...Ungroup...

If there is at least one backordered item in the kit, the status of the kit will be Backordered. The system updates the kit status as items are being loaded or processed in different transactions. If items are ordered online, the system functions the same way.

### Create an Invoice from a Sales Order:

To create an invoice from a Sales Order document, click Actions and select “create Invoice.” The kit price is displayed, not the individual item prices.

### Create a Shipment or Cargo Release from a Sales Order:

When you create a shipment or a Cargo Release from a Sales Order that has a kit in it, the items that constitute the kit can be picked and packed as needed. If some items are backordered, the on hand items can be shipped first.

If the invoice for a SO has not been created and the kit items in the SO are loaded onto a Cargo Release or Shipment, then a charge is added to the operation for the entire kit. This happens even if the kit is shipped partially because the price is per kit, not per individual item. This charge can be removed from the operation and to prevent it from being included in the consolidation of the operation until the full order is shipped. When the remaining items are added to a future shipment, then the kit charge will be added again to ensure the client is invoiced.

### Commissions on Kits:

Sales person's commissions on kits are calculated based on the cost of the kit, and the kit price will be used for the profit calculation.