

## Introducing "Kits"

Kits are used to group items together for use with Quotes and Jobs. The "Kit" has its own code, price and title, and a list of items that belong to the kit.

The best way to explain Kits is through example, in this case a business that can supply and fit towbars. Fitting a towbar would require a some stock ( or purchased ) parts, and labour, and as we would sell the same towbar more than once, to save time and double entry, we will put it together in JAQ as a "Kit".

## Kit List

Our list of Kits is found under the Quotes icon, called "Kits". In this example we only have 2 kits, both towbars for different model Holden Commodores.

The screenshot shows the JAQ software interface. At the top, there is a navigation bar with various icons and a clock showing 3:51 PM on 18 August. Below the navigation bar, the main content area is titled "Kit List" and features a green "K" icon. A button labeled "Add new kit." is visible in the top right corner. The main content area contains a table with the following data:

Code	Name	Sell Price	Active
TOWBARHOLDENVY	Towbar Kit, VY Commodore	\$578.00	1
TOWBARHOLDENVZ	Towbar Kit, VZ Commodore	\$548.00	1

Below the table, there is a section titled "About Kits." with the following text:

A kit is a collection of labour fee's, stock items, etc, combined into one item ( a Kit ), and can be added to a job or quote like any other line item.

Once added to a job or quote, a kit can be left as is, that is, a single line item. Or a kit can be Unpacked. When a kit is unpacked, all of its items are added to the job or quote as new line items. Unpacking lets you customise the kit to suit the particular job or quote.

JAQ will update the item quantity and despatched quantity when a kit is unpacked. Say for example you added a kit to a job, put in 2 for the quantity of kits needed, and this kit contains 10 flanges. And say you have already despatched 1 of these kits. If you Unpack this kit, the new line items will be added, including the flanges, with 20 as the quantity, and 10 despatched.

To add a new Kit, click the "Add new Kit" button. The New Kit and Edit Kit screen look the same, so I'll concentrate on the Edit Kit screen.

To edit the Kit, click the Kits Code ( Magnify glass ).

# Edit Kit


Edit Kit

Back dont save

Kit Details

Kit ID 2, added 18/08/2014 3:51:00 PM by JAQADMIN

Kit Code  \* Existing similar kit codes >

Kit Name   Active

General Notes

Up to date pricing  When adding this kit to a Quote/Job, did you want JAQ to use current pricing. If ticked, JAQ will look up the current prices for the line items below and use those instead of the prices entered below. You will still be able to edit the prices on the Quote/Job either way.

Kit Unit  Kit Account

Cost Total 
  
 Sell Total 
  
 Prices include GST

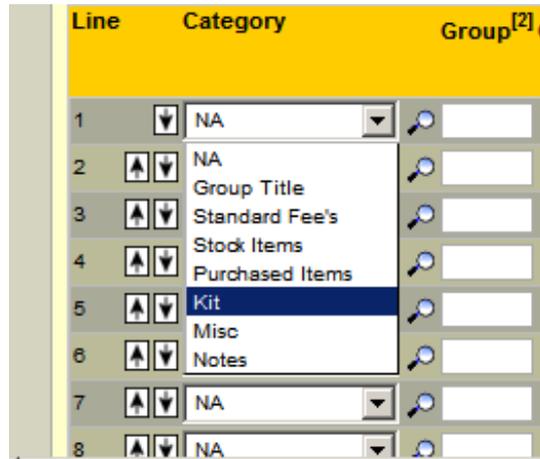
Line	Category	Group	Goods	Details	Account	Qty	Units	Cost Each	Sell Each	Cost Total	Sell Total
1	Standard Fee's		<input type="checkbox"/>	FITTING	Select	2	Hour	45	95	90	190
2	Stock Items		<input type="checkbox"/>	TOWBAR M52K32	Select	1	Each	190	350	190	350
3	NA		<input type="checkbox"/>	7Pin Plug	Select	1	Each	12	21	12	21
4	NA		<input type="checkbox"/>	Cable	Select	2	M	6.5	8.5	13	17
5	NA		<input type="checkbox"/>		Select		Each				
6	NA		<input type="checkbox"/>		Select		Each				
7	NA		<input type="checkbox"/>		Select		Each				
8	NA		<input type="checkbox"/>		Select		Each				
9	NA		<input type="checkbox"/>		Select		Each				
10	NA		<input type="checkbox"/>		Select		Each				

Editing a Kit is just like editing a Quote or Job, except this time its saved as a "Kit Code" instead of a Quote or Job number. The Kit needs a unique Kit Code, plus a Name. You should also choose a Kit Unit ( like Each ), and a Account Number if required.

We also have a option of ticking "Up to date pricing". What this does is, when you later add this Kit to a Quote or Job, JAQ will go through the kit items and get the current prices from the database. So if you add a stock part to this kit, then later change your stock prices, JAQ will use the updated price rates. If un ticked, JAQ will use the prices here, and not update them.

There is a save button, which does the obvious, plus a Save and Copy button, which will save the current page, and copy it to a New Kit page, where you can enter a new code, make a few changes, and save it as a different kit.

# Adding a Kit to a Quote or Job



Adding Kits to our Quotes or Jobs is just like adding any other line item. The Category list now has a "Kit" option, so when you select this and click on the magnify glass, the popup window will list your kits.

Kits					
Code	Name ( Click  for more info )	Cost	Sell	Qty	
TOWBARHOLDENVY	 Towbar Kit, VY Commodore	\$ 305	\$ 578	1	
TOWBARHOLDENVZ	 Towbar Kit, VZ Commodore	\$ 275	\$ 548	1	

Clicking on the orange button will copy the Kit to the Quote or Job as a single line item.

You'll notice there is a little plus symbol next to the kit code on the popup window. Clicking on this will expand the kit out so you can see in more detail what was included in the kit.

Kits							
Code	Name ( Click  for more info )	Cost	Sell	Qty			
TOWBARHOLDENVY	 Towbar Kit, VY Commodore	\$ 305	\$ 578	1			
	Suit sedans only.						
	<b>Group</b>	<b>Goods</b>	<b>Details</b>	<b>Qty</b>	<b>Units</b>	<b>Cost</b>	<b>Sell</b>
			FITTING	2	Hour	90	190
			TOWBAR M52K32	1	Each	190	350
			7Pin Plug	1	Each	12	21
			Cable	2	M	13	17
TOWBARHOLDENVZ	 Towbar Kit, VZ Commodore	\$ 275	\$ 548	1			

Once you click on the Orange button, the Kit will be copied to the Quote/Job, and the popup will close.

## Viewing the Kit

After you save your Quote/Job, you'll notice any line items that are kits have a little magnify glass. Clicking on this will open the Kit Details popup page.



The screenshot shows a browser window titled "JAQ:BAE - Mozilla Firefox" with the URL "localhost/jaq/Popup-ViewKit.asp?KitID=2&QuoteNo=Q11871&LineID=71090". The page content includes:

- Buttons: Print, Unpack\*, Close
- Kit Code: TOWBARHOLDENVY, Kit ID: 2, added 18/08/2014 by JAQADMIN
- Kit Name: Towbar Kit, VY Commodore, Active
- General Notes: Suit sedans only.
- Up to date pricing: No, prices were fixed when this kit was created.
- Kit Unit: Each, Kit Account: 4-6000

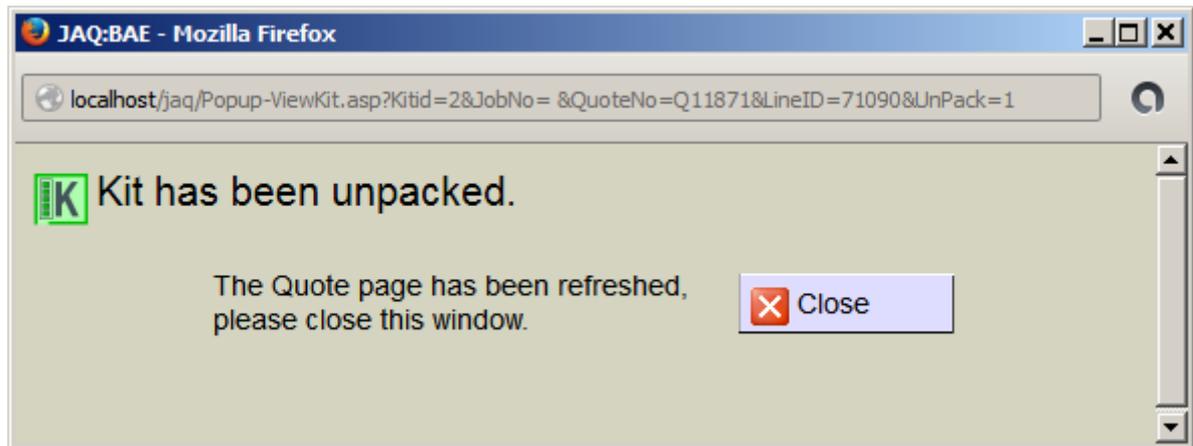
Category	Group	Goods	Details	Account	Qty	Units
Process			FITTING	NA	2	Hour
Product			TOWBAR M52K32	NA	1	Each
NA			7Pin Plug	NA	1	Each
NA			Cable	NA	2	M

\* Unpacking means the kit ( this one ) listed as a item on the Quote , will be broken up into its individual kit line items. So instead of Kit - TOWBARHOLDENVY on the Quote page, you will see the items listed above. The new line items will have a group code of "Kit", which you can change when you edit the Quote . Unpacking the kit will let you edit the Quote and change the individual items as required. However, once a kit has been unpacked, it can not be re-packed into a single line kit item.

The Kit Details page lists the kit items, name, notes, etc. It also has a button called "Unpack".

## Unpacking.

Unpacking a kit will take all its line items, and add them to the Quote/Job as new line items, replacing the original single Kit line item. You can use this function if you want to tailor the kit, such as change item pricing, remove an item, etc. But once unpacked, the kit can not be repacked on this Quote/Job, it will remain as individual line items.



The Unpacked kit will be given a new group of "Kit", which you can change.

Line	Category	Group	Goods?	Details
1	Notes	Kit		Kit: Towbar Kit, VY Commodore
2	Standard Fee	Kit		FITTING
3	Stock Item	Kit		TOWBAR M52K32
4	NA	Kit		7Pin Plug
5	NA	Kit		Cable

## Conclusion.

The Kits system is new and therefore may have a bug or two. If Kits didn't work as expected, or you would like it improved in any way, please let me know.