

How to Set Up Catalog Kit

This document explains how to set up a “Catalog Kit” item to be used as a related item. A kit is an inventory item that is comprised of other inventory items. A Catalog is one type of kit and is the only type that should be used as a related item. A Catalog Kit item contains possible component items of the kit and the user selects the needed items at the time of the sale.

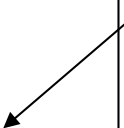
Set up Catalog Kit Item in Main Inventory

A catalog kit item number must be created. There is no pricing on this item and no tracking of quantities. The sole purpose of the catalog kit item is to call up its components. As an example, this document will use “BLADES 52” as a catalog kit of 52” fan blades.

Enter the catalog kit item number and description on the main inventory screen. This inventory item is identified as a catalog item by placing a “C” in the kit flag field. After entering the kit flag of “C,” press [F10] to save, as no other fields need to be filled in. See the example below:

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                Sample of Item Master with Kit Flag of “C”
MM/DD/YYYY                MAIN INVENTORY                ITEM SEQ /
Item No:  BLADES 52        Vendor Code: CRA  Sort:      Seq #:
UPC Num:                   Description: FAN BLADES 52 IN STANDARD
Product Group:      Sub Group:  Stock:   Display:   Serial #: N  Kit Flag: C
Related:                Qty:     0  Chrg:     Room:     Note:
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Enter Items that will be part of the Catalog Kit

From the INVENTORY MENU, select Inventory Kit. Enter the catalog kit item number. If the item number entered does not have a “C” in the kit flag, an error message displays “Record Not Valid.”

The cursor will be positioned in the SEQ# field. Press [Enter] to move to the item number field and enter an item that will be part of this catalog kit. The vendor code and description will display automatically. Enter the quantity of this component item. A message will display “OK TO ADD RECORD? (Y OR N).” Respond Y to add this item as a component item of the catalog kit. Each component item will be assigned a sequence number which increments by 10 as you add new component items. You may manually assign the sequence number as needed. For example, if you want to add a component item that displays between component items with sequence numbers 30 and 40, enter Seq# 35 (or any number between 30 and 40).

In the example shown on the next page, the catalog kit item is “BLADES 52” with CRA (Craftmade) as the vendor code. The first component item is B5/52S-LOK which is a standard light oak 52 inch blade. A quantity of 1 is entered because the five blades are packaged as one item.

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Continue entering the component items. The program has a limit of a total of 999 component items. If you are allowing the program to automatically sequence the components, you will reach line 990 after entering 99 component items. With this in mind, if you expect your Catalog Kit will have more than 99 component items, then it is suggested that you manually assign the sequence number.

When deciding which items and how many to group together as components, consider that the salespeople will see 15 components at a time on the Catalog Item Screen during Point-of-Sale. The salesperson will have to [Page Down] to display the next 15 component items. Having too many component items will make selecting the desired ones cumbersome.

Warning: do NOT use an item as a component item IF it has a related item. In the example below, none of the blade items has a related item. However, you are allowed to enter a different catalog item as a component item (e.g. a subgrouping or “group within a group”). None of the blade items shown in the sample below is a catalog item.

Sample of Catalog Kit Item Set up Screen				
MM/DD/YYYY		INVENTORY KIT		
Item Number: BLADES 52		Vendor Code: CRA		
Description: FAN BLADES 52 IN STANDARD				
SEQ#	Item Number	VC	Description	Quantity
10	B5/52S-LOK	CRA	5 - 52 STD LT OAK BLADES	1
20	B5/52S-AL	CRA	5 - 52 STD ALMOND BLADES	1
30	B5/52S-MP	CRA	5 - 52 STD MAPLE BLADES	1
50	B5/52S-W	CRA	5 - 52 STD WHITE BLADES	1
60	B5/52S-NP	CRA	5 - 52 STD NATURAL PINE	1
70	B5/52S-SW	CRA	5 - 52 STD SANDSTONE BLADES	1
---	-----	---	-----	---
---	-----	---	-----	---
---	-----	---	-----	---
---	-----	---	-----	---
F2=Ln# ENTRY F7=NEXT ITEM F8=PREV ITEM				

To delete a component item, enter the SEQ# of the component item and press [F6]. A message will display “OK TO DELETE THIS RECORD? (Y OR N).” Respond “Y” to delete this component item.

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Enter the Catalog Item as a Related Item

Select Item Master from the Inventory Menu. Enter the item that will have the catalog kit item as a related item. Press [F12] L (reLated item) to move cursor to the first of up to four related items. Enter the catalog kit item as a related item and fill in the fields as desired. Press [F10] to save.

Each of the four related items can be a different catalog item as needed or desired. For example, in addition to having a catalog kit of Fan Blades, another catalog kit item could be set up to list the Fan Glass. Or, rather than having two catalog items, create a single catalog item called "Fan Parts" which could include the blades, glass, and down rods as component items. (Remember, you are limited to 999 component items within a catalog kit and having too many component items will slow down salespeople when they are entering customer orders.)

In the following example, the catalog item "BLADES 52" is entered as a related item for C52PB, which is a Craftmade polished brass fan with 52 inch blades. When the C52PB item is entered in Point-of-Sale, the catalog list of blade items will display automatically

Sample of Item Master with Catalog Kit Item as a Related Item

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MM/DD/YYYY                        MAIN INVENTORY                ITEM SEQ /
Item No: C52PB                      Vendor Code: CRA Sort:   Seq #:
UPC Num:                             Description: 52 POLISHED BRASS FAN
Product Group:      Sub Group:    Stock:  Display:   Serial #: N  Kit Flag: N
Related: BLADES 52      CRA Qty: 1  Chrg: Y  Room: I  Note: PIQL
_____  _____  _____  _____
_____  _____  _____  _____
/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/\/
    
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Sell Item that has a Catalog Kit as a Related Item in Point of Sale

Select Point-of-Sale and open an order as normal. Go to the line item screen and sell the item number that has a catalog kit as a related item. Immediately after selling the item, the related item screen will display. If the catalog item is the FIRST related item, the program will immediately display the CATALOG ITEM SCREEN.

Press [Enter] or [Down Arrow] to highlight the desired item. The [F3] Cat Lookup, meaning "Catalog Lookup," is only needed if you embedded a catalog item within a catalog.

See the following sample screen. Notice that the Quantity Available and the selling price of the component items are displayed.

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Sample Catalog Item Screen during Related Item Entry in Point-of-Sale						
CATALOG ITEM SCREEN						
VC: CRA		Item: BLADES 52	Desc: FAN BLADES 52 IN STANDARD			
Qty	Sqty	Item	VC	Description	Qav	Price
_____	1	B5/52S-LOK	CRA 5	- 52 STD LT OAK BLADES	49	22.28
_____	1	B5/52S-AL	CRA 5	- 52 STD ALMOND BLADES	49	22.28
_____	1	B5/52S-MP	CRA 5	- 52 STD MAPLE BLADES	49	25.91
_____	1	B5/52S-W	CRA 5	- 52 STD WHITE BLADES	50	22.28
_____	1	B5/52S-NP	CRA 5	- 52 STD NATURAL PINE	50	48.84
_____	1	B5/52S-SW	CRA 5	- 52 STD SANDSTONE BLADES	50	43.73
F3=Cat Lookup Tab=Sell/Exit						

Enter a quantity for each component item that you wish to select as a related item. When finished, press [Tab]. In this example, there will be only one set of blades to go with the Fan. A quantity of 1 is entered to select the B5/F2S-MP maple blades.

The Related Item Screen with the selected item (maple blades) is shown below.

RELATED ITEM SCREEN									
VC: CRA		Item: C52PB	Qty: 1	Shp/Dlv	Qav:				
Note: PIQL		Desc: 52 POLISHED BRASS FAN		0	Shp:				
		Room: LIVING ROOM		0	Dlv:				
Ln	Item / Description	VC	Item Qty	Ordrd Bkord	Dv/Loc	Chrg Tx	Rm Nt	Price/Cost	
3	B5/52S-MP	CRA	1	1	FN	Y	I	25.910	
	5 - 52 STD MAPLE BLADES			0		Y		7.850	
_____	_____	_____	_____	_____	_____	_____	_____	_____	
_____	_____	_____	_____	_____	_____	_____	_____	_____	
_____	_____	_____	_____	_____	_____	_____	_____	_____	
_____	_____	_____	_____	_____	_____	_____	_____	_____	
_____	_____	_____	_____	_____	_____	_____	_____	_____	
_____	_____	_____	_____	_____	_____	_____	_____	_____	
F2=Clear entry F3=Lookup F7=Inv Note F8=Sls Note F9=Clear all Tab=Sell/Exit									

If there is another catalog item set up as a related item, the Catalog Item Screen will display with the list of items to choose. Repeat the same procedure noted above. When finished with the Related Item Screen, press [Tab] to sell the related items and exit the Related Item Screen.