

About Kits

On a new setup screen, users can create two different types of kits:

1. A standard Kit, which contains a pre-defined list of component part numbers. The Kit can also contain pre-defined catalog Part Types where component part numbers are selected at POS.
 - The KIT part has no QOH.
 - At POS, a user selects a Kit part to sell all Kit component parts.
 - At invoice finalization, all component parts are “picked off the shelf”, their QOH is decremented and written to the Part Ledger.
 - The component parts, if alternates are used, may be different for the same Kit sold. If Part Type components are used, the parts may also be different based upon a vehicle.
2. A BOM (“Bill of Materials”) Kit also contains a pre-defined list of component part numbers.
 - However, the BOM part has QOH.
 - Before POS, BOM component parts are “picked off the shelf”, packaged together, and their QOH is decremented and written to the Part Ledger. The QOH of the BOM part is increased and written to the Part Ledger.
 - At POS, a user selects a BOM part to sell all BOM component parts.
 - However, at invoice finalization, only the BOM part is “picked off the shelf”, its QOH is decremented and written to the Part Ledger.
 - The “pre-packaged” component parts are always the same for the same BOM part sold.

During kit setup (across all kits):

- Users can define Kit Classes (e.g. Economy and Premium) and assign any kit to a class.
- Users can define Kit Surcharge Fees (e.g. add, upgrade and delete surcharge percentages and minimums, and apply to any KIT).
- Users can define Kit Restocking Fees (e.g. return restocking fee percentages and minimums) and apply them to any KIT or BOM.
- Users can define Sales Class Margins (e.g. a margin percentage per sales class) and use in any kit that defines a Pricing Rule of Sum Sales Class Margins.

During kit setup (for each kit):

- Users can add components from one kit to another by copying one kit to another.
- Users can choose one of five types of components:
 - Part (a single part number e.g. WIX 51515)
 - Part List (a list of part numbers which might be used for pistons or rods in engine kits where the only difference between the part numbers is the SIZE of the part)
 - Part Choice (a list of Lines, PN Codes, PN Groups or Prdt Codes which might be used for a component of “Oil Filters” within the WIX and FRA lines, when selling at POS without using a catalog)
 - Part Type (a list of ACES, Epicor or TecAlliance “catalog part types” which might be used for a component of “Engine Oil Filter” when selling at POS using the catalog)
 - Kit (all of the components from another kit, or even multiple kits when selected one at a time)

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- Users can decide whether at POS, to sell any or all kit components (with a Component Type of Part, Part List or Part Choice) using fractional units (e.g. 1.5 or 1.25). A user can enter each component's 'Qty in Kit' value with one or two places to the right of the decimal.
- Users can decide whether, at POS, users can add, change or delete Kit component parts.
- Users can decide whether the application will apply surcharge fees to the kit price at POS when Kit components are added, upgraded or deleted; with minimum surcharge fees for each action.
- Users can decide whether at POS, to replace Kit component parts with alternates, supersedes or vendor changeovers.
- Users can decide whether, at POS, the application will apply restocking fees if customers attempt to return new re-sellable kit components.
- Users can decide whether, at POS, users can enter or edit a component's Qty in Kit.
- Users can decide whether at POS, to display kit notes or kit components on the printed invoice.
- Users can decide whether to allow "breaking up the Kit" at POS; if yes, the parts in the Kit are "not sold as a Kit" but instead are "sold separately" using regular customer pricing, fees and core pricing rules for each part.
- Users can choose one of five pricing rules:
 - Sum Plan Price (plus an optional discount %) - results in a different kit price for each customer based upon their regular pricing plan.
 - Kit Fixed Price - results in the same kit price for all customers.
 - Sum Cost (plus a markup/margin) - can result in the same kit price for all customers.
 - Kit Plan Price - can have different kit prices per store, store group or account groups.
 - Sum Sales Class Margins - results in the same kit price for all customers.
- Users can control kit profit margins by defining "component price range rules" (e.g. if a Kit with two components has a Fixed Kit Price of \$99.99, users can define that any part selected for Component 1 must have a sell price less than \$29.99, and Component 2 less than \$49.99).
- To extend the example above, users can assign each Kit to a different Kit Class (e.g. "good, better and best") and define two other Kits with Kit Fixed Prices of \$149.99 and \$199.99.
- When using the pricing rule of Sum Sales Class Margins, users can decide whether each component will have its own Margin% override. **Note:** Component Margin% overrides can also be used with a Pricing Rule of Sum Cost (with margin%).

During kit setup (for those that want to sell kits based upon vehicles without using any catalog):

- Users can set up custom vehicles per kit and then search for those vehicles at POS without using the catalog.

During Kit setup (for those using the ACES, Epicor or TecAlliance catalog):

- Users can define additional "part filtering rules" (using Line, PNCode, PN Group and Prdt Code) to limit parts available for selection for each Part Type component. For example, for a "lower grade" Kit, users can define one list of Lines, and for a "higher grade" Kit another list of Lines.
- Users can decide whether a Kit component's 'Qty in Kit' will use the 'Catalog Per Car' quantity.
- Users can define a specified list of vehicles for a kit, and then if anyone in the store searches for catalog parts for that vehicle, that kit will display at the top of the catalog result set. For example,

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a brake kit for a Ford Mustang would display when searching for filters. When vehicles are set up for a kit, users can also find that kit by searching using a vehicle search at POS.

During kit setup (for those using the ACES catalog):

- As a shortcut (within 5 minutes), users can create and start selling brake kits using one of six “templates” (with pre-defined Part Type components).

Before selling kits:

- Users can “test” kits at POS to verify the pricing rules and component part selections. During the “test”, users can view kits but cannot add them to a sales order.
- Users can “activate” kits so that all users in all stores can find, view and sell kits. Users can also “deactivate and reactivate” kits.
- Users can “package” BOM parts within each store where the physical parts are “picked and assembled”. Users can also “un-package” BOM parts either to stop selling BOMs or to avoid losing sales of BOM component parts running low in QOH for regular sales outside of BOM sales.

On the INVOICE screen:

- Optionally display a replacement parts pop-up if a user enters a part on the sell line that is also a component within one or more BOMs or KITS.
- Add BOM and KIT parts to the alternate/supersede/VCO list (grid) displayed below the sell line.
- Display a new Find Kits pop-up when users click the Kits button on the Find Parts pop-up. Users can find kits by entering kit, kit component or kit vehicle attributes.
- Display a new Select Vehicle pop-up so users can enter Year, Make, Model and Engine to select a vehicle, without using the CATALOG screen.
- Display a new Kit pop-up so users can view the kit price and all components before adding kits to a sales order. On the Kit pop-up:
 - Users can change the Kit Price with manager overrides.
 - Users can enter the ‘Qty in Kit’ for any kit component (if user-defined at setup).
 - Users can open a new Change Component pop-up to select or replace kit component parts (if user-defined at setup).
 - Users can add or delete Kit components (if user-defined at setup).
 - Users can even set up a Kit with no components and just select a group of parts for a “kits discount” at POS.
 - To avoid a lost sale, users can convert a BOM to a KIT and “pick and assemble” the component parts at POS.
 - Users can choose to “break up a Kit” and sell parts separately using regular customer pricing for all parts added to the sales order. **Note:** Taxes and fees will apply for each part, all parts can be “sourced” on the ADVANCED SOURCING screen, and the application will not track a Kit sale.
- When a user adds a kit to a sales order, component parts with insufficient quantity can be “oversold” or “sourced later” using the Quick Sourcing pop-up. Users can source Kit components parts (only).
- Taxes and fees will apply to the Kit or BOM part (only).
- Customers can only return component parts for both Kits and BOMs. Users can select a new defective exchange modifier when customers return defective kit component parts to bypass

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tendering. If set up, a minimum restocking fee can be applied to all new re-sellable kit component parts returned by customers. The restocking fee setup for a kit can override any restocking fee setup for the store.

On the ACES, Epicor and TecAlliance CATALOG screens:

- Optionally display kits available for sale, and open the Kit pop-up when a user selects a kit.
- Display the Kit Price for those kits with a pricing rule of Kit Fixed Price, or for those kits where all components have a part defined.
- Display the Kit Class for those kits assigned to a Kit Class.

Upon invoice finalization:

- Save in LISA sell prices and quantities sold for kit parts and all kit component parts.
- Display the KIT or BOM part's quantity sold and sell price on the printed invoice. Users can optionally display all component part quantities sold, without sell prices.
- Save BOM and KIT parts, as well as all BOM and KIT component parts, on the PART HISTORY screen. For Kit component parts, the part sales history units displayed are a mix of kit and regular sales and returns. Update Last Sold Date on all kit parts and components.
- Save BOM parts, and KIT component parts, in the Part Ledger.
- Track rebates and deferred core billing for component parts (only).

For all reports and extracts:

- On a new KIT SALES REPORT screen, users can run a Kit Sales Count Report, a Kit Sales Summary Report and a Kit Component Part Returns Report.
- Also, they can run a Kits Setup Details Report for all kits or specific kits based upon entering specific criteria on the KIT SALES REPORT screen.
- For both LISA Reports, allow users to view either kit parts or kit component parts.
- All other sales reports besides LISA, only include kit parts (sell price and quantity sold) without kit component parts (sell price and quantity sold) to avoid "double counting the sales figures".

For all extracts (e.g. eOffice), send only kit parts (and not kit component parts).