

Training Packet: Kits PartsWatch as of R58.3.1

The Kits training series provides an overview of the Kits functionality in **PartsWatch** that allows the user to sell parts together as a package to increase profits.

The following video and document provide an overview of the kits functionality.

- Kits Overview 4 pages
- KITS Overview 7 minutes. If you are a store manager or simply want to see how kits can be used to boost sales, watch this video to get a 30,000 ft. view of setting up and selling various kits.

The following videos are basic setup videos. Watch these videos if you are an administrator or manager who will be configuring kits for your installation.

- <u>Basic Kit Setup Overview</u> 1 minute. This video introduces the following seven videos so watch it to get a preview or skip right into video #1.
 - 1. What is a KIT? 4 minutes. This video is for those administrators or counter people who are not familiar with what a kit is and the different types of kits.
 - 2. The KIT List 3 minutes. This is a foundational video for administrators to understand and navigate the list of kits on the KIT List tab.
 - 3. <u>Using Search Criteria</u> 2 minutes. Administrators should watch this optional video to learn how to search for kits.
 - 4. Adding a Standard KIT (1 of 3) 7 minutes. Administrators should watch this foundational video to learn how to create a standard kit.
 - 5. Adding a BOM KIT (2 of 3) 6 minutes. Administrators need to watch this video only if they will create Bill of Materials kits.
 - Adding a Template Kit (3 of 3) 3 minutes. Administrators should watch this video if they are using the WHI ACES catalog and are interested in creating brake template kits.
 - 7. Editing, Copying & Deleting a KIT 3 minutes. Administrators should watch this video to learning about modifications to kit configuration.

The following videos are setup videos that detail the differences between the Pricing Rules available that are used to create Kits. Anyone creating a KIT should watch all videos to understand the pros and cons of each rule.

- Sum Plan Price 5 minutes
- Sum Cost 6 minutes
- Sum Sales Class Margins 8 minutes
- KIT Fixed Price 5 minutes
- **KIT Plan Price** 10 minutes

The following videos are setup videos that detail the differences between the components included in a Kit. Administrators who configure kits should watch all videos to understand the different component options available in a kit.

Part 1: Parts, Part Lists, KIT Components – 11 minutes



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- Part 2: Part Choice 9 minutes
- Part 3: Part Type 10 minutes. Watch this video only if you are using one of the following catalogs: WHI ACES, Epicor, TecAlliance or MAM.
- Part 4: KIT in a KIT 5 minutes.

The following videos are the final setup videos for kits, including extra setups like Kit Classes and Kit Fees.

- KIT Classes 7 minutes. Administrators can optionally classify KITs to better organize and easily search for them.
- Configuring an Empty KIT 3 minutes. Administrators may want to configure an empty kit which allows the counter people to create kits-on-the fly.
- KIT Fees 13 minutes. Various fees can be associated with a kit. Surcharges for adding, deleting, upgrading and restocking components as well as assembling kits may be included. Administrators interested in fees should watch this video.

The following videos are intended for counter people, managers or anyone selling kits at the point of sale. Watching any of the prior videos is optional if you are only selling (not configuring) kits.

- Selling a KIT from the Invoice Screen 4 minutes. This is a must watch for anyone selling kits from the Invoice screen.
- Selling a KIT from a Catalog (Embedded) 9 minutes. Watch this video if you sell from a catalog or e-commerce website.
- <u>Kits Pop-Up: General Information</u> 10 minutes. This video provides detailed information on the Kits pop-up and is highly recommended for anyone selling kits to become familiar with the new screen.
- Selling a KIT: Selling a Basic KIT from Start to Finish 6 minutes. This is also a good foundational video for anyone selling kits.
- Selling an Empty KIT to Provide a Discount 3 minutes. This video shows how you can start a sale with an empty kit and add components to it to create a kit on-the-fly.
- **<u>KITS Pop-up: Selling a BOM/Assemble Now BOM</u>** − 3 minutes. This video shows you how to sell a Bill of Materials Kit. If you don't use BOMs, you can skip this one.
- KITS Pop-up: Break Up Kit, Edit Price, Show Adjustment Button & Manager Override 4 minutes. This video demonstrates how to break up a kit, modify the kit price and source insufficient quantities.
- Modify a KIT at POS 11 minutes. Anyone selling kits should watch this video to learn how to add, change or delete components from a kit.