

# Creating a Kit

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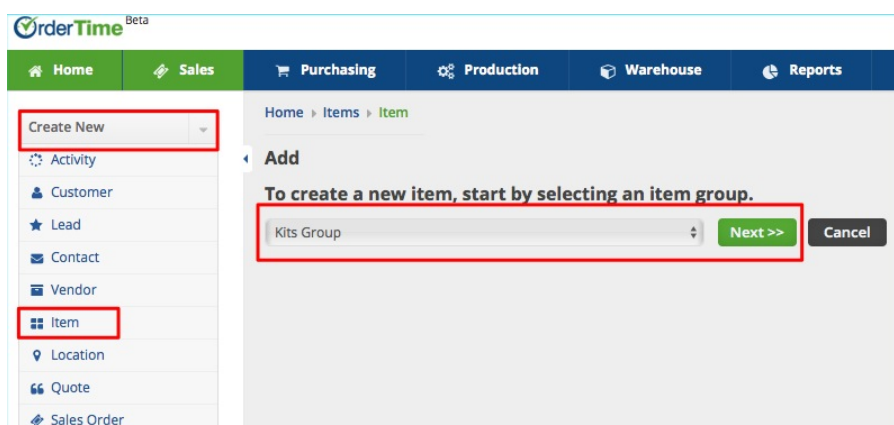
## Overview

*Kits* are used to sell a group of items together. A *kit* is different than an *assembly* in that the *Kit* itself is not an item, whereas the *assembly* is an item. In other words, when you ship a kit, you are actually shipping the individual items within the kit, whereas when you ship an assembly, you **DO NOT** ship the individual components but rather the assembly. An assembly (or job) can be configured which has some similar characteristics of a Kit as we will discuss later.

## Kits

The purpose of creating a kit is to offer the customer choices of what is included in the kit at the order time.

1. To create a Kit, click on the **Create New** drop-down menu and select **Item**. This will lead you to the **Add Item** page.
2. Select **Kits Group** from the *Item Group* drop-down.
3. Click the **Next>>** button.



- Alternatively, you can click on the **Open Full** List drop-down menu and select **Items**. Click the **+New Items** button from the *Item List* page. **This will also lead you to the Add Item page.**
4. In the *New Kit Item* screen, you have the ability to either manually

enter a name for your kit, or automatically generate one by pressing **Next Item No.**

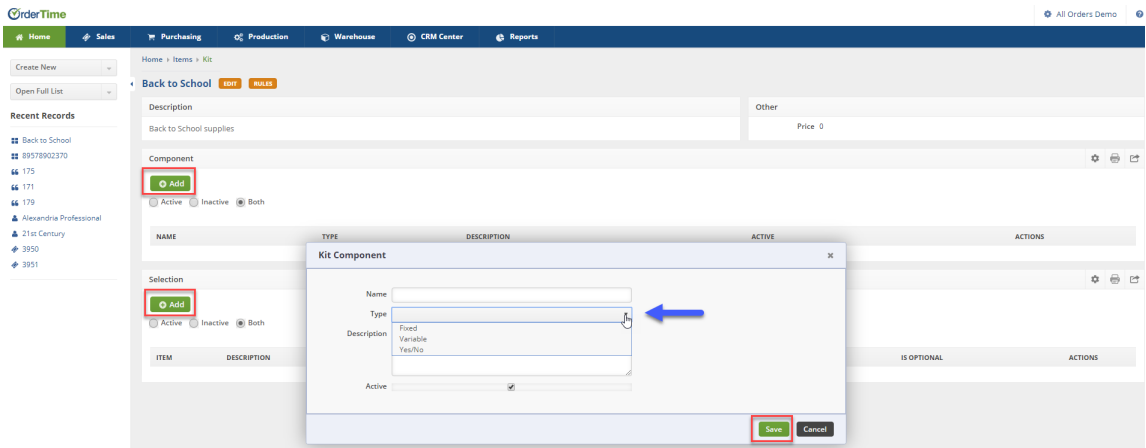
5. Select the *Unit Of Measure* that corresponds to the kit.
6. If the Kit is *Active*, click the box to check it.
7. You also have the option of entering a *Description* and *Notes* about the Kit.
8. Finally, you can enter specifics about the Kit by clicking on the *Custom* Tab.
9. Click **Save**.

The screenshot shows the OrderTime Beta web application interface. The top navigation bar includes Home, Sales, Purchasing, Production, Warehouse, and Reports. The main content area is titled 'Item' and contains a form for creating a new item. The 'Next Item No.' button is highlighted in red. The 'Name' field is also highlighted in red. The 'Active' checkbox is checked and highlighted in red. The 'Save' button is highlighted in green. The 'Description' field is empty.

## Add Components and Selections

After the Kit is created, you can select the Kit from the Item menu and then Add Components and Selections.

- Open the Kit record and click **Edit Kit**. Once the *Edit Kit* screen opens, click the **+Add** button next to the corresponding area.
- The *Kit Component* pop-up allows you to enter the Component's Name, Type, Description and select if it is 'Active'.
- The *Selections* pop-up allows you to enter the Item Name, Price, Quantity, and select if is being used only One Time and if the Selection is 'Active'.



After completing the information requested, click Save.