Kitting and Packaging
Jim2® Business Engine

Fact Sheet

Product Kitting

Kitting and Packaging lets Jim2 users combine a range of inventory components into a 'bundle' when quoting or selling (unlike Bill of Material Manufacturing, which creates a specific stock line from a list of raw materials).

Jim2 includes three different ways to kit products together:

- Dynamic Kitting, which allows you to drag-and-drop products in an ad hoc fashion into and out of the kit frame when quoting or selling. Customers can return individual components from the kit for replacement or credit.
- Static Kitting or 'Just-in-time manufacturing', which does not allow ad hoc changes to the kit's content when quoting or selling. Customers must return the whole kit for replacement or credit.
- Packaging products together to create quantity-on-hand of uniquely identified kits.

Kitting allows you to set up default components and/or build 'on the fly'. Kitting also allows you to choose what a customer sees on a quote or invoice.

Kitting Configurator

The Jim2 Kitting Configurator allows you to set up choices or alternative suggestions within a product range for the kit.
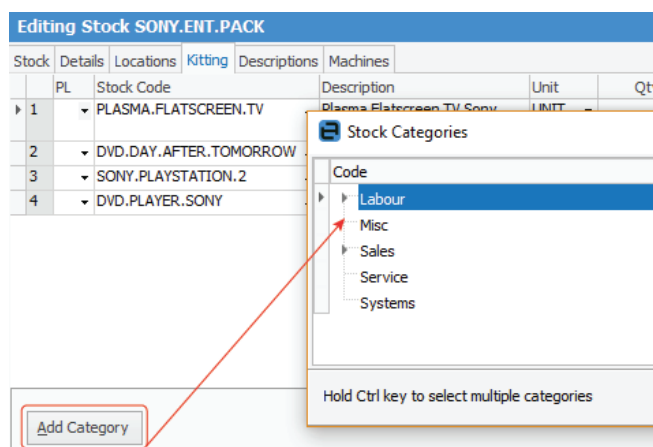
Kit Selling Price

Kit selling prices can be calculated automatically by Jim2 (adds up the selling price on each stock line used in the kit), or set as an overall kit level (apportions profit between all contents).

Individual kit components can be set/changed to 'show or hide' on quotes or invoices.

In a quote, you can choose numerous kits and recommend specific contents.
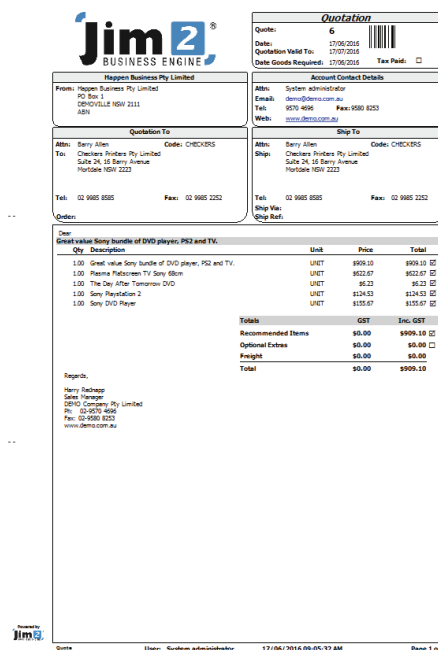
Kit Sales Reporting

The Stock Profit Report allows you to report on kits in two different ways:

- Use the kit header to report on the overall profitability of each kit (not each separate component).
- Use the detailed contents so that the report shows the profit made on each stock item used in each kit.

Dynamic Kitting

The kit type (dynamic) and a default content for the kit is set up and maintained via the Jim2 Stock Record. Customers can return individual components of the dynamic kit for credit or replacement.

Dynamic Kitting allows your sales staff to add to or change kit content at a quote or job level using drag/drop/insert editing in the stock grid.

Simply click on the line number of any additional stock you would like included in the kit and drag it into the blue kit frame. Or, position your cursor inside the kit and use the insert key to add a line, then type (or scan) in the additional stock code.

Dynamic kit contents can also be changed by increasing stock line quantity, and by removing stock lines altogether.

Static Kitting

The kit type (static) and the default content for the kit is set up and maintained via the Jim2 Stock Record. Customers cannot return individual components of the static kit for credit or replacement – they must return the whole kit.

Static Kitting is used when you have products that can be, or need to be manufactured on the fly – that is, you only make up these products if you have a definite sale.

A good example of this is kitting of scented oils. Each kit would contain a bottle, a cap, an amount of base oil and an amount of essential, scented oil. As orders are received, the product is manufactured. A customer could not return just the cap or just the base oil.

Packaging

Packaging is in effect, creating a kit, then holding the created kit as stock on hand. When you create the package, Jim2 understands that the individual components have now been locked away (assigned to complete kits), and are unavailable for sale or use in another job. Jim2 shows the quantity of packaged kits on hand for sale.

Again, the kit type (packaging) and the default content for the kit is set up and maintained via the Stock Record.

A second packaging process is run to indicate that the building process has taken place. Jim2 will then manage serialised identification on individual packages or batch numbers on batch packaging.

The packaging process becomes part of your Jim2 workflow, where each packaging session can be monitored through defined status milestones. At the end of the packaging process (finish), the quantity of packaged kits will be available as stock on hand.

See also: Stock Control Fact Sheet