



Happen Business Pty Limited  
 29 - 33 Pitt Street  
 PO Box 126, Mortdale NSW 2223 Australia  
 p. +61 2 9570 4696  
 f. +61 2 8569 1858  
 w. www.happen.biz

## 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).

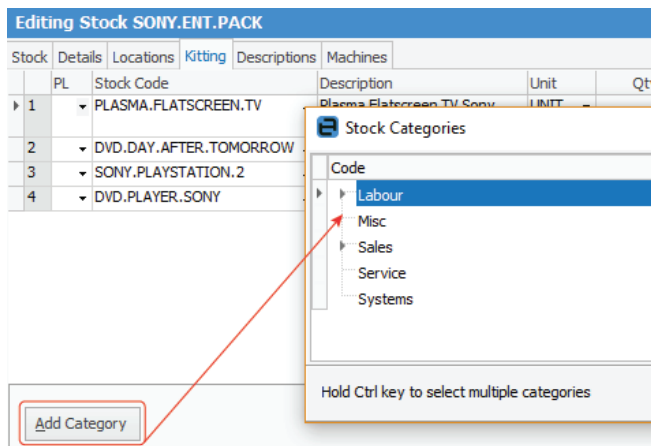
Jim2 includes three different ways to kit products together:

- 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).

PL	Stock Code	Description	Unit	Qty.	Price TF	Price TP	Tax	Use Price	Hide	Tr
1	PLASMA.FLATSCREEN.TV	Plasma Flatcree n TV Sony 68cm	UNIT	1	1000.00	1100.00		<input checked="" type="checkbox"/>	<input type="checkbox"/>	1100
2	DVD.DAY.AFTER.TOMORROW	The Day After Tomorro w DVD	UNIT	1	10.00	11.00		<input checked="" type="checkbox"/>	<input type="checkbox"/>	11
3	SONY.PLAYSTATION.2	Sony Playstati on 2	UNIT	1	200.00	220.00		<input checked="" type="checkbox"/>	<input type="checkbox"/>	220
4	DVD.PLAYER.SONY	Sony Divn	UNIT	1	250.00	275.00		<input checked="" type="checkbox"/>	<input type="checkbox"/>	275

Sub Total \$ 1460.00  
 Tax \$ 146.00  
 Total \$ 1606.00

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

DEMO Company, PO Box 1,  
 DEMOVILLE, NSW, 2111  
 ABN: 1234567890123

**TAX INVOICE # 33**

**Sale of goods**  
 13/04/2005 01:49:17 PM  
 Served by Jole Cole

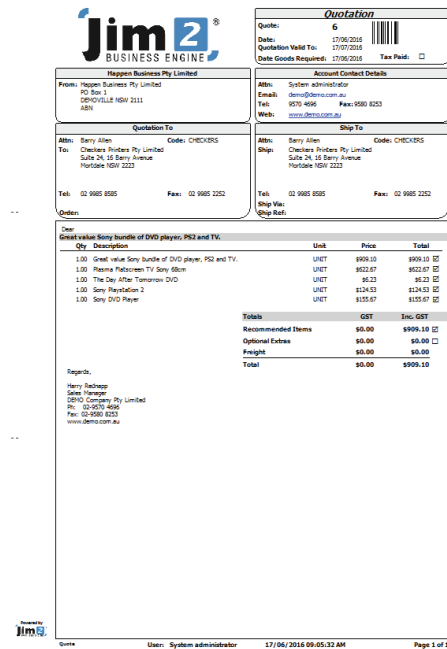
Description	Qty	Price	Total
LUXURY MOTHERS DAY BUNDLE:	1.00	\$200.00	\$200.00
<b>Total</b>		<b>GST</b>	<b>INC</b>
Includes		<b>\$18.18</b>	<b>\$200.00</b>
<b>Total</b>		<b>\$18.18</b>	<b>\$200.00</b>

**PAYMENT**

No.	Description	Amount
19	MasterCard/Visa	\$200.00

This Invoice has been produced using the Jim2 Business Engine.

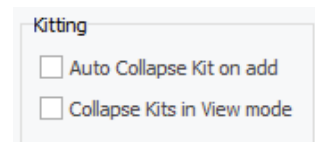
In a quote, you can choose numerous kits and recommend specific contents.



### 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.

Line	Date	Initials	Status	PO#	Location	Stock Code
1	09/07/2018	SYS			NSW	SONY.ENT.PACK
2	09/07/2018	SYS			NSW	PLASMA.FLATSREEN.TV
3	09/07/2018	SYS			NSW	DVD.DAY.AFTER.TOMORROW
4	09/07/2018	SYS			NSW	SONY.PLAYSTATION.2
5	09/07/2018	SYS			NSW	DVD.PLAYER.SONY
6						

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.

Line	Date	Initials	Status	PO#	Location	Stock Code	Description
2	09/07/2018	SYS			NSW	PLASMA.FLATSREEN.TV	Plasma Flat 68cm
3	09/07/2018	SYS			NSW	DVD.DAY.AFTER.TOMORROW	The Day / DVD
4	09/07/2018	SYS			NSW	SONY.PLAYSTATION.2	Sony Play
5	09/07/2018	SYS			NSW	DVD.PLAYER.SONY	Sony DVD
6	09/07/2018	SYS			NSW	CARTON	Carton
7							

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.

Line	Date	Initials	Status	PO#	Location	Stock Code	Description
1	09/07/2018	SYS			NSW	LAVENDER.OIL	Lavender Essential Oil Pack - Lavender Essential Oil Pack
2	09/07/2018	SYS			NSW	LAVENDER.100	100ml Lavender Oil - Almond oil base
3	09/07/2018	SYS			NSW	BASE.ALMOND	Almond Oil - ml
4	09/07/2018	SYS			NSW	BOTTLE.AMBER.100	Amber Glass Bottle 100ml
5	09/07/2018	SYS			NSW	CAP.150	15mm Bottle Cap
6							

## 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.

### Adding Stock Package 3

Session# 3 Date 09/07/2018 Status Booked Location NSW

Package TEST.PACKAGE ... Package created for testing

Stock Code	Description	Serial	
Create package(s)			
Stock	TEST.PACKAGE	Package created for testing	
Method	Individual packaging		
Stock Code	Description	Unit	Qty
1	CDROM.EXP	Express Infra CDROM 52x	UNIT
2	SFT.ANYPC	P2 Remote Anywhere V. 10	UNIT

Default package stock Edit Package

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.

### Viewing Stock TEST.PACKAGE

Stock Details Locations Packaging Descriptions Machines

Stock Code TEST.PACKAGE Type Packaging GL Group Systems

Desc Package created for testing

Measure	Unit	Quantity	Unit Description	Barcode	This stock I
1	UNIT	= 1.0000		1000065000000	<input type="checkbox"/> Buy in
2	UNIT	= 1.0000			<input checked="" type="checkbox"/> Sell in UNIT
3	UNIT	= 1.0000			<input type="checkbox"/> Service

Qty by Locations		Qty on Hand	Committed	Available	BackOrder	On PO
Branch	Locatio					
SYD	NSW	2	1	1	0	0

Groups Test

See also: Stock Control Fact Sheet

