

Adding Build Kit To Documents

To add the build to documents involves the same process as adding items or template task

The advantage of using Build kits as opposed to using template tasks is that the quantity of the build can be amended

e.g Go to **Debtors Module> Activity> Quotation**

Create a new quote as normal. For more info on how to create a quotation click [here](#)

You will note there are 2 options returned:

1. The stock item – which is the resultant BOM item
2. And the Custom Item which is the build Kit item

The screenshot shows the 'Edit Quote Item' window with the 'Quote Item' tab selected. The 'Details' sub-tab is active. In the 'Stock Item' field, 'sub100' is entered. The 'Description' field shows two results: 'SUB100 - Mini Sub 100KVA - Stk - 0.00' and 'SUB100 BUILD - Mini Sub 100KVA Build - C - 0.00'. The second result is highlighted with a red box. The 'Item Group' field is empty. The 'Qty' field shows 'Page 1 of 1'. On the right, there are fields for 'Lead Time', 'Order Date' (2024-08-29), 'Reminder Date' (2024-08-29), and 'Required Date' (2024-08-29). The 'Currency' is set to 'R - Rand South Africa' and the 'Category' is 'Custom'.

Since we intend to manufacture the item, we will use the Build item as this will return the default components required as per the BOM recipe.

We can then choose to edit, add or remove items

The screenshot shows the 'Edit Quote Item' window with the 'Quote Item' tab selected. The 'Build kit' sub-tab is now active and highlighted with a red box. The 'Stock Item' field now shows 'SUB100 BUILD - Mini Sub 100KVA Build'. The 'Description' field shows 'Mini Sub 100KVA Build'. The 'Item Group' field is empty. The 'Qty' field shows '1'. The 'Warehouse' field is empty. On the right, there are fields for 'Lead Time', 'Order Date' (2024-08-29), 'Reminder Date' (2024-08-29), 'Required Date' (2024-08-29), and 'Supplier' (MAD SOUND EQU). The 'Currency' is set to 'R - Rand South Africa' and the 'Category' is 'Custom'.

Once you have selected the build item, you will notice the Build Kit tab becomes active. This is because we have set this item as a Build Kit in the item setup.

Click the Build Kit Tab

The grid will be blank initially.

Edit Quote Item

Quote Item

Inventory Overview View Image Special Item Functions Currency: R - Rand South Africa Category: Custom Close

Details Notes UOM Specs **Build kit**

Search Add Edit Delete Build Update Qty Build Update Items

Qty: 0 Update Qty: ☐ Build Selling: 500 475.0

Build kit Item: Markup %: Infinity

Recipe: Cost: 0.00 0.00

Create Kit as Sub Job: ☐ Build Profit: 0.0 0.00

Page 0 of 0 Quantity Query No data to display

#	Sequence No	Code	Description	Warehouse	Qty	Unit Cost	Total Cost	Show
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To populate the component items, click the Build update items button

The items will then be displayed on the grid

Edit Quote Item

Quote Item

Inventory Overview View Image Special Item Functions Currency: R - Rand South Africa Category: Custom Close

Details Notes UOM Specs **Build kit**

Search Add Edit Delete Build Update Qty Build Update Items

Qty: 0 Update Qty: ☒ Build Selling: 500 475.0

Build kit Item: SUB100 - Mini Sub 100KVA Markup %: Infinity

Recipe: SUB100 - Mini Sub 100KVA Cost: 0.00 0.00

Create Kit as Sub Job: ☐ Build Profit: 500.0 500.00

Page 1 of 1 Quantity Query Displaying 1 - 3 of 3

#	Sequence No	Code	Description	Warehouse	Qty	Unit Cost	Total Cost	Show
1	2.1	RD/CAB/CLIP-6...	Round Cable Clips 6mm	Master Wareho...	0	10.00		☐
2	2.2	New 03-02/310...	Clip Etray 32mm Sliding Dimond	Master Wareho...	0	1.50		☐
3	2.3	12563	Enclosure MildSteel	Master Wareho...	0	1,600.00		☐

If you need to build more than 1 of these items, then you will need to change the quantity on this screen. This will automatically update the quantity on the detail tab screen. (where you usually edit quantities)

Edit Quote Item

Quote Item

Inventory Overview View Image Special Item Functions Currency: R - Rand South Africa Category: Custom Close

Details Notes UOM Specs Build kit

Search Add Edit Delete Build Update Qty Build Update Items

Qty: **2** Update Qty: ☒ Build Selling: **500** 1000.00

Build kit Item: Mini Sub 100KVA Markup %: Infinity

Recipe: SUB100 - Mini Sub 100KVA Cost: 0.00 0.00

Create Kit as Sub Job: ☐ Build Profit: NaN NaN

Page 1 of 1 Quantity Query Displaying 1 - 3 of 3

#	Sequence No	Code	Description	Warehouse	Qty	Unit Cost	Total Cost	Show
1	2.1	RD/CAB/CLIP-6...	Round Cable Clips 6mm	Master Wareho...	0	10.00		☐
2	2.2	New 03-02/310...	Clip Etray 32mm Sliding Dimond	Master Wareho...	0	1.50		☐
3	2.3	12563	Enclosure MildSteel	Master Wareho...	0	1,600.00		☐

Do not change the quantity on the normal item line under the details tab as one would typically do with standard items, because that will not update the required quantity of the build and subsequently not update the respective quantities of the components required.

Edit Quote Item

Quote Item

Inventory Overview View Image Special Item Functions Currency: R - Rand South Africa Category: Custom Close

Details Notes UOM Specs Build kit

Stock Item: SUB100 BUILD - Mini Sub 100KVA Build Tasks: ☐

Description: Mini Sub 100KVA Build Order Date: 2024-08-29

Item Group: SUB100 BUILD - 1321||3: ☐ Manage Qty On Job: ☐ Points: 0 Reminder Date: 2024-08-29 Reminder

Qty: **2** Warehouse: ☐ Required Date: 2024-08-29

Supplier: MAD SOUND EQU Add

Once you have entered the required quantity of the item on the Build Kit tab, click the **Build update Qty** button

This will update the quantities of the component items required to manufacture the quantity specified of the resultant item (Build)

Edit Quote Item

Inventory Overview
View Image
Special Item
Functions
Currency: R - Rand South Africa
Category: Custom
Close

Details
Notes
UOM
Specs
Build kit

Search
Add
Edit
Delete
Build Update Qty
Build Update Items

Qty: 2 Update Qty: ☒ Build Selling: 5000 10000.00
Build kit Item: Mini Sub 100KVA Markup %: 210.26993484331368
Recipe: SUB100 - Mini Sub 100KVA Cost: 1,611.50 3 223.00
Create Kit as Sub Job: ☐ Build Profit: 3388.50 6777.00

Page 1 of 1
Quantity Query
Displaying 1 - 3 of 3

#	Sequence No	Code	Description	Warehouse	Qty	Unit Cost	Total Cost	Show
1	2.1	RD/CAB/CLIP-6...	Round Cable Clips 6mm	Master Wareho...	2	10.00	20.00	☐
2	2.2	New 03-02/310...	Clip Etray 32mm Sliding Dimond	Master Wareho...	2	1.50	3.00	☐
3	2.3	12563	Enclosure MildSteel	Master Wareho...	2	1,600.00	3,200.00	☐

You will also note the selling and cost prices are updated accordingly

Edit Quote Item

Inventory Overview
View Image
Special Item
Functions
Currency: R - Rand South Africa
Category: Custom
Close

Details
Notes
UOM
Specs
Build kit

Search
Add
Edit
Delete
Build Update Qty
Build Update Items

Qty: 2 Update Qty: ☒ Build Selling: 5000 10000.00
Build kit Item: Mini Sub 100KVA Markup %: 210.26993484331368
Recipe: SUB100 - Mini Sub 100KVA Cost: 1,611.50 3 223.00
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Quantity Query
Displaying 1 - 3 of 3

#	Sequence No	Code	Description	Warehouse	Qty	Unit Cost	Total Cost	Show
1	2.1	RD/CAB/CLIP-6...	Round Cable Clips 6mm	Master Wareho...	2	10.00	20.00	☐
2	2.2	New 03-02/310...	Clip Etray 32mm Sliding Dimond	Master Wareho...	2	1.50	3.00	☐
3	2.3	12563	Enclosure MildSteel	Master Wareho...	2	1,600.00	3,200.00	☐

Click Save and Close

This will return you to the main screen, where you can see the costs, markups, etc. as normal.

Attachments

Memo

Create Reminder

Import

Functions

Approval Options

Quote History

Quote

Quote Detail

Address

Extras

Link

Shipping

Action

Docs

Cus

Save

Close

Print Quote

Job Card

Service Card

T & Cs

Quote Number:

QT501374

Quote Status:

Preparation

Customer:

1172

Description:

Test build kit

Customer Name:

IMRAAN NEW

Reference:

Sales Rep:

Imraan1

Order Number:

Quote Date:

2024-08-28

Currency View:

Document Currency

Valid Until Date:

2024-08-28

Exchange Rate:

1

R - Rand South Africa

Delivery Date:

2024-08-28

Comment:

Items

Page 1 of 1

Paging

Add

Note

Edit

Delete

Quick

Dimension

Show/Hide

Disp

#	Line Ref.	Seq. No.	LS	Status	Type	Code	Description	Qty	Unit Sale	Pricing level
1		2		\$	Custom	SUB100 BUILD	Mini Sub 100KV...	2	5,000.0	Default

Footer

Promotion Value:

0.00

Clear Discount

Discount %:

0

Amt:

0.00

Service Month:

August

Internal Contact:

Imraan Saljee

Pricing Analysis

Margin %

66.07

Mark-up %

194.75

Cost Ex VAT

3,223.00

Profit

6,277.0

Total

Selling

Sub Total

9,500.0

Less Discount

0.0

Ex VAT

9,500.0

VAT

1,425.0

Inc VAT

10,925.0

Printing the Quote

There are 2 options to print the quote

Option 1

- Displaying only a single line item for the build
- This option is used in instances where the client does not need to see the individual component

QT501374

Dev HSOF & Co

Phone: 013-443-2794

Email: contact@hugesoftware.co.za

Web: www.hugesoftware.co.za

GST No: 122-321-123

Quote No: QT501374

Quote Date: 28 Aug 2024

Terms: Day Of Month 1

Valid to Date: 28 Aug 2024

Order No:

Keyed By: Imraan Saljee

<u>Code</u>	<u>Description</u>	<u>QTY</u>	<u>UOM</u>	<u>Price</u>	<u>Disc %</u>	<u>Sub Total</u>
SUB100 BUILD	Mini Sub 100KVA Build	2		5 000.00	5	9,500.0

Total Excluding GST:	9,500.0
Total GST:	1,425.0
<u>TOTAL:</u>	10,925.0

Terms and Conditions:

Option

Displaying all or part of the component items as well on the quote

This option displays the build item with full prices but also shows the component items used in the build

To print the quote using this option, you will need to indicate the items you wish to display on the quote.

To do this, edit the item line.

Click the Build Kit tab

Tick the box next to the items you wish to display on the quote

Save and close

Edit Quote Item

×

Quote Item

Inventory Overview

View Image

Special Item

Functions

Currency: R - Rand South Africa

Category: Custom

Close

Details

Notes

UOM

Specs

Build kit

Search

Add

Edit

Delete

Build Update Qty

Build Update Items

Qty: 2

Update Qty: ☒

Build Selling: 5000

9,500.0

Build kit Item: Mini Sub 100KVA

Markup %: 210.26993484331368

Recipe: SUB100 - Mini Sub 100KVA

Cost: 1,611.50

3 223.00

Create Kit as Sub Job: ☐

Build Profit: 3,388.5

6,777.00

Page 1 of 1

Quantity Query

Displaying 1 - 3 of 3

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2	2.2	New 03-02/310...	Clip Etray 32mm Sliding Dimond	Master Wareho...	2	1.50	3.00	☒
3	2.3	12563	Enclosure MildSteel	Master Wareho...	2	1,600.00	3,200.00	☒

When you print the quote, notice all the components selected will be displayed and the values of the individual components will be zero

Acc No: 1172

QT501374

Quotation To:

IMRAAN NEW

Delivery Address:

IMRAAN NEW

Description: Test build kit

Dev HSOF & Co

Address: 17 Willie St, Sophiatown, Johannesburg, Gauteng

Phone: 013-443-2794

Email: contact@hugesoftware.co.za

Web: www.hugesoftware.co.za

GST No: 122-321-123

Quote No: QT501374

Quote Date: 28 Aug 2024

Terms: Day Of Month 1

Valid to Date: 28 Aug 2024

Order No:

Keyed By: Imraan Salijee

Code	Description	QTY	UOM	Price	Disc %	Sub Total
SUB100 BUILD	Mini Sub 100KVA Build	2		5 000.00	5	9,500.0
RD/CAB/CLIP-6MM	Round Cable Clips 6mm	2		0.00	0	0.0
New 03-02/3107148	Clip Etray 32mm Sliding Dimond	2		0.00	0	0.0
12563	Enclosure MildSteel	2		0.00	0	0.0

Total Excluding GST:

9,500.0

Total GST:

1,425.0

TOTAL:

10,925.0

You can now send the quote off to the client and upon approval, promote the quote to sales order or invoice or Job as normal.

Revision #4

Created 30 August 2024 06:48:50 by Otsile

Updated 18 November 2024 13:56:37 by Otsile