KITTING

User's Guide



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INTRODUCTION

Overview

The purpose of this guide is to explain the Kitting Program.

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Revised: June 2019

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CHAPTER 1 - KITTING MENU

Section 1.1 KIT ENTRY

The Kitting Menu is illustrated below.

Friday, 06/21	AUTOPOWER CORPORATION	(P33) C
	KITTING MENU	
	<pre>1Kit - Entry 2Kit - Component Report 3Kit - Master Report 4Kit - Detail with Profit & GM% 5Kit - Work Order Release 6Kit - Finished Goods F/M 7Kit - Reprint Work Order</pre>	
Enter	Selection:	

To select a menu option, use the numeric keys to move around the menu, then press ENTER.

The AutoPower System allows for the use of both Make to Order (Point of Sale kits) and (Make to Stock). In this manual, we will discuss:

- ➤ How to use each type of kit
- When to use each type of kit
- > The differences between each type of kit

CHAPTER 2 – KIT ENTRY MENU

SECTION 2.1 KIT ENTRY

Access the Kitting Entry Menu, make the following menu selections:

Inventory Menu -> Kitting Menu -> Kit Entry Menu

06/2	21/2019	Kit B.O.M. Entry			IN-KIT		
кіт	Number:						
(S) Exp	tock or (0)rder : olode on Invoice.:	Total Cost: Total Weight:					
Ln#	Part Number	Description	Qty	Item Cost	Core		
	Enter Kit#, or C	Component part#, NEW, or '? F	1' for	Kit listing			

Brief Outline of creating Kits

- 1. Create a kit part number and enter it into the kit entry screen. Displayed above.
- 2. Answer **NEW** to create the kit.
- 3. Type in the weight of the kit and press Enter.
- 4. Choose option "A" to add parts to the kit. Add as many line items, as you like to the kit at this point.
- 5. When adding the parts you have the ability to assign the quantity per kit.
- 6. After all parts are added to the kit, Choose "Y"es to update the file with the kit.
- 7. Create the Inventory master record for the kit part number. You must create the Kit Part Number in the Inventory File Maintenance for both types of kits include a pricing matrix for the kit master part number.
- 8. If you are creating a Make to Stock kit, you must run the Finish Goods File Maintenance option from the menu.

The "**D**"elete option is used to delete the kit from the file.

The "**F**"wd and "**B**"wd options are used to page forward and backward if the number of components runs longer than a single page.

Field Descriptions

Kit Number: Create a Kit number or type in a ? or F1, to list the existing Kit numbers or enter the component number to list the Kit number(s) that this component is used in. When you enter the kit number, the kit and its components will display on the screen.

When you enter a **?** and a list of all kits that have been entered into the system will display. Then you must use your mouse to select the correct kit number and press **ENTER**.

Kit T	ypes All Kits Make to Order Kits				
Ő	Make to Stock Kits				
VND	Kit Number	Туре	Description	W1 QOH	^
ABC	4707-VL23	S		-1	
ABC	K4707-VL23	S			
ABC	KIT1	S		1	
ABC	KIT2	S	TESTING MTO RETURNS	1	
ABC	TESTKIT	S	TESTING CORES	6	
BSR	1245AD-235	0	15 X 3 WAGNER-F BRAKE SHOE	-1	
BSR	1254D-385	0	16 X 5 WAGNER FR3A BRAKE SHOE		1
BSR	1280D-463	S	15 X 3 1/2 WAGNER-F BRAKE SHOE		1
BSR	1303D	S	PARKING BRAKE SHOE - EXCHANGE	3	1
BSR	1307TMA212	S	BRAKE SHOE - EXCHANGE		
BSR	1308EMA210	S	BRAKE SHOE - EXCHANGE		
BSR	1308EMA212	S	BRAKE SHOE - EXCHANGE	1	
BSR	1308EMA312	S	BRAKE SHOE - EXCHANGE	16	
DCD	1308ER201	S	BRAKE SHOE - EXCHANGE		Ι.

You can narrow the selection of kits by Make to Order or Make to Stock, by clicking in the appropriate circle.

To enter a new kit, type the word **NEW** at the **Kit Number:** prompt. The kit number cannot be a part in your inventory file. When a new kit is entered, the part will be set up in the Inventory Master File. The message **Adding a New Kit. Enter the new Kit Part Number** will appear at the bottom of the screen.

08/17/2015	Kit B.O.M. Entry			IN-KIT			
Kit Number: ?							
(S)tock or (O)rder : Explode on Invoice.:	Total Cost: Total Weight:						
Ln# Part Number	Description	Qty	Item Cost	Core			

(S)tock or (O)rder: Enter **S** if this is a Make to Stock or **O** for make to Order Kit.

A Make to Stock Kit is one where a number of components are combined into one finished good and put on the shelf as if it had been purchased that way. The components are typically not sold on an individual basis. The correct way to add to the quantity on hand of these kits is in the finished goods maintenance program.

When a Made to Stock Kit build order is entered, the component quantity on hand values has to be sufficient to build the kit quantities.

The components of a Made to Stock Kit are committed when a kit built order is created. You can skip the Work Order Release program and go directly to the finished goods maintenance, if you like, where the components and the finished product are updated out of and into inventory respectively.

The other kit is a **make to order** kit. The make to order kit is a combination of parts that could be sold on an individual basis, but either for convenience or to prevent the end user from being made aware of the components of a kit, it is sold as a single part number. **The quantities on hand of the kit components will be updated at the time of sale, as well as their history.**

The make to order kit is not pre-made, but rather are made up at the time of sale. The made to order kit components are only updated when an order entry line item is created. Components are committed at that time and relieved when the order is invoiced.

Make to Order kits cannot be transferred between locations, as the components are not committed until the make to order kit is added to a sales order.

Explode on Invoice: Enter or if the components of the kit should print on the invoice.

Total Cost: The total cost of the kit will be calculated automatically as you enter the parts in the kit.

Total Weight: The calculated weight of the components, if the parts have a weight value. The weight of the kit can also be entered manually.

Ln#: The component part numbers will be automatically assigned a line number when you enter the components into the kit.

Part No.: Enter the component part number that you would like to be included in the kit.

Description: A description of the part number will display.

Qty: Enter the Qty of the component part that is needed to complete the kit.

Item Cost: The Item Cost will display for each component. If the component part has a core cost, it will be included in the Item Cost column.

Core: If the component has a core then the core flag will be displayed.

SECTION 2.2 KIT COMPONENT REPORT

This program will allow you to print the component report parts detail of a kit. The component report includes parts and miscellaneous cost. This report will list the type of kit, Make to Stock or Make to Order.

🔼 AccuTerm 7 - [APCAssistant - APCHQ - DevServer]	
File Edit View Tools MultiValue Window Help	
🗅 🚰 🕞 🚟 😤 🖺 🐸 🐸 🔚 🛅 🖏 🍎 🆻 🌍 🥝	
APCAssistant - APCHQ - D	
06/24/2019 B.O.M. KIT COMPONENT REPORT	IN-KITBMP
This program will allow you to print the component parts detai Bill of Material Kit including parts and miscellaneous cost.	l of a
Kit Number, Vendor Code, or ALL:	
B.O.M. KITS TO BE PRINTED	

Kit Component Report in the example below will list the kit name, type of kit, master part number, description of the components in the kit and the Qty of the components to create the kit. Also listed will be the cost of each component in the kit and the total kit cost.

КІТ 06/24/2019	COMPONENT REPORT ICE TRUCK PARTS	D/	VCE · 1
50/24/2015		F /	NGE. 1
Ln Part Number	Description	Qty Per	Cost
ABC 4707-VL23 Type: Make to Stock Last Change: 05/29/2018	Weight: 0.00		
L COR 4515 2 DEX 040-123-00 3 BSR RIVET	SHOE & LINING - 12 X 2 MH PF RIVET NEW SHOE	1 1 8	5.80 2.00
	TOTAL KIT COST		21.80
ABC K4707-VL23 Type: Make to Stock .ast Change: 05/29/2018 1 ABC 4707-VL23	Weight: 11.00	2	21.80
2 DEX K23-026-00	BRAKE KIT 10 X 2 1/4 ELEC TOTAL KIT COST	1 ===== =	20.25 63.85
ABC KIT1 Type: Make to Stock	Weight: 174.00		
ABC 111112 ACC 27406E	SPARK PLUGS 24.5x8.25 WHITE DCN WHEEL	4 2	2.56 72.95
	TOTAL KIT COST	=	156.14

SECTION 2.3 - KITTING MASTER REPORT

The Kitting Master Report program will allow you to print a report of all Kit Master Numbers. This report will list ONLY the Kit Number and not the components. This is the actual part number of the kit with the description of the kit. The report will also list the last price update change, component cost, Percentage of cost of freight, Freight, Packaging hour (time), Packaging cost, Shop hour, Shop cost, Total Cost of Kit.

)6/24	/2019		B.O.M. K	it Mas	ter	Repo	ort	IN-KI	TRPT
	This prog File for	gram will all a specific k	ow you to it or all	print kits.	the	Bil	l-of-Material	Kit Master	
	Kit Numbe	er or ALL:	I						
		B.O.M.	MASTER	KITS	то	BE	PRINTED		

An illustration of the report is shown below.

KIT MASTER REPORT ICE TRUCK PARTS							
06/24/2019	PAGE:	1					
Kit Number	Description	Last Change	Total Cost				
ABC 4707-VL23 ABC K4707-VL23 ABC KIT1 ABC KIT2 ABC TESTKIT BSR 1245AD-235 BSR 1254D-385 BSR 1280D-463 BSR 1303D BSR 1307TMA212 BSR 1308EMA210 BSR 1308EMA210 BSR 1308EMA212 BSR 1308EMA210 BSR 1308QMA210 BSR 1308QMA210 BSR 1308QMA210 BSR 1308QMA210 BSR 1308QMA210 BSR 1308TMA212 BSR 1308TMA212 BSR 1308TMA212 BSR 1308TMA212 BSR 1308TMA212 BSR 1308TMA212 BSR 1443EMA312 BSR 1443EMA212 BSR 1443EMA312 BSR 1443EMA212 BSR 1443EMA312 BSR 1443EMA312	TESTING MTO RETURNS TESTING CORES 15 X 3 WAGNER-F BRAKE SHO 16 X 5 WAGNER FR3A BRAKE 15 X 3 1/2 WAGNER-F BRAKE 15 X 3 1/2 WAGNER-F BRAKE PARKING BRAKE SHOE - EXCHANGE BRAKE SHOE - EXCHANGE	05/29/2018 05/29/2018 06/05/2019 06/05/2019 06/05/2019 08/22/2018 02/12/2018 08/30/2018 12/01/2017 07/13/2018 08/30/2018 08/30/2018 12/01/2017 07/13/2018 08/30/2018 12/01/2017 07/13/2018 08/30/2018 12/01/2017 08/30/2018 12/01/2017 08/30/2018 12/01/2017 12/01/2017 12/01/2017 12/01/2017 12/01/2017 12/01/2017	$\begin{array}{c} 21.92\\ 20.25\\ 145.44\\ 99.13\\ 13.25\\ 8.88\\ 18.44\\ 15.12\\ 12.19\\ 12.85\\ 15.57\\ 9.78\\ 12.36\\ 8.57\\ 15.57\\ 9.78\\ 12.36\\ 8.57\\ 15.57\\ 10.22\\ 12.61\\ 8.57\\ 15.57\\ 10.22\\ 12.61\\ 8.57\\ 15.57\\ 10.22\\ 12.61\\ 8.57\\ 15.57\\ 10.22\\ 12.61\\ 8.57\\ 15.57\\ 10.22\\ 12.61\\ 8.57\\ 15.57\\ 10.22\\ 12.07\\ 20.71\\ 11.28\end{array}$				

SECTION 2.4 – Kit Detail Report Calculating Profit and GM%

This procedure will produce a Kit Detail Report. The report will print the detail of the kits including the kit master number, kit type (make to order) or (make to stock), description and the weight of the kit. Also, included in this report will be the component part numbers, quantities of the components that are used to assemble the kit. The total cost, jobber price, profit, and the jobber gross margin percentage will print.

08/24/2015 KIT DETAIL REPORT WITH PROFIT AND GM% IN-KITGM This procedure will produce the Kit Detail Report. The report will print the detail of the kit including the kit master number, kit type (make to order) or (make to stock), description and the weight of the kit. Also, included in this report will be the component part numbers and the quantities of the components that were used to assemble the kit. The total kit cost, jobber price, profit and the jobber gross margin will print. Do you wish to proceed? (Y,N):

24 Jun 2019 Kit Detail Report with Profit and GM% Page 1										
KIT NUMBER	TYPE	KIT DESCRIPTION	WEIGHT	PART NUMBERS	QTYS	COST	T-KITCOST	JOB-PR	PROFIT	JOBBER GM%
ABC4707-VL23	S		0.00	COR4515 DEX040-123-00	1	5.80	21.80	27.40	5.60	20.43
авск4707-vl23	S		11.00	ABC4707-VL23	2	21.80	63.85	86.90	23.05	26.52
ABCKIT1	s		174.00	ABC111112 ACC27406F	4	2.56	156.14	271.13	114.99	42.41
АВСКІТ2	S TES	TING MTO RETURNS	82.00	ABC111112 ACC27404PW	1	2.56	84.61	123.98	39.37	31.75
ABCTESTKIT	S TES	TING CORES	0.00	ABC111112 COR4515Q	2 2	2.56	5.12	6.50	1.38	21.23
BSR1245AD-235	o 15	X 3 WAGNER-F BRAKE SHOE	1.25	BSRRRSHOES COR1245AD-235	1	3.00	8.88	15.54	6.66	42.85
BSR1254D-385	o 16	x 5 wagner fr3a brake shoe	0.00	MERF55/1245A BSRRRSHOE-CBSMA LL	.25	23.53 6.12	18.44	25.92	7.48	28.85
BSR1280D-463	s 15	x 3 1/2 wagner-f brake shoe	1.25	COR1254D-385 FRI1254 MERF5571280 BSRRRSHOE-CBSMA LL	1 .25 .25 1	49.29 35.98 6.12	15.12	26.46	11.34	42.85
bsr1303d	S PAR	KING BRAKE SHOE - EXCHANGE	0.75	COR1280D-463 BSRRRSHOE-CBSMA LL COR1303D	1	6.12	12.69	22.21	9.52	42.86
bsr1307tma212	S BRA	KE SHOE – EXCHANGE	1.75	MERFP1303 BSRRSHOES MERMA2121307	.5 1 .25	13.13 3.00 39.39	12.85	22.49	9.64	42.86
BSR1308EMA210	S BRA	KE SHOE – EXCHANGE	7.43	BSRRSHOES MERMA2101308TDB	1 . 25	3.00 50.29	15.57	27.25	11.68	42.86
BSR1308EMA212	S BRA	KE SHOE - EXCHANGE	7.88	BSRRRSHOES MERMA2121308TTB	1 . 25	3.00 28.87	10.22	17.89	7.67	42.87
		Options: Page (F)orwar	d, (L)ast, (S)eau	rchTex	t, (Q)ui1				

SECTION 2.5 – Kit Workorder Release: Make to Stock only.

The Work Order Release program is used to build **Make to Stock Kits**. You do not have to print a work order release, although it is recommended that you do so.

AUTOPOWER	2	Work Order Release			IN-KITWOR			
Part Number (kit): Total Kits Available: Number of Kits to Build: Rebuilder Number:								
Ln	Part Number	Description	Qty	QOH	Build Qty			

Field Descriptions

Part Number (kit): Enter the Kit Part Number.

Total Kits Available: This number reflects the number of kits that are presently available to be built based upon the quantity on hand values of the kit components.

Number of Kits to Build: Enter the number of Kits that you wish to build. This number cannot exceed the value for Total Kits Available.

Rebuilder Number: Enter the Operator number who will be assembling the kit. When you enter the Operator number the kit components will display. The components came from kit component entry.

Release Work Order? (Y,N,E,R): Enter for yes to release the repair order so that the kit can be built. Enter for No if you would like to make a correction to the number of kits to build or to correct the Rebuilder number that you entered. Enter **E** to Exit completely out without saving any of the information that you have entered. Enter **R** to refresh the screen after making an adjustment.

You can tell the shop foreman that you would like 20 of some part number built. Once the kits are all assembled then you would go to finished goods maintenance program to update everything. He doesn't have to print the work order release if he chooses not to.

06/2	Work Order Release									
Part Number (kit): TRS MVP-TRK TRUCK COOLER KIT Total Kits Available: 3 Number of Kits to Build: 3 Rebuilder Number										
Ln	Part Number	Description	Qty	QOH	Build Qty					
1 2	TRS 65156U TRS 65263U	SATURN SEAL SATURN SEAL	16 8	50 29	3 3					
	Release Kit for Assy? (Y)es, (N)o, (E)xit, (R)edisplay:									

In the example above, a Kit build work order is being started to build no more than 3 of kit TRSMVP-TRK and operator 0 - Autopower will be the operator to assemble the kits. There can be no more than 3 of this kit built for as you see component TRS65263U only has the quantity on hand to build only three of kit TRSMVP-TRK.

You will be prompted to print a single bill of materials document for all kits being built or you can print an individual bill of materials of each kit assembly.

After answering \mathbf{Y} to the above prompt the screen below will appear. A message at the bottom of the screen "Inventory reservation for components in progress" will display. The components for this kit at this time are reserving the QOH for these components in the Inventory system.

Press **ENTER** to exit out of this screen.

The kit build work order(s) will now print. Below is an example of a build sheet.

RO #∶	19	KIT BILL-(ICE TRUCK P OF-MATERIALS -	ARTS MAKE FOR SI	OCK	PAGE: 1
Rebu Rebu DATE	ild Part: ilder: :	TRS MVP-TRK 0 - AUTOPOWER 06/24/2019	TRUC	K COOLER KIT	Bin Loc Build Quanti	at: ty: 3
Qty	Part No	Сом	P O N E N T Description	PARTS	Bin Locat	Qty Pulled
48	TRS 65156	U SA	TURN SEAL			
24	TRS 65263	U SA	TURN SEAL			
	 Ү	ADD Part Number	ITIONAL	PARTS QTY	Part Nu	mber

After the kits have been built you must do Finished Good File Maintenance to update the QOH for the Kit Number.

CHAPTER 3 - FINISHED GOODS FILE MAINTENANCE

SECTION 3.1 FINISHED GOODS MAINTENANCE Make to Stock Only

The Finished Good Maintenance shown below is to update the QOH for the Kit Part

Number. For those occasions where components need to be changed or quantities changed, a Batch Update screen is available. This screen will list all the current components of the kit and show the quantity needed for a single kit for each component. The actual quantity used, which is the kit build quantity multiplied by the component quantity, is available for edit. Additional part numbers can also be added to the kit to account for substitutions. A good example of a Make to Stock kit needing a Batch Update posting would be a brake shoe kit with a lining change or a change in steel. Typically, a specific manufacturer's lining or steel shoe may be used in a kit.

Occasionally, the warehouse may be out of either the lining or steel forcing the need for a substitution. By zeroing out the original quantity for the lining or steel, and then adding a substitute part number with the appropriate quantity, the Finished Goods F/M option will properly relieve the component inventory while adding the correct number of brake shoe kits to the inventory.

Field Descriptions:

B. O. H. Kit Number: Enter Kit Build Work Order Number that was issued in the previous step. If a Kit Work Order Released was created, then the work order RO# should be entered in Kit Finished Goods. If no Kit Build Work Order was entered for the kits assembled, then you may enter the kit part number at this prompt.

Quantity Built: Enter the quantity built for this kit.

Rebuilder: Enter your Salesman number.

After you enter your Rebuilder Number (Salesman Number) the following screen will display.

06/24/2019	5/24/2019 Finished Goods Maintenance							
B.O.M. Kit Number Quantity Possible	QOH:1							
Quantity Built Rebuilder								
Part No	Description	QOH	TFR	New QOH				
TRS MVP-TRK	TRUCK COOLER KIT	1 +	3	4				
Upd	ate inventory? (Y)es, (N)o, (B)a	tch update:						

There was a QOH of TRSMVP-TRK of 1, now that finished goods was ran there is a QOH of 4.

The options on the screen are:

- **Y** to update a kit to Inventory.
- **N** does not update the Kit part number.
- **B** to update a batch to Inventory Components.

In a batch, you may not have all the same components used. For example, to build 20 kits, you might use 20 of A, but only 18 of B because 2 of B were not re-usable. The U option calculates the cost of the batch and updates each piece by the average cost to build one of the batch.

06/24/2019 Finished Goods Maintenance -	Batch Cost Update	IN.KITFGM.BU
Kit Number: TRSMVP-TRK	Total batch cost:	1077.12
Kits being built: 3	Average cost:	359.04
Ln Part Number Description	Per Kit Total Qty	Cost
1. TRS65156U SATURN SEAL	16 48	16.18
2. TRS65263U SATURN SEAL	8 24	12.52

Options: Update, Add, Quit: If all components are correct for this kit enter **U** to accept the input. Enter to exit out of this window and not save your changes. Enter **A** to add more components to this Kit or enter the line item number that you wish to change.

AN AUTOMATED PROCESS IN THE EOD ON YOUR SYSTEM.

Make to Stock kits are manufactured in advance of the point of sale, the current cost of the kit components is not dynamically added to the total kit cost. The component cost is added at the time the kit is entered into the system and does not update the price changes average cost entered to the component parts in the Inventory Master file.

Make to Order kits calculate the cost at the time of sale, but the Make to Stock kits require that component price changes be posted to the Make to Stock kits.

The EOD process will update the current cost (actual or average) from each component part into the kit total cost. Once completed, the component cost and total kit cost for any kits finished in the future will reflect the current costs. On some systems, the selling price of Make to Stock kits is stored in the Kit Entry screen. For these customers, the Kit Future Price Update option allows for the selling prices stored in the Make to Stock Kit to update the selling prices in the inventory master file. In the illustration below, the F6 Inventory inquiry was updated with the QOH for the Made to Stock Kit.

CustNo: 199999 - CASH IN-NINQ											
Description:	TRUCK CO	OLER KIT									
List:	ist: 680.90 Repl/Avg Cost: 359.04/358.59 Group.:										
Fleet:	leet: 510.66 Exp.Del.Date.: SubGrp:										
Dealer:	453.92		Supers	sec	ded By:			Supplr: 1			
Jobber:	408.53		Bin Lo		ation.:	(+)		Sel UN	1: EA		
Cono .			Core C	. 18	ass:			SelPak		0	
core					M-T-D	V-T-D	12-Mo	wergm	. 0.0		
Branch	Q-0-H	AVAIL	Q-0-0		Sales	Sales	Sales	Min	Мах	POP	
AUTOPOWER COLUMBIA	4	4 NOF									
FATETIEVILLE		NUF									
Stocking Date: 01/18/2018 Last Sale Date: Last Receipt: Last Price Change: 07/10/2018 Per Veh Qty:											
1=Sales F2=Info F3=Alt F4=Sup F5=Lost F6=Act F7=Vnd F9=Cust\$ F10=Hist Customer Price=0% off J \$408.53 LS: 08/02/2018 GM=12.22%											

In the illustration below it shows the F6 activity for creating the Made to Stock Kit.

😫 Par	Part Number Transaction History								
Branch: W1 - AUTOPOWER Part Number: TRSMVP-TRK Transaction Code: ALL - Transactions Display Sequence: Image: Image: Newest first image: Oldest first Starting Date: 06/24/19			TRUCK C	COOLER KIT					
TR	Date	Reference	Qty	QOH Blnc	Cost	Avg Cost	Comment		Details
KT	06/24/19	400347	3	4	359.04	358.59	Kit Master		
KT	01/18/18	365516	1	1	357.25	357.25	Kit Master		
2 Tr	ansaction it	ems selected.						Print	<u>C</u> lose

While displaying the kit master part number, I typed in the letter "K" to display all of the components that make up this kit.

CustNo: 199999 - CASH Part Number: TRSMVP-T Description: TRUCK CO List 680.90 Fleet 510.66 Dealer 453.92 Jobber 408.53	RK OLER KIT	Repl/Avg Cost: Exp.Del.Date.: Superseded By: Bin Location.: Core Class:	359.04/358.59 (+)	IN-NINQ Group.: SubGrp: Supplr: 1 Sel UM: EA SelPak:
Part Number	Descrip	otion		Available
Make for Stock Kit Co TRS65156U TRS65263U	mponents: SATURN SATURN	SEAL SEAL	16 8	2 5
	Press <er< td=""><td>nter> for next </td><td>part number</td><td></td></er<>	nter> for next	part number	