AccountMate®

With the AccountMate's Kitting module, you can add the power of kitting to your Inventory control module. Create and manage inventory items packaged and sold together as a single unit. The Kitting module is designed to be used by manufacturers and distributors whose goods are often resold in many different configurations. Users can decide whether assembled units of a kit item must be kept in stock or whether they can be packaged on-the-fly as orders are received. Kit items can be sold using a predefined formula or customized per order. This module tracks items when they are sold as part of a kit and provides the necessary reports to help you determine whether you have sufficient stock to meet existing kit orders thereby allowing you to make sound and up to the minute inventory management decisions. The Kitting module integrates with AccountMate's Accounts Receivable and Sales Order modules.

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Kitting Module

Ease in Creating Kit Items

Kit items are inventory items created by packaging units of other inventory items together for sale to the customer. For example, instead of pre-assembling a complete bicycle for sale, the manufacturer might keep in stock the individual components such as the frame, wheels, handlebars, seat, and pedals and sell them together as a kit item.

Standard Kit Items

A Kit Formula is used to define the standard composition of a kit item unit. Standard kit items can be pre-built according to the standard formula and stocked in inventory; or they can be built as needed according to the same formula. The Kitting module can also be configured to allow non-stock items to be used as kit components.

Kit Formula Maintenance Function Screen

Customize Kit Formula

The Kitting module allows you to modify the standard composition of a kit item as defined in its kit formula to satisfy a sales order specification. This feature gives you added flexibility when processing customer transactions. The customized formula applies only to the particular sales order and does not affect the kit item's standard kit formula record. You can customize a standard kit formula as often as necessary. This allows you to change some kit components before shipping an order in case a component has insufficient quantity and needs to be replaced with a different item.

View Total Estimated Kit Item Costs

You can view the total estimated item cost for standard, customized, prebuild or on-the-fly kit items. Use this information to set customer pricing limits and to project gross profit from kit item sales.

Identify Kit Component Storage

Whether building a standard or customized kit, if any of the kit components do not have the required quantity the system will generate an error message which identifies the kit components that are short and specifies how much is needed. You can also use the Projected Kit Item Requirement Report to see a list of kit components that are required to fulfill open customer orders. It shows the component quantity required for each sales order and the projected remaining quantity after each sales order's kit item is built. This helps you plan and manage the company's inventory reorders to meet its kit requirements.

Simultaneous Build and Ship Kit Items

Build and ship kit items simultaneously within one function. This enables faster order processing and provides added flexibility to use the kit components for other purposes, such as when the components can also be sold as individual items. This eliminates the need to stock quantities of kit item units and allows for more effective inventory management.

Disassemble Pre-built Kit Items

Pre-built kit item units can be disassembled when overstocked or when components are needed in a separate sale or to be used in assembling other kit item units. The disassembly and restocking of kit component parts allows for more efficient management of available inventory.

Monitor Kit Transactions Using Kit Numbers

You can choose to assign kit numbers to prebuilt kit item units. Kit numbers can be used to track sales of kit items to customers, transfers of kit item units across bins or warehouses, and issuance of kit items for internal consumption.

Assign Serial Numbers to Kit Items

Kit item units can also be serialized. You can assign a serial number to a kit item unit allowing you to track the specific cost for each unit as well as track the kit items sold to customers, bin or warehouse transfers, and internal issuances.

Lot Control Tracking of Kit Items

When the Lot Control module is activated, lot control numbers can be assigned to groups of kit item units. This is especially useful when dealing with kit items predominantly composed of parts that may expire over time or are subject to recalls.

Integration with Other Modules

- When integrated with the Inventory Control module, the Kitting module enhances the Inventory Adjustment, Warehouse and Bin Transfers, Internal Stock Issuance and Physical Count functions to allow the selection of kit numbers when processing transactions that involves kit items.

- Integration with the Sales Order module allows users to customize the standard kit formula, simultaneously build and ship kit item units and select kit numbers when shipping customer orders.

- Integration with the Accounts Receivable module supports the simultaneous building and invoicing of kit item units as well as the selection of kit numbers when recording customer invoices and returns.

Other Features

- View the standard kit formula for existing kit item records using the Kit Formula Listing.

- Review details of transactions that involve kit items using the Kit Item Transaction Log.

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