PALADIN DATA CORPORATION™

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FREE ADVANCED TRAINING

ALL ABOUT THAT KIT – PART I

Charles Owen

PALADIN™ DATA CORPORATION

TECHNICAL LEVEL:

EASY | **INTERMEDIATE** | ADVANCED

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ALL ABOUT THAT KIT – PART I

- ❑ What is a kit?
- ❑ Benefits of using kits
- ❑ Types of kits
- ❑ Activate the kit feature
- ❑ Set up the kit trigger
- ❑ Build, store and sell kits

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ALL ABOUT THAT KIT – PART I

What is a kit?

- A kit is a group of items that can be added to a invoice via one barcode or item #.
- A “trigger item” is the item or SKU that gathers items together in a kit.

ALL ABOUT THAT KIT – PART I

Benefits of using kits

- ❑ Allows for custom “package pricing”
- ❑ Promotes upsells
- ❑ Keeps inventory in sync
- ❑ Removes human error
- ❑ Improves customer loyalty

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ALL ABOUT THAT KIT – PART I

Types of kits

There are three basic kit types:

1. Permanently-paired item kits
   (For items that are always sold together)
2. Multiple-item group kits
   (Puts many items on an invoice quickly)
3. Special deal kit with free items
   (Includes free items that you can show or hide on the invoice.)

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How to activate kits

1. Open Paladin Point of Sale.
2. On the **File** menu, click **Setup.**
3. In the **Paladin Configuration** window, click the **Class** tab.
4. In the **Classes** pane, click **New.**
5. In the **Name** box, enter **Kit Trigger.**
6. In the **Class ID** box, enter a **Class ID** # that is outside the range used by the EDI supplier, and then click **Save.**
7. Click the **Company** tab.
   Note: Beginning with Build 9571, click the **Invoice (Store)** tab.
8. Scroll to the **Invoice** pane.
9. Select the **Enable Kit Functionality** check box.
10. In the **Kit Class Number** box, enter a **Class ID** number.
11. Select **Enable Hiding Kit Components**.
12. Click **Save**, and then click **Close.**

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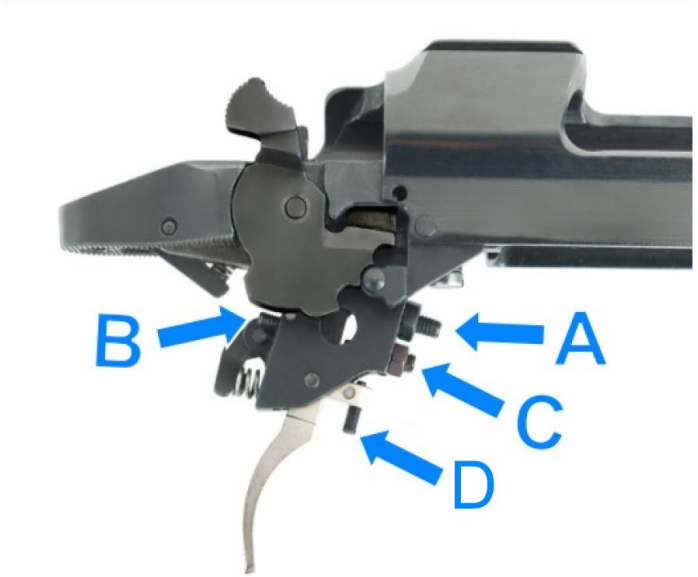
ALL ABOUT THAT KIT – PART I

Setting up the kit trigger



1. Open Paladin Point of Sale.
2. On the top ribbon, select **Inventory** or press **ALT+3**.
3. In the **Inventory** tab, enter the trigger item using one of the following methods:
   - In the **Part #** box, enter the trigger item part number.
   - Click **Adv. Lookup** and locate the trigger item.
   - Click **Add Item** to create a new trigger item.
   - Scan the item.
4. Click the **General** tab.
5. **Classes** pane, in the middle or last **Class** list, select **Kit Trigger.**
   Note: Do not use the first **Class** list because it may overwrite EDI information.
6. In the **Item information** pane, in the **Dept** list, select a department that applies to all the kit items.
7. Click the **Pricing** tab.
8. In the **Pricing Levels** pane, in row **1**, enter the following information:
   - In the **Sale Price** column, enter the sale price.
     Note: The price can be zero if this is purely a trigger and not a tangible item.
   - In the **Ref** column (reference margin), enter 100.
9. Click **Save** or press **F12**.

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ALL ABOUT THAT KIT – PART I

Build, store & sell kits

1. Open Paladin Point of Sale.
2. On the top ribbon, click the **Invoice/Quote** module.
3. Add the kit trigger item to the invoice.
4. Add the additional kit items.
   Note: If an item is included in the kit for free, or you want to hide the item on the invoice, set the item price to zero.
5. On the bottom ribbon, click **Store Transaction** or press **F6**.
6. Select **Kit,** and then enter a **Memo** (optional)**.**
7. Click **Store** or press **F12**.
8. With the **Invoice/Quote** tab visible, press **ESC** to clear the invoice fields.
9. To test the new kit, click **Recall Transaction** or press **F6.**
10. Select the **Kit** option**,** and then double-click the kit name to add it to the invoice.

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ALL ABOUT THAT KIT – PART I

Learn More

To learn more about kits, click About kits or search the Knowledge Base.

-AND-

Join us for next week's webinar: ALL ABOUT THAT KIT – PART 2

(registration announcement coming soon)

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