Microsoft Dynamics Retail Conference 2014

Kits

Hands-on Lab Manual

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Objective of this lab

In this lab, you will learn the following:

1. Create and configure kits.
2. Assemble and disassemble kits.

Estimated time to complete this lab: 1 hour

Exercise 1: Create and configure kits

Scenario
To encourage new sales, the merchandising manager wants to set up kits that include products that are frequently sold together. She also provides substitutes for some of the components. She defines prices for the kits and their components, as well as extra charges for some of the substitutes. She then sends assembly (build) orders and disassembly (breakout) orders to the warehouse. She modifies the receipt layout to accommodate kits and their components.

Goal
At the end of this exercise you will be able to create and configure kits.

Task Overview
1. Create a kit by including components and substitutions.
2. Generate an assembly order.
3. Define prices for the kit and its components, and specify charges for component substitutions.

Tasks

<table>
<thead>
<tr>
<th>Task</th>
<th>Detailed Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td><strong>Create a kit by including components and substitutions</strong></td>
</tr>
<tr>
<td></td>
<td>1. Go to USRT → Retail → Common → Kits → Product kits.</td>
</tr>
<tr>
<td></td>
<td>2. Click <strong>New product</strong>.</td>
</tr>
<tr>
<td></td>
<td>3. Enter the following, and then click <strong>OK</strong>:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Product number</strong>: (JagNet ID)7020 (e.g., mine is tschultz7020)</td>
</tr>
<tr>
<td></td>
<td>• <strong>Product name</strong>: Fashion spring kit</td>
</tr>
<tr>
<td></td>
<td>• <strong>Search name</strong>: Fashion spring kit</td>
</tr>
<tr>
<td></td>
<td>• <strong>Retail category</strong>: Fashion → Menswear → Suits &amp; Sportcoats</td>
</tr>
<tr>
<td></td>
<td>4. Select the new kit, and then click <strong>Configure (Product kit group)</strong> on the Action Pane.</td>
</tr>
</tbody>
</table>
5. Click **Edit** on the Action Pane strip.
6. Click **Add** on the **Components** grid and add the following product variant components: (Select the Fashion->Menswear in the Filters section)
   - 81117: Regular Fit Dress Shirt (Ice Blue, Regular, 36)
   - 81130: Straight Leg Pants (Black, Regular, 36)
   - 81145: Leather Oxford (Cherry, Regular, 11)
   [Note: For each of the components in the Components grid, add “pcs” in the Unit column.]
7. For the component 81117: Regular Fit Dress Shirt (Ice Blue, Regular, 36) in the **Components** grid, click **Add** on the **Substitution** grid and add the following substitutions:
   - 81127: Flat Front Pants (Sandstone, Regular, 36)
   - 81131: Stretch Fit Pants (Deep Navy, Regular, 36)
   [Note: For each of the components in the Substitution grid, add “pcs” in the Unit column.]
8. Click **Approve** on the Action Pane strip to approve the kit.
   Do not close the **Configure kit** form.

2. **Generate assembly order**
   1. **Pre-requisite**: Release kit to legal entity USRT:
      a. Go to **USRT → Retail → Common → Kits → Product kits**.
      b. Select the newly created kit, and then click **Release products** on the action pane.
      c. Follow through the wizard and release the kit to USRT.
   2. **Pre-requisite**: Set the released product properties for the kit:
      a. Go to **USRT → Retail → Common → Kits → Released product kits**.
      b. Select the newly created kit and select dimension groups using Dimension Groups on the action page.
2.b.1. **Storage dimension group**: SiteWH
2.b.2. **Tracking dimension group**: None
c. Select the newly created kit and click **Edit** on the action pane, and set the following properties in the General fast tab:
2.c.1. **Item model group**: MOV_AVG
2.c.2. **Item group**: Fashion
2.c.3. Set **Inventory Unit** = pcs under the following fast tabs:
   2.c.3.1. Purchase
   2.c.3.2. Sell
   2.c.3.3. Manage inventory
3. Go back to the **Configure kit** form and click **Generate assembly order** on the Action Pane strip.

   ![Generate assembly order](image)

4. Provide the following information, and then click OK:
   a. **Company**: USRT
   b. **Warehouse**: HOUSTON
   c. **Quantity**: 20
5. Close the **Configure kit** form.

3. **Define prices for kit and its components, and charges for component substitutions**
1. Go to **USRT → Retail → Common → Kits → Released product kits**.
2. Select the new kit, and then click **Configure (Product kit group)** on the Action Pane.

   ![Configure kit](image)
3. Click **Specify kit price** on the **Components** grid, enter 180, and then click **OK**.
4. Select the component **Regular Fit Dress Shirt** and provide the following charges for each of the products in the **Substitution** grid:
   - **Flat Front Pants**: 15
   - **Stretch Fit Pants**: 20
5. Close the Configure kit form.

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**Exercise 2: Assemble & disassemble kits**

**Scenario**
The warehouse clerk processes a kit assembly (build) order and a kit disassembly (breakout) order that were sent to him by the head office.

**Goal**
At the end of this exercise, you will be able to assemble and disassemble kits based on the assembly (build) and disassembly (breakout) orders that were generated during Exercise 1. Also, you will be able to disassemble a kit in the store (when allowed by the head office).

**Task Overview**
1. Assemble a kit.
2. Disassemble a kit in the warehouse.

**Tasks**

<table>
<thead>
<tr>
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<th>Detailed Steps</th>
</tr>
</thead>
</table>
| 1.   | **Assemble kit**  
1. Go to **USRT → Retail → Common → Kits → Kit orders**.  
2. Select the assembly order for the new kit, **Fashion spring kit**, and then click **Assemble kit** on the Action Pane. |
3. For each of the configurations in the **Update quantity** grid, enter 5 in the **Assembled** column.
4. Click **OK**.

2. **Disassemble a kit in the warehouse**
   1. Go to **USRT → Retail → Common → Kits → Kit orders**.
   2. Click **New**, and then in the **Order type** field, select **Disassembly order**.

3. Enter the following, and then click **OK**:
   - **Retail kit**: Fashion spring kit
4. Select the new disassembly order, and then click **Disassemble kit** on the Action Pane.

5. For each of the configurations in the **Update quantity** grid, enter 5 in the **Disassembled** column.
6. Click OK.