Kinetic Order Management User Guide

Version 2025.1

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Overview

The sales order process is a flexible system you can use to create everything from single release sales orders to complex, configured, kitted, multi-line, multi-release orders. The sales order entry process is also directly integrated with quoting, purchasing, and job management. You can create a new sales order from an existing quote, make the changes you need, allocate the inventory from stock, mark some items to buy direct, and drop ship, or even automatically generate jobs from the order’s detail lines.

Sales Order Management also contains advanced functions. Use the pricing and discounting functionality to define a regular system for discounts and price point levels. You can then apply uniform price breaks across your products or individual price breaks that you assign to specific customers. Use the Sales Kitting functionality to create a sales kit for a part that contains a series of related parts. These child parts can either be stock or non-stock. If you use the Configurator module, you can also create multi-level configured parts that can be included as detail lines on a sales kit order.

There are many powerful tools and features available in Order Management.

Blanket Orders

Establish multiple releases (set up as either firm or not firm) for each sales order line and pull parts directly from inventory or seamlessly integrate with Job Management to generate production orders.

Flexibility

Relate orders to jobs using one-to-one, many-to-one, one-to-many, and many-to-many production strategies.

Credit Checks

The ability to check whether a customer is on credit hold is available from Opportunity/Quote Entry, Sales Order Entry, and Shipment Entry. You define credit limits in Accounts Receivable (AR), but the system can present warnings or prevent orders and/or shipments in Order Management.

Backorders

Orders automatically create backorders for lines shipped incomplete. Backorder flexibility lets you set customer-specific backorder parameters for complete order lines or complete orders.

Price Lists

Generate customer, product group, warehouse, and product-specific pricing hierarchies while matching the end user currency with flexibility. For global enterprises that share and distribute pricing, company, site, and warehouse-specific pricing, it offers further flexibility in pricing products.

Sales Commission

Manage sales commission calculations for both direct and indirect sales teams. Optionally allocate commission percentage over multiple sales entities per order line.

This feature is available with the Accounts Receivable (AR) license.

Price Lists

Generate customer, product group, warehouse, and product-specific pricing hierarchies while matching the end user currency with flexibility. For global enterprises that share and distribute pricing, company, site, and warehouse-specific pricing, it offers further flexibility in pricing products.

Order-Based Discounts

Apply order-based discounts on an order value or product quantity basis. Optionally, override and lock pricing.

Miscellaneous Charges

Enter miscellaneous charges or credits on each order header or order line. These charges are printed on the order and carried over to invoicing.

Order Tracker

As a single source for the activity about an order, use the Order Tracker to see a summarized view of the order then drill down on selected items to see greater details (lines, releases, shipments, charges, bookings, audits, and payment information). Based on technology used in the Dashboard, optionally use real-time data to link to other parts of the system.

Order Job Wizard

Quickly generate appropriate jobs for new orders in a single step that enable the user to create, plan, schedule, and release jobs against multiple lines and multiple releases.

Fulfillment Workbench

The Fulfillment Workbench allows you to automatically or manually reserve material quantities for an order release. You can access them from Order Entry to process the entire order. This is beneficial when trying to satisfy demand material quantities through jobs or stock in a sequence that matches allocation priorities assigned to customers.

Order Fulfillment lets you view release and process releases by order. It includes the ability to select/deselect releases, override the reservation priority, display the fulfillment percentage and remaining percentage, and roll up the weight and volume.

You can reserve, unreserve, select for picking, release for picking, and assign the pack out warehouse. Extended selection parameters enable flexibility when pulling in order releases for processing.

This functionality is only available with the Advanced Material Management (AMM) module license.

Project Management

Link sales orders, jobs, purchase orders (POs), field service calls, tasks, milestones, and budget information to manage projects

By using the available functionality within the sales order process, you can efficiently create, process, and complete your company's sales orders.

Operations

This section details the operations you can run through the Order Management module. Each operation is described as a workflow to help guide you through the process from start to finish. These applications are primarily found within the General Operations folder for this module. If a unique setup record is required to run the operation, this is also described in this section.

You may also need to set up some parameters in Company Configuration. Some modules have global settings you define through this administration application. For more information, review application help.

Creating Sales Orders

A sales order is an order that you receive from a customer. Each order record can have multiple order lines, as well as multiple order releases. Also, each sales order can have different 'Sold To', 'Bill To', 'Ship To', and 'Mark For' locations.

Make sure the order you create answers the following questions:

1. Who is the order for?
2. What is the order on?
3. Where do you need to ship the order?
4. When is the delivery date?
5. How do you ship the order?
6. What is the quantity of goods in the order?

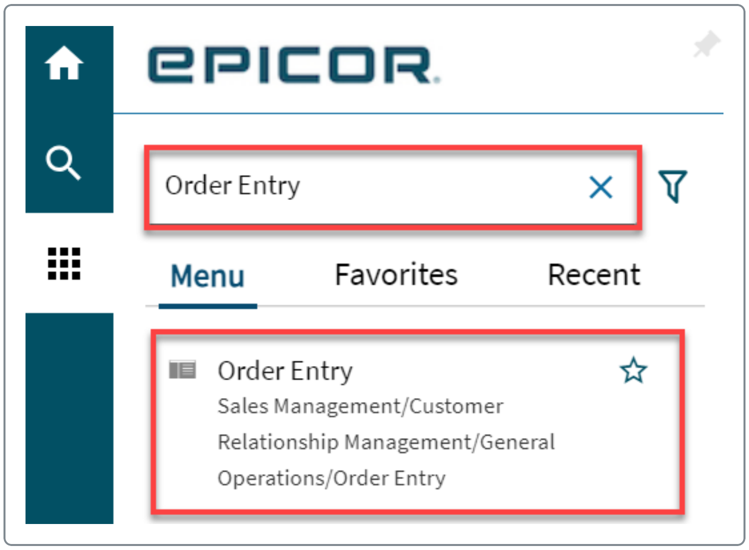
A basic sales order process consists of three steps:

1. Enter a sales order
2. Ship the goods
3. Invoice a customer

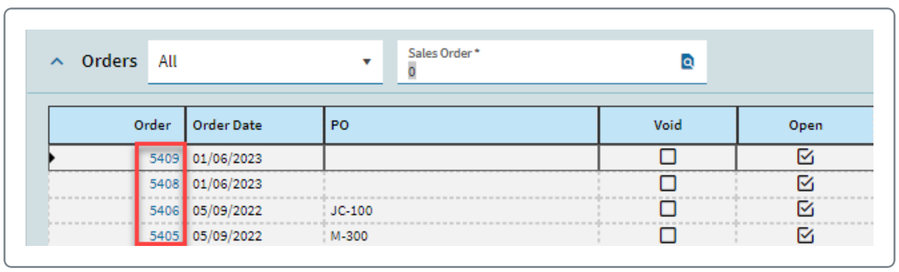
The 'shipping' and 'invoicing' functions are not part of the 'Order Management' module. However, both processes play an important role in the entire order processing cycle.

Entering an Order

1. Open the **Order Entry** app.



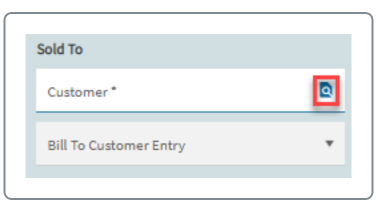
The **Landing** page displays. The page list all the existing sales orders. To select and existing record, select the sales order link inside the grid.



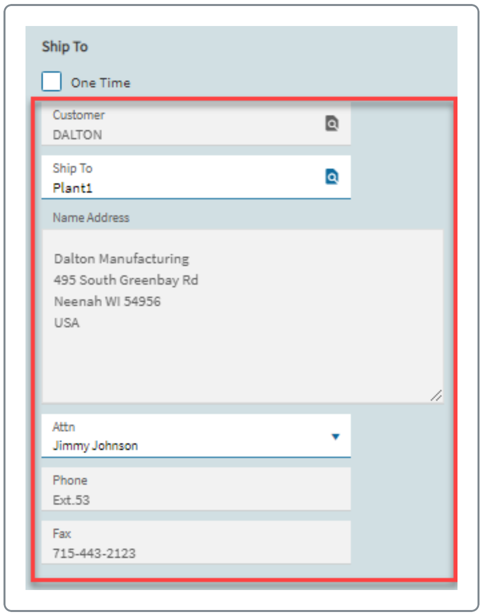
2. To create an order, select **New Order**.

   The **Order Header** card displays.

3. Search for and select a customer using the **Customer** field.

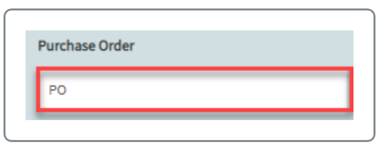


Once you select a customer, the **Ship To** group box fills in. However, you can search for another ship to, if necessary.

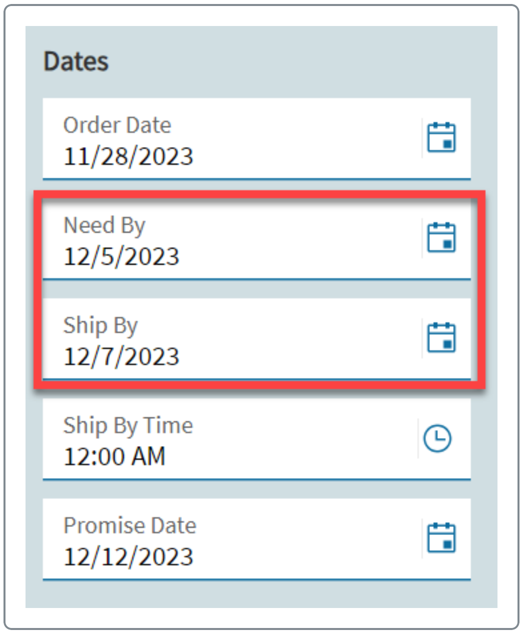


In this example, we selected the 'Dalton' customer.

4. Optionally enter the purchase order number.



5. Enter the required dates in the **Need By** and **Ship By** fields.

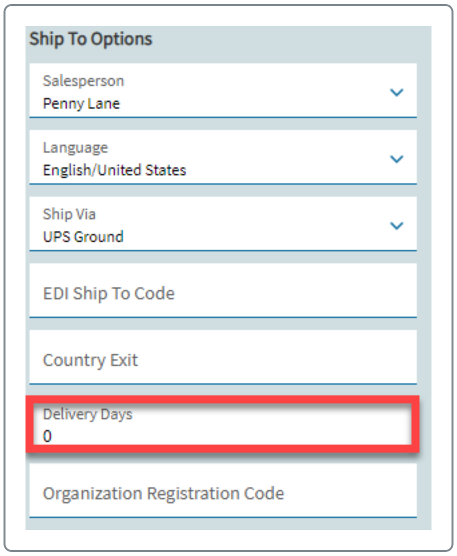


- **Need By** - The date by which the customer needs to receive the order.
- **Ship By** - The date by which you need to ship the ordered quantities so that they reach the customer by their requested date.

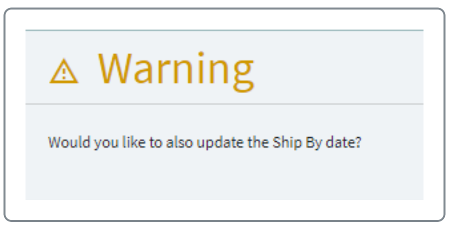
More on the Ship By Date

Kinetic calculates the 'Ship By' date based on the 'Delivery Days' value you enter in the 'Customer' app.

For example, assume your are entering an order for the 'Dalton' customer and the customer needs the items in two months time. If you enter '30' into the 'Delivery Days' field, then Kinetic will calculate the 'Ship By' date of one month from today, assuming you define the 'Need By' date of two months on your sales order.



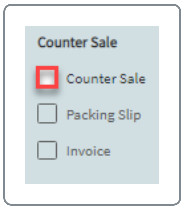
If you change the already defined 'Need By' date on your sales order, Kinetic asks you whether you want to update the 'Ship By' date. If you select 'Yes' then Kinetic will recalculate the 'Ship By' date based on the 'Delivery Days' value you enter in the 'Customer' app.



6. Using the **Dates** group box, define the **Promise Date**.

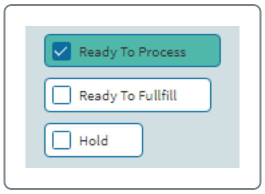
> The date you select in this field represents when the customer actually receives the order. The selected 'Promise Date' defaults to your sales order line(s) and release. However, if you select a different 'Promise Date' on your sales order release then Kinetic does not update the 'Promise Date' at the line or header levels. The same applies to the 'Ship By' date. For example, assume your order includes '2' releases and each release holds a different 'Ship By' and 'Promise' date. You know that it usually takes a week to deliver each release so you know your 'Ship By' dates. However, you have just learned that the courier you use can deliver the products faster so you change the 'Ship By' date on each release. The 'Promise Date' is not affected by this change unless you manually reset it.

7. If this order is a counter order, select the **Counter Sale**.



Selecting this check box will activate the 'Pack' and 'Invoice' check boxes. Select these check boxes if you will immediately print a packing slip and/or an invoice after you save the counter sales order.

8. Select check boxes located in the **Options** group box as necessary:



- **Ready to Process** - Indicates if you want to update all cost and tax amounts on the current sales order and then send the updated tax amounts to the 'Avalara® AvaTax®' website. When you select this check box, you launch several dynamic calculations; only select this check box when you are ready to complete the sales order. You typically will have better order entry performance when this check box is clear, as this prevents the additional processing and Internet data transfer from placing demands against your network resources.

  You can set up this check box to be automatically on by default in the 'Company Configuration' app.

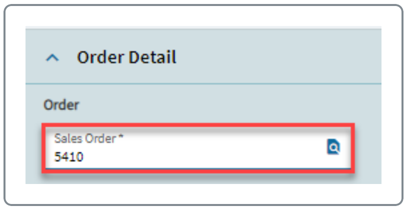
- **Ready to Fulfill** - Indicates that the releases in the sales order are ready to be fulfilled using the 'Fulfillment Workbench' app. This check box is only active with the 'Advanced Material Management' license.

  To learn how to fulfill order, review the Using Fulfillment Workbench article.

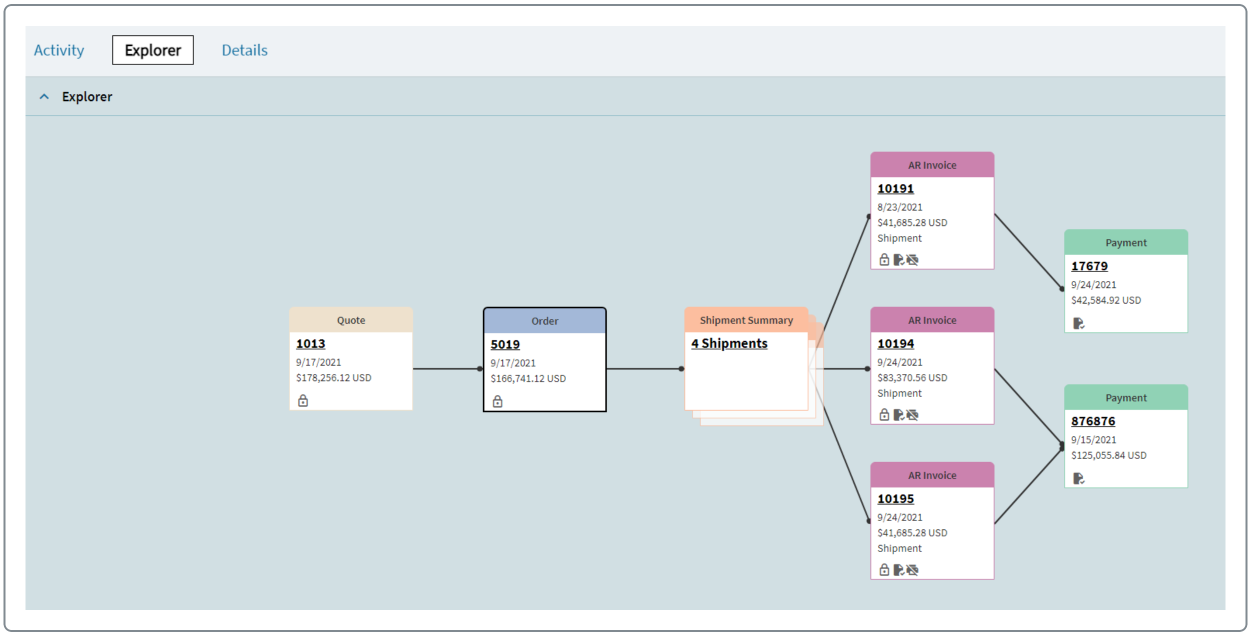
- **Hold** - Indicates whether the order is on hold.

9. Select **Save** .

   Kinetic generates a new order number.



Open the **Explorer** tab to see a graphical representation of relationships between related quotes, orders, shipments, AR invoices and payments - providing a detailed overview of the quote to cash cycle:

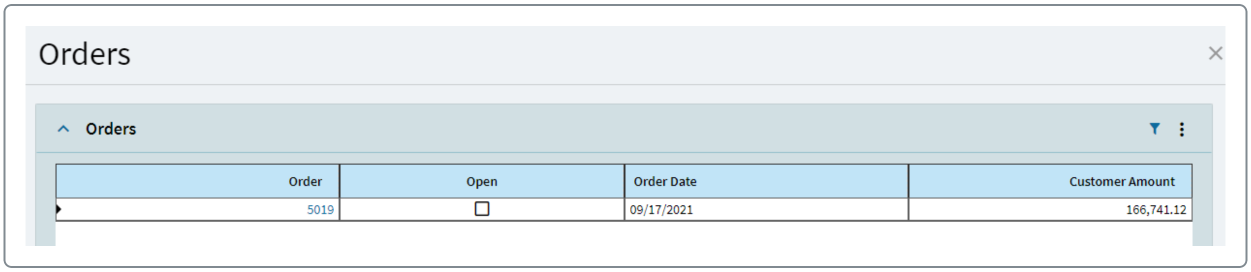


The record you are in is always outlined with black borders.

This relationship “map” consists of five card groups:

1. Quote
2. Order
3. Shipment
4. AR Invoice
5. Payment

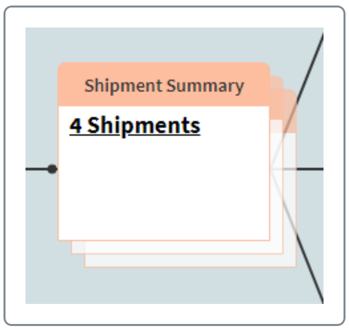
Each card contains a basic overview and an underlined link (the **Quote/Order/Shipment/Invoice/Payment Number** field), which opens a panel with detailed information:



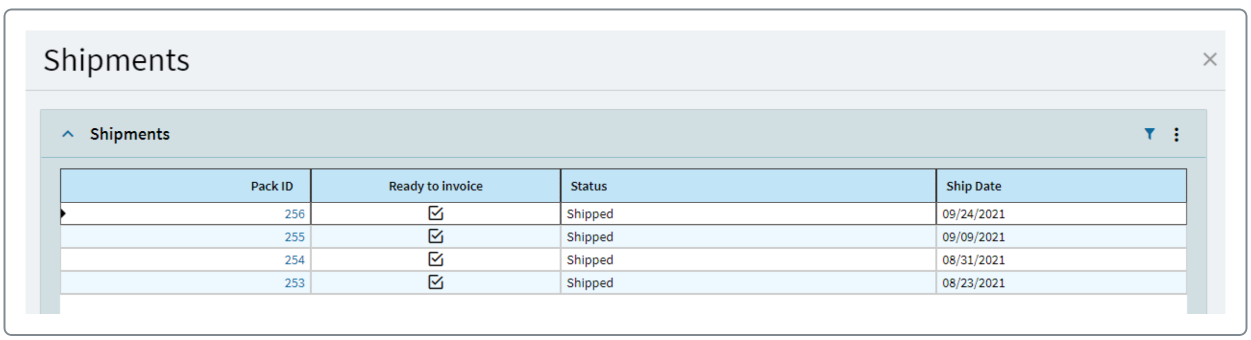
Order	Open	Order Date	Customer Amount
5019	☐	09/17/2021	166,741.12

More details can be added to the grid using the **Personalize Columns** option in the panel's **Overflow menu**. You can also select the record to access it.

When there are four or more cards in a group, a collapsed version of the cards displays:



You can select the underlined link on the collapsed cards to view a panel with all the records listed:



Pack ID	Ready to invoice	Status	Ship Date
256	☑	Shipped	09/24/2021
255	☑	Shipped	09/09/2021
254	☑	Shipped	08/31/2021
253	☑	Shipped	08/23/2021

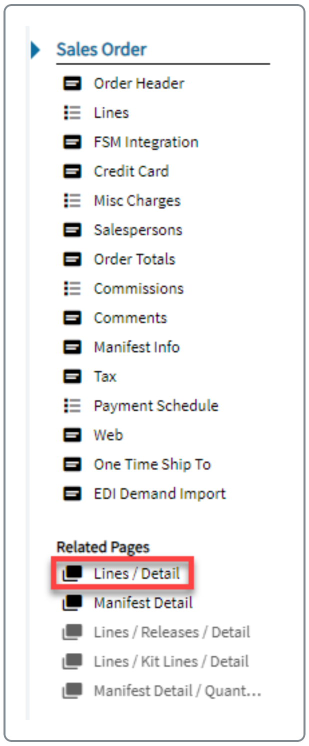
More details can be added to the grid using the **Personalize Columns** option in the panel's **Overflow menu**. You can also select the record to access it.

Adding Lines

Next, add a sales order line.

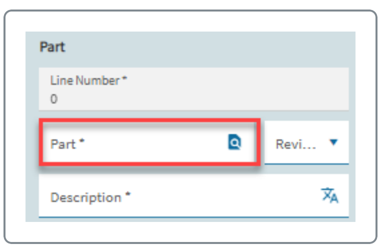
1. In the Nav tree, select the **Lines/Detail** node.

   The **Line Detail** card displays.

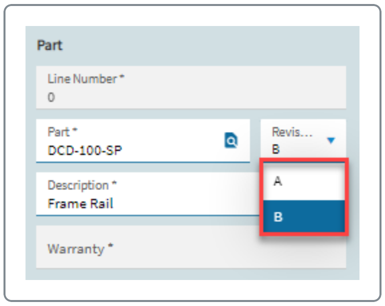


2. To create a new line, select **New Line**.

3. In the **Part** field, search for and select the part for your order line.



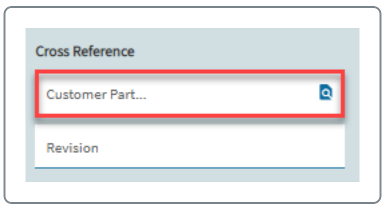
4. If this is a manufactured item that includes multiple part revisions, select a revision for your part.



In this example, we used part 'DCD-100-SP'.

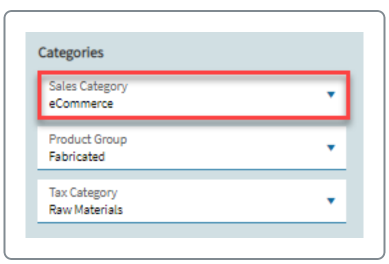
To learn more about ordering parts with multiple revisions, review the Ordering Track Inventory By Revision Parts article.

5. If the part you are adding holds a specific number, search for and select it using the **Customer Part** field.



Sometimes when you order a part, the part number the customer inventories the part is different from the part number in your database.

6. Select a sales category, if required.



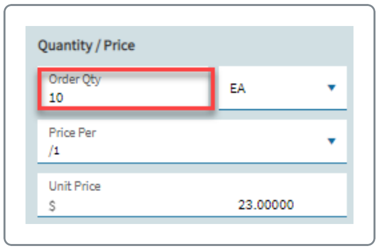
To learn how to create sales categories, review the Creating Sales Categories article.

7. If required, select a tax category using the **Tax Category** field.

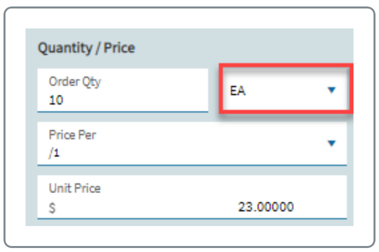
To learn how to create tax categories, review the Creating a Product Tax Category article.

8. Enter the quantity you need to order using the **Order Quantity** field.

You cannot create an order line that has a zero quantity.



9. Once you define the order quantity, select the unit of measure.



You would select a unit of measure for parts that do not hold a record in the 'Part' app. We call these parts 'parts-on-the-fly'. Otherwise, the unit of measure would default in this field, since you link it to a part in the 'Part' app.

10. In the **Price Per** field, select the **Price Per** value based on how you want to sell the part.

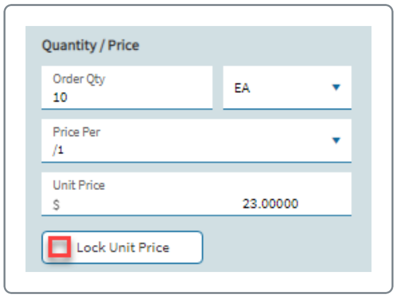
For example, you want to sell a part in batches of '1000' at a price of '$50' per batch. Therefore, you would enter a Unit Price of '50' and select the 'Price Per' option of '/1000'.

11. Specify the price of the part you wan to sell using the **Unit Price** field.

The unit price defined for the part in the 'Part' app displays in this field by default. If the order quantity triggers a change due to a price break, the unit is automatically adjusted to the new price level.

For example, the Unit Price defined for part 'XYZ' is '$500'. You set up a price break for this part that has a break quantity of '25' and a discount amount of '2%'. You enter an order line quantity for '50' pieces. As a result, the default unit price for part 'XYZ' is adjusted to '$490'.

12. Select the **Lock Unit Price** check box to lock the unit price preventing it from being changed as a result of price breaks.

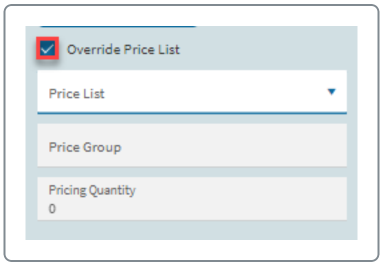


This check box has no effect on the unit price of configured parts. The configuration unit price will always be in effect.

For example, the part on the order line has a base price of ‘400’. If at least ‘100’ parts are ordered, a price break for a discount amount of ‘10’ can be offered. You add an order line for '50' pieces. Therefore, the price of '400' displays. Assume you decide to give the customer the discount anyway, so you manually change the price to ‘390’. If you were to change the quantity to ‘75’ units, without selecting the ‘Lock Unit Price’ check box, then the price would go back to ‘400’. Kinetic refreshes the price based on price breaks and quantity. However, if you select the ‘Lock Unit Price’ check box, the price will stay where it was. In this case, ‘390’.

If a price list exists for the customer and you clear the 'Lock Unit Price' check box of a previously saved locked unit price, the 'Unit Price' value defaults to the 'Base Unit Price' value defined on the 'Price List'.

13. Select the **Override Price List** check box if you want to select a different price list from the one that defaults in the Price List field.



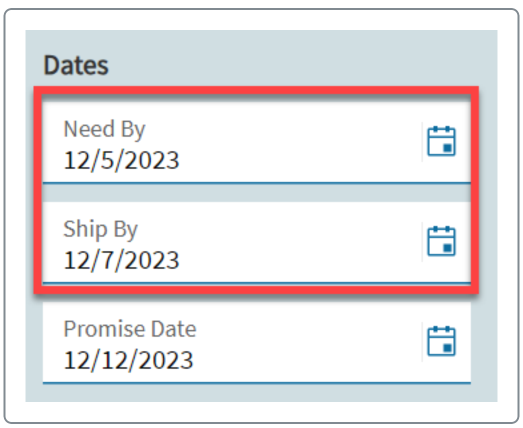
Not every part holds a price list. If you select a part for your order line that is linked to a price list in the 'Price List' app, then the price list defaults in the Price List field. However, you can override the price list by selecting the 'Override Price List' check box.

To learn how to create a price list and link it to a part, review the Setting Up Price Lists article.

14. Select a price list using the **Price List** field.

This field is only active if you select the 'Override Price List' check box.

15. Enter the **Need By** and **Ship By** dates.

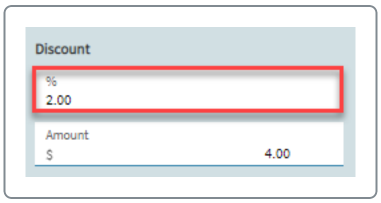


- **Need By** - The date by which the customer needs to receive the order line. If the order line has multiple shipping releases, then you will need to enter different 'Need By' dates on each release.
- **Ship By** - The date by which you need to ship the ordered line quantities so that they reach the customer by their requested date. If the order line has multiple shipping releases, then you will need to enter different 'Need By' dates on each release.

16. Using the **Dates** group box, define the **Promise Date**.

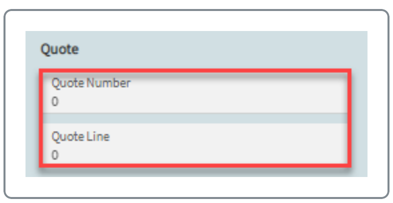
The date you select in this field represents when the customer actually receives the order line. The field defaults the date you select on the order header. However, if you select a different 'Promise Date' on your sales order release then Kinetic does not update this field with the changed date. The same applies to the 'Ship By' date. For example, assume your order includes '2' lines and each line holds a different 'Ship By' and 'Promise' date. You know that it usually takes a week to deliver each line so you know your 'Ship By' dates. However, you have just learned that the courier you use can deliver the products faster so you change the 'Ship By' date on each line. The 'Promise Date' is not affected by this change unless you manually reset it.

17. Specify the percentage that reduces the price on this order line using the **%** field.



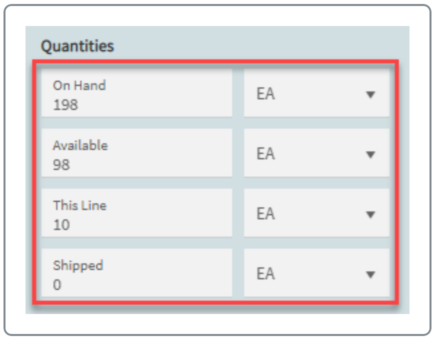
A discount percentage reduces the line amount. In this example, the order line is for '10' units of pard 'DCD-100-SP'. The line carries the cost of '20' dollars per unite. Therefore, Kinetic calculated the discount amount of '4' dollars.

18. The **Quote** group box specifies the quote number and line associated with the order line.



In this example, the order line is not associated with a quote.

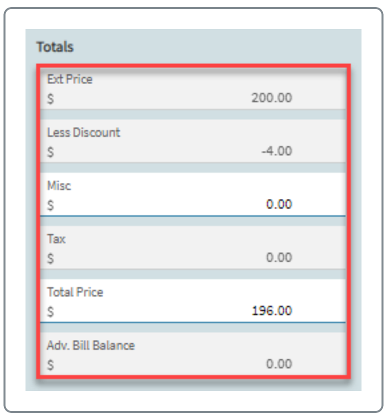
19. The **Quantity** group box shows you the line information.



In this example, we have '198' pieces in our inventory out of which '98' pieces are available. We are ordering '10' units. This is the line quantity.

20. Select **Save**.

21. The **Totals** group box shows you the amounts related information.



In this case, we ordered '10' units of part 'DCD-100-SP' where each units costs '20' dollars. Therefore, the 'Extended Price' field displays the amount of '200' dollars. However, there is a discount of '2%' and therefore the 'Less Discount' field displays the amount of '-4.0' dollars. The total price at this stage is '196' dollars.

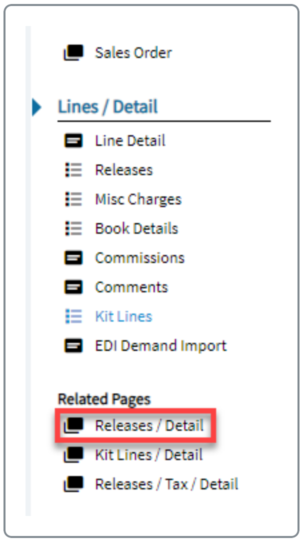
Adding Releases

When you save a line, the 'Order Entry' app automatically creates a single release for the line. This release has the same quantity that was entered on the detail line. You can also create multiple releases for each detail line. You would do this, for example, if the customer needs to receive part quantities at different locations, or to set up a delivery schedule.

To add a release:

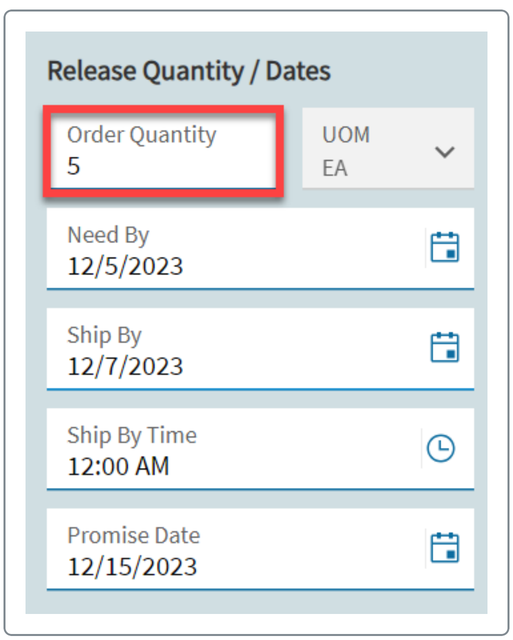
1. In the Nav tree, select the **Releases > Release Detail** node.

   The **Release Detail** card displays.

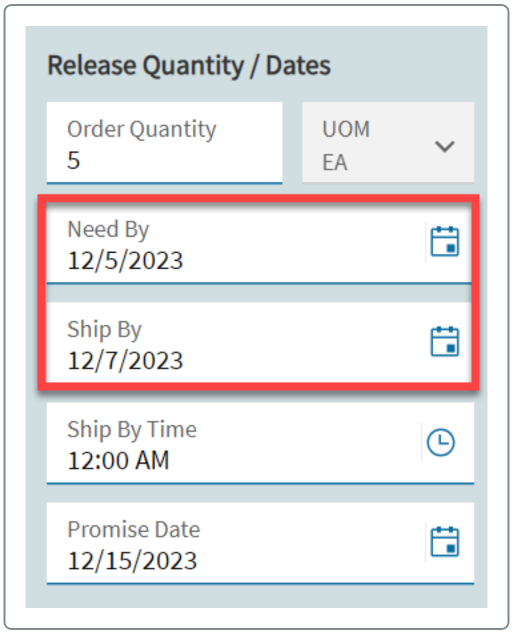


2. To create a new release, select **New Release**.

3. Enter the release quantity.



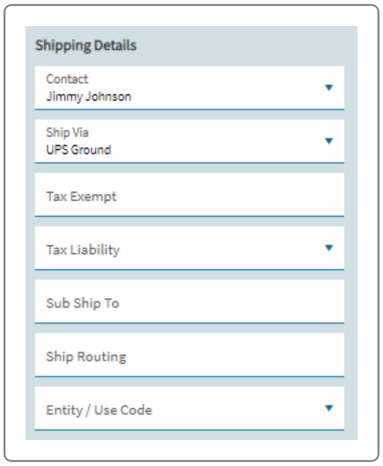
4. Define the **Need By** and **Ship By** dates.



5. Using the **Release Quantity/Dates** group box, define the **Promise Date**.

> The date you select in this field represents when the customer actually receives the release. The 'Promise Date' field defaults the date you select on your order line. If you select a different 'Promise Date' date on your sales order release then Kinetic does not update the 'Promise Date' at the line or order header levels. The same applies to the 'Ship By' date. For example, assume your order includes '2' releases and each release holds a different 'Ship By' and 'Promise' date. You know that it usually takes a week to deliver each release so you know your 'Ship By' dates. However, you have just learned that the courier you use can deliver the products faster so you change the 'Ship By' date on each release, The 'Promise Date' is not affected by this change unless you manually reset it.

6. Define **Shipping Details**.



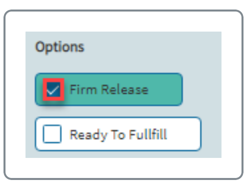
- **Ship Via** - Specifies the means of shipment. For example, UPS, FedEx, and so on.

  To learn how to create Ship Via codes, review the Creating Ship Via Codes article.

- **Tax Exempt** - Specifies the reason code that defines why this order release is exempt from sales tax. You link tax exemption codes to a customer using the 'Customer Entry' app.
- **Tax Liability** - Specifies the unique identifier of the tax region assigned by the user.

  To learn how to create tax liabilities, review the Entering Tax Liabilities article.

7. Indicate if the entered release is the **Firm** Release.

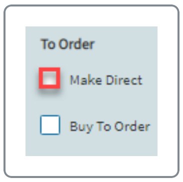


If you select this check box, Kinetic will consider this release to be committed for the date you select. If cleared, Kinetic doesn't consider it 'Firm', but you can still ship an un-firm release. The 'Not Firm' icon displays in these cases and MRP will not consider the quantity as demand, but Kinetic will allow all other processing, such as inclusion on 'Scheduled Shipment Report' and 'Sales Order Pick List'. Kinetic will do everything except help you to prepare to fulfill the demand.

You receive a purchase order from a customer that specifies five scheduled releases for a part, each one month apart. The releases for 'January' and 'February' are set in stone and are considered firm; the 'March', 'April', and 'May' releases are going to happen, but they are just best guesses regarding when the customer will need the material. When you enter the sales order releases, select the 'Firm Release' check box on the first two releases to indicate that they should be included in MRP calculations. Do not select this check box on the remaining releases if you do not want to prepare to fulfill the demand at this time.

8. Select the **Ready to Fulfill** check box if the order release is ready to be fulfilled and can load into the Fulfillment Workbench app.

9. The **Make Direct** check box specifies if this release quantity is being manufactured instead of being pulled from inventory.



This is the case for non-stock parts. If the part on your order release is set to 'Non-Stock' in the 'Part'app, then this check box would be selected by default. If you select this check box, then the 'Buy To Order' check box disables.

Purchased parts and stocked parts do not use the 'Make Direct' feature.

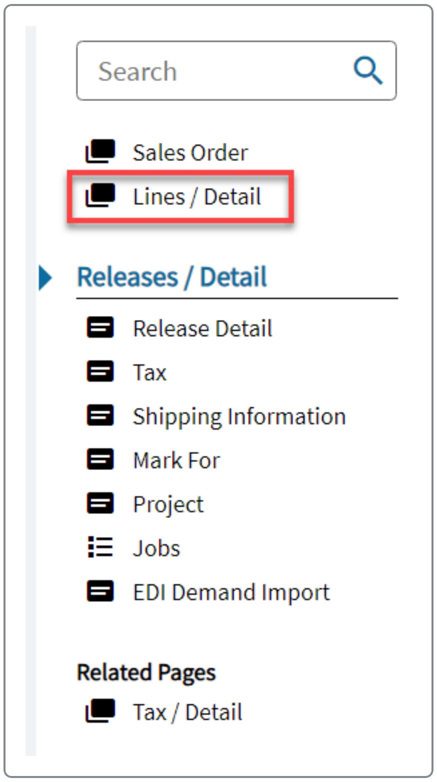
10. Select the **Buy To Order** check box if this is a part you need to buy.

This check box would be selected by default if the part on your order line is a purchased non-stock part. This check box is unavailable for parts defined as 'Sales Kits', or if you select the 'Make Direct' check box.

11. Select **Save**.

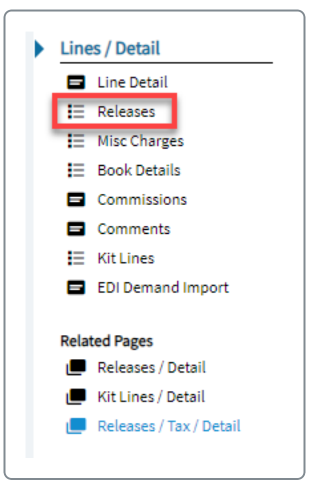
12. In the Nav tree, select the **Line/Detail** node.

The **Line Detail** card displays.

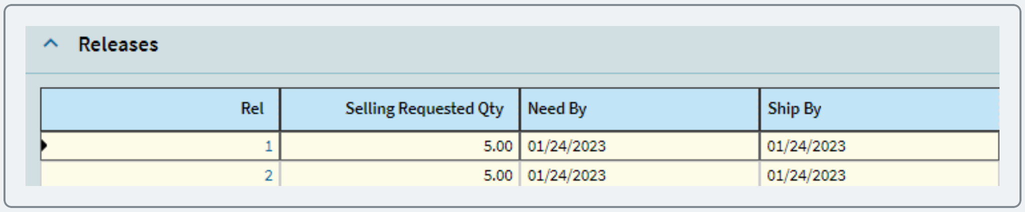


13. In the Nav tree, select the **Releases** node.

    The **Releases** card displays.



The 'Releases' card displays all the entered releases.



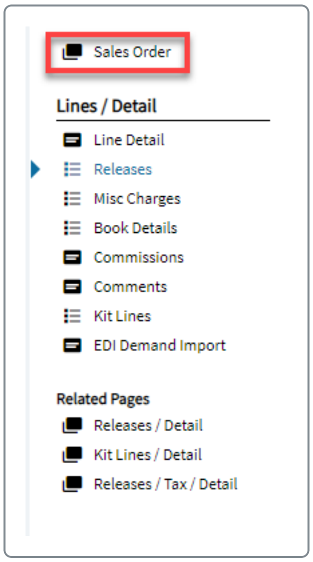
Releases

Rel	Selling Requested Qty	Need By	Ship By
1	5.00	01/24/2023	01/24/2023
2	5.00	01/24/2023	01/24/2023

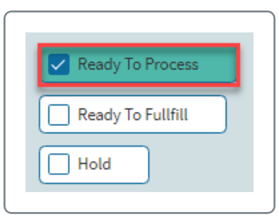
In this case, we created '2' releases for a single line. Each release holds the same quantity of '5' pieces.

14. In the Nav tree, select the **Sales Order** node.

    The **Order Header** card displays.



15. Verify the **Ready To Process** check box is selected.



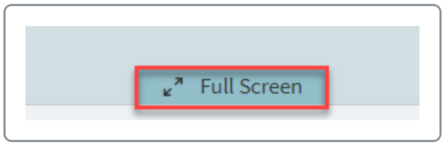
16. Select **Save**.

17. Remain the Order Entry app.

Adding Additional Information

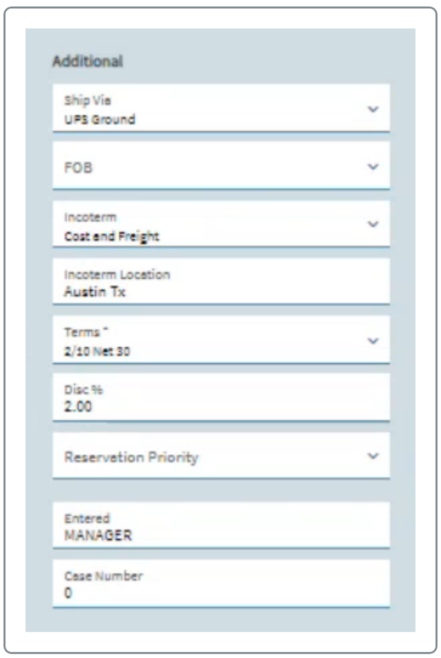
You can add additional information for your sales order if required. To do so:

1. On the Order Header card, select **Full Screen**.



> If you use EDI, the EDI group box displays below the Options group box. It contains **EDI Ack Code** field where you can select the appropriate acknowledgement code. You can also choose to send the EDI acknowledgement by selecting the **Send EDI Acknowledgement** check box.

2. On the card, locate the **Additional** group box.



3. Enter/select required values.

   - **Ship Via** - Specifies means of shipment. The 'Ship Via' associated with this customer appears by default, but you can select a different option from the list.
   - **FOB** - The point at which the ownership title for the shipped goods changes to the customer.
   - **Incoterm** - Select the 'Inconterm' code define in the 'Incoterm Maintenance' app.

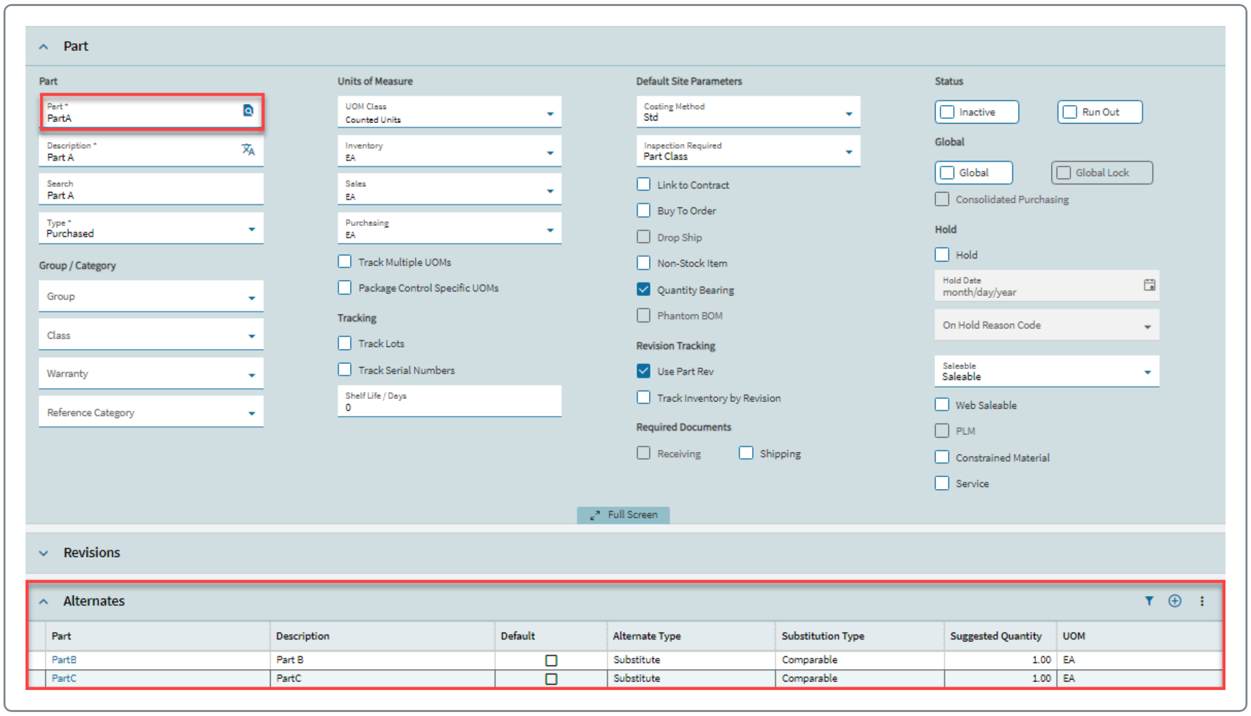
To learn more about 'Incoterm' codes, review the article.

- **Incoterm Location -** Specify an incoterm location. This is the place where your responsibility for the delivery ends. For example, the incoterms location can be a port of export or a destination port.
- **Terms -** The conditions under which the customer will pay for this order. The default terms are pulled from the customer record, but you may select different terms from the list.
- **Disc % -** The percentage that will be removed from the final price of each order line. The discount percent from the customer record by default, but you can change it if you need. (for example, 5.0).
- **Reservation Priority -** The allocation priority for the order. It helps the 'Fulfillment Workbench' prioritize reserving quantities for this customer in relationship with your other customers (for example, High Priority).
- **Entered -** The User ID of the person who entered this order. If you create a new order, your user ID appears by default (for example, RRS).
- **Case Number -** The number of the case assigned to this sales order. A case is a record created to track the resolution of a customer issue; you enter cases through the Case Entry app within the Case Management module. If this order is generated through a case, enter the specific case number within this field.

4. Select **Save**.
5. Exit the Order Entry app.

Working with Substitute Parts

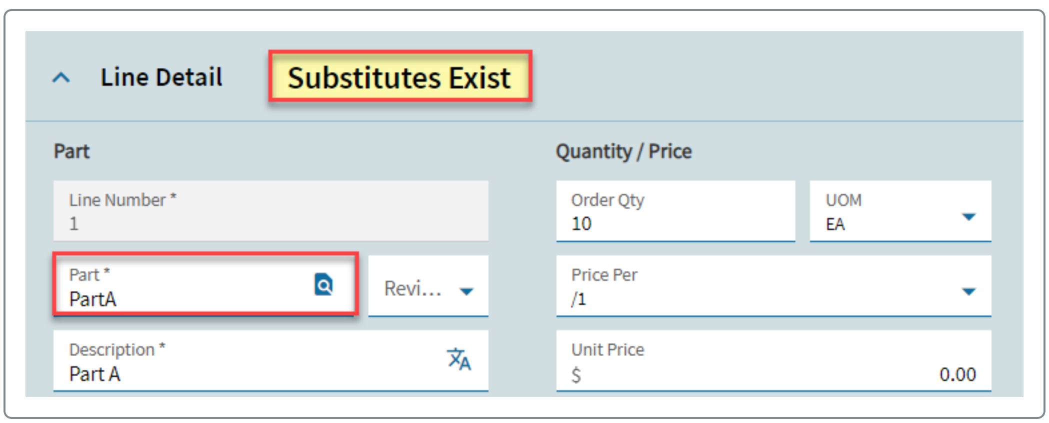
Assume you are ordering '10' units of 'Part A', but 'Part A' holds two alternate parts 'Part B' and Part C'. You do this in the 'Part' app.



When you enter a sales order line for '10' units of 'Part A' then Kinetic will indicate that the 'Substitutes Exist'.

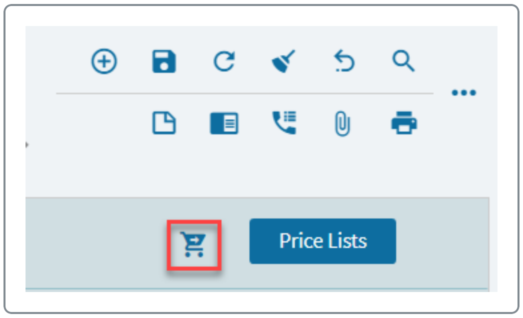
1. Enter a sales order line.

   In this case, we entered 'Part A'. As a result, the 'Substitutes Exist' icon displays.

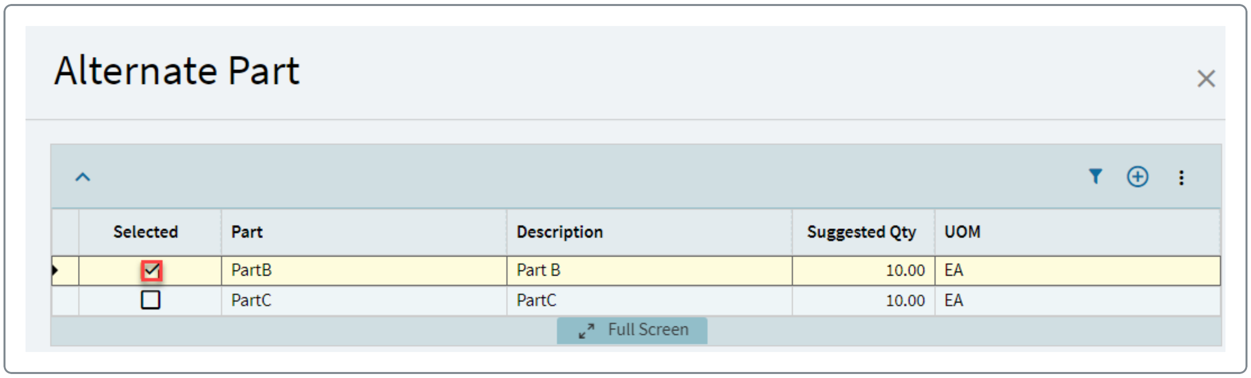


2. Next, select the **Substitutes** icon.

   The **Alternate Part** panel opens.

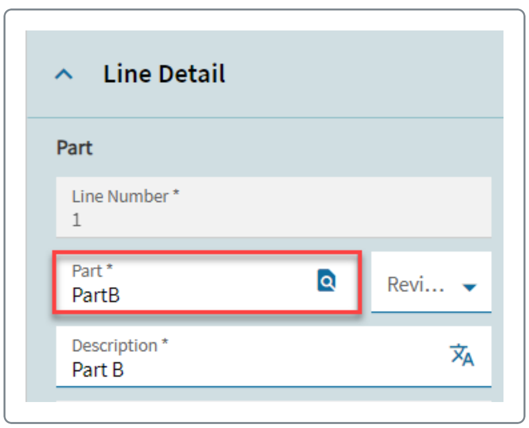


3. Inside the panel, select a substitute part. In this case, we selected 'Part B'. However, this is just an example.



4. Inside the panel, select **OK** to confirm.

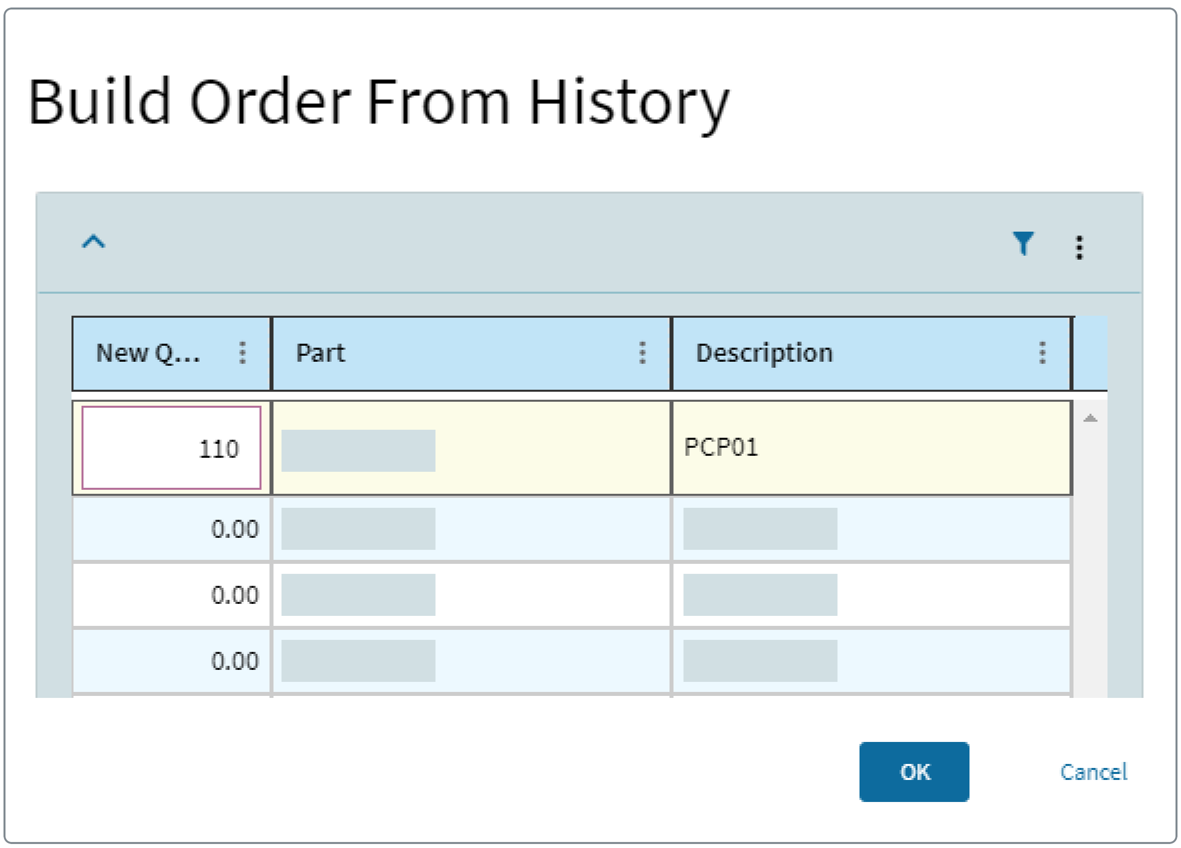
   'Part B' now displays on the sales order line.



Building Orders from History

Review the most recent past orders placed by the customer and optionally build new lines for selected items on the current sales order using the **Build Order from History** option of the Overflow menu in **Order Entry**. Once you select this option, the panel displays order information for all items that the selected customer has ordered during the period set in the **Days Lookup For Order From History** field in **Modules > Sales > Order** in **Company Configuration**.

1. From the main menu, go to **Sales Management > Order Management > General Operations > Order Entry**.
2. Select **New** to create an order.
3. Select the customer you want to generate lines for.
4. From the Overflow menu, select **Build Order from History**.
5. Enter **New Quantity** for the part that you want to create the line for.



6. If necessary, scroll right and review the line details.

7. Repeat the process for as many lines as you need.

8. Select **OK**.

The new lines generate and open in the order page. Now you can view the order details and proceed working with it as you need.

Allocating Sales Orders

You can allocate sales orders in '3' different ways in Kinetic.

- **Manual Allocation -** This is a standard fulfillment procedure.

  To learn more about fulfillment, review the Using Fulfillment Workbench article.

- **Semi-Automatic Fulfillment -** This is not a manual nor fully automated fulfillment allowing you to fulfill an entire sales order or just its releases from within the 'Order Entry' app.

  This fulfillment strategy will be covered by this article.

- **Automated Fulfillment -** You can fully automate Kinetic to fulfill sales orders, transfer orders, and jobs.

  To learn more about automated fulfillment, review the Setting Up Automated Fulfillment article and its related articles.

Activating Fulfillment

First, you need to activate the fulfillment for your site.

To use this feature, you must install the 'Advanced Material Management' license.

1. Open the **Site Configuration Control** app.

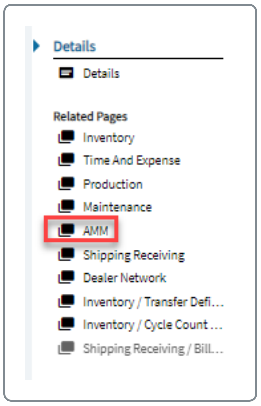
   The Landing page displays.

2. In the Site field, enter a site ID and press **Tab**.

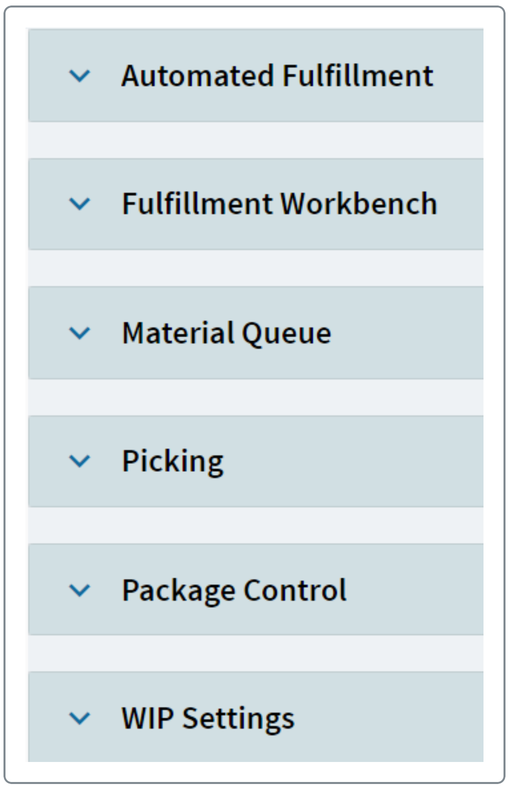
   The Details card displays.

   You can also click on a site link located in the grid.

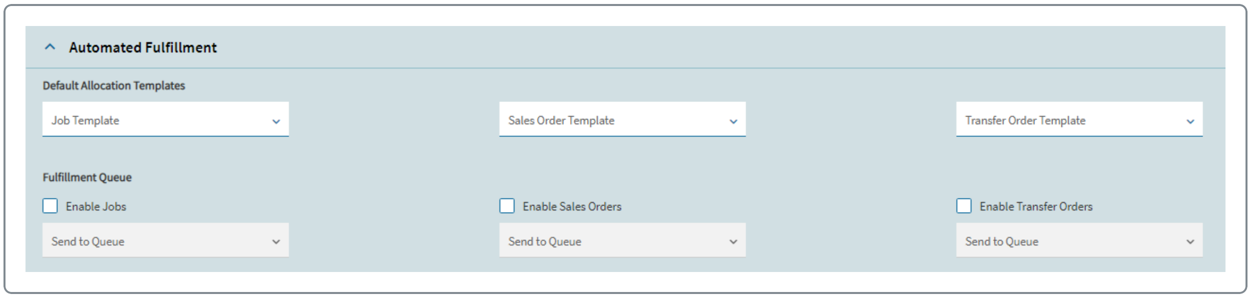
3. In the Nav tree, select the **AMM** node.



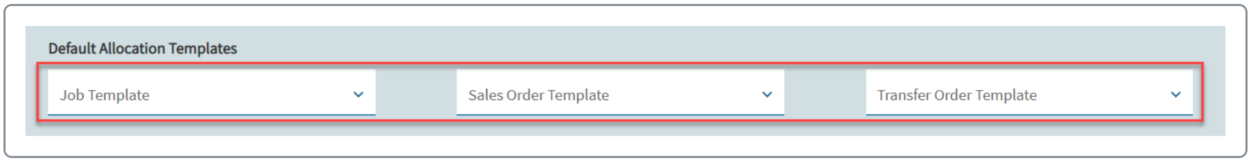
A set of cards displays.



4. Expand the **Automated Fulfillment** card.



5. Select a default allocation template used for jobs, sales orders, or transfer orders.



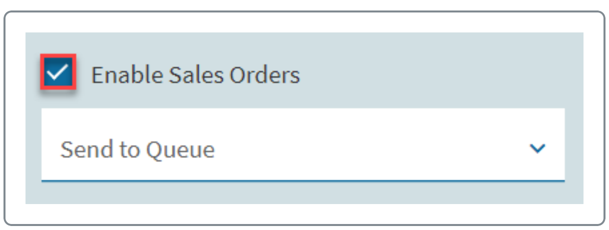
In this case you select a 'Sales Order Template'.

You create allocation templates using the 'Allocation Template Maintenance' app. To learn how to create templates, review theCreating Allocation Templates article.

6. Select the **Enable Sales Orders** check box.

   Selecting this check box activates the **Send to Queue** field.

If you select this check box, but don't define the 'Send To Queue' option (leave it blank), then you can push the sales order release to fulfillment queue.



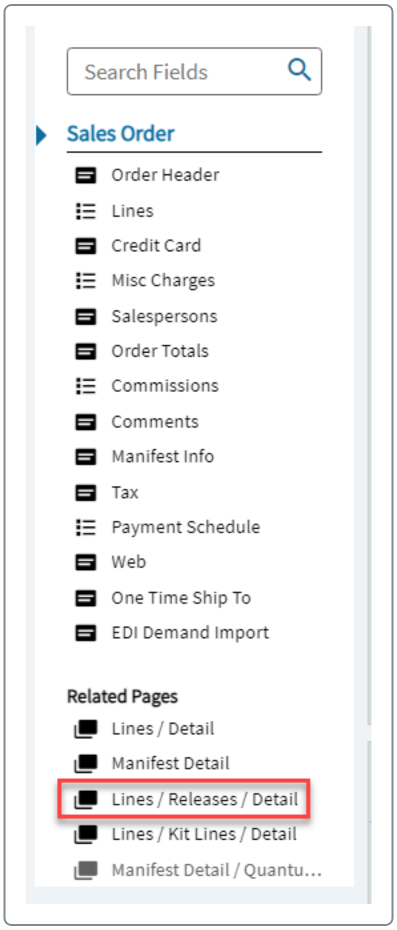
Assume you enter a sale order for '10' units of part 'DCD-100-SP'. If you select the 'Enable Sales Orders' check box, then:

1. Enter a sales order and define its line(s) and release(s).

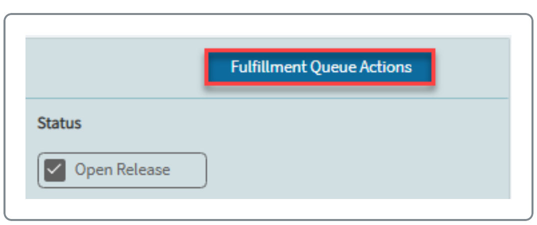
   To learn how to create a sales order, review the Creating Sales Orders article.

2. On your order, select the **Release Detail** node in the Nav tree.

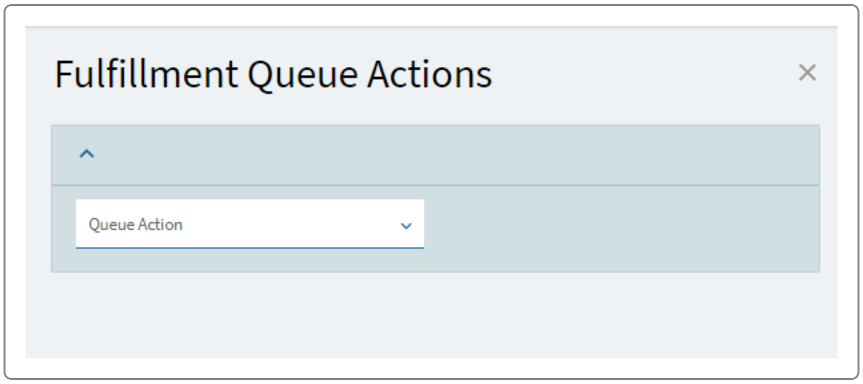
   The Release Detail card displays.



3. Select **Fulfillment Queue Actions** button for your sales order release.



   The Fulfillment Queue Actions panel displays.



4. Inside the panel, select **Send to fulfillment queue** in the Queue Action field.
5. Select **OK**.

7. In the Send to Queue field, select **Ready to Fulfill**.

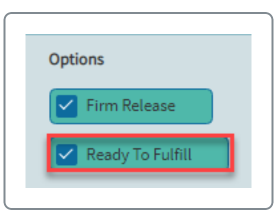
A sales order release will go to the fulfillment queue the moment you set a sales order release to 'Ready to Fulfill'.

> Select this option only if your business requires sales orders to go directly to the fulfillment queue.

Assume you enter a sale order for '10' units of part 'DCD-100-SP'. If you select the 'Enable Sales Orders' check box and then select the 'Ready to Fulfill' option then Kinetic will send the sales order release to the fulfillment queue the moment you set it to 'Ready To Fulfill'.

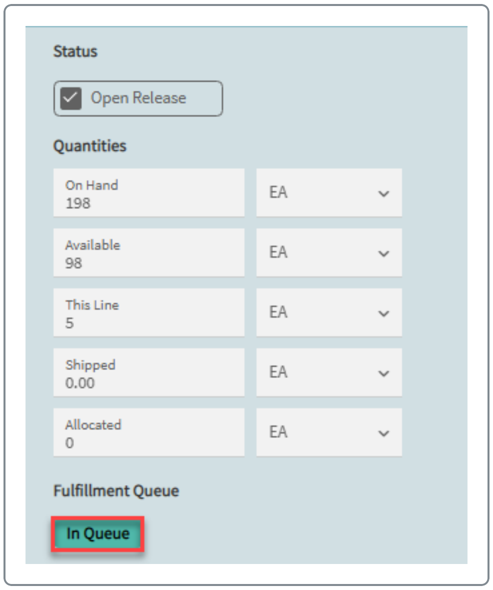
1. Enter a sales order and define its line(s) and release(s).
2. On your order, select the **Release Detail** node in the Nav tree.

   The Detail card displays.
3. Select the **Ready To Fulfill** check box.



4. Select **Save**.

The Fulfillment Queue group box displays the **In Queue** status.



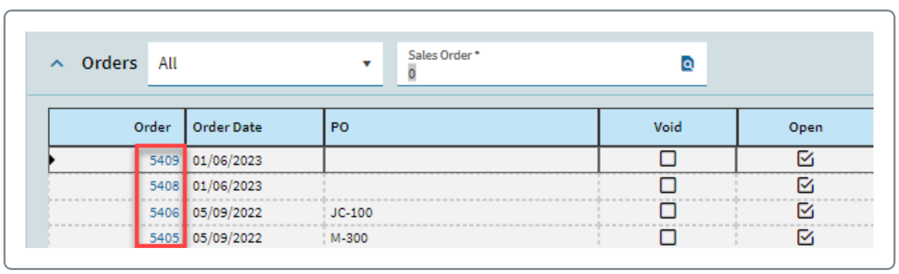
8. Exit the Site Configuration Control app.

Creating a Sales Order

First, create a sales order and define order related dates.

1. Open the **Order Entry** app.

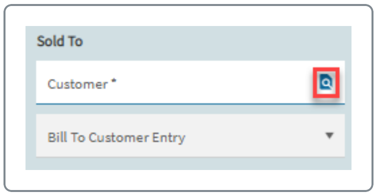
   The Landing page displays. The page list all the existing sales orders.



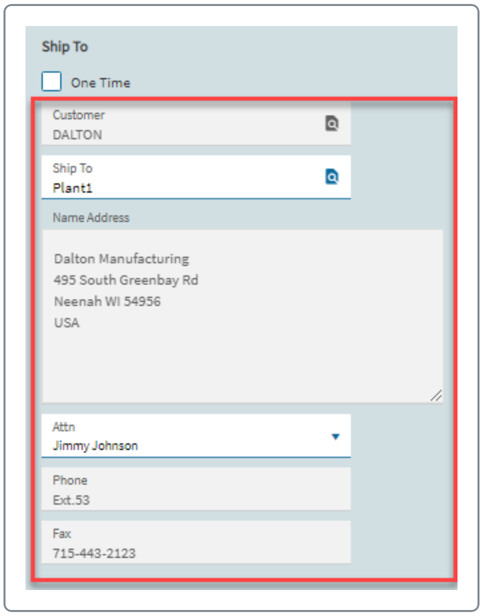
2. To create an order, select **New Order**.

   The Order Detail card displays.

3. Search for and select a customer using the Customer field.

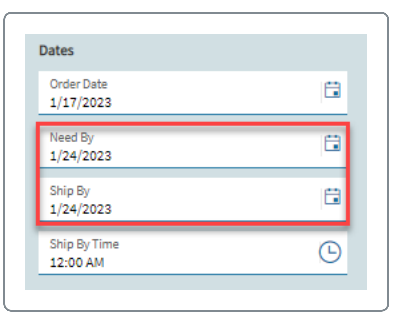


Once you select a customer, the **Ship To** group box fills in. However, you can search for another ship to, if necessary.



In this example, we selected the 'Dalton' customer.

4. Enter the required dates in the **Need By** and **Ship By** fields.



- **Need By** - The date by which the customer needs to receive the order.
- **Ship By** - The date by which you need to ship the ordered quantities so that they reach the customer by their requested date.

5. Select **Save**.

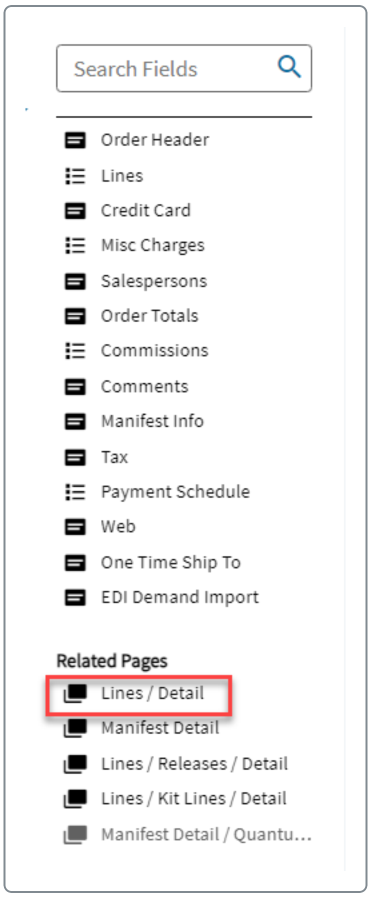
6. Remain in the Order Entry app.

Creating an Order Line

Next, enter a sales order line.

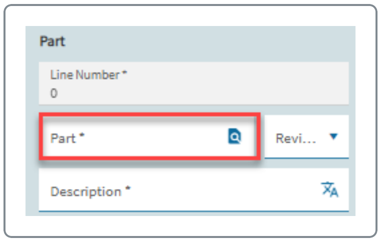
1. In the Nav tree, select the **Lines/Detail** node.

   The Line Detail card displays.

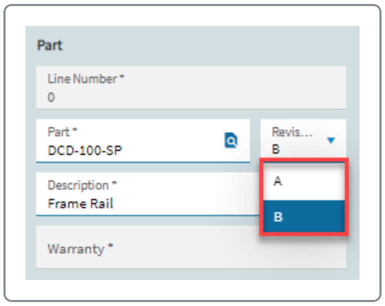
   

2. To create a new line, select **New Line**.

3. In the Part field, search for and select the part for your order line.



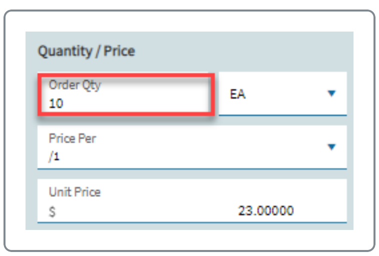
4. If this is a manufactured item that includes multiple part revisions, select a revision for your part.



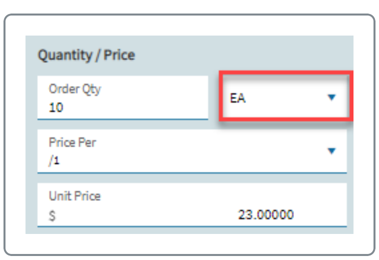
In this example, we used part 'DCD-100-SP'.

To learn more about ordering parts with multiple revisions, review the Ordering Track Inventory By Revision Parts article.

5. Enter the quantity you need to order using the Order Quantity field.

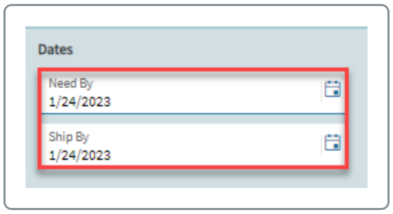


6. Once you define the order quantity, select the unit of measure.



You would select a unit of measure for parts that do not hold a record in the 'Part' app. We call these parts 'parts-on-the-fly'. Otherwise, the unit of measure would default in this field, since you link it to a part in the 'Part' app.

7. Enter the **Need By** and **Ship By** dates.



- **Need By** - The date by which the customer needs to receive the order line. If the order line has multiple shipping releases, then you will need to enter different 'Need By' dates on each release.

- **Ship By** - The date by which you need to ship the ordered line quantities so that they reach the customer by their requested date. If the order line has multiple shipping releases, then you will need to enter different 'Need By' dates on each release.

8. Select **Save**.

9. Remain in the Order Entry app.

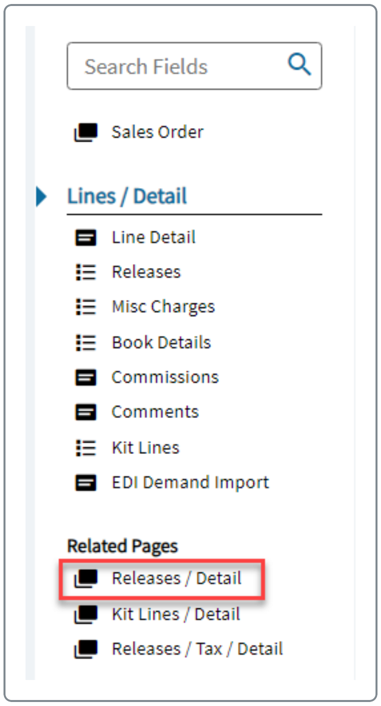
Allocate a Sales Order Release

Next, allocate a sales order release.

> As already mentioned, you can allocate an entire sales order or just its release or releases. In this case, you will learn how to allocate a sales order release.
>
> If you want to allocate an entire sales order skip these steps and proceed to the next topic called 'Allocate a Sales Order'.

1. In the Nav tree, select the **Releases/Detail** node.

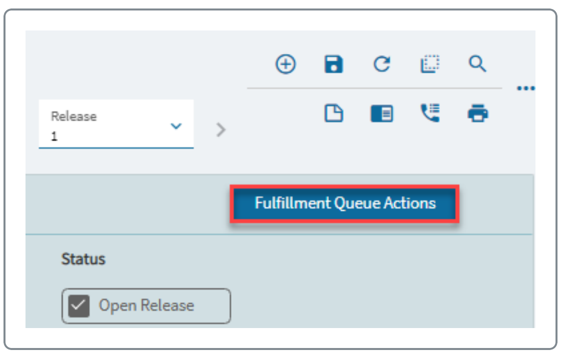
   The Release Detail card displays.



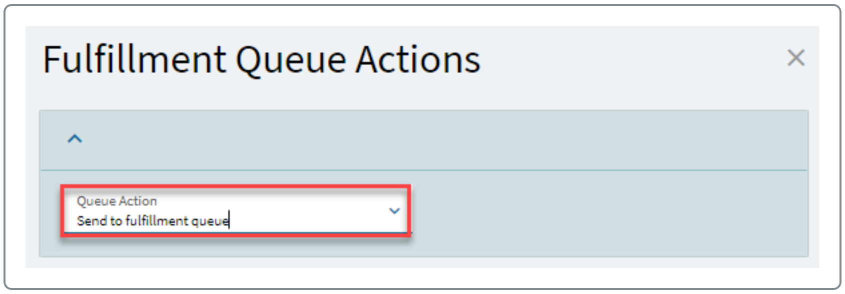
2. To allocate the release, select **Fulfillment Queue Actions**.

   The **Fulfillment Queue Actions** panel opens.

   > ⚠ In this case we did not select the 'Ready to Fulfill' option in the 'Site Configuration' app.



3. In the Fulfillment Queue Actions panel, in the **Queue Action** field, select **Send to fulfillment queue**.

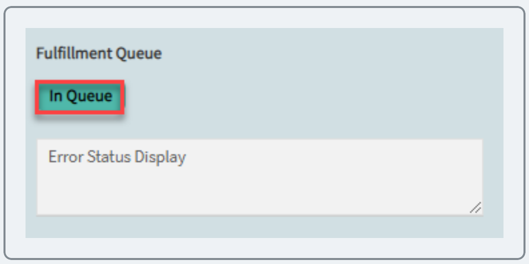


The 'Send to fulfillment queue' option clears any existing entry in the queue for this release and adds the release to the end of the queue.

If you select the 'Remove from Queue' option, then Kinetic clears any existing entry in the queue for this release.

4. Select **OK** inside the panel.

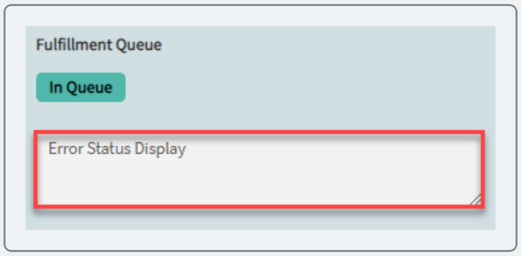
The release displays the **In Queue** icon.



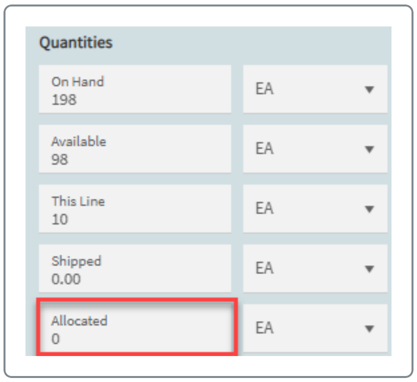
To be able to allocate the order release, you must install the 'Advanced Material Management (AMM)' license and activate the 'Enable Sales Orders' (check box) setting in the Site ConfigurationSite Configuration app.

5. Repeat the steps for other order released, if required.

The **Fulfillment Queue** group box also includes an error related field where you can view the allocation error status of the selected order release. In this case, there are no errors.



6. To review the already allocated quantity of the part on the sales order release, review the **Allocated** field located in the **Quantities** group box.



When you create a sales order and want Kinetic to auto allocate its releases, you must run the Automated Fulfillment Process.

However, this requires the 'Fulfillment Automation' setup. To learn how to do this, review the Setting Up Automated Fulfillment article.

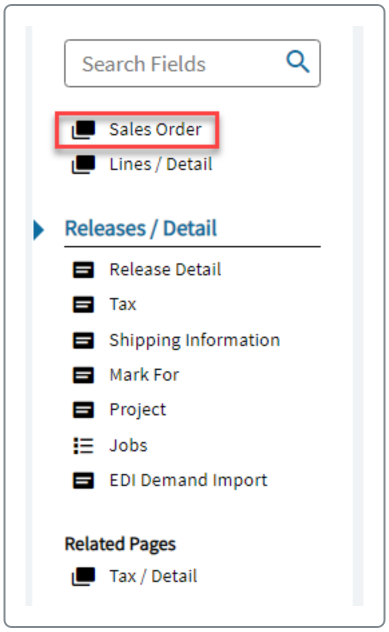
7. Remain in the Order Entry app.

Allocate a Sales Order

If you need to allocate an entire sales order, complete the steps below. Assume your sales order includes multiple lines and each line includes multiple releases. When you allocate a sales order, it makes no difference how many lines or releases a sales order includes. They all get allocated.

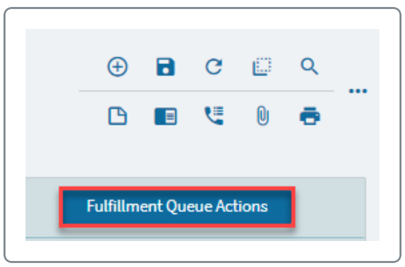
1. In the Nav tree, select the **Sales Order** node.

   The **Order Header** card displays.



2. To allocate an entire sales order, select **Fulfillment Queue Actions**.

   The **Fulfillment Queue Actions** panel opens.



3. In the **Fulfillment Queue Actions** panel, in the **Queue Action** field, select **Send to allocation queue**.

> The same as with the order releases, the 'Send to allocation queue' option clears any existing entry in the queue for this sales order and adds its releases to the end of the queue.
>
> If you select the 'Remove from Queue' option then Kinetic clears any existing entry in the queue for this sales order.

4. Select **OK**.

> The release(s) displays the **In Queue** icon.

To locate a sales order release, in the Nav tree, select the **Lines > Detail > Releases > Release Detail** node.

Since you are allocating the whole sales order, all the released will show the 'In Queue' status.

To be able to allocate the order release, you must install the 'Advanced Material Management' (AMM) license and activate the 'Enable Sales Orders' (check box) setting in the Site ConfigurationSite Configuration app.

5. Exit the Order Entry app.

Run the Automated Fulfillment Process

The process calls the 'Fulfillment Workbench' logic for all records in the allocation queue just as if you searched for the records in the queue and attempted to allocate them manually.

To learn more about the 'Automated Fulfillment Process', review the Run the Automated Fulfillment Process article. To learn about 'Automated Fulfillment', review the Setting Up Automated Fulfillment article.

To run the process:

1. Open the **Automated Fulfillment Process** app.

   If you want to run the process continuously, select the **Continuous Processing** check box.

   If you run this process as a continuous task and this task stops in the task agent, it still runs on the application server. When this occurs, you will see a message in the **Epicor ICE Task Agent Service** event log that states the task continued running on the server. You can access this log from **Task Agent Configuration**. Because this message is a warning, you can also view it in the **System Monitor**.
2.
3. Select the **Fulfill Demand Warehouse** only check box if you want to fulfill using a demand warehouse.

   The demand warehouse is the warehouse displayed on the order release, job material, or transfer order line. The process would use inventory balances found only in the demand warehouse designated for the part.

This selection does not release the items to the 'Material Queue' for immediate picking. The 'Rule Class' you select in this app would have to have a rule that holds the 'Release For Picking' action.

4. In the Rule Class field, search for and select the rule class you want the process to consider.

5. Enter a value in the Delay (Minutes) field if yo want the process to delay.

   For example, if you enter a value of '60' in this field then the process runs in the background with a '60' minute delay between each process run. Enter a value in this field if you run the process in a continuous mode.

6. Verify the Lof Filename field defaults to **AutomatedFulfillment.log**.

   The log file shows you the sequence of the process. You can use the generated log to trouble shoot the process if it completes with errors.

7. Expand the **Filter** card and search for and select a specific site.

   The process will only run the database for the site yo select here. The default is 'All Sites', meaning the process considers all the sites in your company.

8. Expand the **Advanced** card.

9. Select a schedule for you process run in the Schedule field.

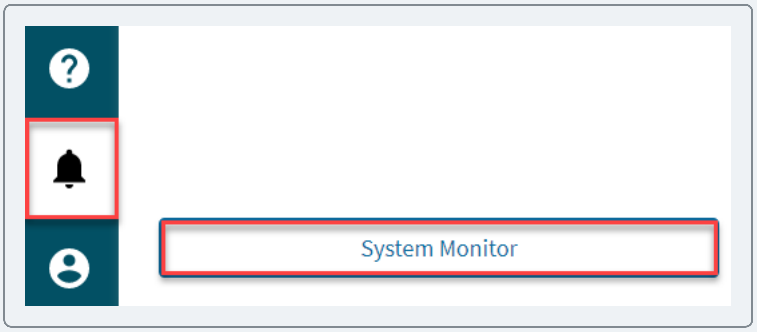
   The options include 'Now', 'Startup Task Schedule', 'Interval Processing' and any other user-defined schedules created for your company.

10. If you want the process to run on a repeating basis then select the **Recurring** check box.

11. Finally, select **Process**.

12. Exit the Automated Fulfillment Process app.

Using the 'System Monitor' app, verify whether you process completed successfully. To locate the app, select the 'Notifications' icon on the 'Menu' bar and select the 'System Monitor' icon.


System Monitor

Creating Sales Order from Quote

You can automatically create a new sales order from an existing quote using the 'Get Opportunity/Quote' command of the Overflow menu. When you turn a quote into an order, all the detail lines on the quote become identical detail lines on the new sales order.

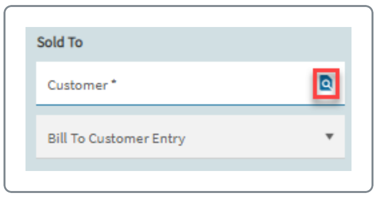
1. Open the **Order Entry** app.

   The **Landing** page displays. The page list all the existing sales orders.

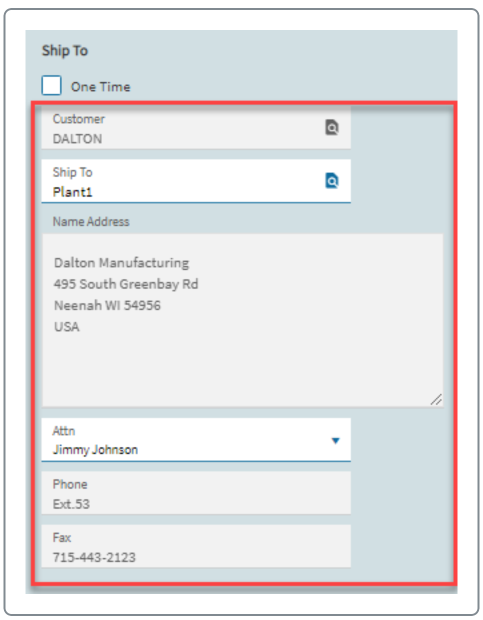
2. To create an order, select **New Order**.

   The **Order Header** card displays.

3. Search for and select a customer using the Customer field.

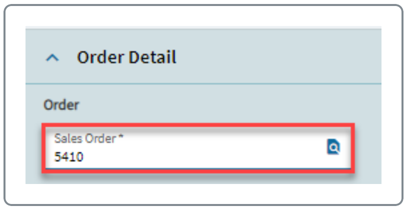
   Once you select a customer, the **Ship To** group box fills in. However, you can search for another ship to, if necessary.

   In this example, we selected the 'Dalton' customer.

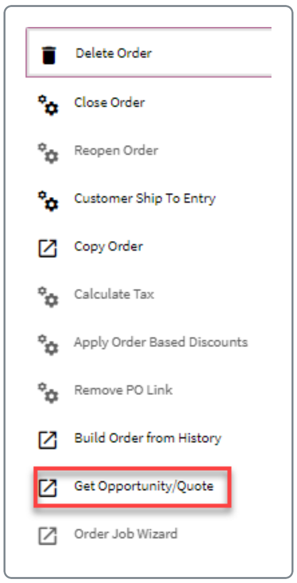
4. Select **Save** .

   Kinetic generates a new order number.

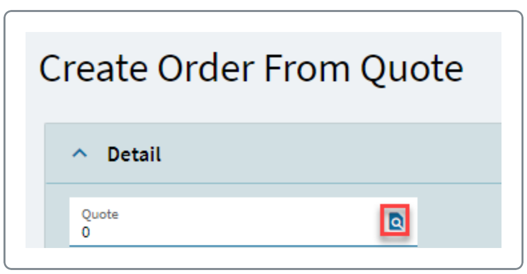


5. From the Overflow menu , select **Get Opportunity/Quote**.

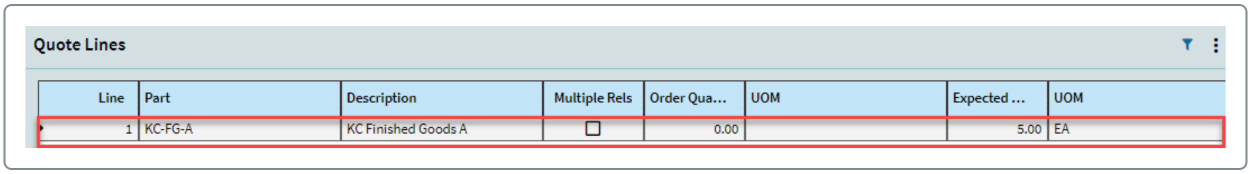
   The Create Order From Quote panel opens.



6. Search for the quote you need using the Quote field.



7. When you select your Quote number, the Quote Lines card inside the panel displays the quoted lines.



In this example, there is only one line to be quoted.

8. Inside the panel, select **OK** to confirm.
9. Complete the sales order.

To learn how to complete a sales order, review the Creating Sales Orders article.

Using Order Job Wizard

When you complete a sales order, you are ready to turn this sales order into jobs. A key feature within Sales Order Entry, use the **Order Job Wizard** to add a demand to an existing job or create new jobs from the current order's detail lines.

You can also use this app to pull in the manufacturing details for the part, schedule the job, and release it to your manufacturing center.

The Order Job Wizard is only available on sales orders that have at least one line selected to be made direct and for which a Ship By date has been entered for the corresponding order release. When you select the **Make Direct** check box, it indicates the release quantity is manufactured directly instead of being pulled from inventory.

The Order Job Wizard is not available for an order line if No Job is selected as the job type.

If you select the **Buy To Order** check box for a sold part in the **Releases > Detail** card, the sold item does not display in Order Job Wizard and is not included in MRP processing. If a part does not exist in the part master file or the part is a non-stock part, the Make Direct check box is automatically selected.

Creating a Job

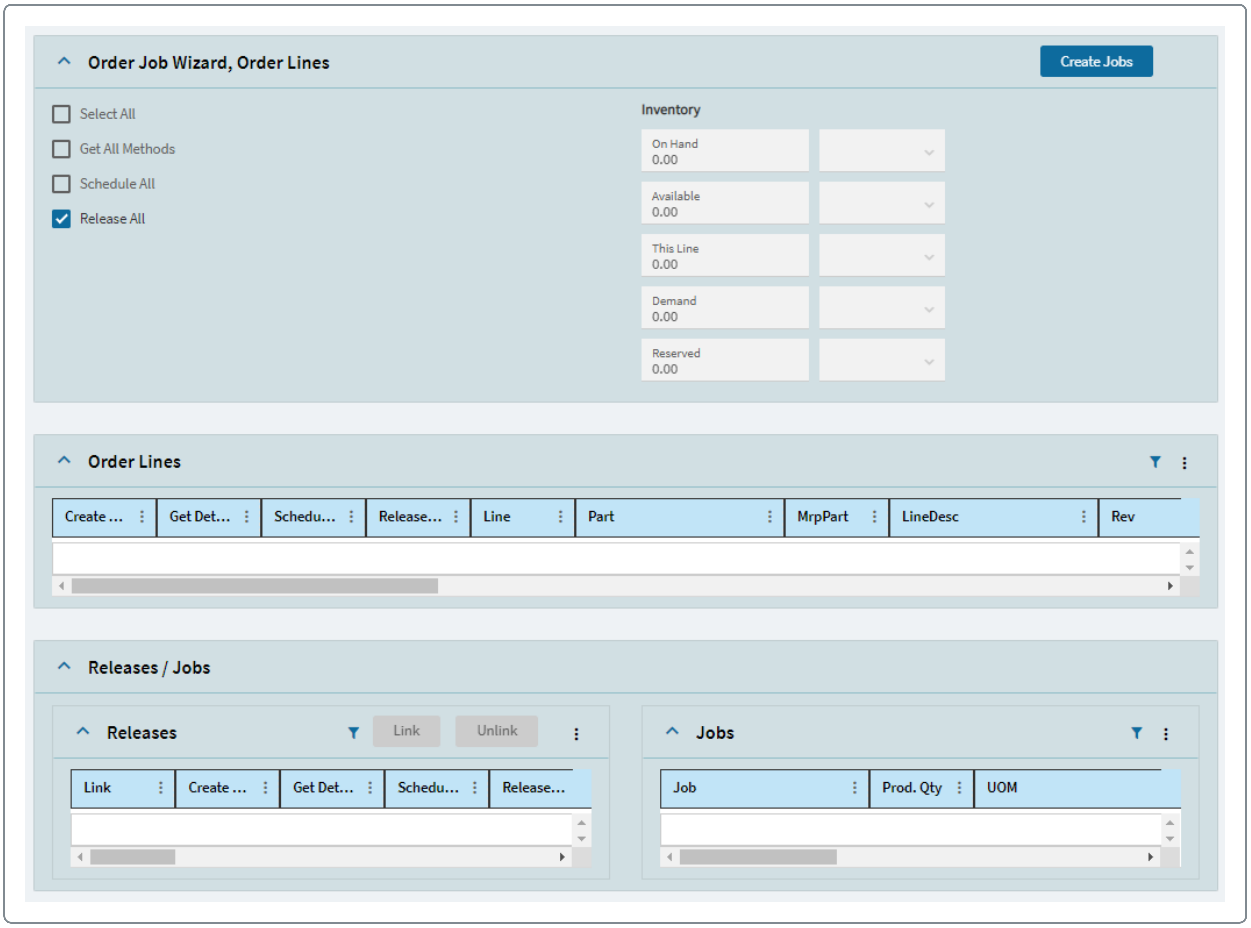
1. To display **Order Job Wizard**, do the following:
    - In **Sales Order Entry**, from the Overflow menu, select **Order Job Wizard**. To activate this option for the sales order line, enter the **Need By** and **Ship By** dates on the **Releases > Detail** card, select the **Make Direct** check box, and save the sales order.
2. To create jobs for all the order lines, select the **Select All** check box on the **Order Job Wizard, Order Lines** card.
3. To pull all the part methods into the new jobs, select the **Get All Methods** check box.

    Method of Manufacturing, or method, is the information required to build a part. It includes the necessary purchased and manufactured parts, as well as the steps required to build the final product. The list of materials is known as the bill of materials and the list of operations is known as the routing or bill of operations. For more information on methods, review the chapter on Engineering.

4. You can automatically place the new jobs within the manufacturing center's schedule by selecting the Schedule All check box.

5. To release these jobs to manufacturing, select the **Release All** check box.

6. Now generate the jobs. To do this, select the **Create Jobs** button. If prompted for part validation, select **Yes** to continue.



7. Select **Save**. 

Linking a Release to a Job

You can also use the Order Job Wizard to link order releases to existing jobs.

1. On the **Releases** grid, highlight a release that is not linked to a job.

2. Clear the **Create Jobs** check box.

3. The **Links** button activates, select this button to link this release to a job on the **Jobs** card.

Printing the Sales Order Acknowledgment

Print the **Sales Order Acknowledgment** to review, print, and acknowledge a sales order.

> You can only print Sales Order Acknowledgment if a sales order holds the **Confirm** icon, as indicated on the **Summary** and **Header** sheets in Sales Order Entry. The Confirm icon displays if you select the **Acknowledgment** check box for the customer selected on a sales order in Customer Maintenance.

The sales order acknowledgment prints all the taxes for a sales order and its lines.

> If you use EDI, you can select the **Include Voided** check box on the Option card of the Sales Order Acknowledgment Report panel. This enables to export voided (canceled) sales order lines on outbound documents.

The **Advanced** card parameters include:

- **Filter** - Informs you whether you used filters or not. After you select a specific filter option, the fields located in this pane display values depending on whether you filtered (Some Selected) or you did not (All Selected).
- **Report Style** - Select the report style option you want to use to run this report.
- **Schedule** - Indicates when you want to print the report. If you select something other than Now, the Recurring check box is available.
- **Archive Period** - Time period you want to keep the report in the System Monitor. The default is 0 Days, meaning that the report will be deleted from the monitor shortly after being printed.

  After the Archive Period passes, the report is purged from the system. When a report is exactly purged is determined by a combination of the date/time the report generates, the number of days set in the report's Archive Period, and the Report Purge Frequency setting. The Report Purge Frequency is defined in the System Agent within its Task Agent Purge Settings.
- **Recurring** - Select this check box if you want the report to run on a repeating basis. This check box is only available if you select a schedule other than Now.
- **User Description** - Enter your own description of the report.

To print a sales order acknowledgment:

1. Open the **Order Entry** app.
2. Create a new sales order or search for and select an existing one.
3. Specify the sales order settings.

4. From the Overflow menu ••• , select **Print Sales Order Acknowledgment**.
5. Select the report parameters on the **Filter** and **Advanced** cards.
6. Select **Print Preview**.

Pricing and Discounting

Kinetic utilizes a pricing system that gives you great flexibility in determining prices. Designed to work with a variety of business practices, use this feature set to define a regular procedure for creating and maintaining prices for your products.

Two kinds of discounting processes are available: quantity-based discounts and value-based discounts. You can use a quantity-based discount system, a value-based discount system, or both. If both systems are used, Kinetic first calculates the quantity-based discounts. After this discount is applied, Kinetic next compares this new amount with the value breaks.

You can also define minimum and maximum discount limits on the customer or ship to location record. These fields are located in the Customer Billing Detail card in Customer Maintenance. If the order exceeds these limits, a different discount percent is applied to the order. You may also add an additional discount after the quantity and value based discounts have been calculated.

Quantity-based discounting reviews the quantity on the order line and compares it to the quantity breaks set up on a price list. The system then applies the discount that matches the quantity break. For quantity-based discounting, the system uses the pricing hierarchy to search for the first available price list. Once it finds a price list for the parts, it uses that unit price for quote or order detail line.

Value-based discounting takes the total amount on the order and compares it to the value breaks set up within a price group. Kinetic then applies the discount that matches the value break.

Setting Up Price Lists

Set up price lists (for example, the ones with specific price or discount to a part or product group) in **Price List Maintenance**. This can be useful if you want to sell the same products to different customers with different price lists.

Price lists can account for different currencies and different situations, like promotional, retail or seasonal prices. You can assign a price list either to a specific customer (bill to or ship to) in **Customer Maintenance** or to a customer group the customer belongs to. The price list then defaults into quotes or orders for that customer based on the part(s) you enter on the line(s). Price lists need a start date but you can leave the end date blank so the prices can stay in effect for as long as you need.

Regardless of the module you create the price list in (**Quote Management** or **Order Management**), the system uses its pricing defaults in both **Opportunity/Quote Entry** and **Sales Order Entry**.

You can also .

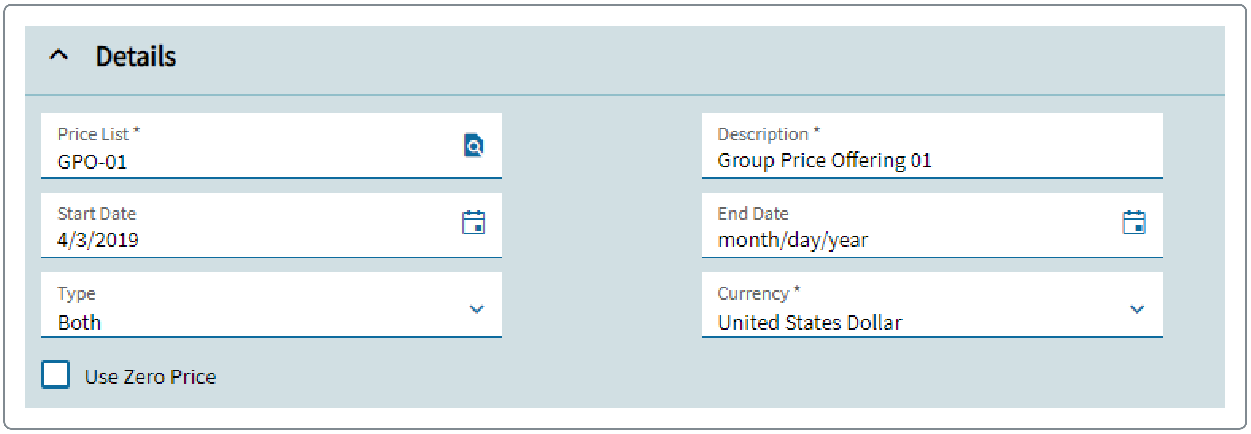
The system defines order and quote from the price lists in a specific hierarchy:

- First, it uses the price you set for the specific customer/part combination.
- If no price exists for the specific customer/part combination, it uses the price you set for the customer group/part combination.
- Finally, if no price exists for the customer group/part combination, it uses the applicable part price.

For a price list and its discounts to be applied, the price list, customer, quote, and order must have matching currencies. If the customer or quote/order record is in a non-base currency, and the price list is in base currency, the price list logic does not apply.

Setting Up Price List Details

1. From the main menu, navigate to **Sales Management > Order Management > Setup > Price List**.
2. Select **New** to add a price list.
3. Enter the price list ID and its description.
4. Select the first date on which the price list takes effect in the **Start Date** field. If necessary, enter the **End Date** value as well. You can leave it blank - this way the prices in this price list will stay in effect for as long as you need.



5. In the **Type** field, select what the system will use the price list to calculate: **Discount**, **Unit Price** or **Both**. These options provide a large degree of flexibility in terms how pricing and discounting operate with specific orders and quotes.

    - **Discount** - A price list that defines discounts when its values match with a corresponding Unit Price List.
    - **Unit Price** - A price list that displays gross unit prices. The system does not apply discounts against these prices.
    - **Both** - A price list that combines both gross unit prices and corresponding discount percentages.

    You can link separate discount and unit price lists to each customer. When you do this, gross unit prices, discounts, and net unit prices display in **Sales Order Entry**, **Quote/Opportunity Entry**, and related programs. However, if you link a price list that uses the **Both** type, only the net unit prices display in these programs.

    After you save a new price list, you cannot change the price list type so the **Type** field is read only.

6. Specify the **Currency** the transactions for this price list use.

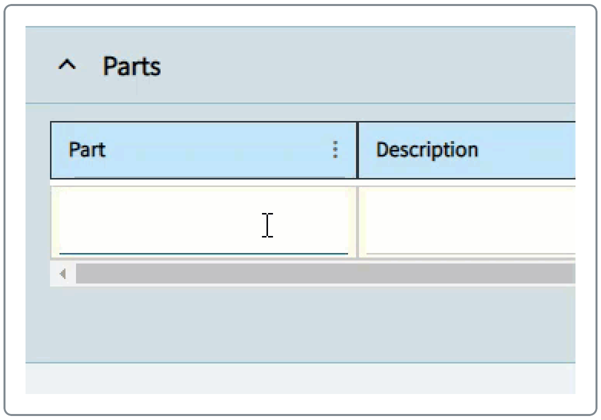
7. Select the **Use Zero Price** check box if the pricing logic in the system should use a zero price if it finds it on the first price list in the associated price list hierarchy.

    - Select the check box to use a zero price if the system finds it on the first pricing list in the associated price list hierarchy during order and quotation pricing. If it does, the pricing logic stops and returns the price list ID and prices zero to the order or quotation line.
    - Clear the check box to skip use of a zero price if the system finds it on the first pricing list (in the associated price list hierarchy during order and quotation pricing). If it does, the pricing logic continues to search the next price list in the associated pricing list hierarchy until it finds a non-zero price. When it does, it returns the price list ID and prices the non-zero price to the order or quotation line. This is the default setting for this check box.

8. Select **Save**.

Assigning Parts to the Price List

1. Go to the **Parts** card and select **New**.
2. Enter the name of the part directly or search for it using the context menu.
   1. Right-click anywhere in the blank space in the **Part** field.

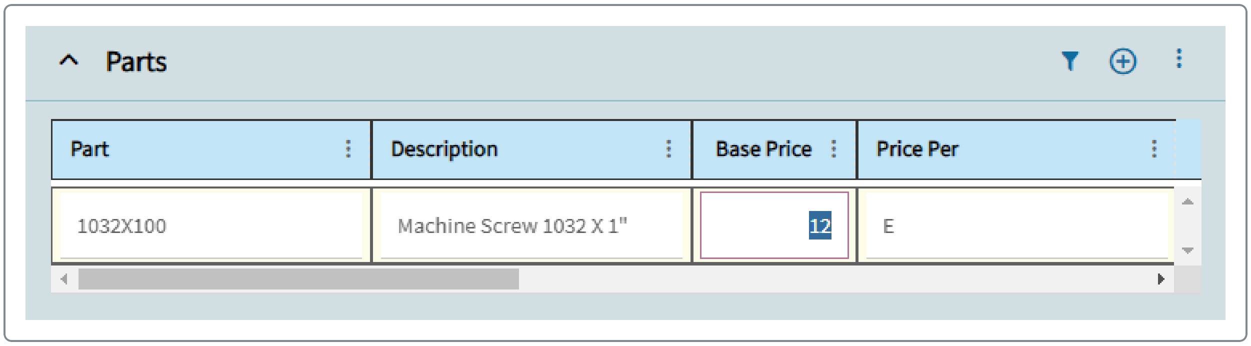
      

   2. Select **Search** or **Open With...** and select an option you need.

   Tip: You can enter the part details in the full version of the page. After you select **New** but don't enter anything, the **Link** icon becomes available in the blank **Part** field. Select it or open the **Part Details** node in the navigation tree.

3. Enter the part's base unit price in the **Base Price** field. This price can change among different price lists.

   The system applies this price using the **Price Per** setting you specified for this part in **Part Maintenance**. You can review it here in the **Price Per** field, but you cannot change it.



4. Select the UOM code (for example, Each, Case, Cubic Centimeters) to use for the part. The default is the base UOM code you set for the part in the **Primary UOMs > Inventory** field in **Part Maintenance**.

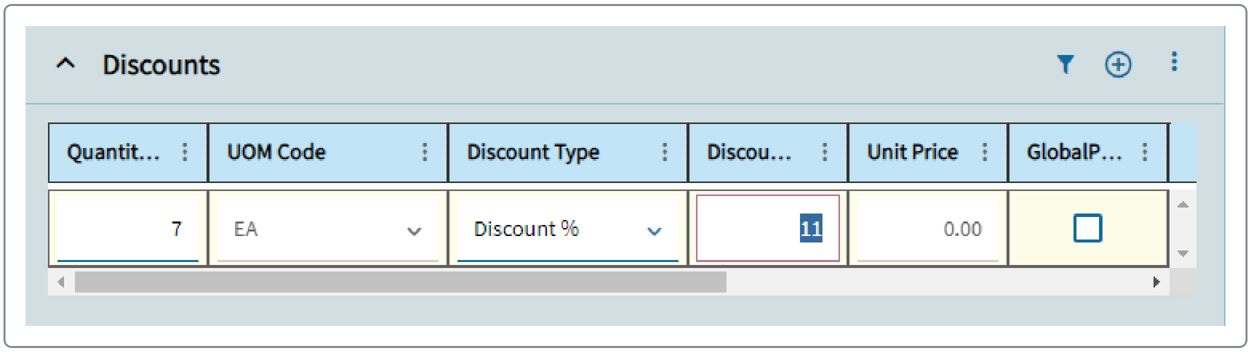
   You must establish prices per each UOM code in which pricing takes place for the part. The system does not convert between prices expressed for a different UOM code. For example, if a Box contains 10 each, and the selling price list has the price of $10 for the **Box** UOM code, the pricing list just provides a price of $10 for a Box, and does not calculate this for the **Each** unit of measure. The system allows only one combination of a part number and UOM code. You must set up a separate price list for other UOM codes for the same part.

   The system allows using pricing per **/100**, **Each** and **/1000** when you enter sales orders. In this case, if you select **Box** as the unit of measure, and the price list has the price of $400 per /100, the application uses a price of $400 per 100 Boxes.

5. Select **Save**.

Adding a Discount to a Part

1. Open the **Part Details** node in the navigation tree (or select the part you added from the grid).
2. Expand the **Discounts** card and select **New** .
3. Enter the first quantity break at which this discount takes effect in the Quantity Break field. The quantity (whole, or fractional with decimals) you can enter in this field, and the number of decimal places depends on the **Allow Decimals** and **Decimals** settings in **UOM Maintenance** for the UOM you're using.
4. Select the discount type from the drop-down: **Discount %** or **Unit Price**. Based on what you select here, enter either the **Discount** or **Unit Price** value in the corresponding fields.



5. Select **Save**.

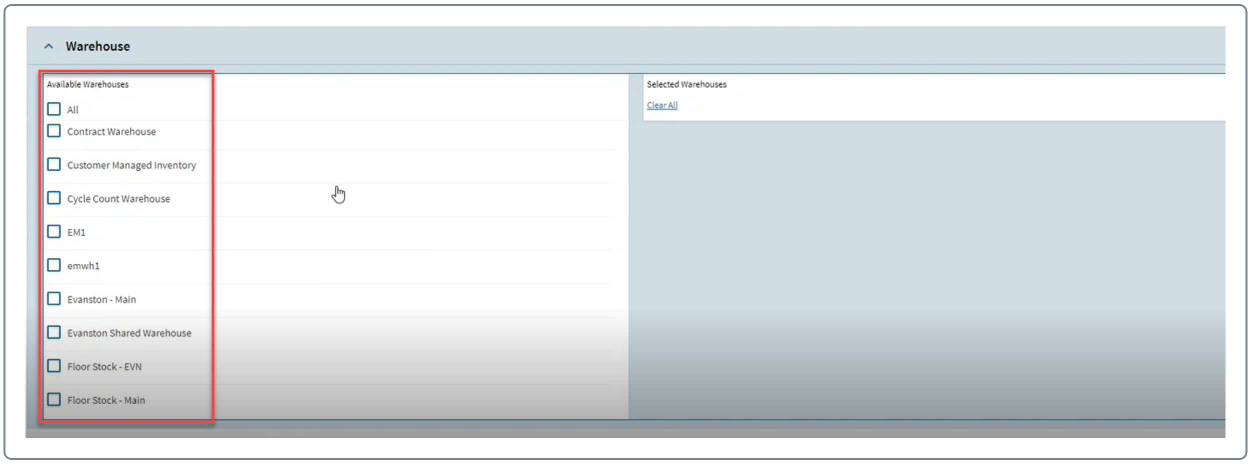
> You can also assign product groups and add their discounts the same way you did it with the parts. Use the **Product Group** card for this. Otherwise, the process is the same as described in the subsections above.

Adding and Removing Warehouses from a Price List

Add warehouses to which the price list applies using the **Warehouse** card. By default, the price list applies to all warehouses in the site.

> You set up warehouses in **Warehouse Maintenance**. You cannot change or add warehouses in **Price List Maintenance**.

1. On the **Details** page, expand the **Warehouse** card.
2. As the **All** check box is on by default in the **Available Warehouses** section, you can see all the warehouses of this site in the **Selected Warehouses** section. If you want to remove some of them, select the **Remove** × icon next to the name of the warehouse. After this, it appears in the **Available Warehouses** section.



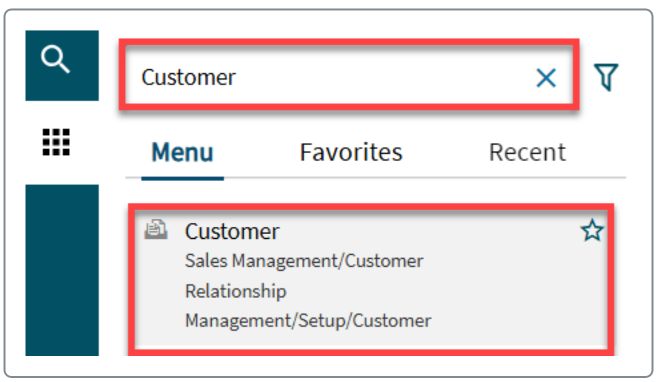
The Available Warehouses are sorted in alphabetical order.

3. If you want to remove all warehouses from the Selected Warehouses section, select **Clear All**. Then select check boxes next to the only warehouses you want to include in the list.

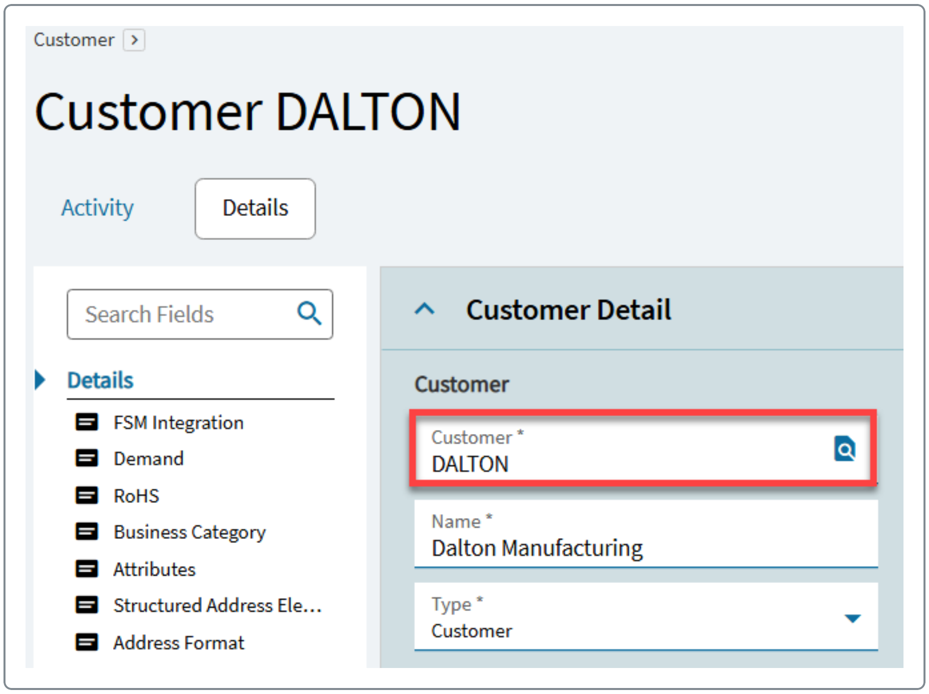
4. When done, select **Save**.

   Once you create a price list, you link it to a customer using the 'Customer' app.

   1. Open the **Customer** app.

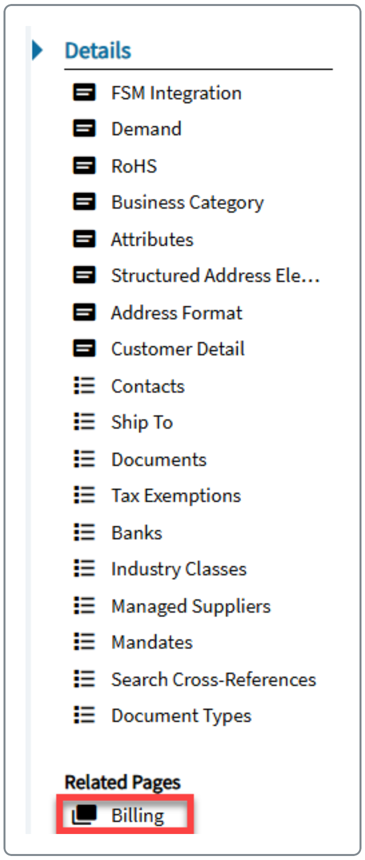
   2. In the **Customer** field, enter a customer ID and press **Tab**.



This is the customer you want to add your price list to.

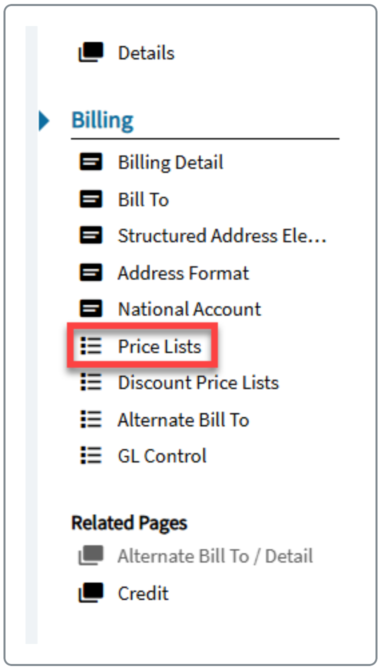
3. In the Nav tree, select the **Billing** node.

   The **Billing Detail** card displays.

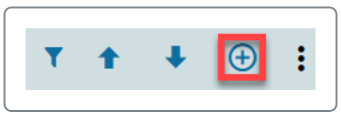


4. In the Nav tree, select the **Price Lists** node.

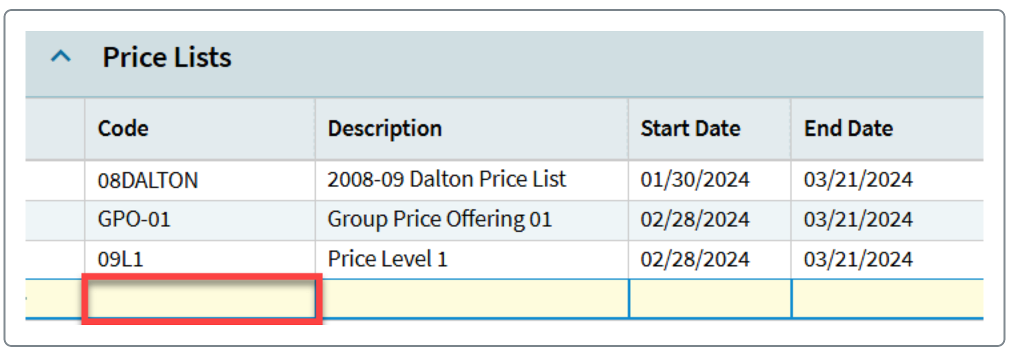
   The **Price Lists** card displays.



5. On the **Price Lists** card, select **New**.



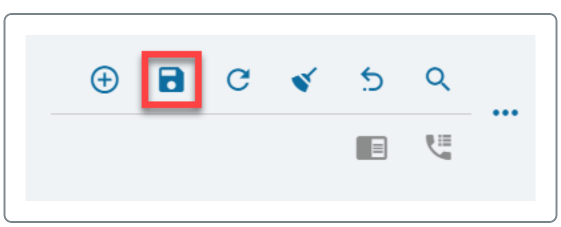
6. In the **Code** field, enter your price list code and press **Tab**.



Price Lists

Code	Description	Start Date	End Date
08DALTON	2008-09 Dalton Price List	01/30/2024	03/21/2024
GPO-01	Group Price Offering 01	02/28/2024	03/21/2024
09L1	Price Level 1	02/28/2024	03/21/2024

7. Select **Save**.



Setting Up Price Groups

In **Price Group Maintenance** you create and update price groups.

Price groups provide a powerful pricing strategy when used with product groups. The relationship between a price group and a product group provides pricing for the parts, that belong to that specific product group. You need price groups to establish discounts based on the order value, quantity, or both.

A price group can have multiple product groups assigned to it. A product group can only belong to one price group. You can override pricing on specific quote and order lines.

1. From the main menu, navigate to **Sales Management > Order Management > Setup > Price Group**.
2. Select **New** ⊕ to add a new price group.
3. Enter a unique code for the **Price Group** record, and add a **Description**.
4. Determine the discount options available for this price group.

Discount options here

Value of the total sale

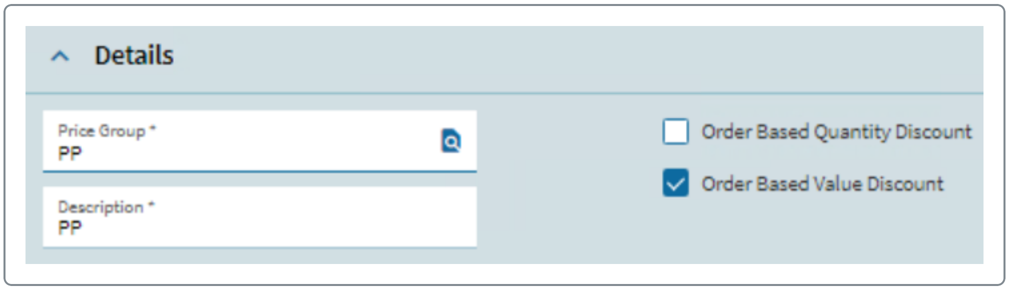
Select the **Order Based Value Discount** check box to assign discounts based on the product's value on the order, or quote line. You define value discounts on the **Price Group Value** card.

Total quantity of the sale

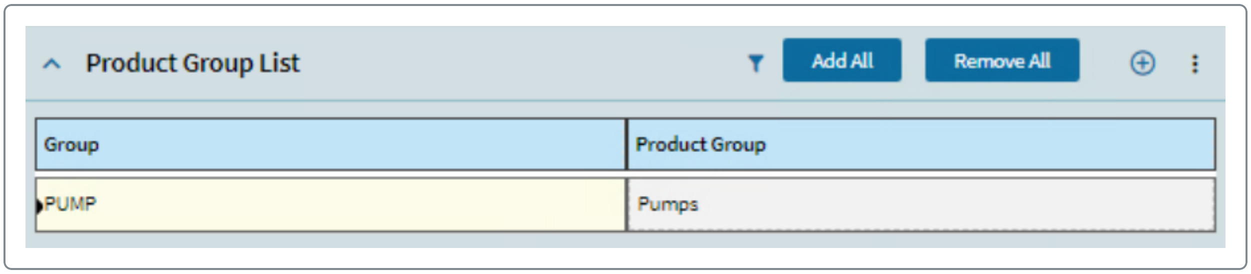
Select the **Order Based Quantity Discount** check box to pull quantity breaks from the current price list. Kinetic evaluates these price breaks against the quantity that is on the quote, or order line. This option totals the quantity of the same parts on the entire order, and then applies the discount to this sum.

Both

You can select both options. In this case, Kinetic uses the total quantity to determine the quantity break, and then matches that amount with the corresponding value break.



5. On the **Product Group List** card, select **New** to add a product group. You can **Add All** product groups to your price group.

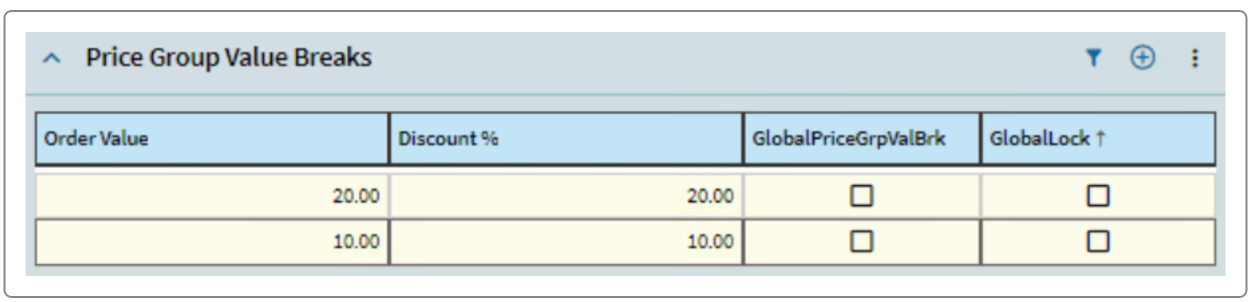


6. On the **Price Group Value Breaks** card, select **New** to create a value break.

   Value breaks provide to customers a discount based on the product's cost.

   > You can add value breaks only if you selected the **Order Based Value Discount** check box on the **Details** card.

7. Enter the **Order Value** amount, and **Discount %**.



8. Select **Save**.

Using Price List Inquiry

Price List Inquiry lets you retrieve, calculate and display pricing and discount pricing information for a customer. You can search for existing pricing and discount pricing based on specific criteria. You can then modify pricing in a what-if mode, enabling you to experiment with different pricing scenarios.

For example, if a customer calls and asks the price of an item based on a discount percentage and number of items they wish to purchase, you can run a quick "what if" inquiry that applies the discount to existing price lists and quantity breaks and retrieves the price. This is useful for customers who want a quick answer instead of going through the quote process.

> Price List Inquiry is for review and evaluation purposes only. You cannot implement price changes in this inquiry.

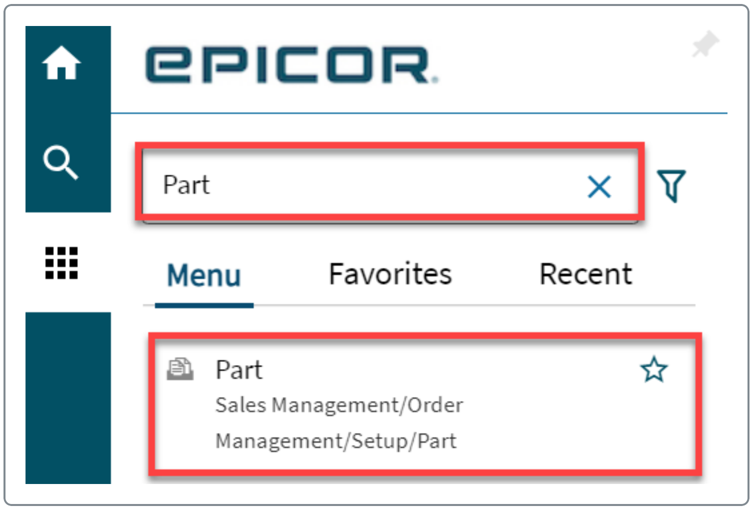
In this article, we will:

- Create a new part.
- Create a price list.
- Add the price list to a customer.
- Review the Price List Inquiry.

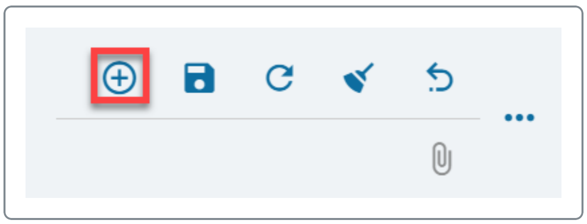
Create Part

Start with creating a new part. You will add this part to your new price list later one. For the purpose of the article, you use your initial for the 'Part ID' and 'Description'.

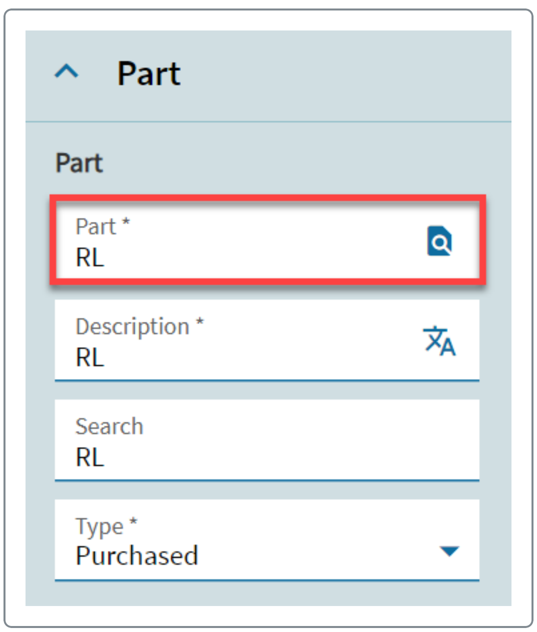
1. Open the **Part** app.



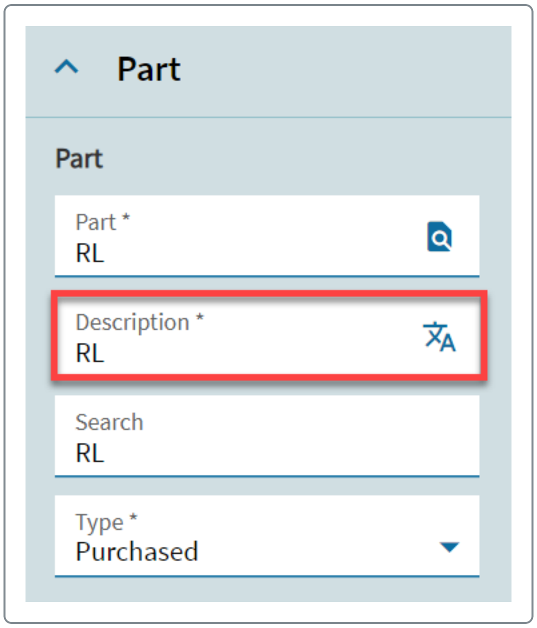
2. Select **New**.



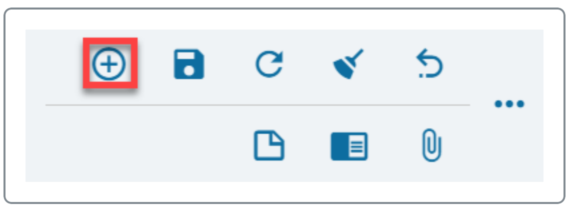
3. In the **Part** field, enter your initials.



4. In the **Description** field, enter your initials.

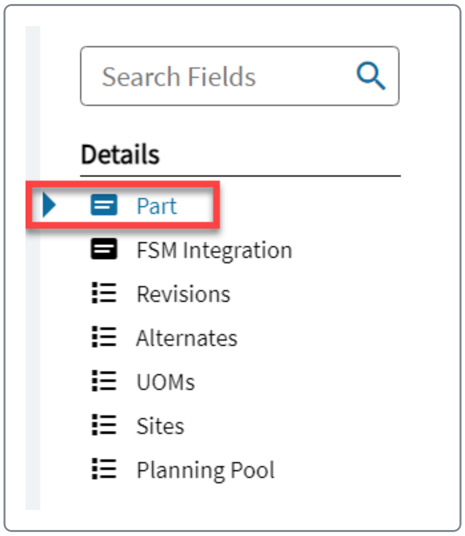


5. Select **Save**.



6. In the Nav tree, select the **Part** node.

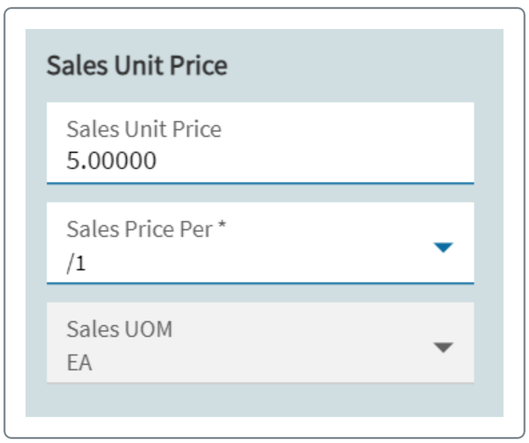
   The **Part** card displays.



7. On the **Part** card, locate the **Sales Unit Price** group box.

You must scroll slightly down.

8. In the **Sales Unit Price** field, enter **5**.



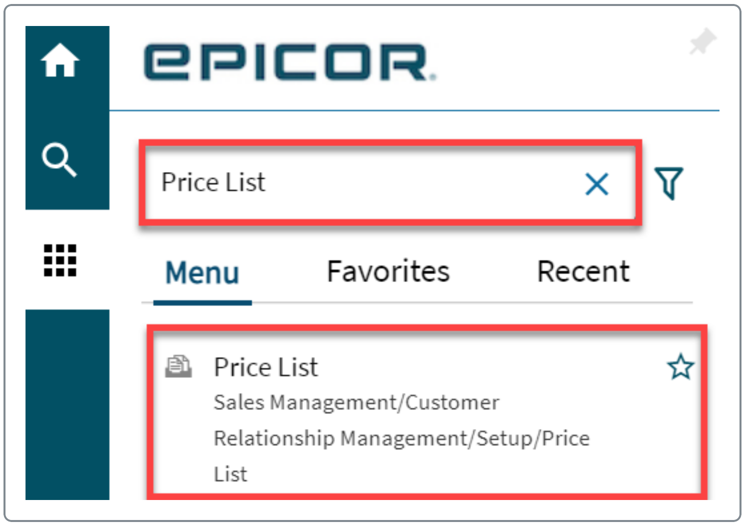
9. Select **Save** and exit the Part app.

Create Price List

Next, create a new price list for the previously created part. Like with the part, you will use your initials for the 'Price List ID' and 'Description'.

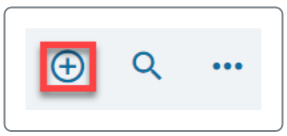
1. Open the **Price List Maintenance** app.

   The **Landing** page displays.

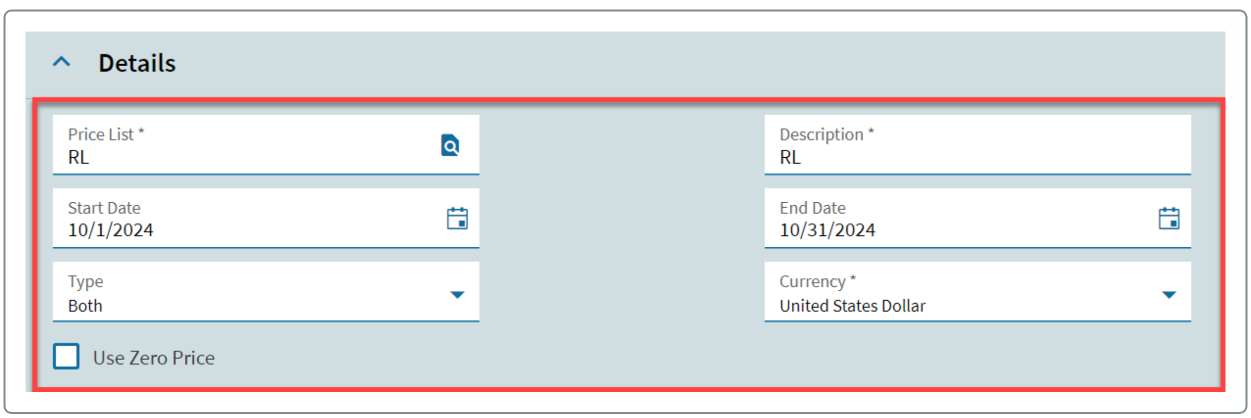


2. Select **New**.

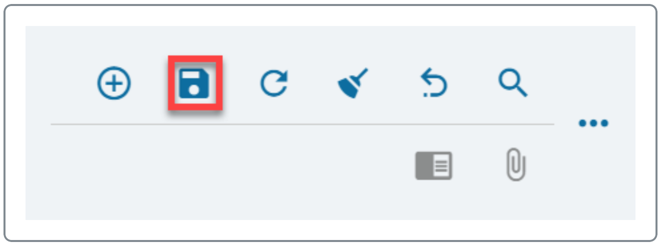
   The **Details** card displays.



3. In the **Price List** field, enter your initials.



4. In the **Description** field, enter your initials.
5. In the **Start Date** field, enter the first day of the current month.
6. In the **End Date** field, enter the last day of the current month.
7. Select **Save**.

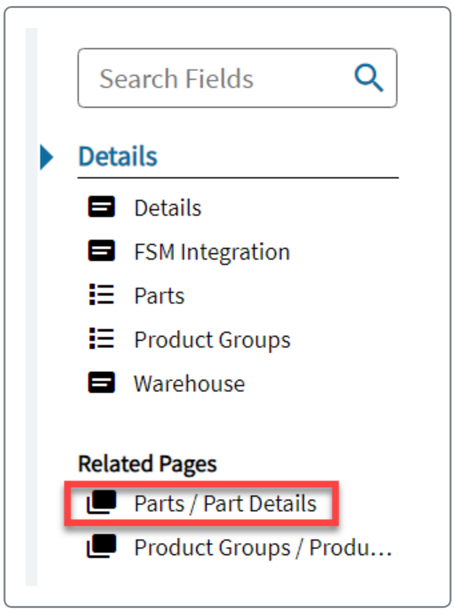


8. Scroll down to locate the **Parts** card and expand it.

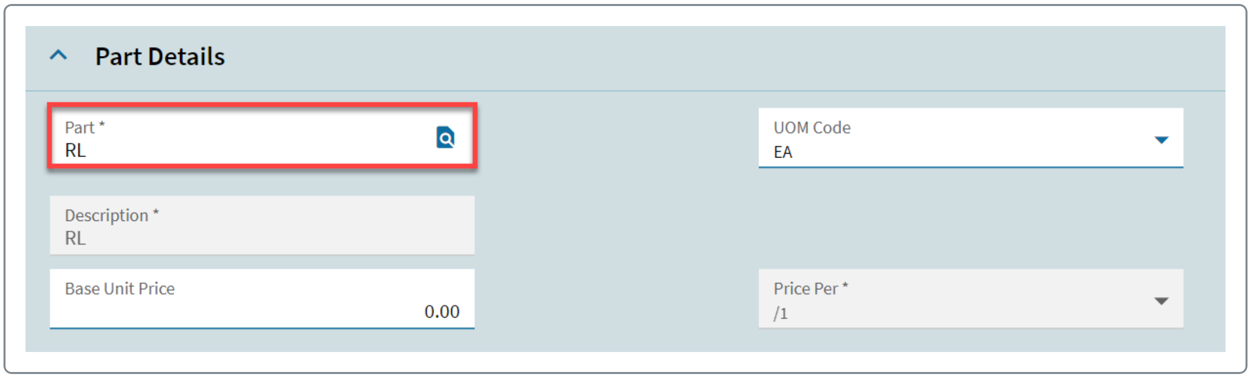
9. On the **Parts** card, select **New**.

10. In the Nav tree, select the **Parts/Part Details** node.

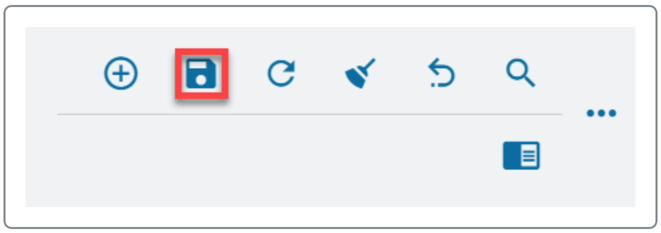
    The **Details** card displays.



11. In the **Part** field, enter your initials and press **Tab**.



12. In the **Base Unit Price** field, enter **10**.
13. Select **Save**.



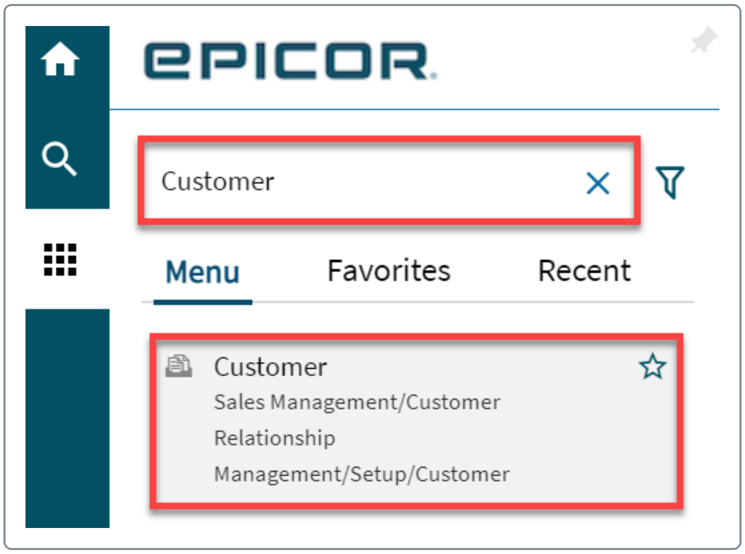
14. Exit the Price List Maintenance app.

Add Price List to Customer

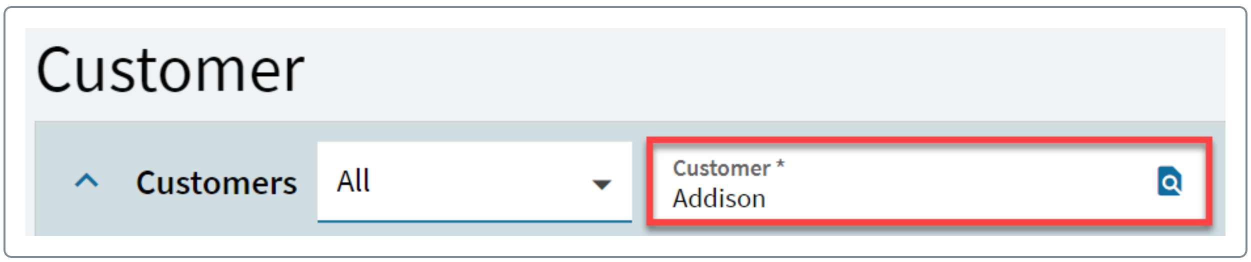
Finally, add the previously created price list to a customer record.

1. Open the **Customer** app.

   The **Landing** page displays.



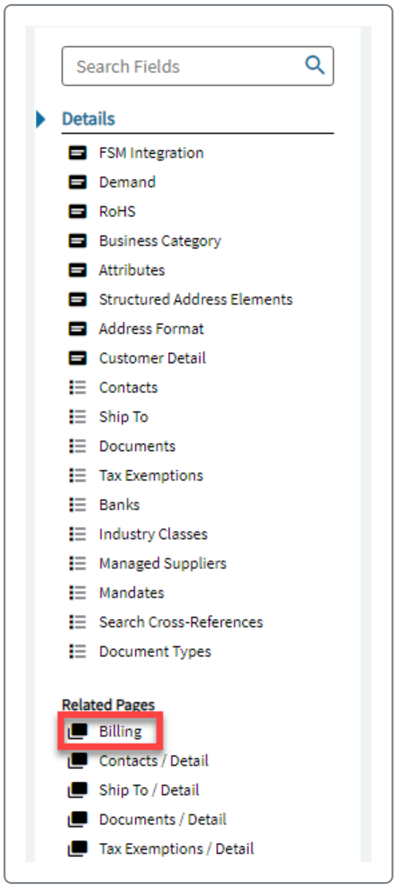
2. In the **Customer** field, enter **Addison** and press **Tab**.



In this case we selected the 'Addison' customer.

3. In the Nav tree, select the **Billing** node.

The **Billing Detail** card displays.

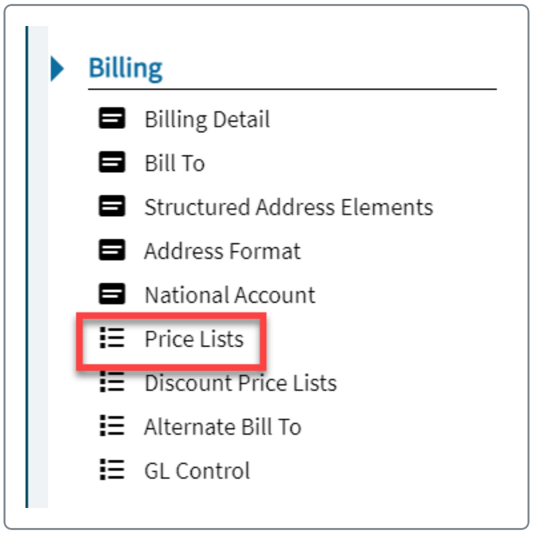


4. Scroll down to locate he **Price Lists** card and expand it.

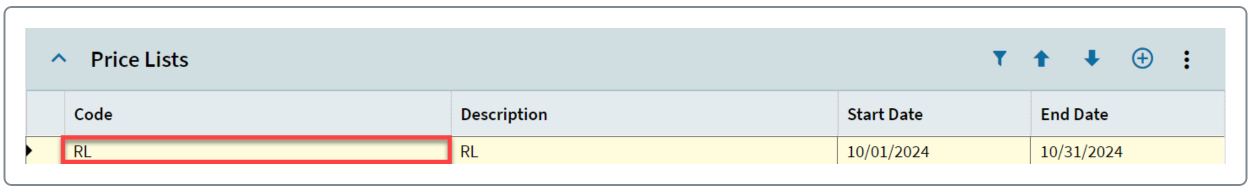
5. On the **Price Lists** card, select **New Customer Price List**.

6. In the Nav tree, select the **Price Lists** node.

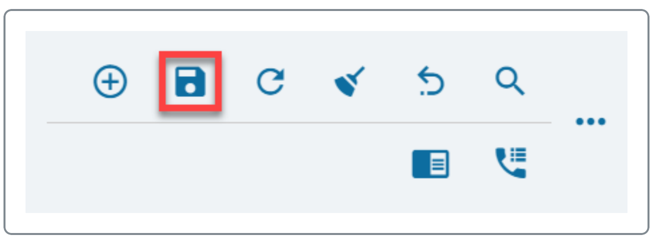
   The **Price Lists** card displays.



7. In the **Code** column field, enter your initials and press **Tab**.



8. Select **Save**.

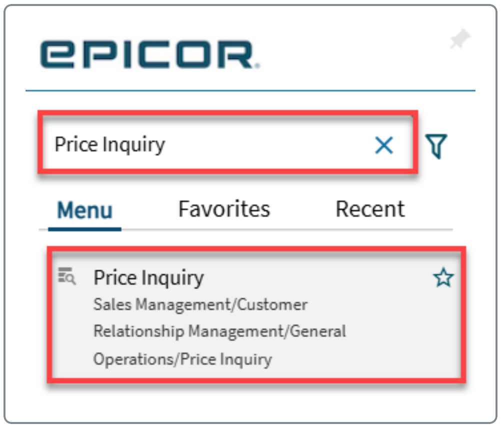


9. Exit the Customer app.

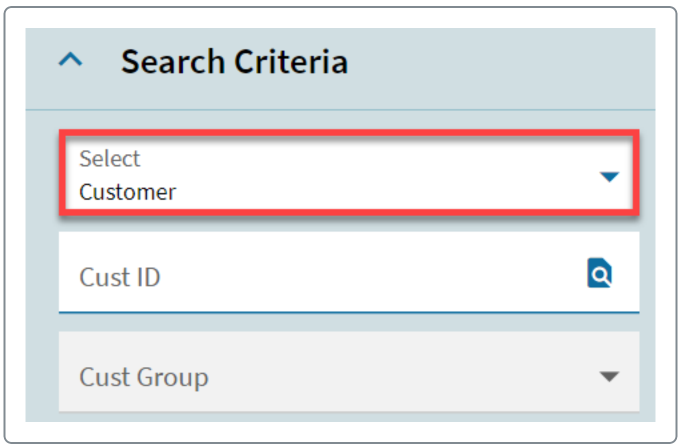
Review Price List Inquiry

Next, review the 'Price List Inquiry' for the previously added part.

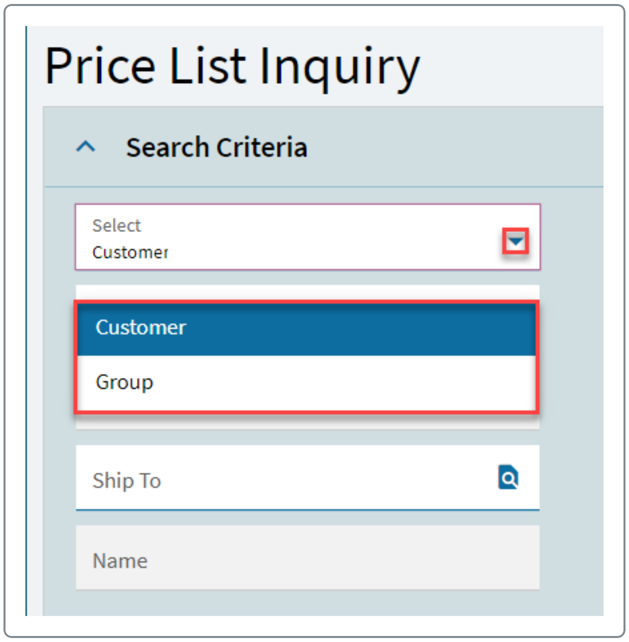
1. Open the **Price List Inquiry** app.



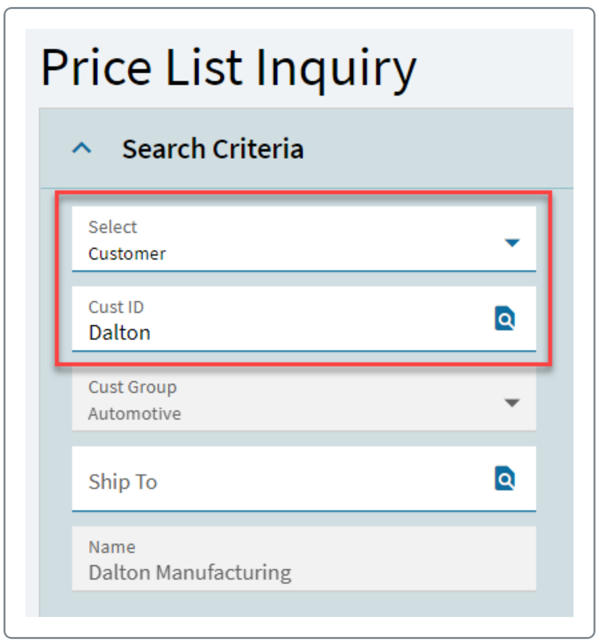
2. In the **Select** field, verify the **Customer** option defaults.



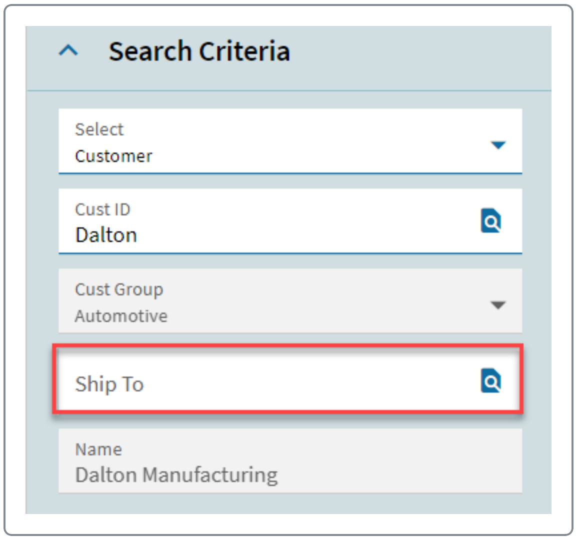
Select **Customer** or **Group**. Based on your selection, different fields activate.



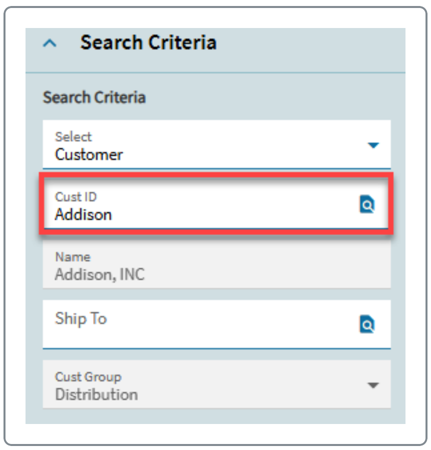
For example, if you select the 'Customer' option, then define a customer ID in the 'Cust ID' field.



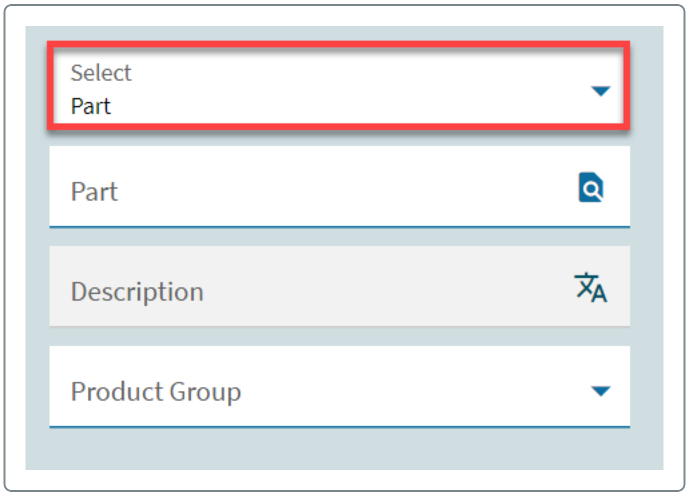
Once you select the required customer, you can define the 'Ship To' address linked to the selected customer. This is if the customer record holds more than one 'Ship To'.



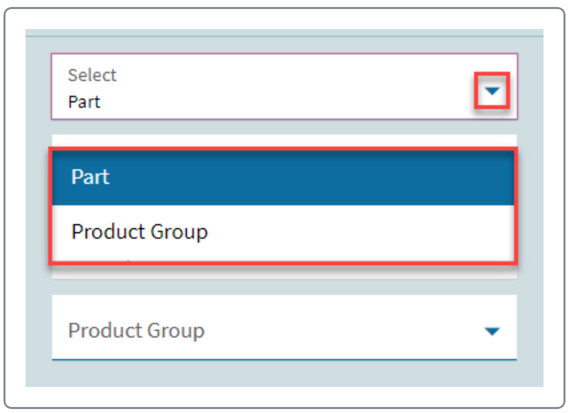
3. In the **Cust ID** field, enter **Addison** and press **Tab**.



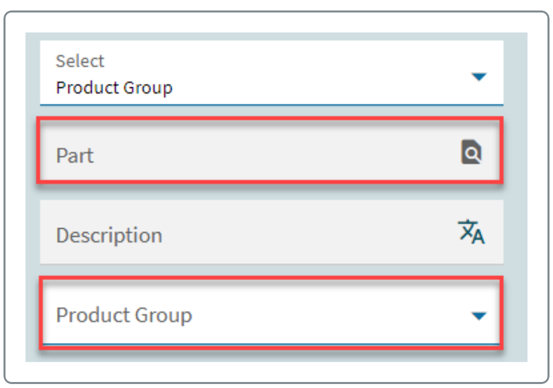
4. In the **Ship To** field, search for and select **001**.
5. In the **Part** field, verify the **Part** option defaults.



If you want Kinetic to retrieve a price list(s) for a specific part or product group, then select one of the available options.

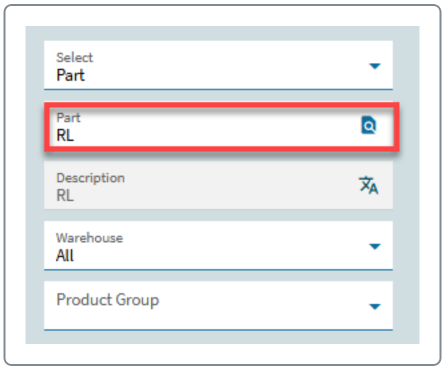


In this example, we selected 'Product Group'. As a result, the 'Part' field inactivates.



If you select a part, then you have to search for the part using the 'Part' field.

6. In the **Part** field, enter your initials and press **Tab**.

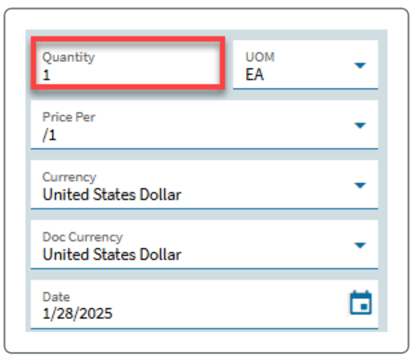


This is the part you entered previously.

7. In the Warehouse field, select a warehouse.

In this case we accept the default of **All**.

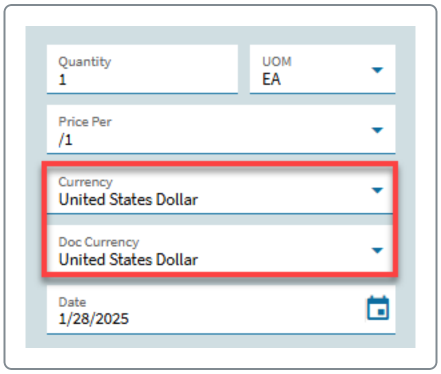
8. In the **Quantity** field, enter **1** and press **Tab**.



9. Next, define the **Price Per** value.

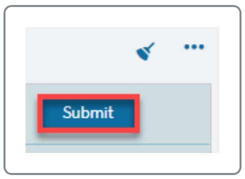
In this case, we accept the default of '1'.

10. Now define the currency.



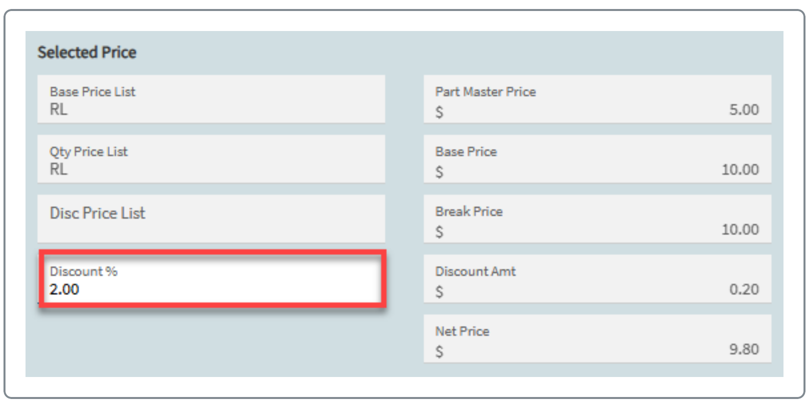
11. In the **Date** field, accept the default of today.

12. Select the **Submit** button.



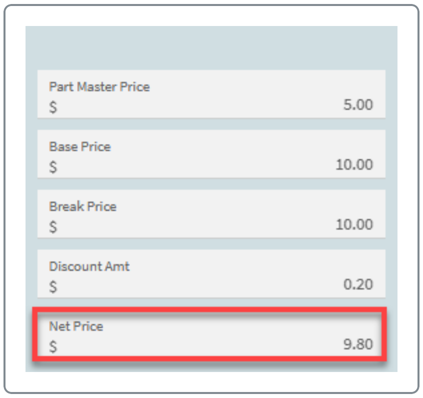
Kinetic has retrieved the previously entered price list.

13. In the **Discount %** field, enter **2** and press **Tab**.

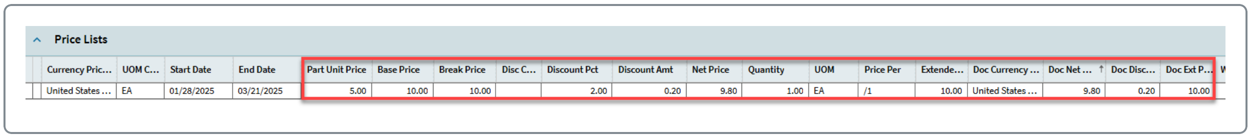


14. Next, review the calculated prices.

The 'Net Price' changes from '10' to '9.80' as a result of entering the discount of 2%.



15. Finally, review the **Price Lists** card.


Price Lists

Currency Pric...	UOM C...	Start Date	End Date	Part Unit Price	Base Price	Break Price	Disc C...	Discount Pct	Discount Amt	Net Price	Quantity	UOM	Price Per	Extende...	Doc Currency ...	Doc Net ...	Doc Disc...	Doc Ext P...
United States ...	EA	01/28/2025	03/21/2025	5.00	10.00	10.00		2.00	0.20	9.80	1.00	EA	/1	10.00	United States ...	9.80	0.20	10.00

> In this case, the card shows the 'Base Price' of '$10.00'. This is correct! We previously entered '$10.00' per unit on our price list. You can also see the 'Part Unit Price' of '$5.00'. This is also correct! We entered '$5.00' when we created the part using the 'Part' app. The 'Net Price' is '$10.00' because we entered the discount of 2 %.

16. Exit the Price List Inquiry app.

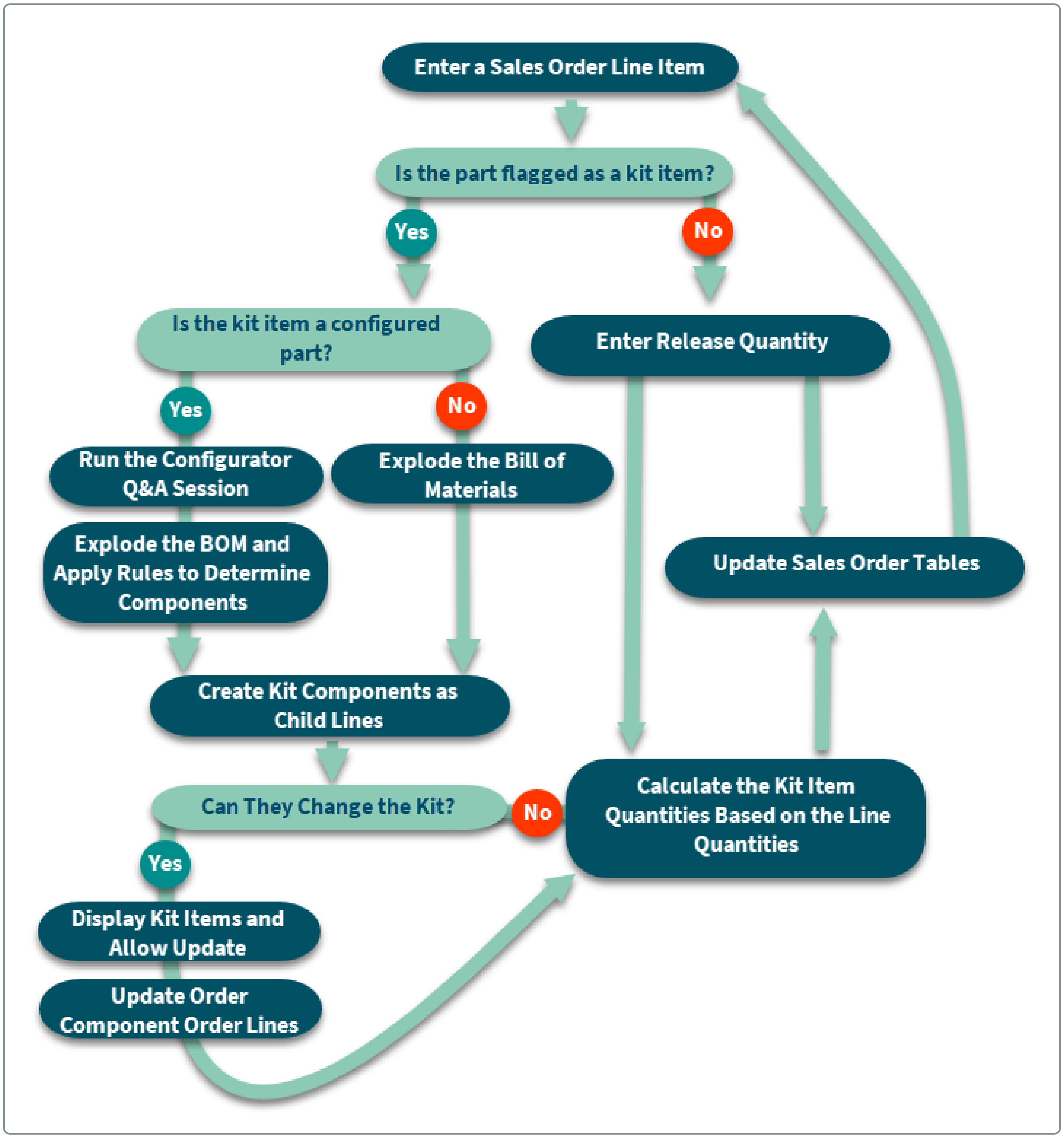
Sales Kitting

A sales kit is a part type that contains a series of related parts. These part records define the individual component parts needed to complete the kit. If you have the Configurator module, you can create sales kits with multi-level configured parts that include non-stock components. When a sales order is created for a sales kit, the component parts are pulled from your stock in the quantities required to complete the final sales kit quantity.

You can set up these part records so that kits either can or cannot be modified. For example, your company sells computer systems. You have a standard computer kit that always uses the same processor, monitor, keyboard, and mouse. You also sell a custom computer kit where the customer can choose different components, such as multiple monitors, hard disk sizes, and colors. Both kit types are supported by the sales kitting functionality.

A sales kit is sold through a single detail line on the sales order. Pricing can be determined at either the parent part or component part level. Price lists can also be used for the parent part and its component parts. Although kits are sold as a single sales order line item, each part component can also display as separate lines on the Sale Order Acknowledgment, quote, packing slip, and invoice.

The following flowchart is an overview of processing a sales kit on a sales order.


Enter a Sales Order Line Item
Is the part flagged as a kit item?
Yes
No
Is the kit item a configured part?
Enter Release Quantity
Yes
No
Run the Configurator Q&A Session
Explode the Bill of Materials
Explode the BOM and Apply Rules to Determine Components
Update Sales Order Tables
Create Kit Components as Child Lines
Can They Change the Kit?
No
Calculate the Kit Item Quantities Based on the Line Quantities
Yes
Display Kit Items and Allow Update
Update Order Component Order Lines

Setting Up Sales Kits

A sales kit is a part type that contains a series of related parts. These parts define the individual component parts you need to complete the kit. To set up a sales kit, you first create the component part, then the parent part.

You can set up the price for a sales kit at either the parent part or component part level or use price lists for them. When you add a sales kit to an order, the system uses a single sales order line item for each kit, you can see each part component as separate lines on the sales order acknowledgment, quote, packing slip, and invoice.

> As the sales order is processed, the component part quantities needed to satisfy each kit are manufactured and pulled from stock. These are the materials added to the 'Sales Kit' part using the 'Engineering Workbench' app.

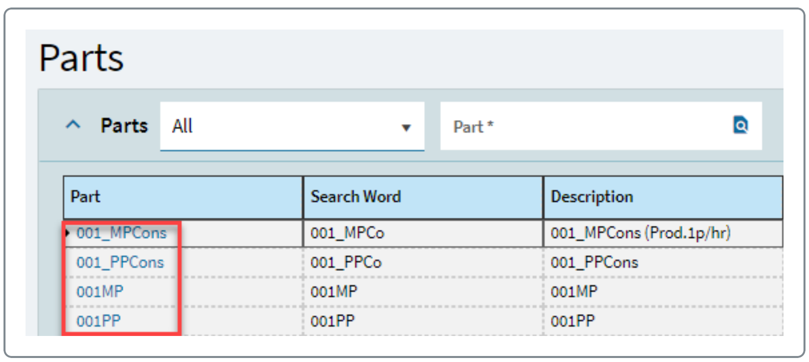
Creating a Sales Kit Part

First, create a sales kit part. This is a standard part entry.

1. Open the **Part** app.

   The Landing page displays. The page displays all the existing part records.

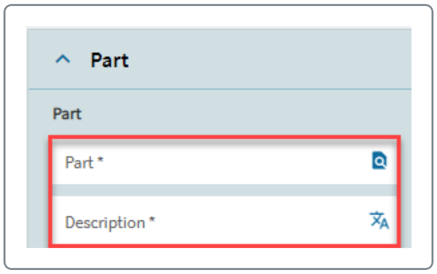
2. To select an existing record, click the link inside of each grid line.



3. To add a new part, select **New**.

   The Part card displays.

4. Enter the part ID and its description.



5. Select **Sales Kit** in the Type field.

6. Define other settings as required.

> To learn about how to enter and complete a part entry in Kinetic, review the Creating a Part article.

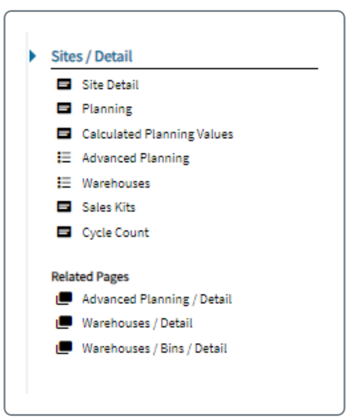
7. Select **Save**. 

Enter Sales Kit Parameters

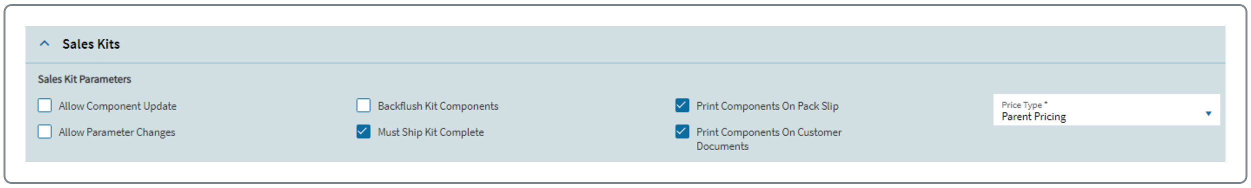
Next, enter the sales kit parameters.

1. Select the **Sites > Detail** node in the Nav tree.

   The Site Detail card displays



2. Scroll down to locate the **Sales Kits** card and expand it.



3. Define the settings on the card.

    - **Allow Component Update** - If selected, you can change the component parts that make up the kit. Select this option for sales kits that can be modified for different kit combinations, such as customer selections, during the sales order entry process.

    - **Allow Parameter Changes** - If selected, you can change the sales kit parameters directly on quotes and sales orders. This causes the Sales Kit Params button to activate on the Line Details in both Opportunity/Quote Entry and Sales Order Entry. Users can select this button to display and change the sales parameters.

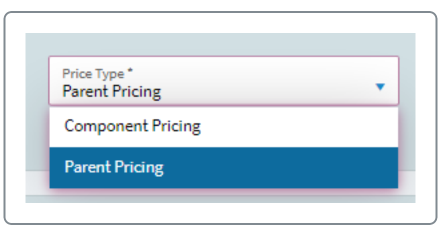
    - **Backflush Kit Components** - If selected, component parts are be automatically pulled from stock. If this check box is clear, each component part quantity must instead be pulled individually from stock.

    - **Must Ship Kit Complete** - If selected, all the component part quantities must be packaged with the sales kit before it can be shipped to the customer. This sales order detail line cannot be closed unless all the parts are shipped at once.

    - **Print Components On Pack Slip** - If selected, the packing slip displays each component part on a separate line. When this check box is clear, only the sales kit part's information displays.

    - **Print Components On Customer Documents** - If selected, each component part displays on a separate line on the quote, Order Acknowledgement, and invoice. When this check box is clear, only the sales kit part's information displays.

4. On the Sales Kits card, define how Kinetic should calculate the sales kit price.



If you select **Parent Pricing**, then the total price is pulled from the 'Sales Unit Price' field on the parent record. If you select **Component Pricing**, then the individual 'Sales Unit Price' values on each part component are added together to generate the final price.

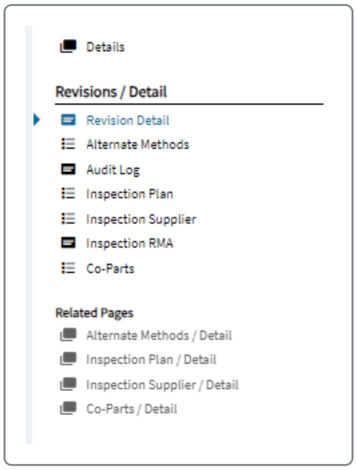
5. Select **Save**.

Complete the Sales Kit

Next, complete the sales kit.

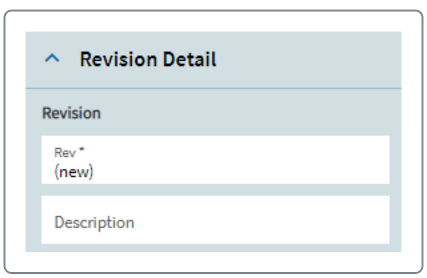
1. Select the **Revisions > Detail** node in the Nav tree.

   The Revision Detail card displays.



2. Select **New Part Revision**.

3. Enter the revision number and a description.



4. Select **Save**.

5. Check out the revision to the Engineering Workbench app.

   To learn more about the 'Engineering Workbench' app, review the Using Engineering Workbench article.

6. Add the sales kit components parts as materials to the Sales Kit part.

> - The parts you add must exist in the 'Part' app.
> - To learn how to add materials, review the Using Engineering Workbench article.

7. Complete the engineering and check in the revision.

8. Select **Save**.

Entering a Sales Kit Order

In Kinetic, you can enter orders for sales kits parts. A sales kit is a part type that contains a series of related parts. These parts define the individual component parts you need to complete the kit.

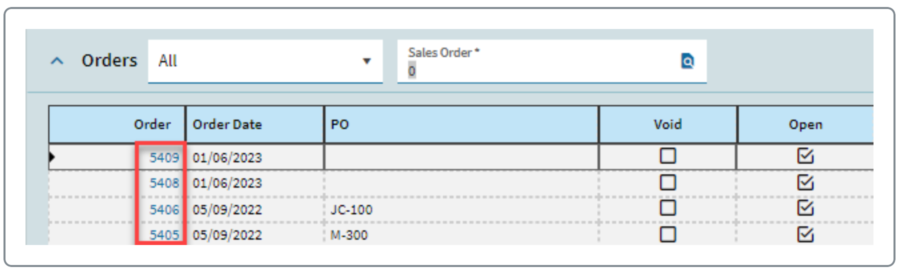
You sell a sales kit through a single detail line on the sales order. You can set up the price at either the parent part or component part level or use price lists for them. Although Kinetic uses a single sales order line item for each kit, you can see each part component as separate lines on the sales order acknowledgment, quote, packing slip, and invoice. As the sales order is processed, the component part quantities needed to satisfy each kit are manufactured and pulled from stock.

Entering a Sales Kit Order

To learn how to enter and complete a sales order in Kinetic, review the Creating Sales Orders article.

1. Open the **Order Entry** app.

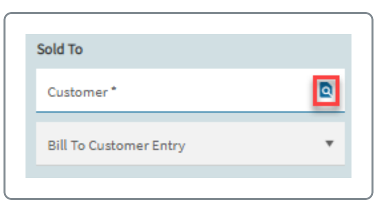
   The Landing page displays. The page list all the existing sales orders.



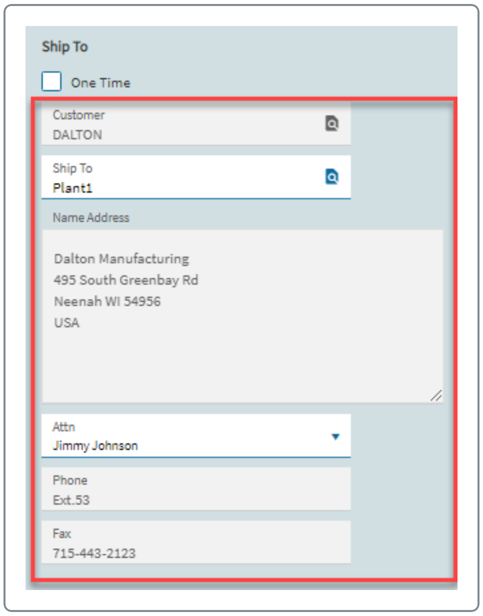
2. To create an order, select **New Order**.

   The Order Detail card displays.

3. Search for and select a customer using the Customer field.



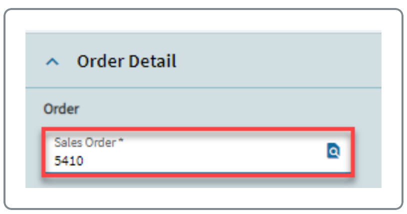
   Once you select a customer, the **Ship To** group box fills in. However, you can search for another ship to, if necessary.



In this example, we selected the 'Dalton' customer.

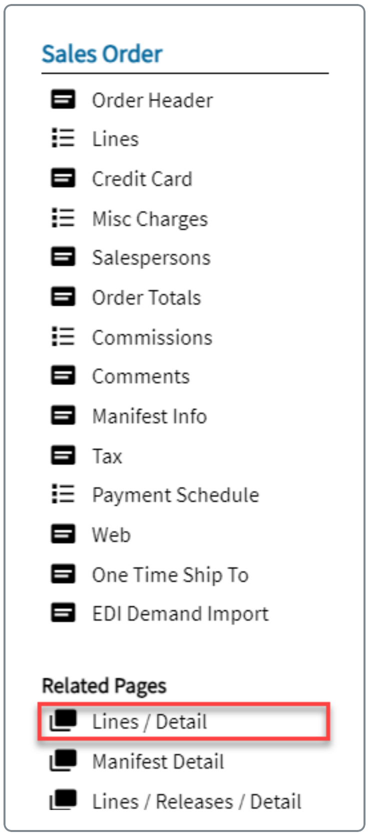
4. Select **Save**.

   Kinetic generates a new order number.



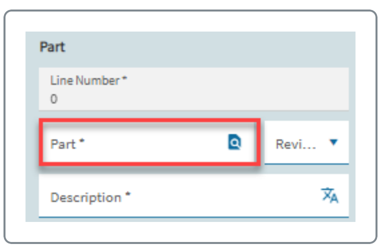
5. In the Nav tree, select the **Lines / Detail** node.

   The Line Detail card dislays.



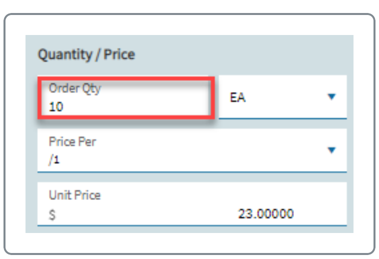
6. To create a new line, select **New Line**.

7. In the Part field, search for and select the part set to Sales Kits in the Part app.

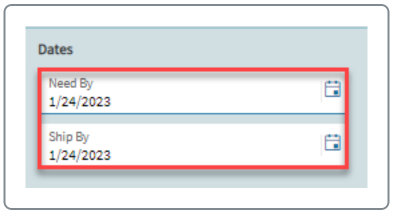


8. Enter the quantity you need to order using the Order Quantity field.

   You cannot create an order line that has a zero quantity.



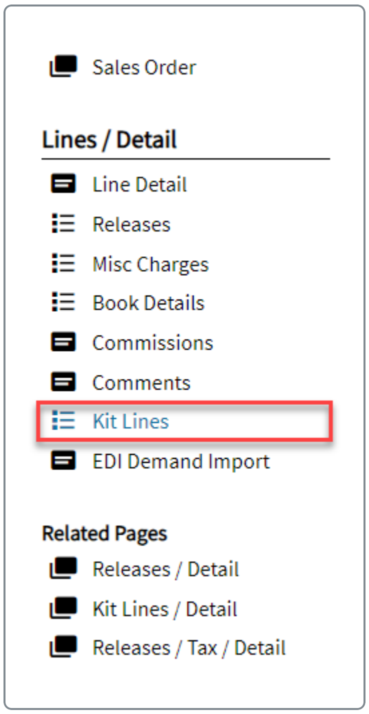
9. Enter the **Need By** and **Ship By** dates.



10. Select **Save**.

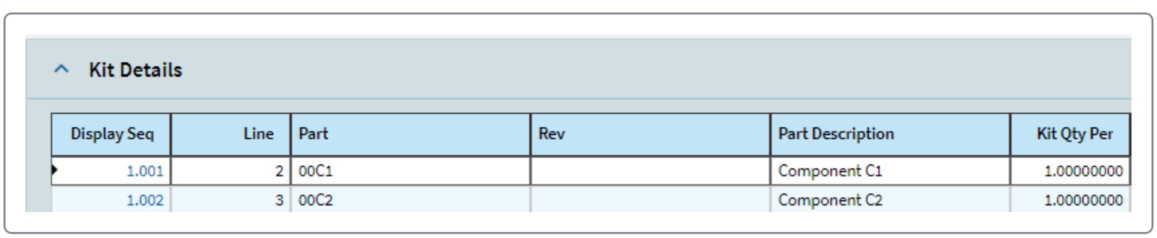
11. In the Nav tree, select the **Lines /Detail** node and then select **Kit Lines**.

    The Kit Details card displays.



12. Review the card.

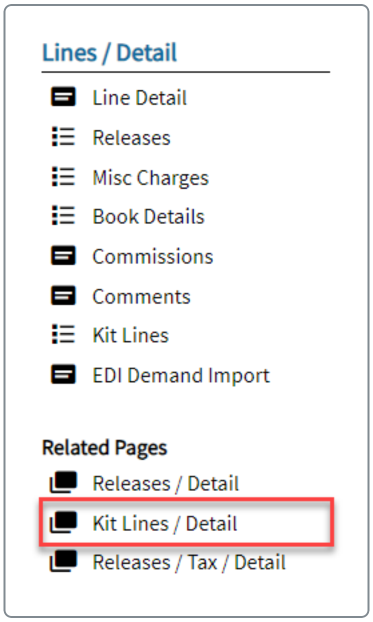
    In this case, the 'Sales Kit' part selected on the order line holds '2' components. However, this is just an example.


Kit Details

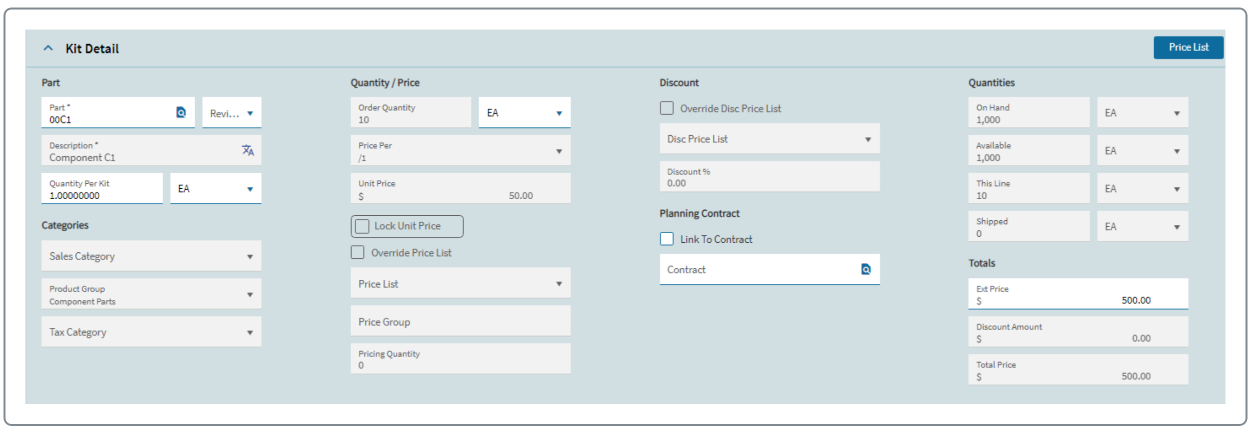
Display Seq	Line	Part	Rev	Part Description	Kit Qty Per
1.001	2	00C1		Component C1	1.00000000
1.002	3	00C2		Component C2	1.00000000

13. In the grid of the Kit Details part, highlight a line and select the **Kit Detail** node in the Nav tree.

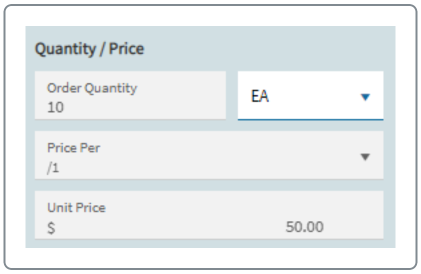
    The Kit Detail card displays.



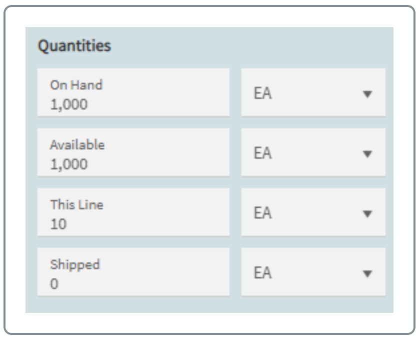
14. Review or adjust values for your sales kit component.



- **Quantity Per Kit** - This value defines how many components you need based on the order line quantity of the 'Sales Kit' part. For example, if you enter '1' in this field, and you order line is for '10' units, then you will need '10' pieces.
- **Link To Contract** - Select this check box if the component is going to be supplied from a planning contract.
- **Quanity/Price** (Group Box) - Defines the 'Order Quantity' and 'Unit Price' of the component.

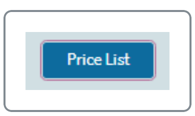


- **Quantities (Group Box)** - Show you the inventory values as well as what is needed.



In this case, we have '1000' pieces in our inventory and need '10', since the order line is for '10' units and the 'Quantity Per Kit' values is set to '1'.

- **Price List** - Select the **Price List** button to open the 'Price List Inquiry' app. The app lets you retrieve, calculate and display pricing and discount pricing information for a customer.

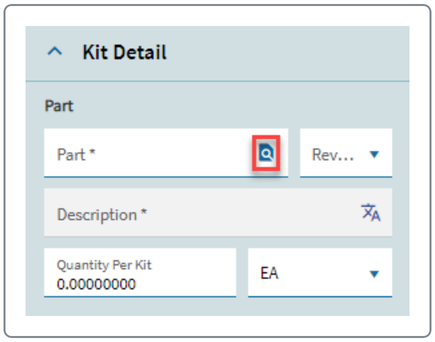


To learn more about the 'Price List Inquiry' app, review the Using Price List Inquiry article.

15. Review all the components for the Sales Kit part you are ordering using steps '13-14'.

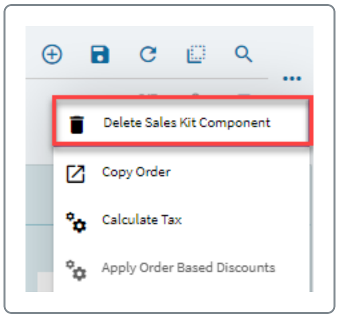
16. To add a new component to the Sales Kit part you are ordering select **New** while being on the Kit Detail card.

17. Search for and select a part number using the Part field.



18. Define the rest of values on the card as necessary.

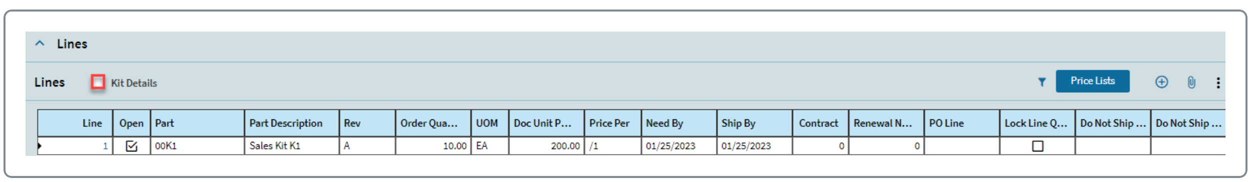
19. To delete a sales kit component, select **Delete Sales Kit Component**.



20. Select the **Lines** node in the Nav tree.

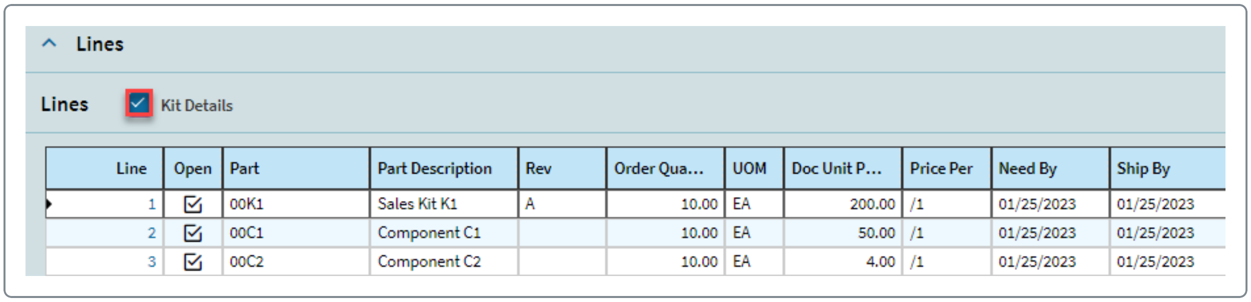
    The Lines card displays.

21. Review the order line without the Kit Details check box being selected.



In this example, we are ordering '10' pieces of the '00K1' part. This part is set to 'Sales Kit' in the 'Part' app.

22. Select the **Kit Details** check box.



Line	Open	Part	Part Description	Rev	Order Qua...	UOM	Doc Unit P...	Price Per	Need By	Ship By
1	☑	00K1	Sales Kit K1	A	10.00	EA	200.00	/1	01/25/2023	01/25/2023
2	☑	00C1	Component C1		10.00	EA	50.00	/1	01/25/2023	01/25/2023
3	☑	00C2	Component C2		10.00	EA	4.00	/1	01/25/2023	01/25/2023

The list of the component associated with the ordered 'Sales Kit' part displays.

In this case, there are '2' components. However, this is just an example.

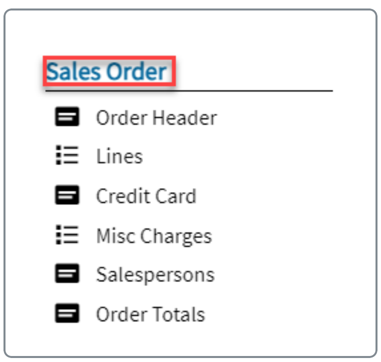
23. Select **Save**.

Printing a Sales Order Acknowledgement

After you have finished the sales kit, you can view the sales kit's part components printed on the 'Sales Order Acknowledgment' report.

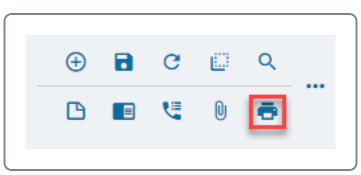
1. Select the **Sales Order** node in the Nav tree.

   The Order Header card displays.

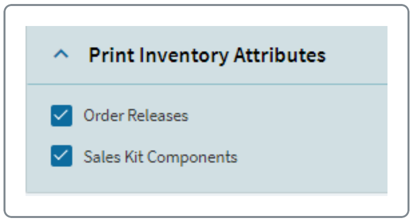


2. Select **Print**.

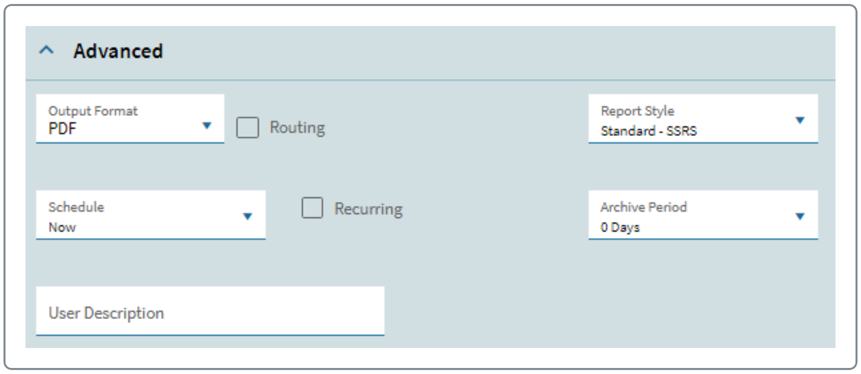
   The Sales Order Acknowledgment panel opens.



3. Select the **Order Releases** and **Sales Kit Components** check boxes.



4. Expand the **Advanced** card and define its values.



5. Select **Print Preview**.

6. Review and close the report.
7. Close the Sales Order Acknowledgment panel.
8. Exit the Order Entry app.