

## CompassPoint Solutions Kitting

Streamline the process of packaging individual items for shipping



### About Us

Green Beacon Solutions partners with clients to implement integrated financial, supply chain, sales automation, and marketing business solutions built on proven Microsoft technologies. Our unique combination of technology, people, and process quickly help identify and implement expert strategies that support our client's business objectives within the distribution, professional services, banking/banking services, and manufacturing industries.

### Why Green Beacon?

Our technology and consulting expertise, combined with our success in solving customer issues, have resulted in our unmatched industry reputation. We have an outstanding track record developing, delivering, and integrating ERP, CRM BI and Marketing Automation technology solutions that deliver direct business benefits for our customers.

**“Entering an order with multiple order lines was never so easy and less time-consuming. I never imagined that this could be possible.”**

### What is Kitting?

Kitting is a powerful tool that can handle a list of items as one unit (a kit) without having to use the production module. Sell a kit, pick and ship the parts and invoice the kit. A kit can comprise of items and a services Bill of Materials (BOMs).

The static kit you define is a set list of items that never change. The numbers do not change either. Use the unique dynamic kit to select the required items from a long pre-defined list and change the numbers required dynamically at quotation or order entry.

The process of the kit is implemented for the sales orders as well as the purchase order. The kit can also be used in the sales quotation, project quotation and project item requirements. It can be priced on kit level (at a special price) or simply defined by the sum of its parts. When the sales quotation has become an order, the kit is transferred to a sales order, the packing slip and eventually an invoice. You can also easily return the entire kit or checkmark returned parts.

With Kitting, creating a customer specific kit is also possible. When a kit is purchased, the required order lines are automatically specified on the purchase order. With the report settings in Kitting you can determine which details are printed on various documents such as sales confirmation, sales picking list, sales packing slip, invoice and the purchase order. This also applies to the price. Either the Kit price can be listed or the price per item can be specified on the output documents.

## Why use Kitting?

Kitting adds value to every organization that works with a process in which individually separate but related items are grouped, packaged and supplied together as one unit.

For example, a wine gift box that consists of a box, a corkscrew, the bottle of wine and a book. As a kit can have a lead-time, you can also define a kit for temporary sales promotions. These are just two examples of many situations where Kitting is an essential enhancement for Microsoft Dynamics AX.

Kitting offers huge benefits to Sales departments because they can easily quote the costs of a kit and immediately calculate the sales price for their offer. Sales reps also have direct insight into the stock availability for all the items in the kit and knows how many kits are directly available.

Logistics departments save a tremendous amount of time using Kitting because they can assemble a kit without going to production and easily handle shipments and returns. Kitting can also be used for purchasing, facilitating the purchasing as well as the return/exchange process for the purchase department.

## Advantages of Kitting

The advantages of Kitting are:

- Time saving for Sales, Logistics and Purchasing departments.
- Simplifies administrative handling.
- Decreases risk of errors.
- Transparency of stock position of the kit and kit parts.
- Kit-assembly without production orders.
- Standard, dynamic and customer specific kits are supported.
- Flexible pricing options and margin control on kit or component level.

Maintain Microsoft Dynamics AX with Green Beacon's

### **SmoothSail Managed Services**

- Dedicated support staff at our Newton, MA HQ
- On-demand and cost-effective management services for CRM and ERP applications
- Advisory services to increase business efficiency by improving system usage
- Support and maintenance services to reduce down-time and ensure productivity so that systems operate at high availability



**GREEN BEACON SOLUTIONS**

- Established in 2001
- Headquartered in Boston, Massachusetts
- Offices in New York, Philadelphia, and Houston
- Specialists in Microsoft Dynamics Business Solutions
- ERP and CRM Consulting Services
- CompassPoint Solution Software Accelerators
- SmoothSail Support & Managed Services