Kitset – (Add-Edit)

This article describes how to Add or Edit a Kitset. There are two types of Kitsets; Master Kitsets (Code displays "whole numbers") and Installer Kitsets (Code displays "point numbers").

> **NOTE:** Master Kitsets cannot be edited directly, they must be Cloned then Edited. On saving they will take on a "point number" and become an Installer Kitset

> **NOTE:** If you have been using SystemFox, the Inhouse Codes have changed. See KAT-1103 for a list of revised Inhouse Codes

To Add a new Kitset;

Adding a new Kitset is done from the KITSETS Tab Library

Quick Flow;

KITSETS Tab > **[Add]** > **Code*** > **Name*** > **Description** > **Icon** > **Heading** > **Products** > **[Save to Library]**

1. Press the **KITSETS** Tab to display the KITSETS Library, then Press the **[Add]** button to display the KITSET: NEW Window

2. From the KITSET: NEW Window's Kitset Information Section, Enter a **Code***, on Pressing away from the Code field the Kitset's "point number" will display
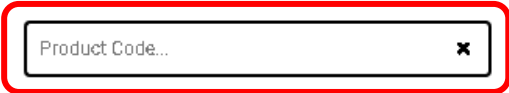

3. From the KITSET: NEW Window's Kitset Information Section, Enter a Kitset **Name*** and **Description***, then from the **Icon** dropdown menu, Select an Icon that goes with the Kitset being made, then select a **Heading** for the Kitset to position under

> **NOTE:** If no Icon is selected, the Kitset will not display in the Visbuild Kitset Library, and will only be available to use in Manually entered Quote Sections by keying in the Kitset Code

> **NOTE:** If the Heading selected uses Brands, the "Use Brands Options" displays and a product MUST be entered in to each Kitset Brand section

4. From the Kitsets COMMON Section enter the Kitset **Products**, by entering Product Codes in the Product Code search field, then entering a QTY for the product
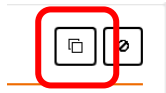
Product Code... ✖

> **NOTE:** If the Kitset Heading selected does not use Brands, all items are entered in to the COMMON Section. If the Kitset Heading selected uses Brands, then common items like; Labour, Travel, Flush Boxes, Cable etc are entered in to the COMMON Section, and additional/branded items like; Additional Labour, Switches, Outlets etc are entered into their BRAND Sections

5. Press the **[Save to Library]** button to save the new Kitset

To Edit a Master Kitset (From the KITSET Tab *OR* Quote);

1. From an open Master Kitset, Press on the [Clone] button to clone the Kitset

2. From the cloned Kitset's Information Section, edit the information as required

3. From the cloned Kitset's COMMON *OR* BRANDED Sections, Delete product line(s) by Pressing on the delete button at the end of the Product Line *OR* Add Product by entering a Product Code in the Product Code search field, then entering a QTY for the product

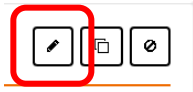| KATSUN | Sundries For Kitsets | $0.75 | $1.01 | | 1.00 | $0.75 | $1.01 | |
| 10540020 | 1.0mm 2CE TPS 100m | $0.62 | $1.15 | | 5.00 | $3.10 | $5.x5 | ... |
| | | | | | | $16.07 | $28.x | |

Product Code... ✖

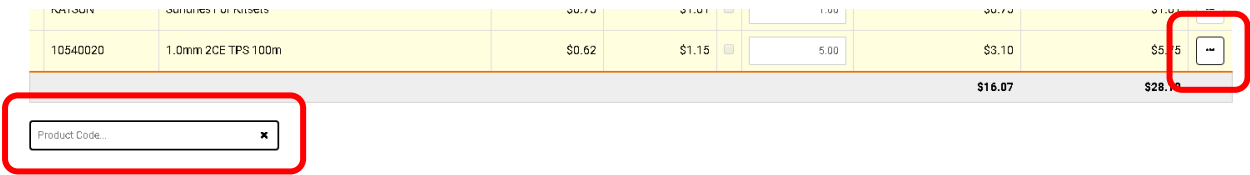4. When editing complete, Press the **[Save to Library]** button to save the editing

> **NOTE:** To access a Kitset from a Quote, Press on the Kitset's [OPTIONS] button , then select option [Show Kitset Detail], then follow steps 1 to 3 above

To Edit an Installer Kitset (From the KITSET Tab *OR* Quote);

1. From an open Installer Kitset, Press on the [Edit] button [✎] to Edit the Kitset

2. From the Kitset's Information Section, edit the information as required

3. From the Kitset's COMMON *OR* BRANDED Sections, Delete product line(s) by Pressing on the delete button at the end of the Product Line *OR* Add Product by entering a Product Code in the Product Code search field

KATSUN	Sundries For Kitsets	$0.75	$1.01	☐	1.00	$0.75	$1.01	
10540020	1.0mm 2CE TPS 100m	$0.62	$1.15	☐	5.00	$3.10	$5.75	⋯
						$16.07	$28.70	

Product Code... ✕

4. When editing complete, Press the **[Save to Library]** button [🖫] to save the editing

To Edit a Master *OR* Installer Kitset (from a Quote Visbuild Plan);

> **NOTE:** Editing a Kitset from a Quote Visbuild Plan converts it to a Misc Works and saves it to that Quote only. It does not save the Kitset back to the Kitset Library

1. Double Press on the Kitset Icon to display the Kitset Detail Window, then from the Kitset Detail Window, Press on the [Convert to Misc Works] button [⇄] (you will be asked if you want to convert the Kitset to a Misc Works, Press the Convert button [⇄] to continue and convert)

Apply Brand to: Kitset [⇄] [🖫] [✕]

2. From the Kitset's COMMON *OR* BRANDED Sections, Delete product line(s) by Pressing on the delete button at the end of the Product Line *OR* Add Product by entering a Product Code in the Product Code search field
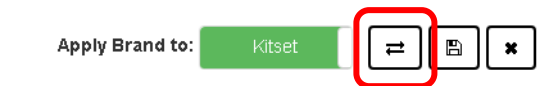
> **NOTE:** You can add any clarification text to the Kitset Name, this will display on the Quote PDF Legend, *ALSO* a text box and arrow(s) can be used on the Plan to point to and highlight that the Kitset has been modified

3. When editing complete, Press the **[Save]** button [🖫] to save the editing

[🖫] [✕]