

Items - How to Build Item Bundles (Assemblies)

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Definition of Terms

1. Bundle- referred to an assembled item made out of more than 1 component or items;
2. Components- Are items that is need to build a bundle item.

Set Up the Bundle Item

1. Create a bundle item. In the Dashboard, Go to Items> Item List Screen> click 'New' tab located at the bottom left corner of the screen.
2. Add new Product or Service Item screen pops up. Fill in the necessary information. Under the 'Type' field choose 'Bundle (Assembly)' in the drop down list. Once clicked, a pop message will appear. Click OK.

Add New Product or Service Item

New Item Duplicate Item

Item Number *

Description

Type

Default Vendor

Vendor Item #

Vendor Item Cost

Vendor Case Pack

Vendor Lead Time (# Days)

Inventory

Inventory

Service

Non-Inventory

Bundle (Assembly)

List Price \$0.00

Taxable ☐

Bin

Unit Of Measure (UOM)

Shipping Weight/Unit

Replenish Stock Category

QuickBooks Income Account

QuickBooks Expense Account

QuickBooks Asset Account

QuickBooks Online does NOT support the CREATION or EDITING of 'Bundle' items or 'Bundle' components OUTSIDE of QuickBooks Online (at this time). To make a Bundle (in 1 place) please change the TYPE to 'Inventory' and then select the 'Assemblies' checkbox.

OK

Cancel

Enter Pricing Levels

Sync with QuickBooks Online ☐

Help Save

3. Display Bundle Components on Sales:

- Select Pre-Assembled Bundle- This is where a Bundle is created and put into stock--in advance of the sale--on the Item Detail screen (Bundles tab).
 - Select Auto-Assembled Bundle- When a Sales Transaction is placed (and the Bundled item is out of stock) depending on the selected options in Settings, the user can receive a prompt to 'auto-assemble' the bundle on the fly
 - Editable Bundle: When a Sales Transaction is placed (and the Bundled item is out of stock) depending on the selected options in Settings, the Bundle components can be displayed on a popup screen--and can be 'edited'--before the components are taken out of Stock.
4. A pop up window will appear Re: Quickbooks does not support creation or editing of Bundle items.... Click OK.
 5. Click 'Add Bundle Components' button.
 6. 'Item Bundle Components' screen will pop up for you to fill in the components for you to build the bundle
 7. Click 'Close'.

8. Tick the checkbox if necessary.
9. Fill in the necessary information.
10. Click Save.

The screenshot shows the 'Add New Product or Service Item' form. It includes a 'New Item' tab, a 'List Price' field set to '\$0.00', and a 'Taxable' checkbox. A green box labeled '8' highlights the 'Taxable' checkbox. Below it, a green box labeled '9' highlights the 'Bin' field. A green box labeled '5' highlights the 'Add Bundle Components' button. A green box labeled '6' highlights the 'Item Bundle Components' table. A green box labeled '7' highlights the 'Close' button. A green box labeled '10' highlights the 'Save' button. The 'Item Bundle Components' table has columns for 'Sort', 'Item Number', 'Quantity', 'Assembly No...', and 'Action'. The 'Form' section includes fields for 'Default Vendor', 'Vendor Item #', 'Vendor Item Cost', 'Vendor Case Pack', and 'Vendor Lead Time (# Days)'. The 'Display Bundle Components on Sales' section has radio buttons for 'Yes' and 'No'. The 'QuickBooks' section includes fields for 'QuickBooks Income Account', 'QuickBooks Expense Account', and 'QuickBooks Asset Account'. The 'Sync with QuickBooks Online' checkbox is also visible.

Build the Item Bundle

Please refer to the screenshot below.

1. In the Item List, select the Bundle item you have just created. It will redirect you to the Item Detail screen, click the 'Bundles (Assemblies) tab.
2. Click 'Refresh' button to calculate the number of items it could create and its individual cost. Please make sure that the Qty in Stock of each components is greater than Zero.
3. In the space provided before the word 'Bundle(s)', fill in the number of items to be built.
4. Click 'Build Bundle' button.
5. A pop up message will appear once you have successfully created/ bundled an item. Click OK.
6. Click Save.

Item Detail osQHTAdmin

Description: Bundle test
 Bin Location: Bin

Quantity on Back Order: 50,000
 Quantity on Order: 0

Item number: Bundle test
 Quantity in Stock: 5,000

To Sync ☐ Resync Flag ☐ Last Synced: QBO Last Sync Date

Dashboard Item Details Stock Vendors Financial PO's **Bundles (Assemblies)** Sales Catalog Custom Fields Documents Transaction Log Audit Log

⚙

Sort	Bundle Component	Item Description	Labor	Qty Needed	Assembly Notes	Qty Can Build*	Qty in Stock*	Qty Reserved*	Vendor*	Cost*	Extended Cost*	Action
	Item Test 01	Item Test 01		1		25000	25000	0		\$2	\$2	✕
	Item Test 2	Item Test 2		2		10000	20000	0		\$3	\$6	✕
	Item Test 3	Item Test 3		1		20000	20000	0		\$2	\$2	✕
	✕											

How to Use This Screen:

- Press the **Refresh** button below to calculate how many Bundles you can build (based on your Qty's in Stock).
- Enter Qty to build and then press the **Build Bundle(s)** button to create the Bundles.

You can create 10000 Items of this bundle for stock, at an individual cost of \$10 each. (\$10 parts + \$0 labor)

Refresh Build Bundle(s) Build 1000 Bundle(s)

Print Bundle Stock Picking Ticket Print Bundle Build List

1. Go to Bundles (Assemblies) tab;
 2. Click the Refresh button (to calculate);
 3. Indicate the number of pieces you want to build. (In this case I put 10000 pieces);
 4. Click Build Bundle(s). Once it is clicked a pop up message would appear once you have successful build the bundle.
 5. Click OK button;
 6. Click Save.

✓

You have successfully created / bundled 10000 of Item: Bundle test.

OK Click OK

New Item Delete Item

Save Help Close

Note: If one of the components have a Zero number in Qty in Stock, 1place will not allow you to build a bundle. (Refer to the screenshot below)

Item Detail osQHTAdmin

Description: Bundle test
 Bin Location: Bin

Quantity on Back Order: 45,000
 Quantity on Order: 0

Item number: Bundle test
 Quantity in Stock: 10,000

To Sync ☐ Resync Flag ☐ Last Synced: QBO Last Sync Date

Dashboard Item Details Stock Vendors Financial PO's **Bundles (Assemblies)** Sales Catalog Custom Fields Documents Transaction Log Audit Log

⚙

Sort	Bundle Component	Item Description	Labor	Qty Needed	Assembly Notes	Qty Can Build*	Qty in Stock*	Qty Reserved*	Vendor*	Cost*	Extended Cost*	Action
	Item Test 01	Item Test 01		1		15000	15000	0		\$0	\$0	✕
	Item Test 2	Item Test 2		2		0	0	0		\$0	\$0	✕
	Item Test 3	Item Test 3		1		10000	10000	0		\$0	\$0	✕
	✕											

How to Use This Screen:

- Press the **Refresh** button below to calculate how many Bundles you can build (based on your Qty's in Stock).
- Enter Qty to build and then press the **Build Bundle(s)** button to create the Bundles.

You can create 0 Items of this bundle for stock, at an individual cost of \$0 each. (\$0 parts + \$0 labor).

Refresh Build Bundle(s) Build 0 Bundle(s)

Print Bundle Stock Picking Ticket Print Bundle Build List

It has a zero Qty in Stock