



Assembly: Overview

An *assembly item* is an item that is itself composed of two or more other inventory items and sold as a set. For example, a "Ski Slope Package" could be defined as an assembly item made up of a pair of skis, bindings, and boots, all of which already exist in your inventory as individual items. Assembly items are often used to sell a set of items at a discount.

You "build" assembly items from the existing items in inventory, which are referred to as the *component items*. An assembly item can also be a component item of another assembly. When you build an assembly, the on-hand quantity of each component item is reduced by the quantity of the item included in the assembly and the on-hand quantity of the assembly item is increased by one. The number of assemblies you can build is dependent on the on-hand quantity of the component items. Assemblies can also be broken, thus freeing the component items to be sold individually again.

The assembled item has a single associated tax code; the entire assembly is taxed or not based on this code. Use judgment and observe local tax regulations if mixing taxable and non-taxable items in an assembly. Consider listing a non-taxable component as a separate service or non-inventory item on the receipt or use a group item instead. You can even include an assembly item in a group item.

Once an assembly is defined and built, it can be listed on documents in the same manner as other items. Sales reports include assembly items as unique items and do not report on the component items that are included. Keep reporting needs in mind when you assign a department, vendor, and descriptions to your assembly items.

(Multi-store) Only Headquarters can define assembly items, but remote stores can build and break assemblies as necessary to meet local sales demand.

When assemblies are built, the on-hand quantity of the assembly item is increased by the quantity you choose to build. The on-hand quantity of each component item is reduced by the total number included in the built assemblies.

Quantity and cost adjustment memos are automatically created to adjust inventory when building assemblies. The logged in user's name will be entered on the memo, along with appropriate comments ("Assembly created from inventory") and reason ("Creat Asm"). If users are not required to log in, you will be prompted to enter a user name for the memo(s) upon creation.

An assembly item can be a component item of another assembly item.

You can break, edit, or delete assemblies as needed to free the individual component items, to change the component items or quantities, or to discontinue using the assembly.

Breaking an assembly makes the component items available for sale individually. This option is only available if the on-hand quantity of the assembly item is greater than zero (0).

(Multi-store) Remote stores are limited to breaking assemblies at their own store and cannot edit or delete the assembly item.



How does an assembly item differ from a group item?

Item assemblies and groups both offer a way to sell a predefined set of items by listing a single item on a sales document. However, the two item types vary in several ways, as outlined below.

Key questions to ask when deciding between an assembly and a group?

Do you want to physically pre-build the set, thus removing the component item quantities from inventory?

Do you want the component item quantities in the set to remain available for individual sale?

Do you want the individual items printed on customer receipts or just the set as a single item?

Do you sell more of the items individually or as a set?

Will there be both taxable and non-taxable component items?

Key Differences Between Assembly and Group Items

Option	Assembly	Group
Pre-built?	Yes	No
Sell component items individually?	No*	Yes
Can include service and non-inventory items?	Yes	Yes
Can include assembly item as component?	Yes	Yes
Can include group item as component?	No	No
Assembly/group item printed on receipt?	Yes	Yes
Assembly/group item price printed on receipt?	Yes	Optional **
Component items printed on receipt?	No	Yes
Component item prices printed on receipt?	No	Optional **
Can contain both taxable and non-taxable items?	No***	Yes
Can assign discounted price?	Yes	Yes
Track costs and quantities?	Yes	No****

* Quantities of component items not pre-built into assemblies can be sold individually and built assemblies can be broken, freeing the component items for individual sale.

** Controlled with a preference setting.

*** After assembly, the single tax code assigned to the assembly item determines if it is taxed or not. The entire assembly is subject to the same tax code, so taxable and non-taxable items should not be mixed.

**** Quantities and costs of group component items are tracked individually, not as a group.

Assembly: Adding & Building

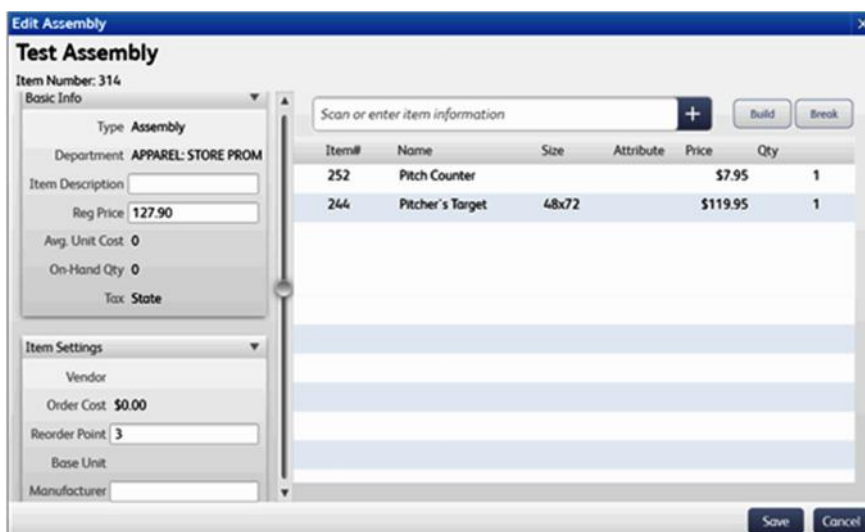
An assembly must be defined and then built to make it available to sell.

(Multi-store) Only Headquarters can define an assembly item. Once defined, both Headquarters and remote stores can build (or break) assemblies as needed; Headquarters for any store; remote stores for the local store only.

To define and build assemblies:

1. Be sure all component items have been added to inventory individually.
2. From you item list, click **Add**.
3. Enter a descriptive name for the assembly item in the **Item Name** field.
4. In the item **Type** field, select **Assembly**.
5. Specify a department (required) and a vendor (optional).
6. Enter information in other item fields as appropriate.
 - a. You cannot enter an **On-Hand Quantity** or **Average Unit Cost** at this time. The quantity will be created when you "build" the assemblies; the average unit cost will be automatically calculated as the sum of the average unit costs of the component items. This cost will be recalculated each time you build or break assemblies.
 - b. Optionally, enter a **Regular Price**. If a price isn't entered, Point of Sale will auto-fill the field with the sum of the component item prices once they are added. You can edit the price later, if needed.
 - c. Enter a **Tax Code**. The entire assembly will be taxed (or not) based on this code. You cannot mix taxable and non-taxable item component items in an assembly.
 - d. To include the assembly item on Build Point reports and reorder Reminders (to be reminded to build more of the assembly) enter the minimum desired on-hand quantity in the **Reorder Point** field.
7. Click **Save**. The assembly item is added to your item list and displayed with details.
8. Click the **Assembly** button next to the item **Type** field.

The Assembly Details window is displayed. The information entered so far is shown on the left and the grid on right is used to display the component items in the assembly.



Item#	Name	Size	Attribute	Price	Qty
252	Pitch Counter			\$7.95	1
244	Pitcher's Target	48x72		\$119.95	1



9. Click **Edit Assembly**.
10. In the **Scan or enter item information** drop-down box, scan or type item information to search for the item to add.
 - o Use any of these methods to add items to the group:
 1. **Scan** the bar code from the item tag.
 2. **Type** the item's UPC, Item #, or alternate lookup value and press **<Enter>**
 3. **Search** by item name (beginning characters) or other item keyword. Just begin typing the name or keyword and a list of matching items is displayed. Select an item from the list by clicking it (keyboard users, press the down arrow key to scroll, then **<Enter>** to select). The selected item is added to the group with a quantity of 1.
 4. If no matching item is found, check your spelling or the identifier you entered. Entering fewer characters will find more matches.
 5. To see your entire item list, click the + icon with no entry in the Add Item field. You can scroll through the list looking for the needed item.
 6. Click Add New Item to Inventory if needed.
12. Specify the quantity of the component item.
13. By default, each item is listed with a quantity of one. Click the **Qty+** and **Qty-** button to quickly increase/decrease by one or click the **Qty** button to enter another number. Quantity is the only editable field for the component items.
14. Repeat to add all items in the assembly.
15. Click **Build** at the top of the window.

Headquarters in multi-store only: Specify the store for which you are building the assemblies.

The Build Assembly dialog is displayed, notifying you of the maximum number of assemblies that can be built. This number is based on the available on-hand quantities of the component items.

16. Specify the number of assemblies you wish to build and then select **Build**.
17. Click **OK** on the confirmation dialog.
18. Click **Save**.



Assembly: Break, Edit, Delete

To break assemblies:

1. Locate and highlight the assembly item in your item list.
2. Click **Show Details**.
3. Click the **Assembly** button next to the item **Type** field. The Assembly Details are shown.
4. Click **Edit Assembly**. The Edit Assembly window is opened.
5. Click **Break** at the top of the Edit Assembly window.

Headquarters in multi-store only: Specify the store for which you are breaking the assemblies.

The Break Assembly dialog displays the number of existing assemblies that can be broken.

6. Specify the number of assemblies you would like to break and then click **Break** in the dialog.
7. Click **OK** on the confirmation dialog.
8. Click **Save**.

Breaking an assembly reduces the on-hand quantity of the assembly item by one (for each assembly broken) and increases the on-hand quantity of each component item by the total number included in the broken assemblies.

Quantity and cost adjustment memos are automatically created to adjust inventory when breaking assemblies. The logged in user's name will be entered on the memo, along with appropriate comments ("Assembly broken from inventory") and reason ("Brk Asm"). If users are not required to log in, you will be prompted to enter a user name for the memo(s) upon creation.

If an assembly item includes a second assembly item as one of its components, then breaking the first assembly does not break the second assembly contained therein.