

Kitting Setup and Process

Aptean Ltd
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1 Kitting Setup and Process



2 System Set Up

2.1 Transaction Types Maintenance (CTLTRAN01A)

Ensure that there is a 'ADJK' (Adjustment Kitting) record in the Transaction Types Maintenance screen

This screen only has to be amended/created if wanting to use the Transactions Report. The system will automatically generate the Transaction Types when processing. Note, some of the Transaction Types are already created when opening this screen. The values below are the default types.

Transaction Type	Description	Interface
ADJ	Adjustment	N
ADJH	Adjustment from Hold	N
HOLD	Hold	N
MOVE	Movement	N
PICK	Pick	N
QIK	Quick Transaction	N
REC	Receipt	N
REL	Release	N
RET	Return	N
SALE	Sale	N
SCRP	Scrapped Stock	N
STTK	Stock Take	N

Note:

- The Transaction denotes each system or user generated transaction type during all processes
- The Interface flag is used is client specific EDI Processing

2.2 System Parameters (WHS0010)

To raise an assembly order request, an assembly location must be set against the warehouse in the System Parameters - Default Locations tab. The field will be labelled, ?Assembly Location?. Kits will be assembled and stored in this location.

The other fields in the System Parameters screen are documented in [Warehouse Set Up](#)



System Parameters Maintenance

Owner: XXA Warehouse: XX1 08-AUG-2011 WHS0010 v4.10

Main Goods In Default Locations

ID Station:

Reject Spur at ID Station:

Q/A:

Turntable:

Input Spur to Conveyor:

Default Marshalling Location:

Default Despatch Bay Location:

Pre-advice Virtual Location:

Quarantine in Marshall:

Auto Bulk Reject:

Default Ship Pallet Build Locn:

Default Damages:

Default Returns:

Problem Resolution:

Kit Assembly Location:

Unbonded Putaway Locations:

Bonded Putaway Locations:

2.3 Owner Maintenance (STS1000)

To raise an assembly order request, a default customer must be set against the owner record in the Owner Maintenance screen.

The other fields in Owner Maintenance are documented in [Owner Maintenance](#)



Owner Maintenance

Company: JP1 Department: 0000 08-AUG-2011 STS1000 v4.46

Owner: XXA 001 Standard Client (3pl)

Main General Sales Order Goods Rec'd SOP C/H EDI EDI Inbou... EDI Out... Charging Def Bul... Format Owner R... Owner UOM

Owner Group : XXA 001

Supplier : PL1 X-001 001

Customer : SL1 X-001 001

Address 1 : 908 Winding Road

Address 2 :

Town : High Town

County : Lancashire

Country : GB Great Britain

Post Code : L45 C54

Tel :

Fax :

Gr By Po : No

VAT No : GB-1234567-890

Owner Email Addr :

2.4 Stock Maintenance (STKSTOC01B)

Stock kit codes are created in the same way as ordinary stock codes. To define a Stock Code as a Stock Kit, the field ?Sales Kit? should be set to ?Yes? in the Stock Maintenance screen.

Component stock codes are also created in the same way as ordinary stock codes. To define a Stock Code as a component, the field ?Sales Kit? should be set to ?No? in the Stock Maintenance screen. The ?Sales Kit? should be set to ?Both? in the Stock Maintenance screen so that the stock item can be both a master kit item and a component of a kit. The other fields in the Stock Maintenance screen are documented in [Stock Set Up](#)



Stock Maintenance

Company: JP1 Department: 0000 08-AUG-2011 STKSTOC01B v4.52

Owner: XXXA 001 Standard Client (3pl)
 Stock Code: E1 Description: Non Pallet Pick Face Size:

Main Further Stock Physical Att... Accounting Product S... Client Sp... Code Refe... Serial Nu... Stock War... Bond Pick/Disp...

Product Range 1 Product Class 01 Product Category 02 Product Group 01 Prod Sub Group +
 Food Meat Fresh Chicken Chicken

Unit Of Measure 1 EACH
 Unit Of Measure 2 CASE
 Unit Of Measure 3 PALLET
 Stocking Unit of Measure CASE

Factor EACH To CASE 10
 Factor CASE To PALLET 10
 Factor EACH To PALLET 100
 Factor EACH To Transit 0

Product Type 1
 Tax Code 1
 Normal Supplier X-001 001 Customer
 Country of Origin GB Great Britain

Bonded ☐ Yes ☒ No

Sales Kit No
 Convert Units Both
 Product Status No Yes
 Net Weight 1.000 KGM
 Gross Weight 1.000 KGM
 Pallet Type STD ABC Code N
 EAN Code
 Auditing ☐ Yes ☒ No

Copy Item Notes Send RF Data



3 Kitting Process

Stock items will be identified as either kits or components of kits. Components will be associated with kits by assigning each component to the kit in a new Stock Kit Maintenance screen. Components may be applied to many kits or sold as individual items. The three stages to this process are as follows:

- Stock Kits Maintenance CSS0290
- Stock Kits Assembly Request SOS1427
- Stock Kits Assembly Confirmation SOS1428

The warehouse will be able to raise assembly orders in the system. A new order type, ?K?- Kit Assembly, will be created and will initiate the picking of kit components, their assembly and subsequent placement into stock as a kit. The assembly order can be viewed in the standard order enquiry screens and must be allocated, pick listed and pick confirmed via the existing warehousing SOP screens.

Once the components have been pick confirmed, the user will assemble the kits in the warehouse assembly location (assigned at warehouse level) and will confirm assembly using a new Stock Kit Assembly Confirmation screen. This screen will decrease the component stock levels and increase the kit stock level. The kit will remain in the assembly location and can be moved to the appropriate warehouse location manually.

As there may be a shortfall of stock, this will leave an excess of components not used to assemble the kits. The Stock Kit Assembly Confirmation screen will recalculate the number of full kits that can be assembled and place the excess components on hold in the assembly location.

3.1 Stock Kits Maintenance (CSS0290)

This screen allows the components that constitute a kit to be defined. Effectively, informing the system about the component quantities required to make a kit.

Field Name	Description	Values
Owner	The owner of the Goods	LOV available
Kit Stock Code	The finished stock code	LOV available to display valid stock codes
	The component stock codes.	



Field Name	Description	Values
Component Stock Code		Provide a LOV of valid stock code from the stock table.
Description	Description of the Stock component code	Display
No in Kit	The number of component stock items required to make up a kit.	Numeric field
Critical Item	The component stock code is a vital part of the Kit, if flagged as Yes and there is not enough available stock then the order will not be completed	Valid values are (Y) Yes or (N) No

3.1.1 Assembly Instructions

The screenshot shows a software window titled "Stock Kit Maintenance". At the top, it displays "Company: .P1 Department: 0000" and "08-AUG-2011 CSS0290 v4.3". Below this are two tabs: "Stock Kit" and "Assembly Instructions", with the latter being selected. The main area is divided into two sections. The top section, labeled "Stock Kit", contains a text field with the value "MASTER-CODE". The bottom section, labeled "Stock Kit Assembly Instructions", contains a large white rectangular area for text entry. The text "Ensure Leaflet is enclosed within plastic sleeve." is visible at the top of this area.

Any notes or instructions that are required to follow the order can be entered at this point.

3.2 Stock Kits Assembly Request (S0S1427)

This screen generates assembly orders to pick component parts and return them to stock as assembled kits. By clicking the ?Kit Assembly? button the user is able to request the number of required kits. An assembly order, with an order type of K, will be created and the order number displayed at the bottom of the screen. The order can then be allocated, pick listed and pick confirmed, but must be despatch confirmed using the Stock Kit Assembly Confirmation Screen. Stock must be pick confirmed into the dedicated assembly location set-up against the warehouse.



Field Name	Description	Values
Owner Code	The code for the owner of the stock	Display
Kit Stock Code	The finished stock code	LOV available to select valid stock codes
Order Number	Entered once an assembly order has been created using the ?Kit Assembly? button	System Generated
Order Reference	Entered once the user has chosen to assemble a kit using the ?kit Assembly? button	To be entered by user - 20 Character field
Component Stock Code	The component stock codes.	Displays all component stock codes linked to the finished code.
Description	Description of the Stock	Display
No in Kit	The number of component stock items required to make up a kit.	Numeric field (Display)
Critical Item	Whether the component stock code is a vital part of the Kit or not	Valid values are (Y) Yes or (N) No (Display)
Current Kits	The total number of assembled Kits	Display
Possible Kits	The maximum number of kits that can be assembled from the current stock holding.	Display
Requested Kits	Number of Kits required	Numeric Field
Special Instruction	Three lines of instruction of the Order	Input 40 Character field
Buttons	Description	
Enq	By selecting any of the Enq buttons the Stock Enquiry Detail Screen for the stock code will be called	
Kit Assembly	Selecting the Kit Assembly button will call the order form see below	

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Kit Assembly

Requested Kits: 5

Order Reference: REF#4545F

Special Instructions:

OK Cancel

Field Name	Description	Values
<i>Requested Kits</i>	Number of Kits required	Numeric
<i>Order Reference</i>	Customer Reference of the Order	20 Character free text field
<i>Special Instructions</i>	Three lines of instruction of the Order	40 Character free text field
Buttons		
OK	The system will then create the kitting order with the information entered	Order is created with a Order Type of 'K'
Cancel	Cancel the data entered into the field.	Cancel the action

3.3 Stock Kits Assembly Confirmation (S0S1428)

This screen allows the user to confirm that the order created in the Stock Kits Request Screen has been assembled into a kit.

The user is able to confirm that the components have been assembled into the kit by clicking on the ?Confirm? button on this screen. This will decrease the stock levels on the pallet records for the component stock items and increase the stock levels for the kit item. However, it is possible that the original order quantities for the components has been changed or that there was a shortfall of stock. Either way, the confirm procedure must recalculate the number of kits that can be assembled from the actual components picked. This may leave an excess of components. The excess components will be moved from marshalling to the assembly location, placed on hold, and dealt with by the users manually.



Field Name	Description	Values
Owner	The owner of the Goods	Depending on set up will normally be display only.
Order Number	Entered once an assembly order has been created using the ?Kit Assembly? button	System Generated
Order Status	The Order status and the description ?Pick Conf?	System Generated
Order Date	The Date Order entered	Display - DDMMYY
Kit Stock Code	The stock code in the Kit selected from the stockist code	Display
Audit NO.	Unique, system generated audit number	Numeric
Component Stock Code	The component stock codes.	Display
Description	Description of the Stock	Display
Order Quantity	The quantity ordered separated with ?/? for cases and units	Display
Picked Quantity	The quantity ordered separated with ?/? for cases and units	Display
Confirm	Confirms that the components have been assembled into the kit	Will downdate the component code and update the finished code with the value of the picked quantities. An audit record will also be written to IAJD.

Stock Kits Assembly Confirmation

Company: JP1 Department: 0000 08-AUG-2011 SOS1428 v4.8

System Rot: +

Owner Rot: +

OK Cancel

Upon confirmation it is possible to add system and customer rotation numbers if required to the finished product.



Note: It is also possible to run the **Oracle Reporting Suite** for a Report Type of 'Journal' to report on relevant transactions.

5 Document History

Version	Date	Status	Reason	Initials
Version 1	08/07/2011	In Progress	User Guide	LBW

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