



Dynamic Kits vs Static Kits

v1.1

Contents

Dynamic Kits..... 2

Static Kits..... 7

Dynamic Kits

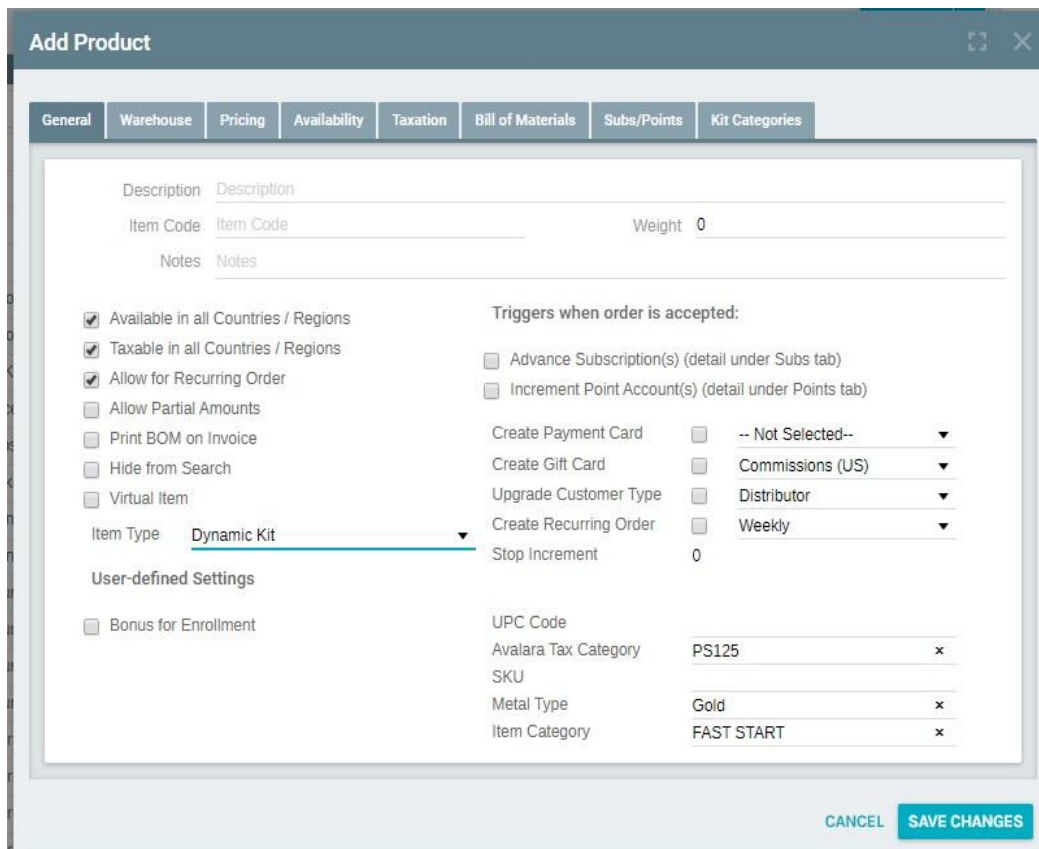
A dynamic kit is comprised of one master item (the kit itself) and a company defined number of additional items from various item categories. To create a dynamic kit in Exigo you will:

1. Create the Master Item
2. Create the kit items (Note: you may not need to create new items if you plan to use items already configured in Exigo)
3. Create the kit item categories, and define which items are in each category
4. Configure the remaining settings of the Dynamic Kit. Set which item categories are eligible for your dynamic kit, and the quantity of items to be chosen from each category
5. Add kit to product lists for shopping

How to set up a Dynamic Kit:

1. Create master item code:

Note: Item Type needs to be set as Dynamic Kit



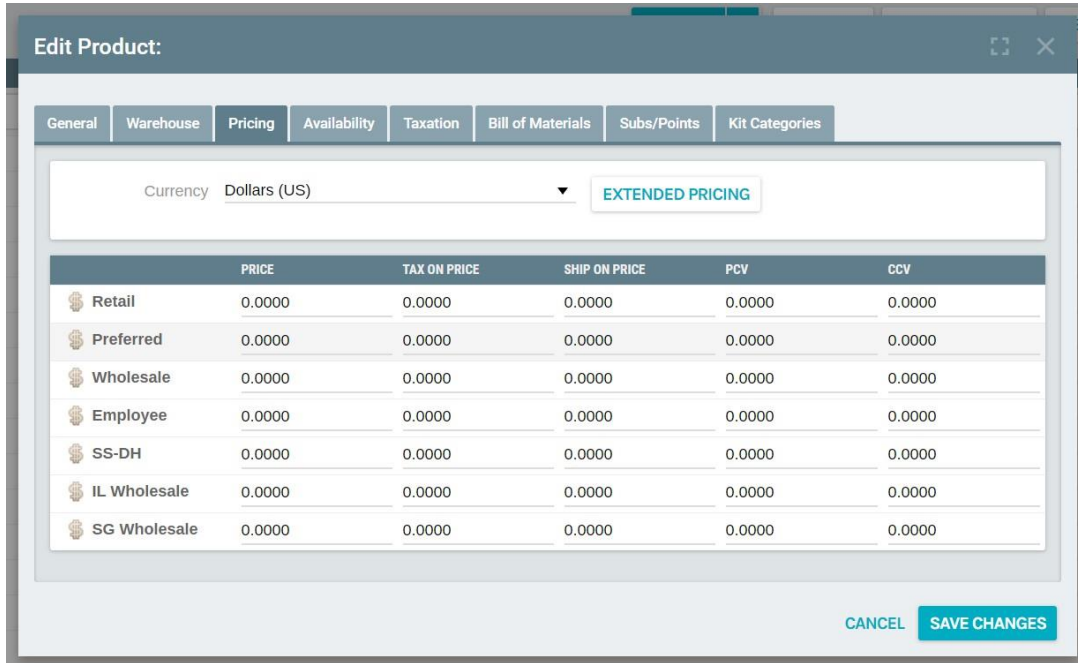
The screenshot shows the 'Add Product' form in Exigo, with the 'General' tab selected. The form includes the following fields and options:

- Description:** Description
- Item Code:** Item Code
- Weight:** 0
- Notes:** Notes
- Available in all Countries / Regions:**
- Taxable in all Countries / Regions:**
- Allow for Recurring Order:**
- Allow Partial Amounts:**
- Print BOM on Invoice:**
- Hide from Search:**
- Virtual Item:**
- Item Type:** Dynamic Kit
- User-defined Settings:**
 - Bonus for Enrollment:**
- Triggers when order is accepted:**
 - Advance Subscription(s) (detail under Subs tab):**
 - Increment Point Account(s) (detail under Points tab):**
 - Create Payment Card:** -- Not Selected--
 - Create Gift Card:** Commissions (US)
 - Upgrade Customer Type:** Distributor
 - Create Recurring Order:** Weekly
 - Stop Increment:** 0
- UPC Code:**
- Avalara Tax Category:** PS125
- SKU:**
- Metal Type:** Gold
- Item Category:** FAST START

Buttons: CANCEL, SAVE CHANGES

2. Set up the pricing for the entire kit. This will determine pricing, not the items in the kit.

Once pricing has been set, click Save Changes.



Edit Product:

General Warehouse **Pricing** Availability Taxation Bill of Materials Subs/Points Kit Categories

Currency: Dollars (US) EXTENDED PRICING





	PRICE	TAX ON PRICE	SHIP ON PRICE	PCV	CCV
Retail	0.0000	0.0000	0.0000	0.0000	0.0000
Preferred	0.0000	0.0000	0.0000	0.0000	0.0000
Wholesale	0.0000	0.0000	0.0000	0.0000	0.0000
Employee	0.0000	0.0000	0.0000	0.0000	0.0000
SS-DH	0.0000	0.0000	0.0000	0.0000	0.0000
IL Wholesale	0.0000	0.0000	0.0000	0.0000	0.0000
SG Wholesale	0.0000	0.0000	0.0000	0.0000	0.0000

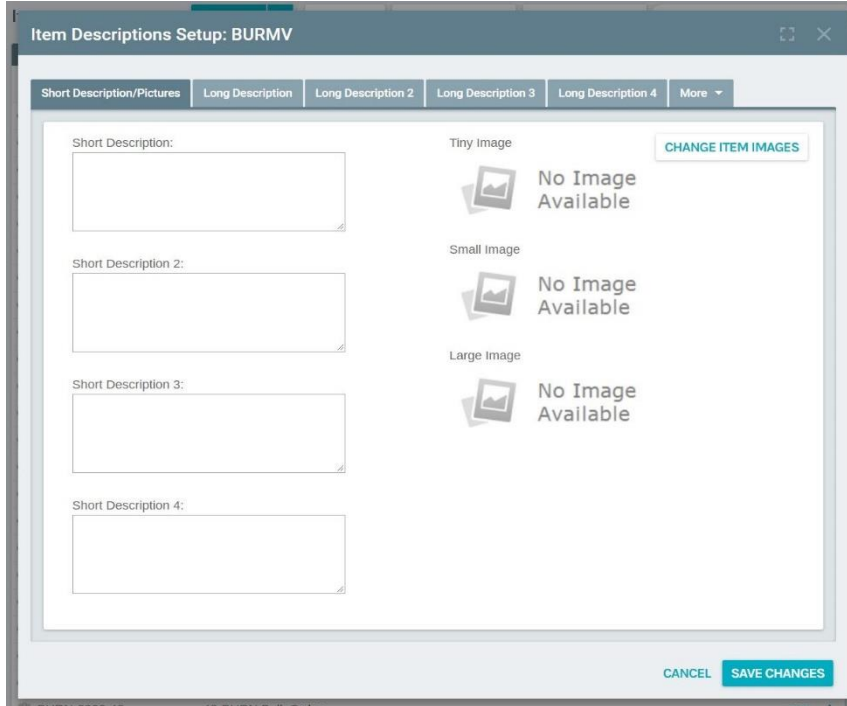
CANCEL **SAVE CHANGES**

3. Set up the web information / upload pictures for the item:

Navigate to Administration > Items > Click the Ellipses on the right > Edit web info

BACK1001	Backoffice Subscription - Annual Access	EDIT	⋮
Bort2	33	EDIT	⋮
BOSS	Annual Backoffice Subscription	EDIT	⋮
BURMV	Best Multi Vitamin	EDIT	⋮
Burn-2265	Red/Black Burn Band Sm		
BURN-2265m	Red/Black MASTER		
Burn-2272	Red/Black Burn Band Med		
Burn-2289	Red/Black Burn Band Large		
Burn-2296	Red/Black Burn Band XL		
BURN-2296-96	96-BURN Bulk Order		
Burn-2296	Violet/Black Burn Band Sm		

-  Edit Item
-  Edit Web Info
-  View Item Summary
-
-  Delete



4. Create the Kit items (Child Items).

These are the individual items that can go into a kit. These can be existing items.

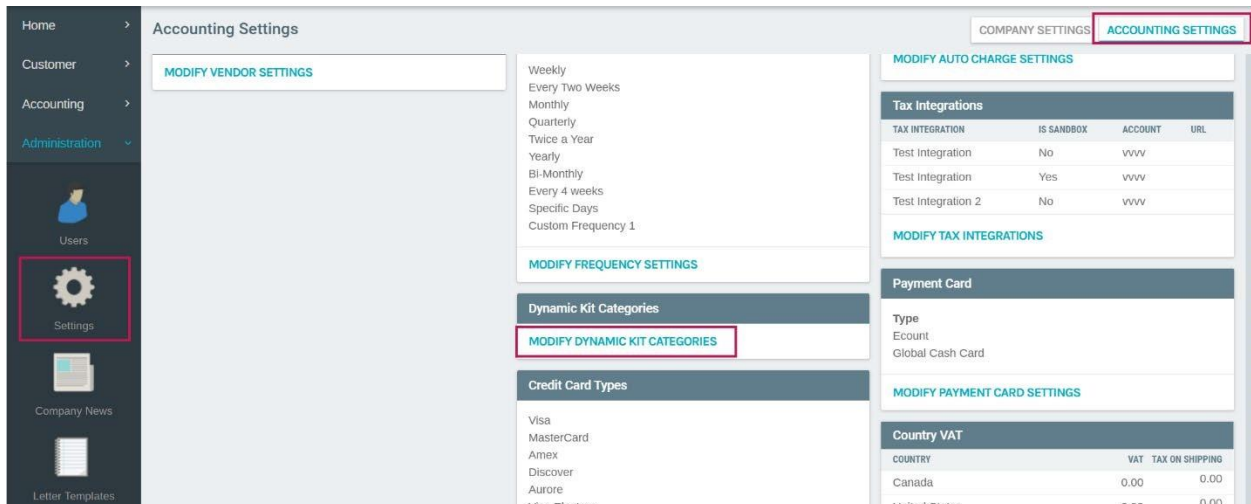
Follow the same steps as above to create an item.

Note: Kit Items themselves will be Standard item type NOT dynamic kit type. Exigo does not support Kits inside of Kits.

5. Create Kit Categories:

Navigate to Administration > Settings > Accounting Settings > Modify Kit Categories

After adding Categories just close, it will auto save.



Dynamic Kit Categories

ID	DESCRIPTION	EDIT
1	Beauty	EDIT
2	Widgets	EDIT
3	Suppliments	EDIT
4	Drinks	EDIT
5	Nutrition	EDIT
6	Fitness	EDIT
7	Cannisters	EDIT
8	Cosmetics	EDIT
9	Shakes	EDIT
10	Promo Materials	EDIT
11	Shampoo	EDIT
12	Conditioner	EDIT
13	Shower Gel	EDIT
14	Hand soap	EDIT
15	Static Kits	EDIT
16	ElisaTesting	EDIT
17	ElisaGroup	EDIT
18	Hats	EDIT
19	Shirts	EDIT

CANCEL **ADD KIT CATEGORY**

6. Navigate back to master item: configuration of the master item code.

Under bill of materials, hit "add category" and add all the item categories you would like to allow in the kit, and the number of items per category.

Edit Product: BURMV

General Warehouse Pricing Availability Taxation **Bill of Materials** Subs/Points Kit Categories

ADD CATEGORY

ID	KIT CATEGORY	QUANTITY
* ADD YOUR FIRST ITEM *		

Calculate Tax on Kit Detail
 Calculate Shipping on Kit Detail

CANCEL **SAVE CHANGES**

Annual Backoffice Subscription

Item Kit Setup

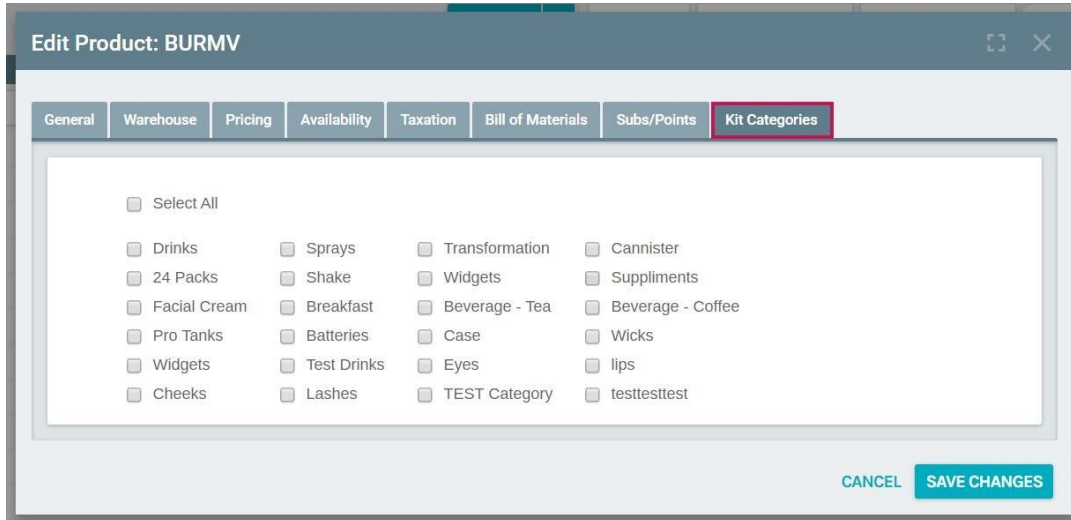
Item Code:

Quantity:

CANCEL **ADD ITEM**

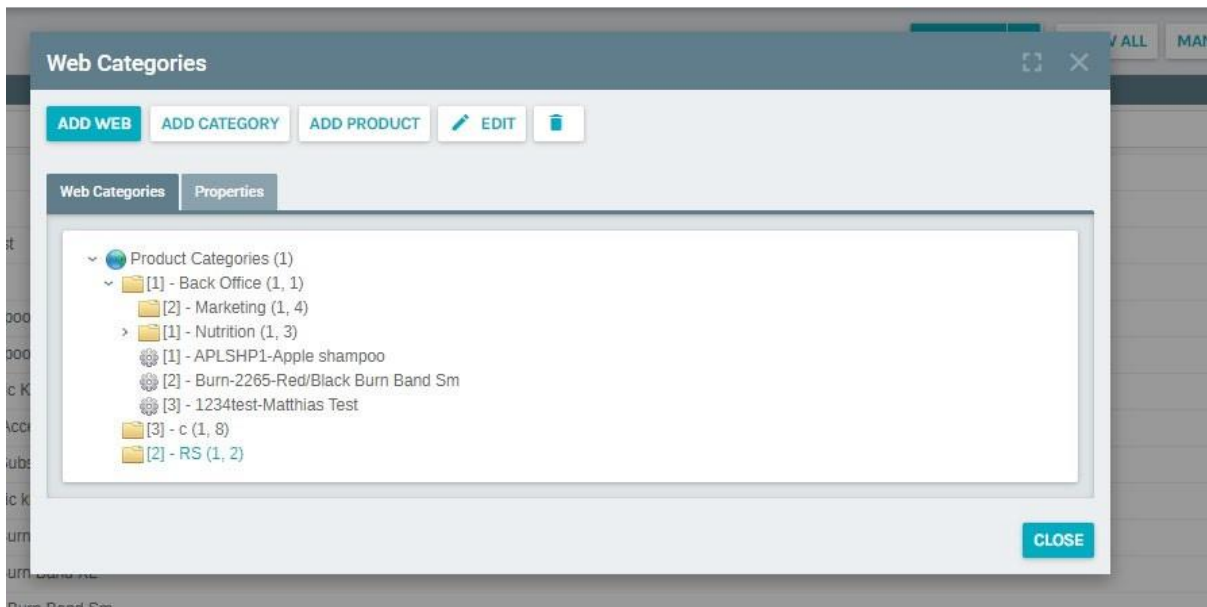
- Configure child item codes: When setting up child items, you will need to define which kit categories they are available in.

Note: the parent Item does **not** need this set up.



- Update your web categories to include your newly created Dynamic Kit item so it can be displayed on your website for purchase.

Navigate to Accounting > Items > Web Categories (top right)



Now add your product to the category or categories of your choice.

Static Kits

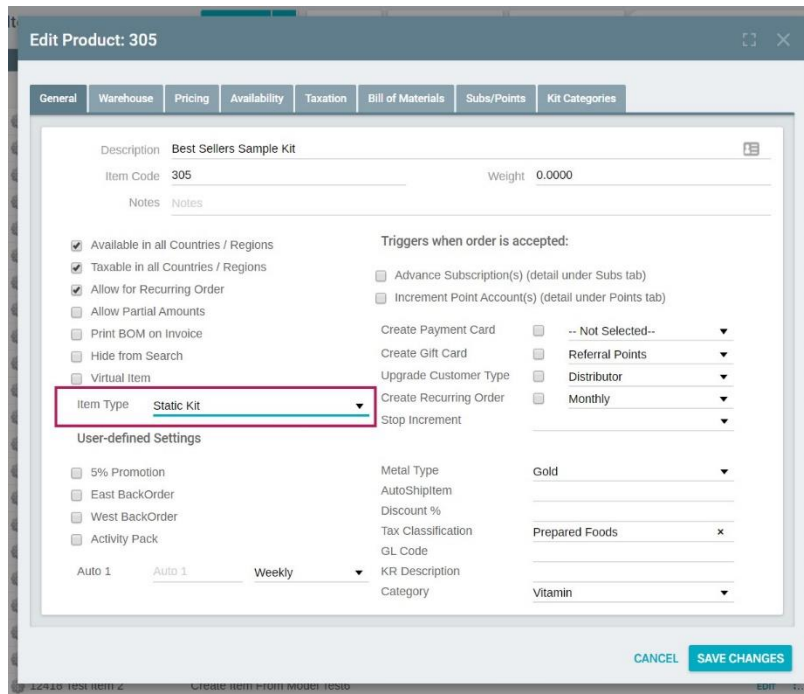
This is a predefined kit that automatically includes specific items as configured by the Company.

This kit does not allow customization.

How to set up a Static Kit:

1. Create master item code. This will determine pricing.

Make sure to configure the master item code to be a static kit.



Edit Product: 305

General Warehouse Pricing Availability Taxation Bill of Materials Subs/Points Kit Categories

Description: Best Sellers Sample Kit

Item Code: 305 Weight: 0.0000

Notes: Notes

Available in all Countries / Regions
 Taxable in all Countries / Regions
 Allow for Recurring Order
 Allow Partial Amounts
 Print BOM on Invoice
 Hide from Search
 Virtual Item
 Item Type: **Static Kit**

Triggers when order is accepted:

Advance Subscription(s) (detail under Subs tab)
 Increment Point Account(s) (detail under Points tab)

Create Payment Card: -- Not Selected--
 Create Gift Card: Referral Points
 Upgrade Customer Type: Distributor
 Create Recurring Order: Monthly
 Stop Increment:

User-defined Settings

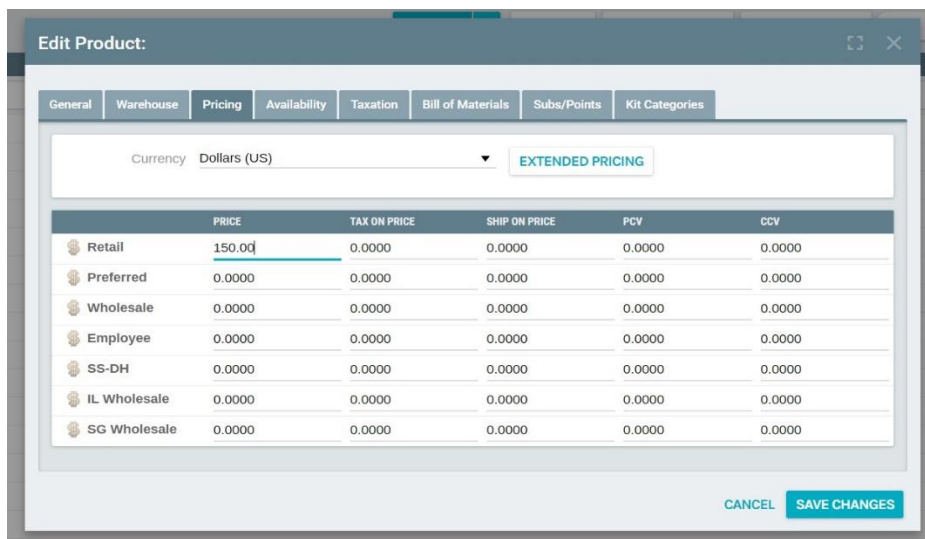
5% Promotion
 East BackOrder
 West BackOrder
 Activity Pack

Auto 1: Auto 1 Weekly

Metal Type: Gold
 AutoShipItem:
 Discount %:
 Tax Classification: Prepared Foods
 GL Code:
 KR Description:
 Category: Vitamin

CANCEL SAVE CHANGES

2. Set up the pricing for the entire kit



Edit Product:

General Warehouse Pricing Availability Taxation Bill of Materials Subs/Points Kit Categories



Currency: Dollars (US) EXTENDED PRICING

	PRICE	TAX ON PRICE	SHIP ON PRICE	PCV	CCV
Retail	150.00	0.0000	0.0000	0.0000	0.0000
Preferred	0.0000	0.0000	0.0000	0.0000	0.0000
Wholesale	0.0000	0.0000	0.0000	0.0000	0.0000
Employee	0.0000	0.0000	0.0000	0.0000	0.0000
SS-DH	0.0000	0.0000	0.0000	0.0000	0.0000
IL Wholesale	0.0000	0.0000	0.0000	0.0000	0.0000
SG Wholesale	0.0000	0.0000	0.0000	0.0000	0.0000

CANCEL SAVE CHANGES

3. Set up the web information/upload pictures for this item code

300	Product 300	EDIT	⋮
301	Product 301	EDIT	⋮
302	Product 302	EDIT	⋮
303	Product 303	EDIT	⋮
304	Product 304	EDIT	⋮
305	Best Sellers Sample Kit	EDIT	⋮
343434	Test		
365	Test Jewelry		
456	hfhjf		
7771	testproduct		
787878	Test Bill Of Materials_1		
800100kit	Test Kit 800100 for Jusuru		

-  Edit Item
-  Edit Web Info
-  View Item Summary
-
-  Delete

Item Descriptions Setup: 305

Short Description/Pictures | Long Description | Long Description 2 | Long Description 3 | Long Description 4 | Grouping | Web Categories


Short Description:

Short Description 2:


Short Description 3:

Short Description 4:


Tiny Image CHANGE ITEM IMAGES

 No Image Available

Small Image

 No Image Available

Large Image

 No Image Available

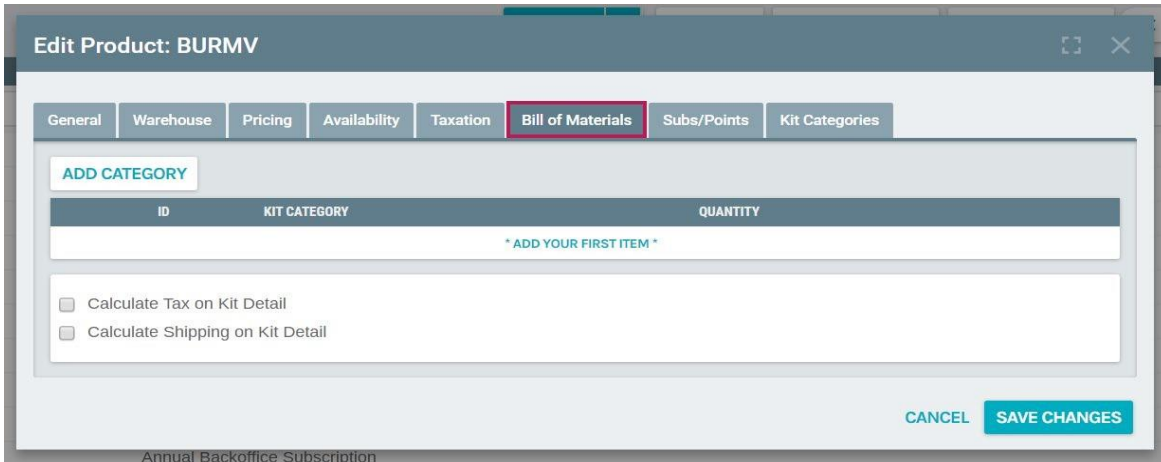
CANCEL SAVE CHANGES

4. Create child item codes/ and kit members. These can be preexisting items.

300	Product 300	EDIT	⋮
301	Product 301	EDIT	⋮
302	Product 302	EDIT	⋮
303	Product 303	EDIT	⋮
304	Product 304	EDIT	⋮
305	Best Sellers Sample Kit	EDIT	⋮

5. You may select how many items will be included in the main (parent) kit.

Note: Notice Qty on items can be determined here.



Edit Product: BURMV

General Warehouse Pricing Availability Taxation **Bill of Materials** Subs/Points Kit Categories

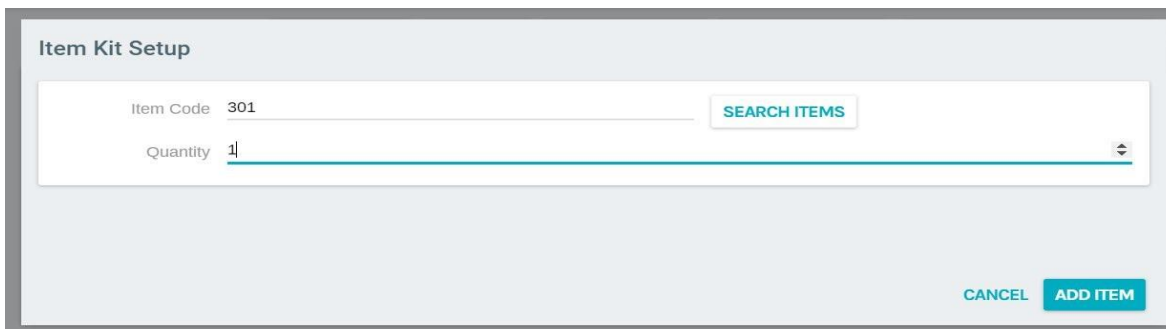
ADD CATEGORY

ID	KIT CATEGORY	QUANTITY
* ADD YOUR FIRST ITEM *		

Calculate Tax on Kit Detail
 Calculate Shipping on Kit Detail

CANCEL SAVE CHANGES

Annual Backoffice Subscription



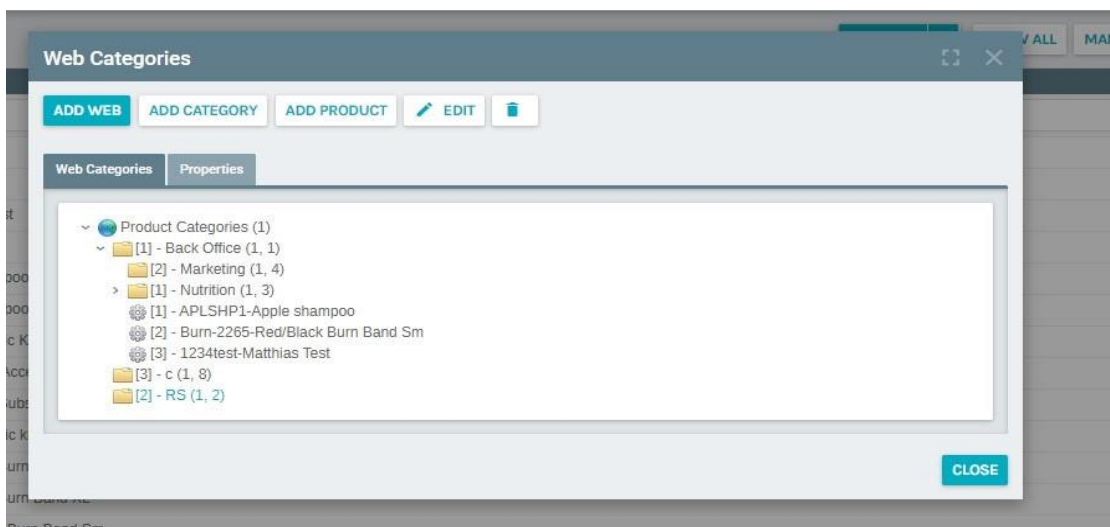
Item Kit Setup

Item Code 301 SEARCH ITEMS

Quantity 1

CANCEL ADD ITEM

6. Update your web categories to include your newly created Static Kit item so it can be displayed on your website for purchase.



Web Categories

ADD WEB ADD CATEGORY ADD PRODUCT EDIT

Web Categories Properties

- Product Categories (1)
 - [1] - Back Office (1, 1)
 - [2] - Marketing (1, 4)
 - [1] - Nutrition (1, 3)
 - [1] - APLSHP1-Apple shampoo
 - [2] - Burn-2265-Red/Black Burn Band Sm
 - [3] - 1234test-Matthias Test
 - [3] - c (1, 8)
 - [2] - RS (1, 2)

CLOSE