

Knowledgebase > SalesPad > Sales > Packages, Kits, and Pricing

Packages, Kits, and Pricing

Megan De Freitas - 2025-06-11 - Sales

Overview

Packages are grouped inventory items equivalent to Kits set up in Microsoft Dynamics GP, but SalesPad lists each line item in a Package separately, allowing for line-by-line customization inside the sales document. Users can change, add, and remove the components of a package as needed for each document. Package components can be comprised of inventory items and/or service items.

User Fields

In SalesPad, set up a user defined field called "xPackage"

1. Go to Modules > User Field Editor



2. Select Sales Line Item from the Bus. Objects column

User Field Editor					
📑 Close 🛛 📙 Save 🔹 Upda	te Database	: Table 👔 Update All Database Table	s 🕴 Design L	ayout 🛛 🐻 Export	阙 Import 🛛 🖼 Import Data
Bus. Objects	🚺 🖉 Use	r Fields 🛛 🕈 New 🗶 Delete 🗅 Co	y	📓 Field Propertie	s
Bus. Object 🛆	Seq 🛆	Field	Disabled		
License Plate	▲ 0	sd_CfgKey		Table Name:	Sales Line Item
License Plate Detail	0	sf_CfgKey		Field Name:	sd_CfgKey
Location	0	xImage		Map To:	- X
Opportunity	0	xItemPhoto		Screen Label:	Item Configurator Req Field
Opportunity Line Item	0	xSalesTransferBin		Field Types	Taut a Lanath: E0
Package	0	xSalesType		ned type.	Text Cengul. 50
Package Detail	0	xTransferBin		Blank Value:	
Prospect	0	XUDF		Value Options:	•
Purchase Line Item				Options	
Purchase Order					
Purchase Receipt				Field is Read	Only Field is Required (Returns Only)
Purchase Receipt Line Item				Field is a File	Attachment Field is Rich Text Memo
Quick Pick Category				Field is a Cus	tomer Lookup Cust. Class Lookup
Quick Pick Item				Field is a Hyp	erlink 🔄 Field is an Image
RMA				Field is Unico	de 🗌 Is Multi Select
RMA Line				View Permissions:	*
Sales Document				Edit Permissions:	*
Sales Line Item				Ouide Descete	
Sales Rep	=			Quick Report:	
Sales Territory				UDF Calculation:	
Service Transfer				Script (Beta):	
Service Transfer Line					
System User				Show on Sales Do	ocument Types
Vendor				Quote	Order Invoice Return
Vendor Addr					
Vendor Item					
	-				

- 3. Click the **New** button in the User Fields column
- 4. Enter the Field Name (xPackage) and select **OK**. The Field name will appear in the User Fields Column.

🔘 New User Field	×
Field Name2	
xPackage	
OK	Cancel

5. In Field Properties, enter "Package" into the screen label field, set field type to Text,

Table Name:	Sales Line Ite	m	
Field Name:	xPackage		
Map To:			-
Screen Label:	Package		
Field Type:	Text 🔻	Length:	100
Blank Value:			
Value Options:			
Options			
Field is a File A	Attachment	Field is Rich Tex	xt Memo
Field is a File A	Attachment omer Lookup erlink	Field is Rich Tex Cust. Class Lookup Field is an Imag Is Multi Select	xt Memo
 Field is a File A Field is a Cust Field is a Hype Field is Unicod View Permissions: 	Attachment omer Lookup erlink e	Field is Rich Tex Cust. Class Lookup Field is an Imag Is Multi Select	xt Memo je
 Field is a File A Field is a Cust Field is a Hype Field is Unicod View Permissions: Edit Permissions: 	Attachment omer Lookup erlink e *	Field is Rich Tex Cust. Class Lookup Field is an Imag Is Multi Select	xt Memo je
 Field is a File A Field is a Cust Field is a Hype Field is Unicod View Permissions: Edit Permissions: Quick Report: 	Attachment omer Lookup erlink e *	Field is Rich Tex Cust. Class Lookup Field is an Imag	xt Memo
 Field is a File A Field is a Cust Field is a Hype Field is Unicod View Permissions: Edit Permissions: Quick Report: UDF Calculation: 	Attachment omer Lookup erlink e *	Field is Rich Tex Cust. Class Lookup Field is an Imag	xt Memo
 Field is a File A Field is a Cust Field is a Hype Field is Unicod View Permissions: Edit Permissions: Quick Report: UDF Calculation: Script (Beta): 	Attachment omer Lookup erlink e *	Field is Rich Tex Cust. Class Lookup Field is an Imag Is Multi Select	xt Memo
 Field is a File A Field is a Cust Field is a Hype Field is Unicod View Permissions: Edit Permissions: Quick Report: UDF Calculation: Script (Beta): 	Attachment omer Lookup erlink e *	Field is Rich Tex Cust. Class Lookup Field is an Imag Is Multi Select	xt Memo

and Length to 100.

- 6. Click Save.
- 7. Click Update Database, and then click Yes.
- 8. Close the User Field Editor and log back in to SalesPad.

Note: Refer to the SalesPad <u>User Defined Fields</u> document for more detailed instructions on creating user defined fields.

Dynamics GP

Define the kit and its components in Dynamics GP (Cards > Inventory > Kits). The kit description must include the same Package Indicator entered in SalesPad Settings:

🛛 Item Kit Maintenance							
<u>F</u> ile <u>E</u> dit <u>T</u> ools <u>H</u> elp			sa Fabrik	cam, Inc. 4/12/2017			
🛃 Save 🗙 Delete				_			
Item Number ZTESTKIT		Q					
Description Sample Testing	Kit (Pkg)						
Cost of Goods Sold Account	From Component	nt Item 💿 From K	it Item				
Current Cost	\$0.00 S	tandard Cost		\$0.00			
Component Item Number	🔍 U of M 🔍	\lambda Quantity	Current Cost	*			
Description			Standard Cost	*			
ZTP01	Each	1		\$0.00 🔺			
SAMPLE	Each	1		\$0.00			
M1700	EACH	1		\$0.00			
		0.00		#0.00			

Notes - Adding Kits to sales documents:

- Once saved, you cannot change the quantity of a kit item (GP issue).
- By default, Kits with components on backorder will not show as backordered on the line item. Upon saving, quantities will be reduced to the quantity available to sell complete (only if the Default Kits to Backorder All setting is False in later versions). You can manually backorder kits by adding quantity to the QTY BO column, or if the Default Kits to Backorder All setting is available and set to True, all Kit quantities will automatically be set to backorder.

Adding Packages to a Sales Document

- 1. Open a new standard order
- 2. In the Line Items tab, click **New** to create a new line item
- 3. Input an inventory item that has been set up as a kit in Microsoft Dynamics GP

If Sales Line Components > Auto Run is set to True in the Security Editor, a window will pop up displaying the components for the selected package. This window can be accessed at any time to view components, by clicking the **Actions** dropdown () on the sales document Line Items tab and selecting Components. The Components window will also display components of a GP-defined Kit, but these cannot be modified in SalesPad.

Package item on the Components screen:

Components			
tem Number	Item Number	Item Description	Qty Per UOfM
OMPUTER			
<u>o</u>			
ARGE			
DWR-T1I-0001			
			OK Cased



	rten Number	Item Description	Qty Per	UOfM
DWR-DCD-0001	E Kit: HDWR-DCD-0001			
	ITCT-CIR-CD85	Integrated Circuit, PCD85-1	1	Each
	RESR-TRR-68KM	Resistor, 6.8 Kohm	1	Each
	RMTL-CAP-10MF	Capacitor, .10mF	1	Each
	TRAN-STR-N394	Transistor, 2N394	1	Each
	5-ASSY	Assembly Labor	0.5	HOUR

Click **OK** to return to the sales document.

SalesPad will designate a kit or package item as a non-inventory item. Kit items will only display the main item on the sales document, whereas a package will list each item that makes up the package by grouping the items together on the sales document. Each component item of a package can then be modified as needed for the individual order.

Note: The main item in a package will post to the non-inventory GL account. Dynamics GP only allows you to set up one NI GL account. The non-inventory GL account is set up under Posting > Posting Accounts in Dynamics GP.

Viewing Package/Kit Components in Inventory

Aside from the sales document, in later versions of SalesPad (approximately 4.0.660+) you can view kit components on the Item Kit Components tab in the Inventory Analysis module or from Inventory Lookup. Details of the kit that can be viewed include item number and description, kit number, component U of M, total weight, and availability.

ten nomber		Description			UOfM Sched		
ISSOR-SLEEP		Assorted Sleeping Bag(pk)	a)		EACH		
HAN-PHN-0001		Standard Phone Package	(pkg)		PHONE 1-10		
HSY-STD-0001		Standard Phone System (okg)		PHONE 1-10		
3 7 (Description) Like ''	150kg 1%						_
। द्वा 🖓 (Description) Like " Item Priventory Item Priv	noko 1% 💌 aperties Item Sales Item Purchas	es Item Notes Item Serial/Lot Numbers	Item Analysis Item Q	Quick Report	Item Substitutes	Item User Fields	Item Kit Compene
Description] Like * Item Inventory Item Pro Tem Number	isonomia V operties Item Sales Item Purchas Item Description	es Item Notes Item Serial/Lot Numbers Kit Number	Item Analysis Item Q Qty / Kit	Quick Report	Item Substitutes	Item User Fields Item Shi	Item Kit Compene
Desciption] Like ** Item Inventory Item Pro Item Number ACCS+IDS-2EAR	Item Sales Item Purchas Item Cescription Headset - Dual Ear	es Item Notes Item Serial/Lot Numbers Kit Number PHSY-STD-0001	Item Analysis Item Q Qty / Kit 10	Quick Report Component L Each	Item Substitutes J of M	Item User Fields Item Shi	[tem Kit Compene pping Weight 0.50
(Description) Like The Inventory I the Pro Them Number ACCS-HDS-2EAR PHON-84.5-1230	Item Sales Item Purchas Item Description Headset - Dual Ear Handset, multi-line	es Item Notes Item Serial/Lot Numbers Kit Number PHSY-5TD-0001 PHSY-5TD-0001	Item Analysis Item Q Qty / Kit 10 10	Quick Report Component L Each Each	Item Substitutes J of M	Item User Fields Item Shi	Item Kit Compene pping Weight 0.50 3.00
Comparison (Description) Like Transition Temporation (Description) (Description) (Tem Number ACCS+IDS-2EAR PHONEUS-1220) WIRE-MCD-0001	pertie Item Sales Item Purchas Item Description Headset - Dual Ear Handset,mult-line Multi conductor wire	es Item Notes Item Serial/Lot Number Kit Number PHSY-STD-0001 PHSY-STD-0001 PHSY-STD-0001	Item Analysis Item Q Qty / Kit 10 10 100	tuick Report	Item Substitutes	Item User Fields Item Shi	Item Kit Compene pping Weight 0.50 3.00 175.00

Hiding Package Components on Printed Reports

To hide package components from showing on a printed report use the following instructions.

- Open Report Designer on the report you wish to modify (Modules Menu > System > Report Manager > (select a report) > Design
- 2. Find the bar **Detail1**, click on it, and then click the Scripts button:



and add an On_Before print script as shown below:

private void Detail1_BeforePrint(object sender, System.Drawing.Printing.PrintEventArgs e) { string NonInvStatus = ""; string PkgInf = ""; NonInvStatus = DetailReport.GetCurrentColumnValue("Is_Non_Inventory").ToString(); PkgInf = DetailReport.GetCurrentColumnValue("xPackage").ToString(); label3.Text = NonInvStatus;

```
if( PkgInf == "" )
{
```

```
e.Cancel = false;
}
else
{
if ( NonInvStatus.ToUpper() == "FALSE" )
{
e.Cancel = true;
}
else
{
e.Cancel = false;
}
}
}
```

3. Save your report

A Preview will show all line items except the package component lines.

To hide Kit Components, follow the steps above, but use the following script: (see disclaimer on the following page*)

```
object val = DetailReport.GetCurrentColumnValue("Component_Seq_Num");
if(Convert.ToInt32(val) > 0)
{
    e.Cancel = true;
}
```

*Important Reminders and Suggestions:

- This script is considered "as is" and any changes/modifications that might be needed would require a signed quote.
- If you are required to change a Security Option or Setting, your users will need to restart SalesPad before the changes take effect.
- Please install this on a test machine and run it against a test database before using it on your live system.
- You should always make sure you have a database backup prior to installing new software.
- Database Triggers, after final delivery, are the responsibility of the customer. SalesPad will not be responsible for maintaining copies of custom database objects.
- C# scripts, after final delivery, are the responsibility of the customer.

Retail+ price levels are created in Dynamics GP. In SalesPad, Retail+ pricing allows you to

create substitute items for package components and assign them markup or markdown prices that will affect the price of the package.

Retail+ can only be used with fixed currency pricing. If there is a Retail+ price level created, all packages will by default use the Retail+ pricing, regardless of whether a Retail+ price list is defined for the components.

Note: If items do not have price levels, the *Prices Not Required in Price List* setting within Sales Order Processing setup in Dynamics GP needs to be checked to allow the document to be saved.

Creating Retail+ Price Level

In Dynamics GP, go to Microsoft Dynamics GP Button > Tools > Setup > Inventory > Price Level to create the Retail+ price level:

📑 Price Level Se	tup		. 🗆 💌
File Edit Too	ols Help	sa Fabrikam, In	c. 4/12/2017
🛃 Save 🌌	Cļear 🗙	<u>D</u> elete	_
Price Level	RETAIL+	Q 🗋	
Description	Price level fo	r Packages	
	y Price Level	•	0

Creating Retail+ Price on Kit Components

- 1. Set up a kit with at least one component
- 2. Set up a price level of Retail+ for each component. Make sure to use the Currency Amount price method.
- Each price level on the header needs to have a + price level set up to process packages correctly. For example, INTERNATIONAL price level would need an INTERNATIONAL+ price level set up for packages. These price levels do not get assigned to items. They simply need to be present in the system.
- 4. The + price level can be set up on individual items to be used as Upcharge items, with the associated price being the amount the kit should be upcharged when that specific item is substituted in.

Settings

Package Indicator – The indicator in the item description that designates that the Kit Item should be treated as a Package Item (Ex: (PKG)). This can go anywhere in the item description.

Package Item Prefix* – The prefix to prepend to the package item number entered on a sales document (Ex. ^). The package item will be a non-inventory item on the document. This can be different than the non inventory indicator specified in Settings > Non Inventory Item Prefix.

Sales Line Item Package Smart Field – The Sales Line Item user field (xPackage) that will store the parent package item number (so line items will be added as package components). The creation of this user field is described in page 2.

Default Kits to Backorder All – If True, all Kit items on a sales document are automatically backordered. By default, Kits with components on backorder will not show as backordered on the line item, but, upon save, are reduced to the quantity available to sell complete.

Apply Discounts To Package Items – If True, existing discounts will be applied to package items.

Delete Entire Package – If True, all lines in a package will be deleted when the top item is deleted.

Prompt To Roll Down Package Quantity – If True, the quantity for every line in a package will adjust when the header item quantity is changed.

Reprice Package Lines When Qty Changes – If True, SalesPad will check GP price lists for tiered pricing and adjust the price as needed if the package quantity is changed.

Security

Sales Line Components- Allows users to see any components for a Sales Line Item using the Sales Line Components Action.

Item Kit Components- Allows users to see the Components tab in the Inventory Lookup window