

How to Add Bundle Type Item to Sales Transaction

1. Before you proceed, make sure the **Bundle** item type has been created. Here is a sample Bundle Details.

| Item | Quantity | Description | Unit Measure | Unit |
|--------------------|----------|------------------------|--------------|------|
| bundle component02 | 2.00 | for bundle component02 | Each | 1.00 |
| bundle component01 | 1.00 | for bundle component | 2pcs | 2.00 |
| | 0.00 | | | 0.00 |

The 'List Bundle Items Separately' option will also dictate if the bundle components will be added to the sales transaction or not. If the option is checked, only the bundle components will be added to the transaction. Else, the parent item will be added.

Item - Bundle

New Save Search Delete Undo Duplicate Close

Details Setup Pricing Bundle Details Comments (0) Attachments (0) Audit Log (9)

GL Accounts Location Sales Point of Sale Contract Item Xref Motor Fuel Tax Others

Stocked Item: ☐

Dyed Fuel: ☐

Barcode Print:

MSDS Required: ☐

EPA Number:

Inbound Tax: ☐

Outbound Tax: ☐

Restricted Chemical: ☐

Fuel Item: ☐

List Bundle Items Separately: ☒

RINS

Fuel Inspect Fee:

Feed

Tonnage Tax: ☐

Load tracking: ☐

Mix Order:

Hand Add Ingredients: ☐

Medication Tag:

Ingredient Tag:

Volume Rebate Group:

2. Open the transaction screen, e.g. Quote, Sales Order, Invoice, or Credit Memo , where you will add the item.
 3. Fill out the necessary header details on the transaction screen.
 4. On grid area | **Item No** field, select the bundle type item.
- Here is a sample transaction after adding selecting above bundle item.

Invoice - ABC Reseller

New Save Search Delete Undo Print Add Shipment Email Duplicate Post Recap Recurring Close

Details Instructions Payments (0) Attachments (0) Audit Log (1) Comments (0)

Type: Standard Recurring: ☐ Bill To: ABC Reseller Freight Term: Invoice No: SI-205 Split:

Customer: ABC Reseller Ship To: ABC Reseller Deliver/Pickup: PO Number: BOL Number:

Invoice Date: 04/22/2016 Post: 04/22/2016 Ship Via: UPS Due Date: 05/22/2016 Salesperson: Jared Smith Currency: USD

Location: 0001 - Fort Wayne Terms: 5% 5, Net 30 Accrual: 1 Ship Date: 04/22/2016 Comments:

| Item No | Contract No | Contract Seq | Description | Ordered | Order UOM | Shipped | UOM | Discount | Tax | Sub Currency | Price | Total | Weight UOM | Tax Group |
|--------------------|-------------|--------------|----------------|---------|-----------|---------|-----|----------|------|--------------|----------|-------|------------|-----------|
| bundle component01 | | | for bundle ... | 1.00 | 1.00 | 2pcs | | 0.00% | 0.00 | | 2.246912 | 2.25 | | IN SST |
| bundle component02 | | | for bundle ... | 2.00 | 2.00 | Each | | 0.00% | 0.00 | | 3.000000 | 6.00 | | IN SST |
| | | | | 0.00 | 0.00 | | | 0.00% | 0.00 | | 0.000000 | 0.00 | | |



If the parent bundle is used on the transaction, the stock and GL accounts will still use that of the components'.