



Process

Documentation

Department:

Customer Support

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NAME OF PROCESS

Setting up and Using Equipment and Sales Kits

Use Case / Objectives

This guide describes how to set up [Equipment Kits](#) and [Sales Item Kits](#) in RentalMan as well as how to add them to a [Rental Contract](#) or [Sales Order](#). An equipment kit is a collection of category/class components that are always rented together. An equipment kit is entered as one item on a rental contract. A sales item kit is a collection of sales items that are always sold together. A sales item kit is entered as one item on a sales order.

If your organization rents the same grouping of equipment or sells the same collection of items repeatedly, set up equipment kits and sales item kits so that you can quickly enter the kit numbers on your rental contracts and sales orders. With the proper setup, the general ledger and inventory quantities will be updated appropriately when kits are rented or sold.

Configuration, Training, and Reporting

This document assumes you know how to perform basic Search functionality to find information in the system (i.e., F4 search). The steps for this are not included within this document.

Field definitions for applicable tasks are available in the Reference Glossary. To view these definitions either click on the screen name in the task or scroll to the end of the documentation to view the Glossary.

Menu options to access:

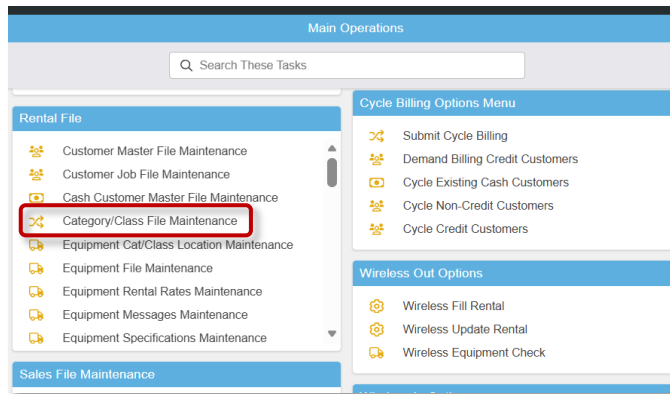
Main Operations => Rental File => Category/Class File Maintenance

Main Operations => Rental File => Kit File Maintenance

Setup and Creation of an Equipment Kit

Process Steps

1. Log into the [Roleplay Environment](#) using your credentials.
2. Select the **Main Operations** menu from the left toolbar.
3. In the **Rental File** section, click on the **Category/Class File Maintenance** option.

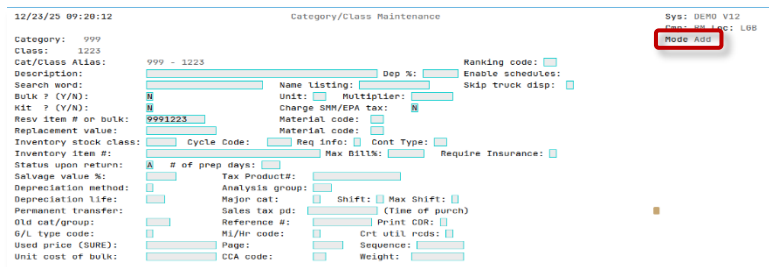


- a. The **Category/Class Maintenance - Launch** screen opens.



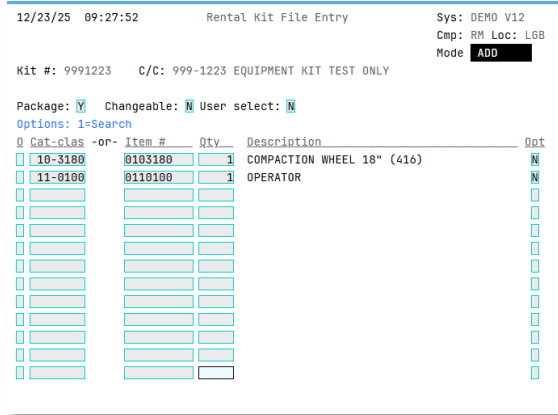
4. Type in the **Category** and **Class** for the equipment you would like to create an **Equipment Kit** and press Enter. **NOTE:** This should be a unique combination in the system *unless* you are updating an existing **Equipment Kit**. **NOTE 2:** For the purpose of this article, we are focusing on adding a **NEW Equipment Kit**.

- a. The **Category/Class Maintenance - Details** screen opens in **ADD Mode** for the entered category/class.

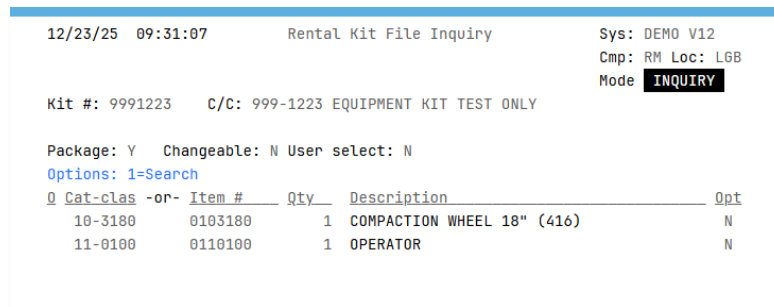


5. Type in the details for your **Equipment Kit**, including **Description** and **Search Word**.
6. Type Y in both the **Bulk? (Y/N)** and the **Kit? (Y/N)** fields.
7. Make note of the **Resv Item # or bulk** value for use below.

12. In the *Package* field, type **Y** if the kit has one rental rate as a package or type **N** to use the rental rates for each component in the kit.
13. In the *Changeable* field, type **Y** if you want to allow a user to update/change any of the components of the kit when it entered on a contract.
14. In the *User select* field, type **Y** if only one component may be selected.
15. From here you will enter the *Cat-class* or *Item #* for the components of your kit.
NOTE: To search, type **1** in the *O* field and press **Enter**. **NOTE 2:** The *Qty* field will default to 1 but can be updated to the desired quantity.



16. Once you have added all the components for the kit, press **Enter** to save.
 - a. The kit saves and the **Rental Kit File Maintenance - Launch** screen displays.
17. To see the details of your saved kit, press **F10** on your keyboard or click on **F10 Inquiry** in the **Display Functions** menu to change the *Mode* to **Inquiry** then type in the *Kit #* and press **Enter**.
 - a. The **Rental Kit File Inquiry** screen opens displaying the details of the entered kit.



Adding an Equipment Kit to a Rental Contract

Process Steps

1. Navigate to the **Main Operations** screen.
2. In the **Rental** section, click on the Create Rental option to open the **Create Rental** screen. **NOTE:** For assistance with creating a rental contract, please refer to the [Create a Rental Contract \[RolePlay\] - PDF](#) document on the resources website.
3. Type in the Cust # or Name and press Enter.
4. Select a Job Name and press Enter.
5. Update any necessary details on **Create Rental Customer Information** screen including the *Est Return* and *Ordered by* fields and press Enter.
6. On the **Create Rental Equipment Information** screen, in the *Equipment #* field, type in your Equipment Kit number and press Enter.

7. Depending on the equipment in your kit, it maybe necessary to select specific item numbers for your kit and the **Equipment Search by Equipment #** field will display.

Op	Equip #	Typ	Make	Model	Yr	Serial #	Lst/ Est	Status	FS	CN	AP	Service Due	Yard	Cur	Asn
<input type="checkbox"/>	9282	R R	BACKHOE	BACKHOE	23	BACKHOE700	11/16/25	AVAILABLE	N			.000 ***		L6B	L6B
<input checked="" type="checkbox"/>	9317	R	BACK2	BACK2	24	BACK2	10/15/25	ON RENT	N			100.000 **		L6B	L6B
<input checked="" type="checkbox"/>	9318	R	BACK3	BACK3	24	BACK3		AVAILABLE	N			100.000 **		L6B	L6B

8. If that is the case, type 1 in the *Op* field next to the desired item and press Enter. **NOTE:** Repeat for each item, as necessary. **NOTE 2:** If any of the items in your kit are **ON RENT**, you will not be able to add them to your rental contract and will need to select a different item number.
9. If necessary, select the **Dynamic Rates** for your items and any **Suggested Items** pressing Enter to continue.
 - a. The **Create Rental Equipment Information** screen displays and the selected items display in the list.

12/23/25 10:35:30 Create Rental Equipment Information

Type option, press Enter.
 1=Search 2=Detail 3=Avail 4=Dsc 6=Eqp msg 7=Sug eqp 8=Orig rates ...

Opt	Equipment #	Qty	Description	Yard	Total Weight:
<input type="checkbox"/>	9991223	1	EQUIPMENT KIT TEST ONLY		
<input type="checkbox"/>	9318	1	BACKHOE TRACTOR		
<input type="checkbox"/>	9498	1			
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

Thanks for the opportunity to demo our product....
 Backhoes

Sales/Misc 1=Search 2=Detail 5=Inquiry

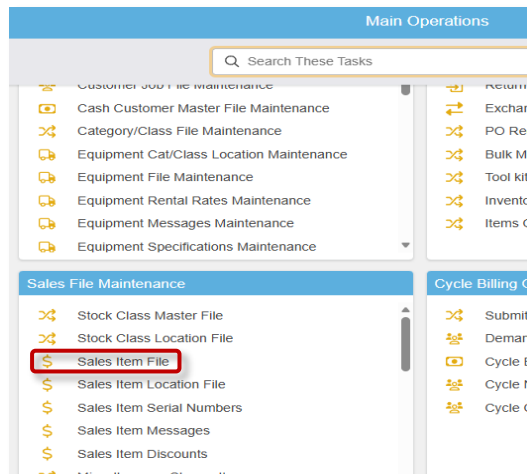
Op	Item #	Qty	UM	Description	Price	Sold
<input type="checkbox"/>	TXSRG	1.00	EA	TEXAS SURCHARGE		
<input type="checkbox"/>	EPA2	1.00	EA	EPA CHARGE		
<input type="checkbox"/>	ENV	1.00	EA	ENVIRONMENTAL CHARGE		
<input type="checkbox"/>						

10. At this time, you can add additional items to your reservation.
11. Once all items are added, review the information and press Enter to continue.
12. Press Enter on the **Create Rental Review** screen to write the rental contract.

Setup and Creation of a Sales Kit

Process Steps

1. Log into the [Roleplay Environment](#) using your credentials.
2. Select the **Main Operations** menu from the left toolbar.
3. In the **Sales File Maintenance** section, click on the **Sales Item File** option.



- a. The **Sales Inventory Maintenance - Launch** screen opens.

12/19/25 09:08:04	Sales Inventory Maintenance	Sys: DEMO V12
Item number: <input type="text"/>		Cmp: RM Loc: LGB
Stock Class: <input type="text"/>		Mode Change

4. If the **Mode** is not **ADD**, press F6 on you keyboard or click on F06 Add in the **Display Functions** menu.
 - a. The **Mode** is now **ADD** and we can begin to create our Sales Item Kit.

12/23/25 08:25:31	Sales Inventory Maintenance	Sys: DEMO V12
Item number: <input type="text"/>		Cmp: RM Loc: LGB
Stock Class: <input type="text"/>		Mode Add

5. Type in the **Item Number** field.
6. Type in the **Stock Class** field or press F4 to search.
7. Press Enter.
 - a. The **Sales Inventory Maintenance- Details** screen opens and the **Item number** and **Stock class** entered display.

12/23/25 08:29:09 Sales Inventory Maintenance Sys: DEMO V12
 Item number: TEST SALES KIT Cmp: RM Loc: L6B
 Stock class: DECAL DECALS Mode: Add Status code: A
 Stock status: P/M/E code: P
 Description:
 Search word: TEST SALES KIT Last cost update:
 MF0 Item#: TEST SALES KIT UPC: Cd: UP
 G/L category: 100 Pricing at Cmp(N)/Whs(W)/Loc(Y):
 Tax product#: Optional: used to auto calculate cost
 Last/current cost: USD Based on: (L/R) % of L/R:
 List price: L Optional: used to calculate R/P/D prices
 Regular price: R <- Based on: (C/L) % of C/L:
 Preferred price: <-- Based on: (C/L/R) % of C/L/R:
 Dealer price: <-- Based on: (C/L/R/M) % of C/L/R:
 Usual vendor: 147 ALVEY'S SIGN INC Omit from ENB:
 1st U/M: EA 2nd U/M/qty: 3rd U/M/qty:
 Rental cat/class:
 Serialized (Y/N): Taxable (Y/N): Discountable (Y/N):
 Inventoried (Y/N): Commissionable (Y/N): Expected profit %:
 Inventory class: Cost overhead %: Com % in/out:
 Freight %: Excise tax %: Material code:

8. Type in the details for your item, making sure to update the value in the *Inventoried* (Y/N) field to N.

12/23/25 08:29:09 Sales Inventory Maintenance Sys: DEMO V12
 Item number: TEST SALES KIT Cmp: RM Loc: L6B
 Stock class: DECAL DECALS Mode: Add Status code: A
 Stock status: P/M/E code: P
 Description: DECAL KIT FOR SALE
 Search word: DECAL KIT Last cost update:
 MF0 Item#: TEST SALES KIT UPC: Cd: UP
 G/L category: 100 Pricing at Cmp(N)/Whs(W)/Loc(Y):
 Tax product#: Optional: used to auto calculate cost
 Last/current cost: 75.000 C USD Based on: (L/R) % of L/R:
 List price: 100.000 L Optional: used to calculate R/P/D prices
 Regular price: 100.000 R <- Based on: (C/L) % of C/L:
 Preferred price: <-- Based on: (C/L/R) % of C/L/R:
 Dealer price: <-- Based on: (C/L/R/M) % of C/L/R:
 Usual vendor: 147 ALVEY'S SIGN INC Omit from ENB:
 1st U/M: EA 2nd U/M/qty: 3rd U/M/qty:
 Rental cat/class:
 Serialized (Y/N): Taxable (Y/N): Discountable (Y/N):
 Inventoried (Y/N): N Commissionable (Y/N): Expected profit %:
 Inventory class: Cost overhead %: Com % in/out:
 Freight %: Excise tax %: Material code:

9. Review the information and press Enter twice to add the item.
 - a. The **Sales Inventory Maintenance - Launch** screen displays.
10. Next we will add the components to the sales item kit.
11. Press F3 to return to the **Main Operations** screen.
12. In the **Sales File Maintenance** section, click on the **Sales Item Kit File** option.

Main Operations
 Search These Tasks
 Equipment Specifications Maintenance
 Sales File Maintenance
 File Cabinet Maintenance
 Update Items from Vendor Price List
 Sales Item Kit File
 Sales Item Cross Reference
 Sales Item Specifications
 Suggested Sales Items File
 Stock Class Master File Listing
 Ancillary Rule Maintenance
 Stock Class Location File Listing
 Wireless In Options
 Wireless End Rental
 Wireless Equipment Check
 Wireless Equipment Exchange
 Wireless Return Equipment

a. The **Sales Kit File Maintenance - Launch** screen opens.

12/23/25 08:42:30 Sales Kit File Maintenance Sys: DEMO V12
 Cmp: RM Loc: L6B
 Mode: CHANGE
 Item number:
 Stock Class:

13. Type in the *Item number* and *Stock Class* for your Sales Item Kit and press Enter.
 - a. The **Sales Kit File Entry** screen opens for your Sales Item Kit.

Adding a Sales Item Kit to a Sales Invoice

Process Steps

When selling the kit on a sales invoice, all the components in the kit will be removed from inventory. The general ledger entry will affect the correct cost of goods sold account and inventory account for each item accordingly.

1. Navigate to the **Main Operations** screen.
2. In the **Sales** section, click on the **Create Sales Order** option to open the **Parts and Merchandise Order Entry** screen. **NOTE:** For assistance with creating a sales order, please refer to the [Creating a Sales Order \[RolePlay\] - PDF](#) document on the resources website.
3. Type in the *Cust # or name* and press Enter.
4. On the **Customer Job Selection** screen, type 1 next to the desired *Job Name* and press Enter.
5. Update any desired information on the **Customer Information** screen including the *Ordered By* field and press Enter twice.
6. On the **Item Information** screen, type in the *Item #* and press Enter. **NOTE:** If you do not know the item number, type 1 in the *Opt* field and press Enter to open the item search screen.
 - a. The **Item Information** screen refreshes to display the entered kit's information.

12/23/25 11:40:15 Item Information Sys: DEMO V12
Cmp: RM Loc: LGB

Type option, press Enter.
1=Search 2=Detail 3=History 4=Qty 6=Sales Msgs 7=Suggested items

Opt	Item #	Ship Qty	UM	Description	Reg price	Sold price
<input type="checkbox"/>	TEST SALES KIT	1.00	EA	DECAL KIT FOR SALE	100.000	95.000
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

Bottom

7. Review the order information and press Enter to continue.
8. Review the information on the **Sales Order Review** screen and press Enter to complete the sales order.

Reference Glossary

Field Definitions for Tasks

Category/Class Maintenance - Launch

- *Category* - Enter the code of the category you want to view, update, or create.
- *Class* - Enter the code of the class you want to view, update, or create.

Category/Class Maintenance - Details

- *Category* - Displays the code of the category that you are creating, updating, or reviewing.
- *Class* - Displays the code of the class that you are creating, updating, or reviewing.
- *Description* - Enter a brief description of the category/class.
- *Search word* - Enter one or two words to be used as search words for this category/class in primary searches and alphabetical sorts on reports. When creating search words for any of the entities in the system, it is recommended that you develop a standard format for them and remain consistent as you assign them.
- *Name Listing* - Enter the NC8/NGP code combination associated with this category/class. If you do not know the code, press F4 to search for it. **NC8/NGP** codes are set up in *Equipment Name Listing*, and they are used in the European Union to classify products.
- *Bulk* - Indicate whether this category/class is for bulk items. You must create a category/class location record for bulk items. Set this field to **Y** if the category/class is a rental kit, and you set the *Kit* field to **Y**.
- *Unit* - Enter the unit of measure for this category/class - such as LF - linear foot or SF - square foot. In conjunction with the *Multiplier* field, you can analyze productivity of yard personnel for all locations based on movement or on profit (since pricing may vary by different market areas).
- *Multiplier* - Enter the value to multiply against the quantity of the item for productivity analysis. For example, if the category/class is for 9' planks and you enter LF - linear foot in the *Unit* field, enter 9 as the *multiplier*. If a quantity of 10 is entered for this category/class on a rental contract, that is multiplied by 9 to arrive at 90 linear feet, and that is the amount used when analyzing productivity of yard personnel.
- *Kit* - Indicate if this category/class is a kit. If you set this field to **Y**, you must also set the *Bulk* field to **Y**.
- *Charge SMM/EPA tax* - Use the *Charge SMM/EPA Tax* field to indicate whether you want environmental (non-SMM) charges to default on rental contracts for equipment in this category/class. In order for this functionality to work, you must also set the *Use EPA charge* field to **Y** in control record **EPACHG** to automatically add an environmental charge item to rental contracts. If the Select certain equipment field in the **EPACHG**

control record is set to Y, the system looks at the setting in the *Charge SMM/EPA tax* field when a rental reservation/quote is entered to determine whether it should calculate an estimate of the SMM/EPA charges for the reservation/quote.

- *Reservation item number or bulk* - Enter the number to use when entering this category/class on a rental reservation or when entering bulk items on a rental contract. This number can be a combination of the category and class codes, or you can create a new number.
- *Material code* - Enter the code that represents the material type for this category/class when it is rented. This code can be used to classify the category/class for VAT purposes.
- *Replacement value* - Enter the replacement value of equipment in this category/class. For bulk equipment, if the unit cost of bulk for this category/class is zero, the system will use this amount for the cost of goods sold and relief of inventory (dollar value per unit) when it writes the general ledger entry. This field is also the second choice for unit selling price if used *price (SURE)* is zero for bulk equipment. When a piece of equipment is added to the equipment master file whose cost is greater than this replacement value in its corresponding category/class master record, this value is updated by the system for equipment that is not *type O* (owned) and the *Bulk* field is equal to N. The replacement value is useful information if the equipment is lost or damaged.
- *Material code* - Enter the code that represents the material type for this category/class when it is sold. This code can be used to classify the category/class for VAT purposes.
- *Inventory stock class* - Enter the sales stock code associated with the equipment in this category/class. If equipment in this category/class is sold, this stock class code is used to determine the general ledger category from which to determine sales revenue distribution.
- *Cycle code* - If applicable, enter the code that represents the days in a cycle count duration that equipment in this category/class should be cycle counted.
- *Inventory item number* - Enter the item number from your sales inventory to use when new equipment is transferred into this category/class.
- *Max bill percentage* - Enter the percentage of the maximum billed amount per unit that calculates for the length of a rental contract. This percentage is based on the equipment's replacement value, so for example, if a piece of equipment has a replacement value of \$100,000, what is the percentage of that amount that you would want as the maximum amount you would bill a customer for renting it.
- *Status upon return* - Enter the code that represents that status of equipment in this category/class when it is returned. The equipment stays at this status until the Number of prep days expires, or until someone changes the status in Equipment Status Change.

- *Number of preparation days* - Enter the number of days necessary to prepare the equipment for the next rental. This setting is used to determine availability of equipment for rental contracts.
- *Salvage value percentage* - If you are operating in Canada, enter the percentage of the cost to salvage the item if it is damaged beyond repair. If you operate in the United States, enter the salvage value as a monetary amount (not a percentage) for each piece of equipment in the equipment master file.
- *Tax product number* - If you are integrated with a tax software package, and if applicable, enter the tax product category/number that groups this category/class of equipment for special taxation.
- *Depreciation method* - Enter the code that represents how you will depreciate equipment in this category/class.
- *Analysis group* - Enter the code for the analysis group into which you want to place this category/class. Analysis groups are collections of category/classes and are used for reporting and analysis purposes.
- *Depreciation life* - Enter the number of months of life for depreciation purposes for equipment in this category/class.
- *Major category* - Indicate whether this category/class is a major category. This setting is used for analysis reporting and setting sales representative commissions.
- *Shift* - Indicate the type of shift differential to use to bill the customer who rents equipment in this category/class:
 - single shift (S)
 - double shift (D)
 - triple shift (T)
- *Maximum shift* - Enter the code for the highest shift differential allowed for this category/class.
- *Sales tax paid* - If applicable, enter the amount of sales tax paid for the equipment at the time it was purchased.
- *Old category/group* - If applicable, enter the category or group code from a legacy software system for this category/class. If control record **RAINV3** is set to use this old category/group number, equipment messages that print for a rental contract will change each time this number changes on the contract rather than when the category/class changes.
- *Reference number* - Enter a user-defined number to use for custom queries.
- *G/L type code* - Enter the code that represents the general ledger type for revenue distribution when this category/class is rented. Use control record **RAECCM** to protect this field from change. If the control record is set to Y, the code in the field defaults from the PME type, and you cannot change it.
- *Miles/Hours code* - Enter the code that represents how equipment in this category/class is metered for usage. Valid codes include:
 - M - Miles
 - H - Hours

- U - Usage
- *Create utilization records* - Indicate whether you want the system to create utilization records for equipment in this category/class. Enter Y or leave the field blank if you want to create utilization records.
- *Used price (SURE)* - Enter the selling price for used equipment in this category/class.
- *Page* - Enter the page number for this category/class in your customized rate book. This setting can be used with the Rate Book with Specs Listing and the Equipment Rental Rates Listing.
- *Sequence* - Enter the sequence that determines the printing order on the page in your customized rate book.
- *Unit cost of bulk* - Enter the cost per unit for bulk items only. This is the amount (per unit) that will be used for the cost of goods sold and relief of inventory when the system creates the general ledger entry for sale of equipment.
- *CCA code* - If applicable, enter the Canadian tax code for this category/class.
- *Weight* - Enter the weight per unit for equipment in this category/class.

Rental Kit File Maintenance - Launch

- *Kit Number* - Enter the number of the kit you want to maintain. The kit number is the reservation item number of the category/class that you have marked as a Kit in Category/Class Maintenance.

Rental Kit Maintenance

- *Kit Number* - Displays the number of the kit you want to maintain. The kit number is the reservation item number of the category/class that you have marked as a Kit in Category/Class Maintenance.
- *Category/Class* - Displays the description of the rental kit category/class.
- *Package* - Indicate whether the kit has one rental rate as a package (Y), or whether the rental rates for each component are used (N).
- *Changeable* - Indicate whether the user can change any of the components of the kit when it is entered on a contract.
- *User Select* - Indicate whether only one component may be selected (Y). The system will list all the components and then you must select the individual one to use.
- *Category/Class* - Enter the number of the category/class that is a component of the rental kit.
- *Item Number* - Alternately, enter the reservation item number for the category/class that is a component of the rental kit.
- *Quantity* - Enter the quantity of the component in the rental kit.
- *Description* - Displays a description of the category/class component.
- *Optional* - Determines whether or not the user is allowed to change the quantity of this component once it is entered on a contract.

Sales Inventory Maintenance - Launch/Sales Kit File Maintenance - Launch

- *Item Number* - Enter the item number you want to add, change, or inquire on.
- *Stock Class* - Enter the stock class associated with the item number.

Sales Inventory Maintenance

- *Item number* - Displays the item number you want to add, change, or inquire on.
- *Stock class* - Displays the stock class associated with the item number.
- *Status code* - Enter or accept the current status for the sales item. Valid codes are:
 - A - Active
 - D - Deleted
 - S - Suspended
- *Stock status* - Enter **NS** if this sales item is considered a non-stock item that is not included on reorder reports and physical inventory count sheets. Use the **Default Codes** program in **Cross Application Maintenance** to set up additional user-defined stock status codes using code **SS**.
- *P/M/E code* - Enter the code that represents the type of sales item. Valid codes are:
 - P - Part
 - M - Merchandise
 - E - Equipment
- *Description* - Enter a brief description of the item.
- *Search word* - Enter text that you can use to search for this item on inquiry screens.
- *Last cost update* - Enter or accept the date of the last time the *Last Cost* field was updated by the system. This date is automatically populated by the system, so change it only on an exception basis.
- *Manufacturer's item number* - Enter the manufacturer's item number assigned to this sales item.
- *UPC* - If applicable, enter the *UPC number* assigned to the item.
- *UPC Code* - If applicable, enter the code associated with the *UPC number*. Two codes are supported, and the default code is **UP**.
- *G/L category* - Enter the code that represents the link between this item and the G/L sales revenue distribution file. The G/L distribution determines the general ledger account numbers used for revenue, inventory and cost of goods sold when this item is sold or purchased. This information might be defaulted from the item's stock class, and it might be protected against changes on this screen. If field **ZXYON3** of control record **SAITMM** is set to **Y**, this G/L category is defaulted from the master record of the stock class assigned to this item, and you cannot change it. If control record **SAITM2** - *Use G/L Cat in Stock Master* is set to **Y**, the G/L category is always defaulted from the stock class assigned to the item, regardless of any entry made here.
- *Pricing at Company/Warehouse/Location* - Indicate if the pricing for this item is at the company (**N**), warehouse (**W**), or location (**Y**) level. If you enter **N**, the pricing for this item comes from its master record. If you enter **Y**, the pricing for this item comes

from the price set at the location where the item is being transacted. If you enter **W**, the pricing for this item comes from the location that is set as its warehouse/supplying location. Your setting in this field overrides the setting at the location level; however, if you leave this field blank, the setting at the location level is the default for this item.

- **Tax product number** - If you are integrated with a tax software package, and if applicable, enter the tax product category/number that groups this item for special taxation.
- **Last/current cost** - Enter or accept the last or most current cost of this sales item. This field is automatically updated when the item is received against a purchase order in the system.
- **Currency** - Enter or accept the code for the currency in which all monetary amounts on this screen are displayed/entered.
- **Auto calculate cost based on List or Regular** - If you want to use the sales item's list or regular price to automatically calculate its last/current cost, indicate which price to use: List Price (L) or Regular Price (R).
- **Percentage of List or Regular** - If you entered a code in the Based on field, enter the percentage by which the list or regular price should be multiplied to arrive at the last/current cost.
- **List price** - Enter the manufacturer's suggested list price for the item. This amount is not used for invoicing; it may be used for calculation of cost or selling price based on the codes assigned for auto calculations.
- **Regular price** - Enter the retail price normally charged for this item. In the event there are no discounts or other pricing codes assigned for the transaction, this is the price the system uses when this item is being sold.
- **Auto calculate regular price based on Cost or List** - If you want to use the sales item's cost or list price to automatically calculate its regular (retail) price, indicate which one to use: List Price (L) or Cost (C).
- **Percentage of Cost or List** - If you entered a code in the Based on field, enter the percentage by which the list price or cost should be multiplied to arrive at the regular (retail) price.
- **Preferred price** - Enter the price that is used when this item is sold to a customer with a price code of P in their master record.
- **Auto calculate preferred price based on Cost, List, or Regular** - If you want to use the sales item's cost or list price or regular price to automatically calculate its preferred price, indicate which one to use: List Price (L), Cost (C), or Regular Price (R).
- **Percentage of Cost, List, or Regular** - If you entered a code in the Based on field, enter the percentage by which the list price or cost or regular price should be multiplied to arrive at the preferred price.
- **Dealer price** - Enter the price that is used when this item is sold to a customer with a price code of D in their master record.

- *Auto calculate dealer price based on Cost, List, Regular, or M* - If you want to use the sales item's cost, list price, regular price or a formula to automatically calculate its dealer price, indicate which one to use: List Price (**L**), Cost (**C**), Regular Price, (**R**), or formula (**M**). Enter **M** if you want the system to calculate the *Dealer Price* based on the formula: $(List + Last Cost) / 2$.
- *Percentage of Cost, List, or Regular* - If you entered a code other than **M** in the *Based on* field, enter the percentage by which the list price or cost or regular price should be multiplied to arrive at the dealer price.
- *Usual vendor* - Enter the number of the vendor from whom you usually purchase this item. This is the vendor used on reorder and analysis reports for this item.
- *Omit from ENB* - If set to **Y**, the system will not process this item in the Earned Not Billed report.
- *1st unit of measure* - Enter the code that represents the smallest unit of measure in which this item is sold, purchased, or stocked.
- *2nd unit of measure* - Enter the code that represents the second unit of measure in which this item is sold, purchased, or stocked.
- *2nd quantity* - Enter the quantity of items in the first unit of measure that is equivalent to one unit in this second unit of measure. **Example:** The first unit of measure is **EA** for each. The second unit of measure is **BX** for box. There are 10 of this item (in eaches) in one box, so enter 10 in the *Quantity* field. When this item is sold, purchased, or counted during inventory, you can enter a unit of measure of **BX**, and the actual boxes sold, purchased, or counted, and the system calculates the amount in eaches based on this quantity.
- *3rd unit of measure* - Enter the code that represents the third unit of measure in which this item is sold, purchased, or stocked.
- *3rd quantity* - Enter the quantity of items in the first unit of measure that is equivalent to one unit in this third unit of measure. **Example:** The first unit of measure is **EA** for each. The third unit of measure is **CS** for case. There are 100 of this item (in eaches) in one case, so enter 100 in the *Quantity* field. When this item is sold, purchased, or counted during inventory, you can enter a unit of measure of **CS**, and the actual cases sold, purchased, or counted, and the system calculates the amount in eaches based on this quantity.
- *Rental category* - If this item is used in your rental fleet as either serialized or bulk equipment, enter the category for this item. This information is necessary when completing a sales to rental transaction.
- *Rental class* - If this item is used in your rental fleet as either serialized or bulk equipment, enter the class. This information is necessary when completing a sales to rental transaction.
- *Rental sub-class* - If this item is used in your rental fleet as either serialized or bulk equipment, enter a maintenance sub-class for it.
- *Serialized* - Indicate whether you track this item individually with unique serial numbers. When you set this to **Y**, you must enter serial numbers when selling,

receiving, or transferring this item. You can also use Serial Number Maintenance to add or change sales item serial numbers.

- **Taxable** - Indicate whether you apply tax to this item when you sell it. If the customer to whom you are selling the item is marked as non-taxable, this setting is ignored.
- **Discountable** - Indicate whether this item is discountable. If set to **N**, this setting overrides discounts set in the customer master file and sales item discounts set in **Sales Item Discount Maintenance**. This setting does not disallow manually entered discounts.
- **Inventoried** - Indicate whether you track this item in inventory. If set to **Y**, a sales item location record is required for each location that stocks this item. The quantity on hand is automatically updated in the system for items that are marked as Inventoried. If the sales item is considered a kit, set this field to **N**, unless the **Use Inventoried kits opt** field is set to **Y** in control record **SAKITM**.
- **Commissionable** - Indicate whether sales of this item are calculated for sales representative commissions.
- **Expected profit percentage** - Enter the profit percentage you expect to achieve when this item is sold. You can set the system to warn you during a sales transaction if this profit percentage is not met. Run the **Inventory Profit Analysis** report to review the profit percentage on sales transactions.
- **Inventory class** - Enter a user-defined code to classify the item for query and analysis purposes. If you do not know the code, press F4 to search for it.
- **Cost overhead percentage** - If applicable, enter the percentage to add to this item's cost when the cost is displayed. The inflated cost is displayed for users with security code **Z01** in their user profile. Users with security code **Z02** will see the item's actual cost.
- **Commission percentage inside** - If applicable, enter the percentage used to calculate split commissions for inside sales representatives.
- **Commission percentage outside** - If applicable, enter the percentage used to calculate split commissions for outside sales representatives.
- **Freight percentage** - Enter the percentage of the sale price of the item to charge for freight.
- **Excise tax percentage** - Enter the percentage of excise tax to charge for this item.
- **Material code** - Enter the code that classifies this item for VAT taxation purposes.

Sales Kit File Entry

- **Item Number** - Displays the item number for which you want to set up a kit.
- **Stock Class** - Displays the stock class for the sales item.
- **Sequence** - Enter a number to designate the sequence in which the component item prints on sales orders/invoices.
- **Component Item Number** - Enter the number for the item that is a component of this sales item kit. If you do not know the number, enter 1 in the **Opt** (Option) field to access **Parts/Merchandise Search** and search for it.

- *Stock Class* - Enter or accept the stock class associated with the entered item number.
- *Quantity* - Enter the quantity of the component in the sales item kit.
- *Percentage of Total Kit Price* - Enter the percentage of sales revenue from the kit that will go toward this item. The total of all percentages must equal 100%. You can enter 0 for one or more components, but the total percentages entered must always equal 100%.
- *Description* - Displays the description of the sales item component.