Adding SKU Items
Training Guide

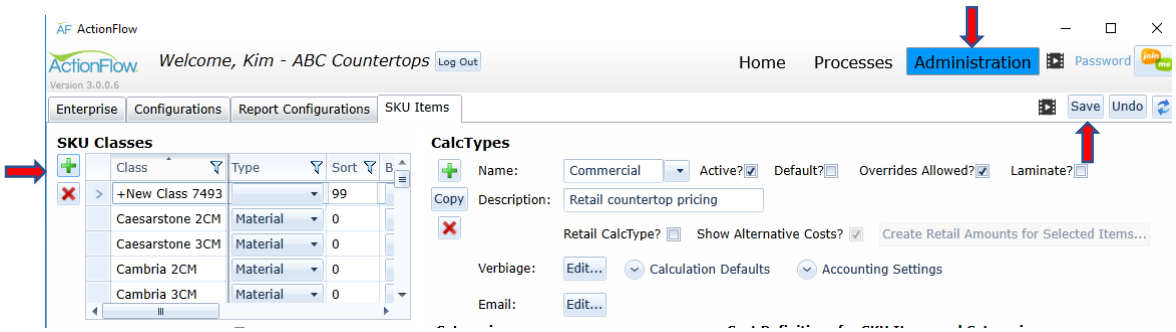
Step 1- Create a SKU Class

Every item you might want to charge for in ActionFlow should be listed in SKU Items. Every SKU Item must be assigned to a SKU Class. These are the columns for SKU Classes.

- The Name is the name of the Class
- The SKU classes are grouped into classes and they fall into different Types. The different Types are listed in this dropdown
- The Material Type is for countertop material, which charges for a material charge,
- Edge Types are for those charges resulting from finished edges
- The Percentage Type are for items that are calculated as a percentage of other items, for example a commission
- The Calc Type is for items that apply to job as a whole, such as tearout of an existing top
- The CalcTop Type is for items that apply to a specific top, such as a cutout
- The Tax type is for tax items
- The Material Tax is for taxes that apply only on material
- The Sort number defines how line items will be sorted on the Customer reports
- The Inventory should be checked if you are planning to track this class as an Inventory item
- The other SKU Class columns are not commonly used

Follow the steps below to add a new SKU Class:

1. Click on the Administration tab on the top navigation bar. Once in the Administration Tab, locate the SKU Classes on the left side of the screen.
2. Click the Green Plus sign to add a new SKU Class.
3. Fill out the columns based on the information provided above.
4. Click on the Save button in the upper right hand corner to save the SKU Class.



Step 2- Add a SKU Item to a SKU Class

These are the columns for the SKU Items:

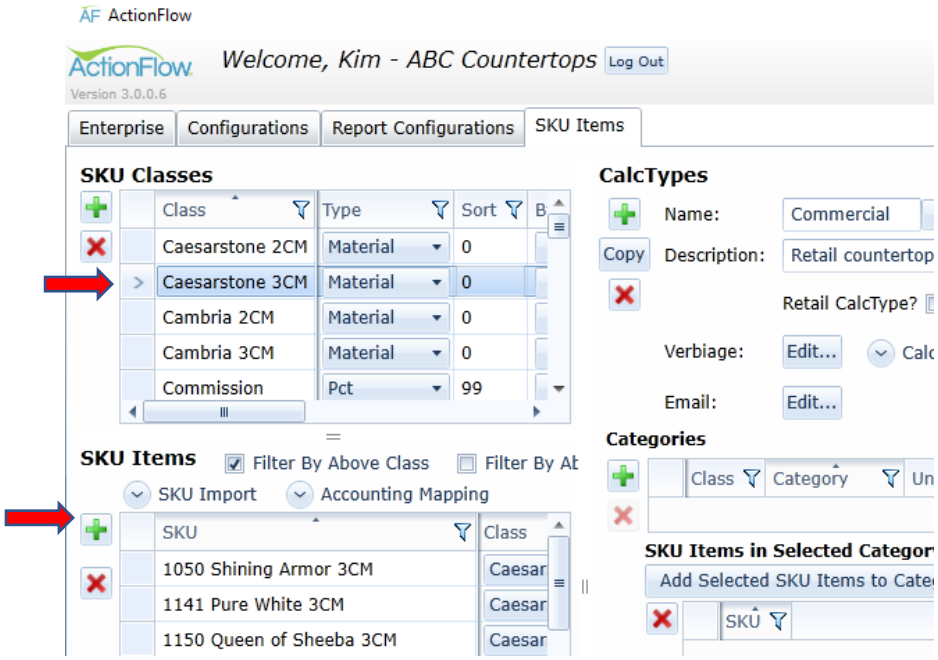
- The SKU name uniquely identifies the line item and must not duplicate any other SKU name
- The Class identifies the SKU Class
- The Unit must be one of these values:

    1. Each - where the user will enter the quantity manually
    2. Finished Linear Foot - ActionFlow will calculate the quantity as the number of finished linear foot
    3. Slab - ActionFlow will determine the quantity based on the slab information entered
    4. SqFt - ActionFlow will calculate the quantity as the number of countertop square footage in the quote
    5. Total Linear Foot - ActionFlow will calculate the quantity as the number of total linear foot

- The Length and Depth are where you enter the dimensions of slabs
- The Unit Cost is where you enter the cost for purposes of calculating the margin on estimate
- The Margin is where you override the margin for margin calculations.
- The Aliases allows you to enter alias names for items. Multiple aliases should be separated by commas.
- The Description is where you can enter a detail description
- The next four columns define how items show up on the drawing of estimates.
- The Image is where you enter the image that will be displayed on reports for this line item, and the buttons next to it allow you to add, delete and view the images for the line item
- The Remnant determine how much of the value of a slab is carried over when a remnant is created
- The Invoice Accounting Mapping allows you to map this item to an item in your accounting software
- And the Default Category is used as part of the SKU Import function to automatically add the item to a category

Follow the steps below to add a new SKU Item:

1. Select the SKU class to which it belongs.
2. Once the SKU Class is highlighted blue, click on the green plus sign under the SKU Items Section.
3. Fill out the information based on the columns above that you want to add. (The SKU, SKU Class and Unit are required columns)
4. Click on the Save button in the upper right-hand corner.

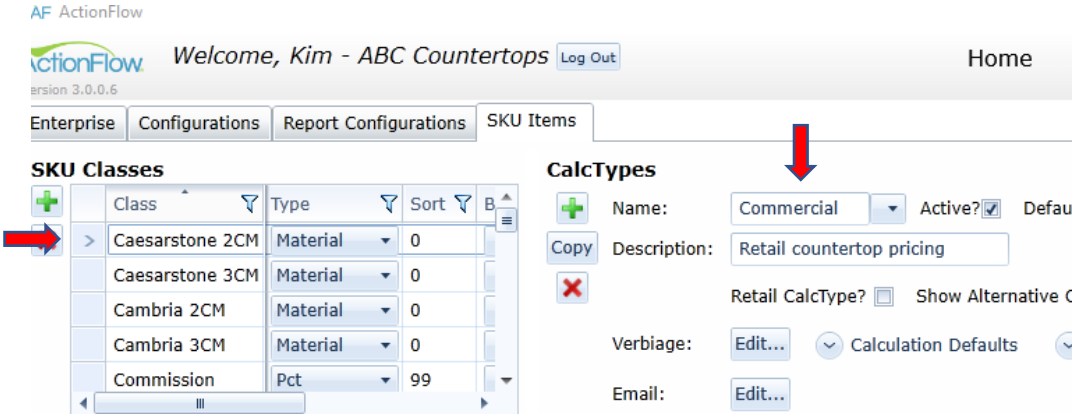


Step 3- Add a SKU Item to a CalcType

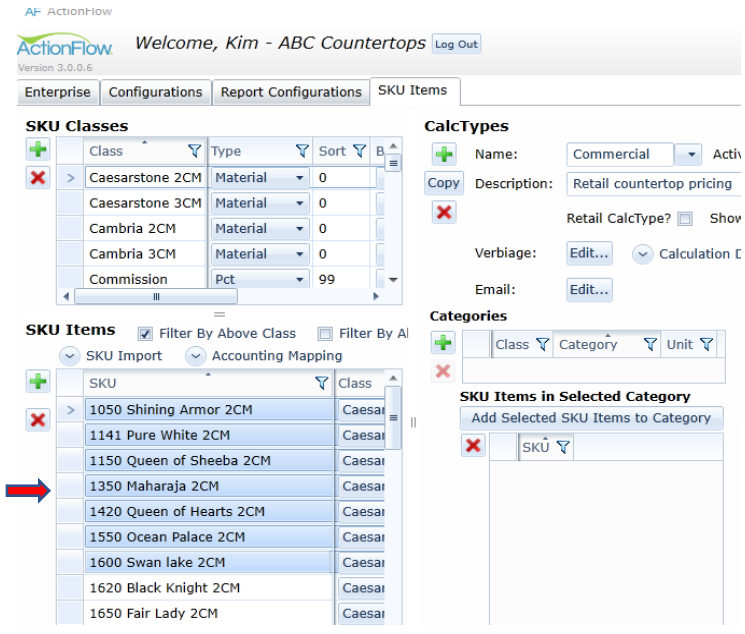
Now that you have created a SKU Item, the next step is to add it to one or more CalcTypes. CalcTypes are essentially price lists where you set the amount to charge the customer for each SKU Item. Every SKU Item you want to charge for on your quote should appear as a SKU Item within one or more CalcTypes. To set the price, the SKU item must be moved to the right side of the screen, into the Cost Definitions grid. You can assign prices individually or you can create Categories. Categories can be used to group items that all have the same price point. For example, a color Category can be used to set the price of multiple colors at one time.

<u>Option 1- Adding SKU Items to the Cost Definition Grid (No Category)</u>

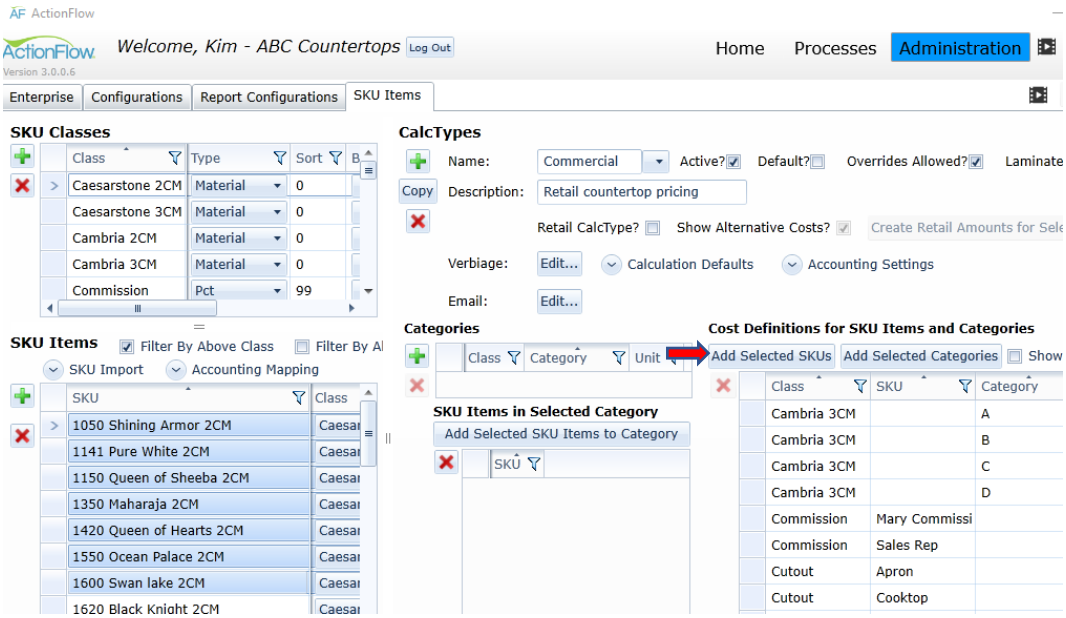
1. Select the name of the CalcType from the Name drop down box that you want to add the SKU Item to.
2. Select the SKU Class for the SKU Item falls in to that you want to add. Click the SKU Class to highlight the field.



3. Highlight the selected SKU Items you would like to add to the Cost Definitions. (You can add multiple SKU Items by clicking on the items you would like to add while holding down the Control or Shift Key.)

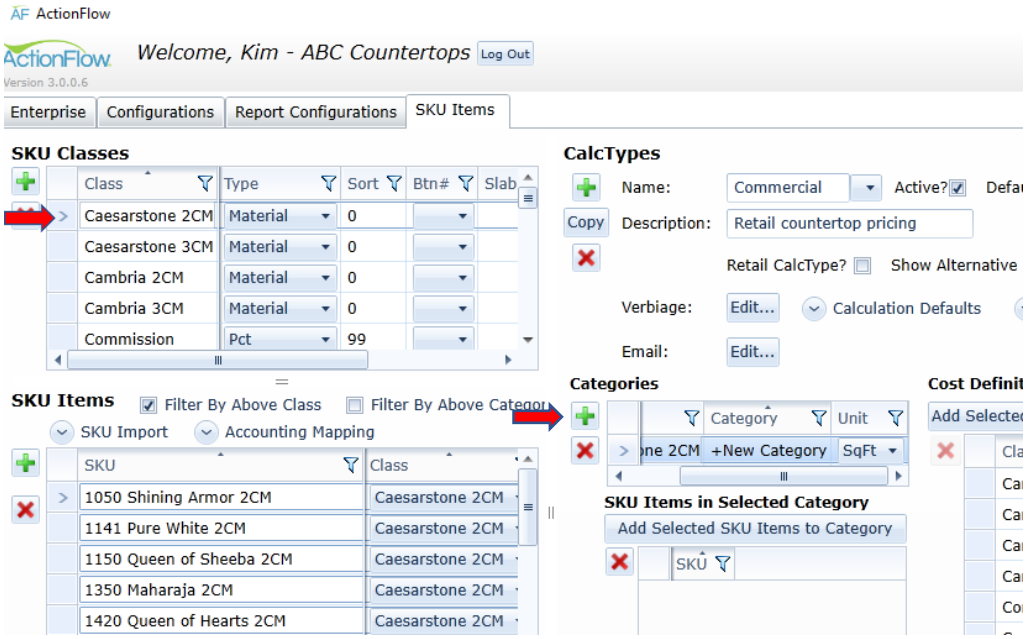


4. Click on the 'Add Selected SKUSs' button under the Cost Definitions. This will add the SKU Item to the CalcType. Click on the Save button that is located on the top right-hand corner of your screen after you add the SKU(s).

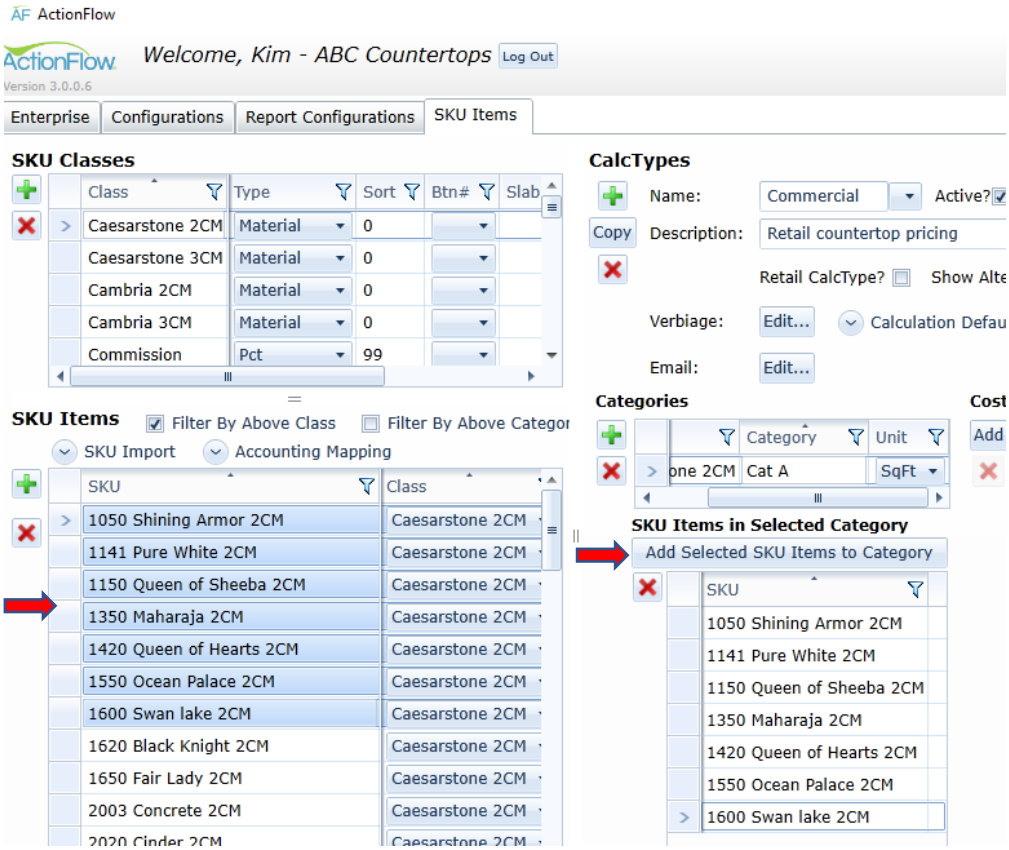


Option 2- Adding SKU Items to Categories and then to the Cost Definitions Grid

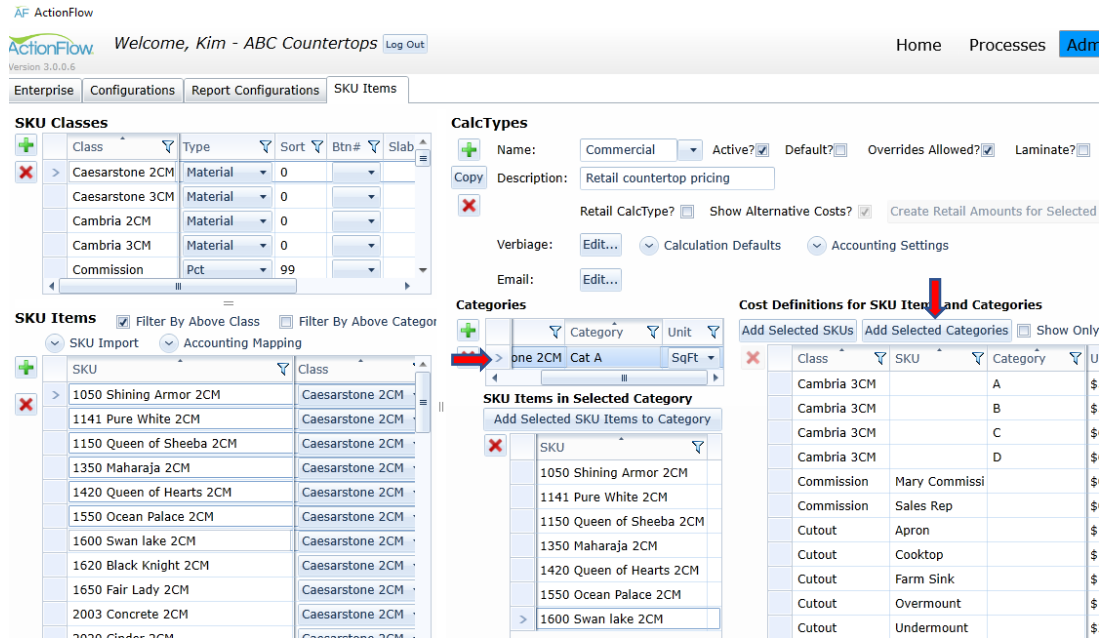
4. Instead of adding each SKU Item individually to a CalcType, you can instead add the SKU Items to a Category, and then add the Category to the CalcType. To create a Category, click on the SKU Class that you want to add the category to. Click on the Green Plus sign under Categories. The Class will autofill. Enter the Category and Unit.



5. Highlight the SKU Items you want to add to the Selected Category. You can select multiple SKU's to add at one time by clicking on the items you would like to add while holding down the Control or Shift Key. Make sure the Category you want to add to is highlighted blue. Click the 'Add Selected SKU Items to Category' button.



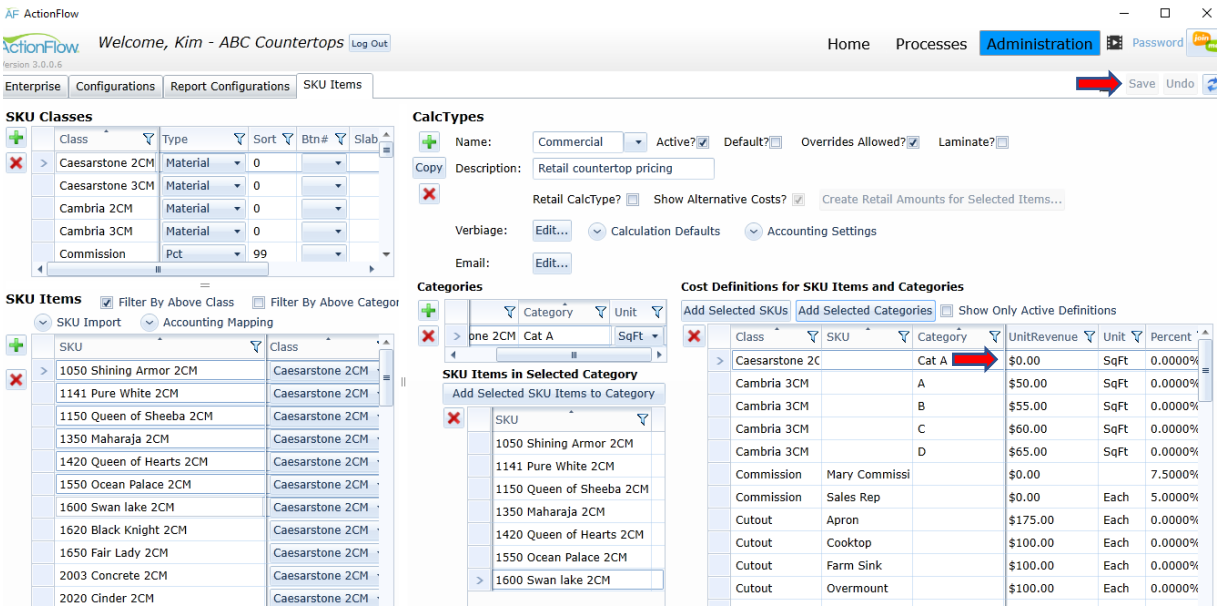
6. Click on the Category to highlight the column you want to add to the Cost Definitions. Then click on the Add Selected Categories button. This will move the Category to the Cost Definitions chart.



Step 4- Add Pricing That You Will Charge the Customer

You can set a price for individual SKU Items or for a Category using the same process once they are moved over to the Cost Definitions Grid. You can set different prices for different CalcTypes.

1. Enter the price you want to charge the customer into the UnitRevenue field. Once entered click on the Save button in the upper right-hand corner of your screen.



There are other settings that you can change on the Cost Definitions Grid, which are described below:

- The Material column allows you to define a charge than only applies when a certain material is selected. If the asterisk is showing, then the line item will apply for all materials.
- The five columns starting with the Special column allow ActionFlow to perform special calculations in very specific situations and I won't go into detail on that here
- The AltCalc checkbox is used to tell ActionFlow to include that Material line item in the Alternative Calculations grid. In those cases, you can enter a 'Slab Square Foot' amount to be used in those calculations.
- The AutoAdd column tells ActionFlow to automatically add this line item to every calculation
- The NotTaxed column tells ActionFlow to exclude this item from tax calculations
- The Hidden column will hide this item from the Estimate reports
- The Discontinued checkbox disabled the item from future calculations, while leaving it in for past calculations
- The Option checkbox will cause the item to be added as an 'Optional' item
- The Effective and End columns allow you to define certain periods where the item applies. So, if the price changed, you can enter an End Date and then create a new line for that item with the new price and the applicable Effective Date