

Adding SKU Items Training Guide

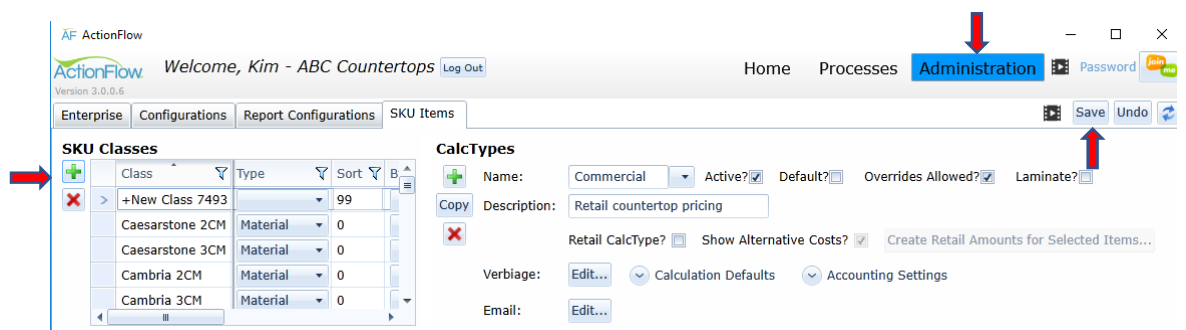
Step 1- Create a SKU Class

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.



The screenshot shows the ActionFlow Administration interface. The top navigation bar includes 'Home', 'Processes', and 'Administration' (highlighted with a red arrow). Below the navigation bar, there are tabs for 'Enterprise', 'Configurations', 'Report Configurations', and 'SKU Items'. The 'SKU Items' tab is active, and the 'SKU Classes' section is expanded. A red arrow points to the green plus sign icon used to add a new class. The 'SKU Classes' table lists existing classes: '+New Class 7493', 'Caesarstone 2CM', 'Caesarstone 3CM', 'Cambria 2CM', and 'Cambria 3CM'. The 'CalcTypes' form on the right is partially visible, showing fields for Name, Description, and various checkboxes.

Class	Type	Sort
+New Class 7493		99
Caesarstone 2CM	Material	0
Caesarstone 3CM	Material	0
Cambria 2CM	Material	0
Cambria 3CM	Material	0

Step 2- Add a SKU Item to a SKU Class

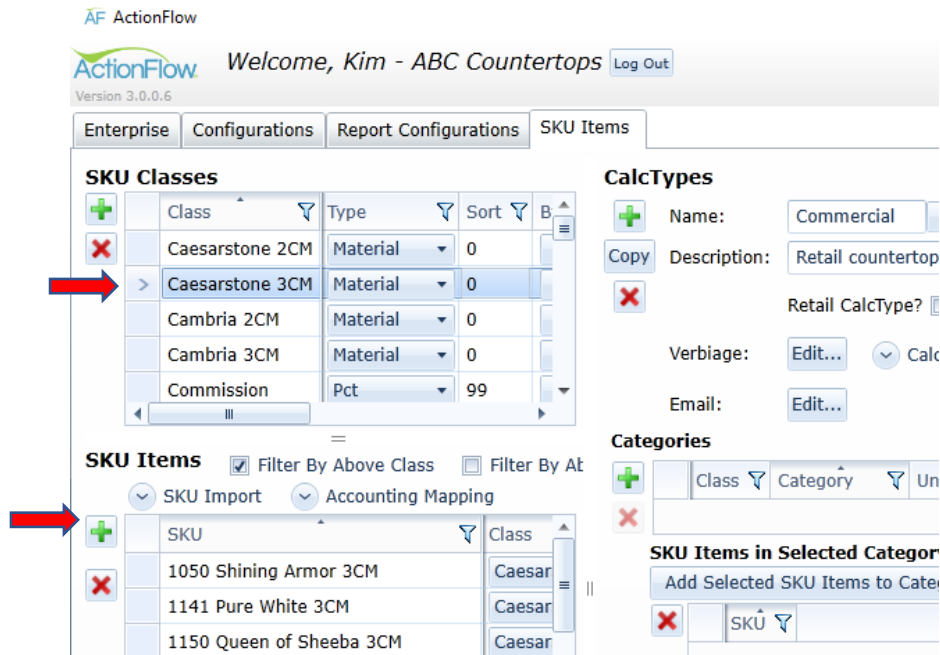
These are the columns for the SKU Items:

- 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.



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Enterprise Configurations Report Configurations **SKU Items**

SKU Classes

Class	Type	Sort	B
Caesarstone 2CM	Material	0	
Caesarstone 3CM	Material	0	
Cambria 2CM	Material	0	
Cambria 3CM	Material	0	
Commission	Pct	99	

SKU Items Filter By Above Class Filter By At

SKU Import Accounting Mapping

SKU	Class
1050 Shining Armor 3CM	Caesar
1141 Pure White 3CM	Caesar
1150 Queen of Sheeba 3CM	Caesar

CalcTypes

Name: Commercial

Description: Retail countertop

Retail CalcType? []

Verbiage: Edit... Calc

Email: Edit...

Categories

Class Category Un

SKU Items in Selected Categor

Add Selected SKU Items to Cate

SKU

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.

Option 1- Adding SKU Items to the Cost Definition Grid (No Category)

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.

The screenshot shows the ActionFlow interface with the 'SKU Items' tab selected. On the left, the 'SKU Classes' table is visible with columns for Class, Type, Sort, and B. A red arrow points to the first row, 'Caesarstone 2CM'. On the right, the 'CalcTypes' form is open for the 'Commercial' CalcType. A red arrow points to the 'Name' dropdown menu, which is currently set to 'Commercial'.

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.)

The screenshot shows the ActionFlow interface with the 'SKU Items' tab selected. The 'SKU Classes' table is still visible. Below it, the 'SKU Items' table is shown with columns for SKU, Class, and Unit. A red arrow points to the item '1350 Maharaja 2CM'. To the right, the 'Categories' form is open, showing a table with columns for Class, Category, and Unit. A red arrow points to the 'Add Selected SKU Items to Category' button.

- Click on the 'Add Selected SKUS' 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).

The screenshot shows the ActionFlow software interface with the following sections:

- SKU Classes:** A table with columns: Class, Type, Sort. Rows include Caesarstone 2CM, Caesarstone 3CM, Cambria 2CM, Cambria 3CM, and Commission.
- CalcTypes:** A form with fields for Name (Commercial), Description (Retail countertop pricing), and Verbiage (Calculation Defaults).
- Categories:** A table with columns: Class, Category, Unit. A red arrow points to the 'Add Selected SKUs' button.
- SKU Items:** A table with columns: SKU, Class. Rows include 1050 Shining Armor 2CM, 1141 Pure White 2CM, 1150 Queen of Sheeba 2CM, 1350 Maharaja 2CM, 1420 Queen of Hearts 2CM, 1550 Ocean Palace 2CM, 1600 Swan lake 2CM, and 1620 Black Knight 2CM.
- Cost Definitions for SKU Items and Categories:** A table with columns: Class, SKU, Category. Rows include Cambria 3CM (A, B, C, D), Commission (Mary Commissi, Sales Rep), and Cutout (Apron, Cooktop).

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

- 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.

The screenshot shows the ActionFlow software interface with the following sections:

- SKU Classes:** A table with columns: Class, Type, Sort, Btn#, Slab. A red arrow points to the green plus sign next to the 'Caesarstone 2CM' row.
- CalcTypes:** A form with fields for Name (Commercial), Description (Retail countertop pricing), and Verbiage (Calculation Defaults).
- Categories:** A table with columns: Class, Category, Unit. A red arrow points to the green plus sign. The 'Class' field is filled with 'Caesarstone 2CM'. The 'Category' field contains '+New Category' and the 'Unit' field contains 'SqFt'.
- SKU Items:** A table with columns: SKU, Class. Rows include 1050 Shining Armor 2CM, 1141 Pure White 2CM, 1150 Queen of Sheeba 2CM, 1350 Maharaja 2CM, and 1420 Queen of Hearts 2CM.
- Cost Definitions:** A table with columns: Class, SKU, Category. Rows include Caesarstone 2CM, Caesarstone 3CM, Cambria 2CM, Cambria 3CM, Commission, and Cutout.

- 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.

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Enterprise Configurations Report Configurations **SKU Items**

SKU Classes

Class	Type	Sort	Btn#	Slab
Caesarstone 2CM	Material	0		
Caesarstone 3CM	Material	0		
Cambria 2CM	Material	0		
Cambria 3CM	Material	0		
Commission	Pct	99		

CalcTypes

Name: Commercial Active?

Description: Retail countertop pricing

Retail CalcType? Show Alts

Verbiage: Edit... Calculation Defau

Email: Edit...

SKU Items Filter By Above Class Filter By Above Category

SKU Import Accounting Mapping

SKU	Class
1050 Shining Armor 2CM	Caesarstone 2CM
1141 Pure White 2CM	Caesarstone 2CM
1150 Queen of Sheeba 2CM	Caesarstone 2CM
1350 Maharaja 2CM	Caesarstone 2CM
1420 Queen of Hearts 2CM	Caesarstone 2CM
1550 Ocean Palace 2CM	Caesarstone 2CM
1600 Swan lake 2CM	Caesarstone 2CM
1620 Black Knight 2CM	Caesarstone 2CM
1650 Fair Lady 2CM	Caesarstone 2CM
2003 Concrete 2CM	Caesarstone 2CM
2020 Cinder 2CM	Caesarstone 2CM

Categories Add

Category	Unit
one 2CM	SqFt

SKU Items in Selected Category

Add Selected SKU Items to Category

SKU
1050 Shining Armor 2CM
1141 Pure White 2CM
1150 Queen of Sheeba 2CM
1350 Maharaja 2CM
1420 Queen of Hearts 2CM
1550 Ocean Palace 2CM
1600 Swan lake 2CM

- 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.

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Enterprise Configurations Report Configurations **SKU Items** Home Processes **Adm**

SKU Classes

Class	Type	Sort	Btn#	Slab
Caesarstone 2CM	Material	0		
Caesarstone 3CM	Material	0		
Cambria 2CM	Material	0		
Cambria 3CM	Material	0		
Commission	Pct	99		

CalcTypes

Name: Commercial Active? Default? Overrides Allowed? Laminate?

Description: Retail countertop pricing

Retail CalcType? Show Alternative Costs? Create Retail Amounts for Selected

Verbiage: Edit... Calculation Defaults Accounting Settings

Email: Edit...

SKU Items Filter By Above Class Filter By Above Category

SKU Import Accounting Mapping

SKU	Class
1050 Shining Armor 2CM	Caesarstone 2CM
1141 Pure White 2CM	Caesarstone 2CM
1150 Queen of Sheeba 2CM	Caesarstone 2CM
1350 Maharaja 2CM	Caesarstone 2CM
1420 Queen of Hearts 2CM	Caesarstone 2CM
1550 Ocean Palace 2CM	Caesarstone 2CM
1600 Swan lake 2CM	Caesarstone 2CM
1620 Black Knight 2CM	Caesarstone 2CM
1650 Fair Lady 2CM	Caesarstone 2CM
2003 Concrete 2CM	Caesarstone 2CM
2020 Cinder 2CM	Caesarstone 2CM

Categories Add

Category	Unit
one 2CM	SqFt

Cost Definitions for SKU Items and Categories

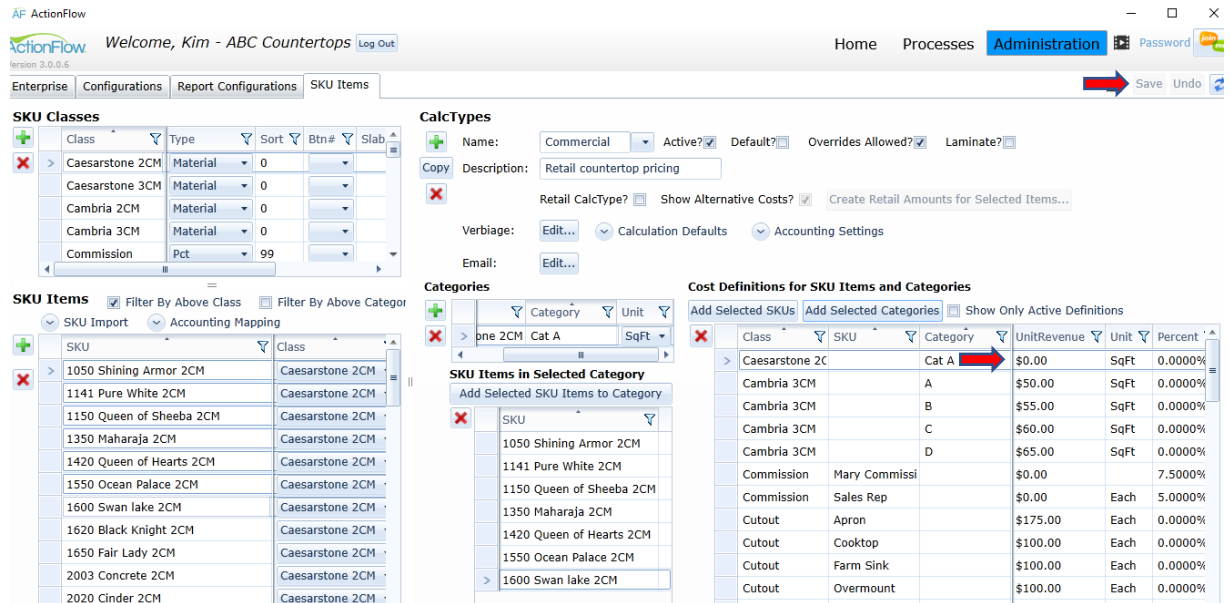
Add Selected SKUs Add Selected Categories Show Only

Class	SKU	Category	U
Cambria 3CM		A	\$
Cambria 3CM		B	\$
Cambria 3CM		C	\$
Cambria 3CM		D	\$
Commission	Mary Commissi		\$
Commission	Sales Rep		\$
Cutout	Apron		\$
Cutout	Cooktop		\$
Cutout	Farm Sink		\$
Cutout	Overmount		\$
Cutout	Undermount		\$

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.



The screenshot displays the ActionFlow software interface. The 'Administration' section is active, showing the 'SKU Classes' table with columns for Class, Type, Sort, Btn#, and Slab. Below it, the 'SKU Items' table lists various countertop items. The 'CalcTypes' section shows 'Retail countertop pricing' with 'Retail CalcType?' checked. The 'Categories' section shows 'Cat A' selected. The 'Cost Definitions for SKU Items and Categories' table shows pricing for various items, with a red arrow pointing to the 'UnitRevenue' field for 'Caesarstone 2C'.

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 that 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