



Parker Tracking System

KITS

Fast. Easy. Accurate.

Release 7.16 | Version 1

Parker Hannifin Corporation

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KITS

Using the navigation toolbar *select 'Support'*, *navigate to 'Downloads'* then *'Templates'* and *select the excel icon* for either the 'Essential' or 'Pro' Template.

i The Pro template is a function of PTS Pro, a subscription based function of PTS; please contact your PTS representative to learn more about the powerful features of PTS Pro.

Options

1. Essential Template
2. Pro Template

Pages / ... / Downloads

PTS Documentation

Created by Amanda Chiancone, last modified just a moment ago

Template	Function	Product Use	Upload Location	Download	Quick Reference Guide
Essential Template	Kits	Hose	Seach/Create Kit ID		KITS
Essential Template	Pre-Print	Hose	Imports		Using Pre-Print Template
Pro Template	Kits	Hose	Search/Create Kit ID		KITS
Pro Template	Pre-Print	Hose	Imports		Using Pre-Print Template
Import Template	Replacements	Hose/Non-Hose	Imports		Using Import Replacements

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1. Essential Template

1.1: Essential Template

From the opened excel spreadsheet edit the fields requiring update and save the file to a known location on your PC.

- Qty
- Kit Item/Part Description
- Assembly
- OAL
- Offset Angle
- Hose Part#
- Hose Length
- Fitting Part #1
- Fitting Part #2
- Component 3 Part #
- Component 4 Part #
- Component 5 Part #
- Sleeve or Guard Part #
- Sleeve or Guard Length
- Customer Part #
- Custom Tag Data Line 1
- Custom Tag Data Line 2
- Custom Tag Data Line 3
- Hose Quality Control Code

Qty	Kit Item Part/Description	Assembly	Overall length (Based on Account Setting U/M, Imperial=Inches Metric=mm)	Offset angle	Hose Part #	Hose length (Based on Account Setting U/M, Imperial=Inches Metric=mm)	Fitting 1 Part #	Fitting 2 Part #	Component 3 Part #	Component 4 Part #	Component 5 Part #
111	TestingKitItemDescripti	222222222	11.000	333	444444444	44.000	555555	666666	777777	888888	999999



1.2: Pro Template

From the opened excel spreadsheet edit the fields requiring update and save the file to a known location on your PC.

- Qty
- Kit Item/Part Description
- Assembly
- OAL
- Offset Angle

- Hose Part#
- Hose Length
- Fitting Part #1
- Fitting Part #2
- Component 3 Part #

- Component 4 Part #
- Component 5 Part #
- Sleeve or Guard Part #
- Sleeve or Guard Length
- Customer Part # (Alternate Part #)

- Custom Tag Data Line 1
- Custom Tag Data Line 2
- Custom Tag Data Line 3
- Hose Quality Control Code
- **Comment**

- **Criticality**
- **Location 1**
- **Location 2**
- **Equipment**
- **VIN/Serial #**

- **Application Inlet**
- **Fitting 1 QC Code**
- **Fitting 2 QC Code**

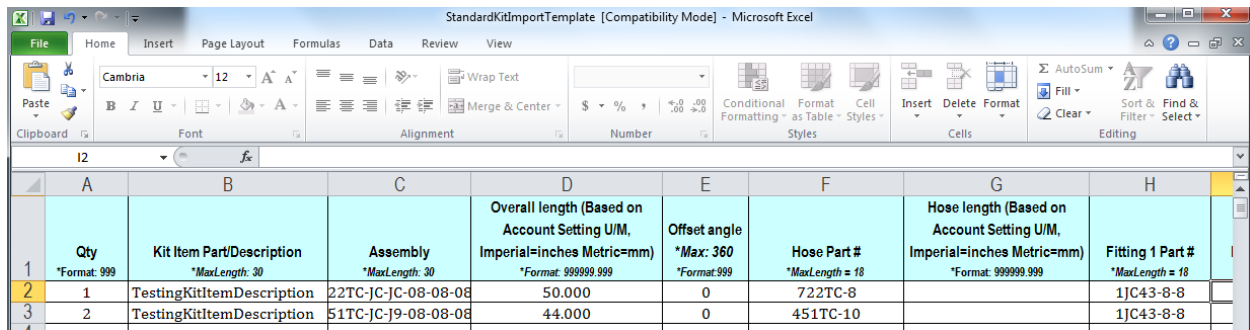
 Additional fields available with **PTS Pro Template**

1: Excel

Open the Excel file and enter information about each hose assembly within the kit.

Note the following:

1. Each row represents a separate assembly
2. A value must be entered in the column titled 'QTY' (quantity)
3. The Excel file is locked from editing column headers and order to prevent potential upload errors.



	A	B	C	D	E	F	G	H
	Qty	Kit Item Part/Description	Assembly	Overall length (Based on Account Setting U/M, Imperial=inches Metric=mm)	Offset angle	Hose Part #	Hose length (Based on Account Setting U/M, Imperial=inches Metric=mm)	Fitting 1 Part #
	*Format: 999	*MaxLength: 30	*MaxLength: 30	*Format: 999999.999	*Max: 360 *Format: 999	*MaxLength: 18	*Format: 999999.999	*MaxLength: 18
1	1	TestingKitItemDescription	22TC-JC-JC-08-08-08	50.000	0	722TC-8		1JC43-8-8
2	2	TestingKitItemDescription	51TC-JC-J9-08-08-08	44.000	0	451TC-10		1JC43-8-8

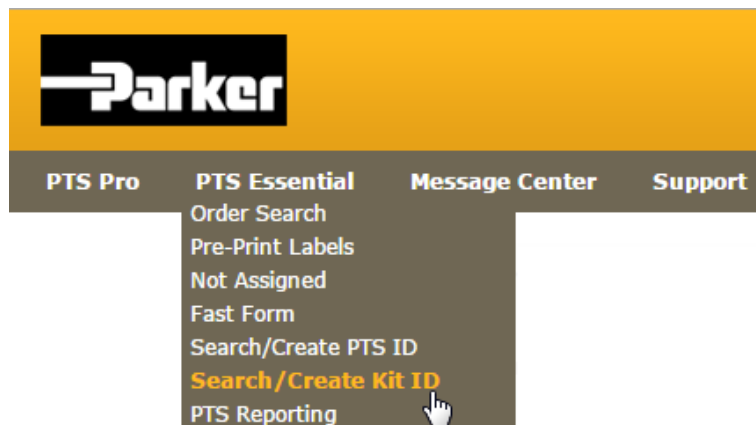
Once complete, save the file to the desired location.

Requirements:

Column names beginning with "Custom Part #/Alternate Part #" or "Custom Tag Data" will appear on the label when using the standard PTS label format. This does not apply to templates used with pre-printed tags or custom label formats.


2: Search Kit ID

Click the 'Search/Create Kit ID' link in the PTS Essential navigation toolbar.



3: Create Kit

1. Specify a 'Kit Code', 'Kit Description', and a 'Customer Number' in the spaces provided.

2. Click  icon to create a new PTS kit.

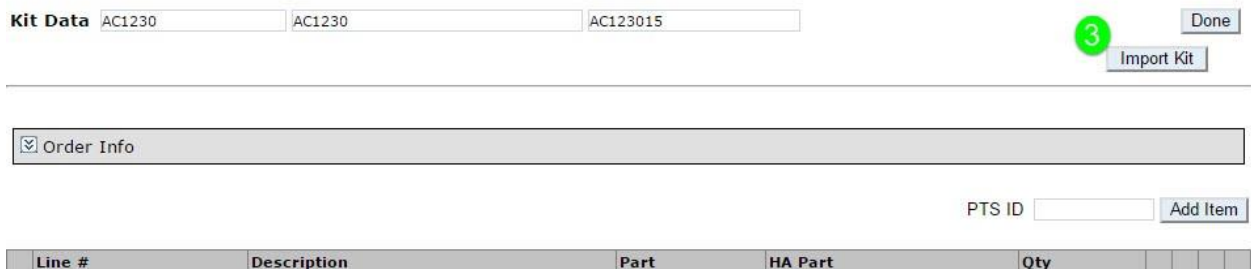
SEARCH/CREATE KIT ID



* Search for Kits or select Create New to add Current Account only Group

3. Once complete, click  to upload the PTS kit file

SEARCH/CREATE KIT ID

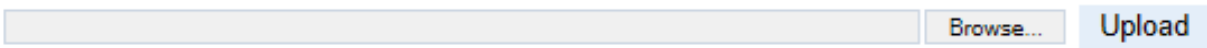


Line #	Description	Part	HA Part	Qty
--------	-------------	------	---------	-----

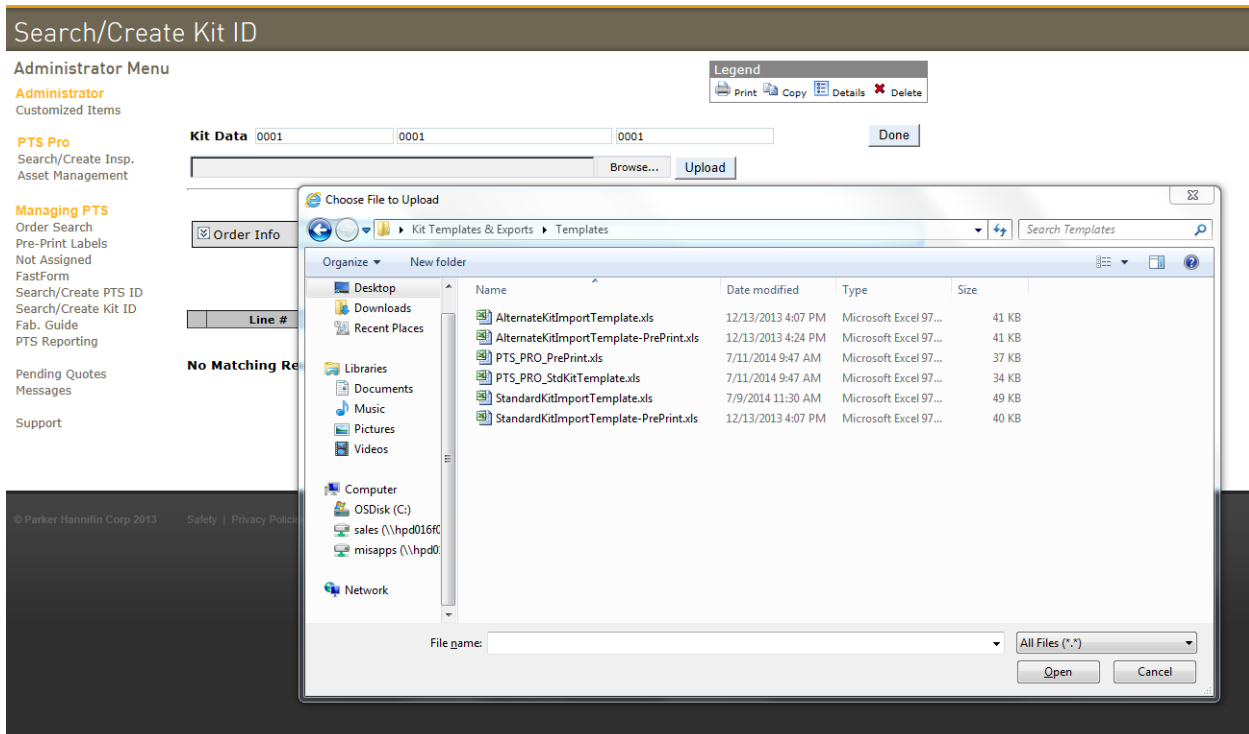


4: Upload Kit

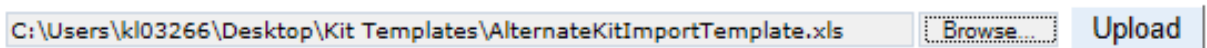
Click 'Browse...'



Select the kit file that was previously saved.



Click 'Upload'



5: Printing Kits

Click [Print All](#) to print tags for the entire kit.

Select the check box(es) to the far left

	Line #	
<input checked="" type="checkbox"/>	001	12

 then click [Print Selected](#) to print specific tags.

Click [Export](#) to download the kit as an Excel file.













Choose the red  to delete items from the list.

Enter an existing PTS ID and click [Add Item](#) to add additional assemblies to an existing kit.

Order Info

[Print All](#) [Print Selected](#) [Export](#)









PTS ID [Add Item](#)

	Line #	Description	Part	HA Part	Qty				
<input type="checkbox"/>	001	12345678910	1111111	222222222	1				
<input type="checkbox"/>	002		Customer Part No.	F-787TC-JC-J9-24-24-24-50	0				
<input type="checkbox"/>	003		Customer Part No.	F-787TC-JC-J9-24-24-24-50	0				

6: Using Past Kits (optional)

Kits that are created once are automatically saved for later use. In order to reproduce a past kit, *click* **'Search/Create Kit ID'** from the PTS Essential navigation


toolbar, *click* the  button below, and repeat **Step 6**









Kit Code	Description	Customer				
123KIT	Demonstration 1	123456				
Sample	Sampel for New Customer	123456				




7: Increasing Kit Item Qty. (optional)

If it is necessary to increase the quantity of a specific kit item, begin by clicking 'Search/Create Kit ID'.













































Select the  icon next to the kit needing the quantity update.

Kit Code	Description	Customer				
123KIT	Demonstration 1	123456				
Sample	Sample for New Customer	123456				

Locate the assembly from the list that appears below and click the  icon.

Kit Data

Order Info

	Line #	Description	Part	HA Part	Qty				
<input type="checkbox"/>	001	T1655 Commander 3.1	1234	F-797TC-JC-JC-16-16-16-24	1				
<input type="checkbox"/>	002	T1655 Commander 3.2	1235	F-797TC-JC-JC-16-16-16-24	1				
<input type="checkbox"/>	003	T1655 Commander 3.3	1236	F-797TC-JC-JC-16-16-16-18	1				
<input type="checkbox"/>	004	T1655 Commander 3.4	1237	F-797TC-JC-J9-24-24-24-18	1				
<input type="checkbox"/>	005	T1655 Commander 3.5	1238	F-797TC-JC-J9-24-24-24-12	2				
<input type="checkbox"/>	006	T1655 Commander 3.6	1239	F-797TC-JC-JC-16-16-16-9"	2				
<input type="checkbox"/>	007	T1655 Commander 3.7	1240	F-797TC-JC-JC-08-08-08-18	2				
<input type="checkbox"/>	008	T1655 Commander 3.8	1241	F-797TC-JC-JC-08-08-08-24	4				
<input type="checkbox"/>	009	T1655 Commander 3.9	1242	F-797TC-JC-J9-08-08-08-18	4				
<input type="checkbox"/>	010	T1655 Commander 3.10	1243	F-797TC-JC-J9-08-08-08-18	4				
<input type="checkbox"/>	011	T1655 Commander 3.11	1244	F-797TC-JC-JC-08-08-08-18	4				



8: Update Kit Item Qty. (optional)

Once the 'Bill of Materials' appears, *update* the field that says 'Kit Item Qty.'

Kit Item Maintenance

Administrator Menu

- Administrator**
Customized Items
- PTS Pro**
Search/Create Insp.
Asset Management
- Managing PTS**
Order Search
Pre-Print Labels
Not Assigned
FastForm
Search/Create PTS ID
Search/Create Kit ID
Fab. Guide
PTS Reporting
- Pending Quotes
Messages
- Support

Legend
 Search Add Delete Download

PTS ID

Originator Distributor Demonstration

BOM / Order Details **Application Data**

Kit Item Desc **Kit Item Qty**

Mfgr Part **Customer Part**

Base Part Number **OAL**

Offset Angle degrees

Label

Custom Data 1

Custom Data 2

Custom Data 3

Override Edits

Component Part (partial for search)	Quantity	Length	Angle	U/M	QC Code	
797tc-12 <input type="text" value="Hose"/>	1	78.000		in <input type="text" value=""/>		
1j077-16-12 <input type="text" value="Fitting"/>	1			PC <input type="text" value=""/>		
10577-12-12 <input type="text" value="Fitting"/>	1			PC <input type="text" value=""/>		
*Unknown <input type="text" value=""/>	1			PC <input type="text" value=""/>		

Click then to update.