



Parker Tracking System

KITS – General Assets

Dynamic Bill of Material

Fast. Easy. Accurate.

Release 8.16 | Version 1

Parker Hannifin Corporation

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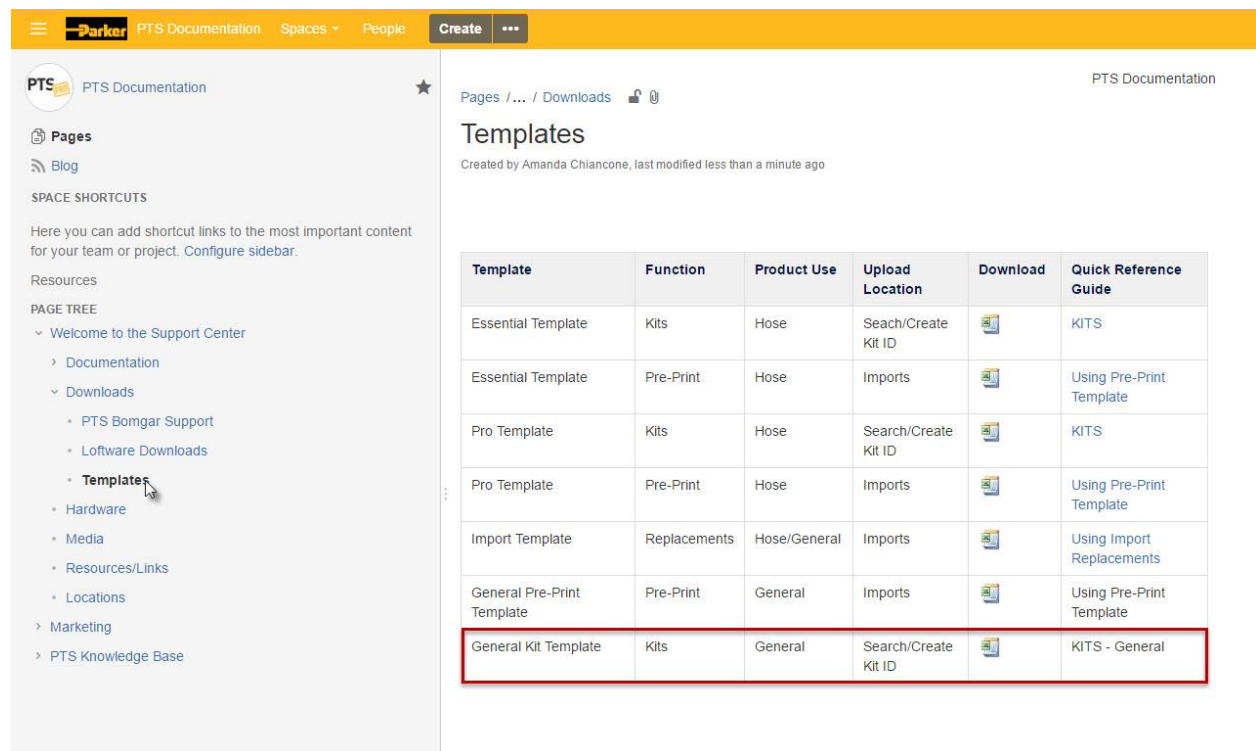
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KITS

Using the navigation toolbar *select 'Support'*, *navigate to 'Downloads'* then *'Templates'* and *select the excel icon for 'General Kit Template'*.

 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.










PTS Documentation

Pages / ... / Downloads

Templates

Created by Amanda Chiancone, last modified less than a minute 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/General	Imports		Using Import Replacements
General Pre-Print Template	Pre-Print	General	Imports		Using Pre-Print Template
General Kit Template	Kits	General	Search/Create Kit ID		KITS - General



A. General Kit Template

Users are required to select 'Enable Editing' from the header of the excel file to proceed with making changes. The first lines of information are for reference only and can be deleted.

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
- Product Type
- Part #
- Serial #
- Customer Part #
- Component Part # (9)
- QC Code (9)
- Custom Tag Data Line 1
- Custom Tag Data Line 2
- Custom Tag Data Line 3
- Comments
- Criticality
- Location 1
- Location 2
- Equipment
- Vin/Machine

Qty	Kit Description	Product Type	Part #	Serial #	Customer Part #	Component 1 Part #	Component 2 Part #	Component 3 Part #	Component 4 Part #	Component 5 Part #	Component 6 Part #	Component 7 Part #	Component 8
1	KitDesc1	Valve	MFGR PART 1	Serial1	CUSTPART1	Component1 1	Component2 1	Component3 1	Component4 1	Component5 1	Component6 1	Component7 1	Component8 1
2	KitDesc2	Cylinder/Actuator	MFGR PART 2	Serial2	CUSTPART2	Component1 2	Component2 2	Component3 2	Component4 2	Component5 2	Component6 2	Component7 2	Component8 2
3	KitDesc3	Accumulators	MFGR PART 3	Serial3	CUSTPART3	Component1 3	Component2 3	Component3 3	Component4 3	Component5 3	Component6 3	Component7 3	Component8 3
4	KitDesc4	Filter	MFGR PART 4	Serial4	CUSTPART4	Component1 4	Component2 4	Component3 4	Component4 4	Component5 4	Component6 4	Component7 4	Component8 4
5	KitDesc5	Motor	MFGR PART 5	Serial5	CUSTPART5	Component1 5	Component2 5	Component3 5	Component4 5	Component5 5	Component6 5	Component7 5	Component8 5
6	KitDesc6	Other	MFGR PART 6	Serial6	CUSTPART6	Component1 6	Component2 6	Component3 6	Component4 6	Component5 6	Component6 6	Component7 6	Component8 6
7	KitDesc7	Power Take Off	MFGR PART 7	Serial7	CUSTPART7	Component1 7	Component2 7	Component3 7	Component4 7	Component5 7	Component6 7	Component7 7	Component8 7
8	KitDesc8	Pump	MFGR PART 8	Serial8	CUSTPART8	Component1 8	Component2 8	Component3 8	Component4 8	Component5 8	Component6 8	Component7 8	Component8 8
9	KitDesc9	Seal	MFGR PART 9	Serial9	CUSTPART9	Component1 9	Component2 9	Component3 9	Component4 9	Component5 9	Component6 9	Component7 9	Component8 9
10	KitDesc10	Sensors/Diagnostics	MFGR PART 10	Serial10	CUSTPART10	Component1 10	Component2 10	Component3 10	Component4 10	Component5 10	Component6 10	Component7 10	Component8 10
11	KitDesc11	Other	MFGR PART 11	Serial11	CUSTPART11	Component1 11	Component2 11	Component3 11	Component4 11	Component5 11	Component6 11	Component7 11	Component8 11
12	KitDesc12	Power Take Off	MFGR PART 12	Serial12	CUSTPART12	Component1 12	Component2 12	Component3 12	Component4 12	Component5 12	Component6 12	Component7 12	Component8 12



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). Qty of 1 indicates one record/label will be generated. Qty of 6 indicates six records/labels will be generated.
3. Using the drop down arrow in column C to select the type of product.
4. Users may add specific or generic details into any of the columns to aid in search results.
5. The Excel document is open. To prevent potential upload errors, it is a recommended best practice to not make any changes to column order or header names.

Once complete, save the file to the desired location.

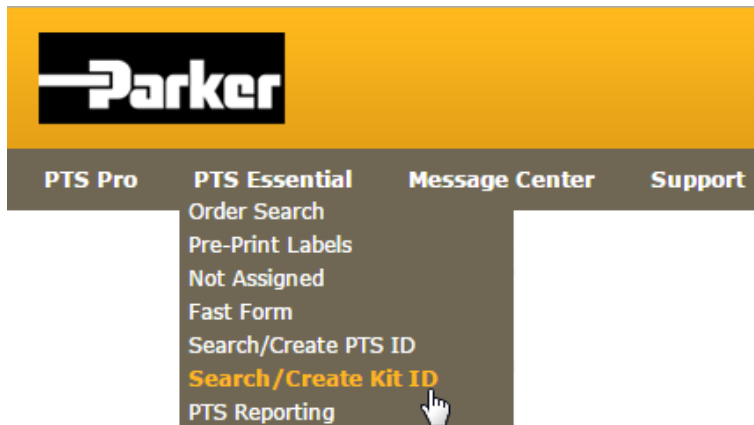
Note:

There are two different label options that can be configured for General printer use.

1. GeneralLabel.lwl – Prints Custom Data Line 1 and Custom Data Line 2
2. GeneralLabel2.lwl – Prints Customer Part # and Custom Data Line 1


2: Search Kit ID

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



3: Create Kit

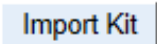
1. Specify a 'Kit Code', 'Kit Description', and a 'Customer Number' in the spaces provided.

2. Click  icon to create a new PTS kit.

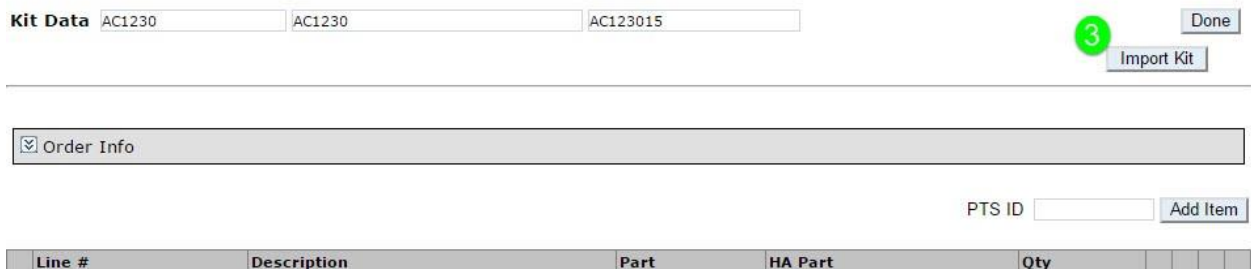
SEARCH/CREATE KIT ID



* 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

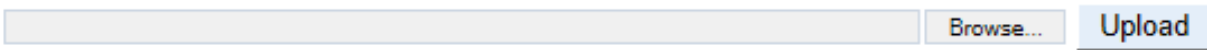


Line #	Description	Part	HA Part	Qty			
--------	-------------	------	---------	-----	--	--	--

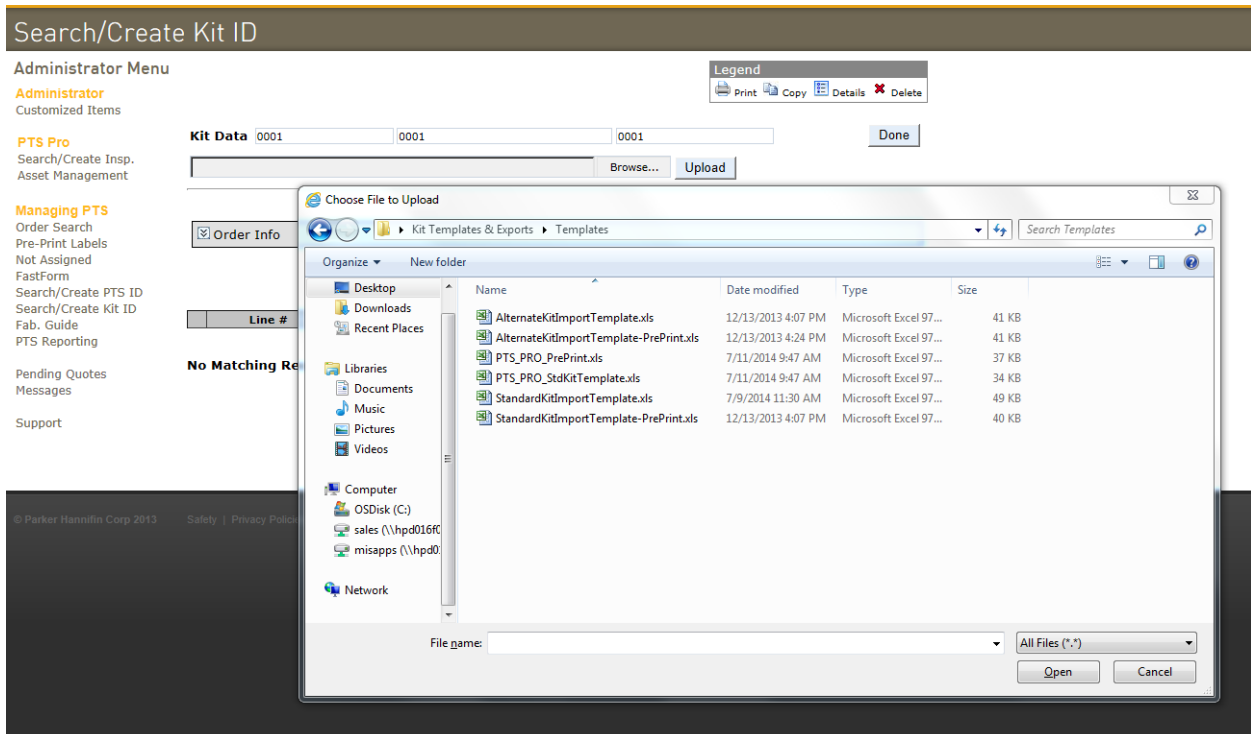


4: Upload Kit

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
 ***** Done Update Cancel

Originator Distributor Demonstration

BOM / Order Details **Application Data**

Kit Item Desc Baler MFG **Kit Item Qty** 2

Mfgr Part 797tc-j0-05-16-12-12-78 **Customer Part** 1414204

Base Part Number 797tc-12 **OAL** 78.000 in

Offset Angle degrees

Label

Custom Data 1 Baler MFG Default

Custom Data 2 (555) 555-5555 Browse...

Custom Data 3 contact@email.com Memorize

Override Edits

Component Part (partial for search)	Quantity	Length	Angle	U/M	QC Code	
797tc-12 Hose	1	78.000		in		✖
1j077-16-12 Fitting	1			PC		✖
10577-12-12 Fitting	1			PC		✖
*Unknown	1			PC		✖

Click Update then Done to update.