



Kits & Bundles

Two different ways to group items together as a single sellable or issuable unit

Introduction

Data Fusion has two separate features for grouping items together: Kits and Bundles. They sound similar but work completely differently, and it's important not to confuse them.

- **A Kit** is a “recipe” you define inside Data Fusion. It says: “one unit of this finished good item is made up of these component items, in these quantities, plus some additional costs.” Kits are created, costed and maintained in Data Fusion.
- **A Bundle** is defined and maintained entirely in Sage Accounting, as a Sage “Item Bundle.” Data Fusion only displays what Sage already has — you cannot create, edit or delete a Bundle in Data Fusion.

Neither a Kit nor a Bundle is the same thing as a Bill of Materials (BOM). A BOM is for items that go through a full manufacturing process using Works Orders and production recording — see the separate BOM guide for that. Kits and Bundles are simpler: they group existing items together for costing and assembly, without a full works-order production process.

This guide covers defining a Kit's recipe and viewing a Bundle's contents. Physically assembling or issuing a Kit or Bundle into stock is done on the Job Card screen, which is covered in its own guide.



Before You Begin — Prerequisites

- Kits are part of Data Fusion's optional Module 2 feature set (Planning, Job Cards, Kits and Finished Goods Demands). If you don't see "Kits" as a menu option, contact Data Fusion support to have it switched on.
- Before you can create a Kit, the finished good item must be ticked "**Is Made Up From A Kit**" on its Item screen — only items with this flag ticked appear in the Kit's Finished Good Code list. See the Item screen guide ("Stock items – the details") for where this flag lives.
- Component items you want to add to a Kit line must be ticked "**Is a Kit Component**" on their Item screen, unless they are non-stock/service items — those are always available as Kit components.
- Bundles need no setup in Data Fusion at all. They must already exist as Item Bundles in Sage Accounting; Data Fusion picks them up automatically the next time it syncs items from Sage.

Key Terms — Glossary

Term	What It Means
Kit	A recipe, defined in Data Fusion, describing what components (and what additional costs) go into one unit of a finished good item.
Finished Good Code	The item that the Kit produces — the thing you're building the recipe for.
Kit Component	An item used as an ingredient/part on a Kit line. Must be flagged "Is a Kit Component," or be a non-stock/service item.
FG Qty	On a Kit line, the quantity of that component needed to make ONE unit of the finished good.
Additional Costs 1–3	Extra costs (for example labour or packaging) you add on top of component costs to build the Kit's total cost.
Bundle	A group of existing items sold or issued together, defined and owned entirely by Sage Accounting. Read-only in Data Fusion.
Bundle Line	One item within a Bundle, showing its code, description, quantity and average cost as last synced from Sage.
Job Card	The screen where a Kit or Bundle is actually assembled/issued into stock. Covered in a separate guide.



Where This Happens

Task	Data Fusion	Sage
Create/edit a Kit's finished good, components and costs	✓	
Push a Kit's calculated cost through as the item's average cost	✓ (button)	✓ (receives it)
Create/edit a Bundle's code, description and item lines		✓
View a Bundle's contents and costs	✓ (read-only)	
Physically assemble/issue a Kit or Bundle into stock	✓ (via Job Cards)	

The Full Workflow

Creating a Kit

1. Go to Settings, Configuration and Master Files, then click Kits.
2. Click "Add New Kit."
3. On the Kit Master screen, choose the **Finished Good Code** from the drop-down. Only items already flagged "Is Made Up From A Kit" on their Item screen appear here — tick that flag first if the item you want is missing.
4. The item's description fills in automatically once selected.
5. In the Kit Lines grid, pick a component **Item Code** from the drop-down and enter the **FG Qty** — the quantity of that component needed for one unit of the finished good — then click the save (disk) icon on that line.
6. Repeat for each component. A new blank line is always ready at the bottom for the next component.
7. If needed, enter Additional Costs 1, 2 and/or 3 (for example labour or packaging) — Data Fusion totals these automatically.
8. Click "SAVE KIT" to save the Finished Good Code and additional costs.
9. The Kit now appears in the Kits list. Click its item code at any time to reopen Kit Details, where you can keep editing lines and costs, delete individual lines, copy the whole Kit as a starting point for a new one, or delete the Kit entirely.

Working With Bundles

10. There is nothing to create in Data Fusion — Bundles are set up as Item Bundles in Sage Accounting.
11. The next time Data Fusion syncs items from Sage, it also pulls in the latest Bundles and their lines automatically.
12. Go to Settings, Configuration and Master Files, then click "View Bundles" to see the list of active Bundles.
13. Click a Bundle's code to open Bundle Details — a read-only view showing each line's item code, description, quantity and average cost.
14. To change what's in a Bundle — its code, description or items — make the change in Sage Accounting, then wait for (or run) the next Data Fusion sync to see it reflected.

Understanding Kit Costing

- **Component costs update automatically.** The Av Unit Cost and Av Cost columns on a Kit's lines are calculated from each component's current average cost × its FG Qty, so they move as component costs change.
- **The finished good's own cost does NOT update on its own.** Kit Details shows "This Kit Total Cost Price" (all component costs plus your Additional Costs). To actually apply that figure as the finished good's average cost, you must click "Update SBCA Average Unit Cost." This is a deliberate, manual step — nothing pushes the recalculated cost through by itself.
- **"Update SBCA Average Unit Cost" only changes cost, never quantity.** It revalues the finished good in Data Fusion and sends a zero-quantity cost adjustment to Sage — stock on hand is untouched.

⚠ Important: A Kit's Additional Costs (1, 2, 3) are entered manually and are not linked to anything else in Data Fusion — update them yourself if labour, packaging or other build costs change.

Common Mistakes to Avoid

- **Trying to select a finished good that isn't in the Kit's drop-down.** It won't appear until you tick "Is Made Up From A Kit" on that item's Item screen.
- **Trying to create or edit a Bundle inside Data Fusion.** Bundles are owned by Sage Accounting — make the change there and re-sync; there is no create/edit option for Bundles in Data Fusion.
- **Assuming a Kit's cost changes reach Sage automatically.** They don't — you must click "Update SBCA Average Unit Cost" on Kit Details whenever you want the recalculated cost applied.
- **Mixing up Kits, Bundles and BOMs.** A BOM drives a full manufacturing/Works Order process; a Kit is a simpler costed recipe for a finished good; a Bundle is just a Sage-defined group of items. See the separate BOM guide for manufactured items.