

# Tips & Tricks

## Get the Kit Qty Available to Sell

**Goal** – Calculate the Kit/Package quantity that is available to sell for use in a saved search to export, or use in a custom field on the Kit record.

### Steps

- I. Create a new Saved Search of search type Item
- II. Criteria tab
  - i. Type = Kit/Package
- III. Results tab
  - i. Name – Summary Type = Group
  - ii. Description – Summary Type = Group
  - iii. Formula (numeric) – Summary Type = Minimum
    - a. CASE WHEN {memberitem.quantityonhand} IS NOT NULL THEN  
FLOOR({memberitem.quantityonhand}/{memberquantity}) ELSE 0  
END
- IV. Rename and Save search

**This search can then be run on demand to return the total available to sell for all kit/packages in the system.**



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## Create a Custom Field for Kit Quantity

**Goal** – Use the previous saved search to populate a custom field on the kit/package record

### Steps

- I. Create a copy of the existing saved search to edit
- II. The results tab must have only 1 field, which is the field you expect to have the value in
  - i. Formula (numeric) - grouped by minimum
- III. On the Available Filters tab add Internal ID as a filter
- IV. Save

**When run manually, this search will not display any results.**



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## Create a Custom Field for Kit Quantity

### Create the custom field

- I. Create new Custom Item Field
- II. Uncheck Store Value (the value won't be stored, it will be calculated)
- III. On the applies to tab choose Kit/Package
- IV. On the Display tab choose a Subtab
- V. On the Validation & Defaulting tab choose your search
- VI. Save and Apply to Forms

Now go to a Kit record to view the new custom field and the calculated kit available quantity.



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