

# BUNDLES

While the basics of Order Bundles have been brought into SmartSales, we have also made some enhancements to make working with bundles even easier and more productive. To create a bundle select one or more line items in the Individual Line Items section. Unlike in DentaCAD Classic, the line items do not have to be adjacent to one another.

## Order Lines

Individual Line Items

SmartCatalog Search

Configurator

Create a Bundle

Add an Order Line

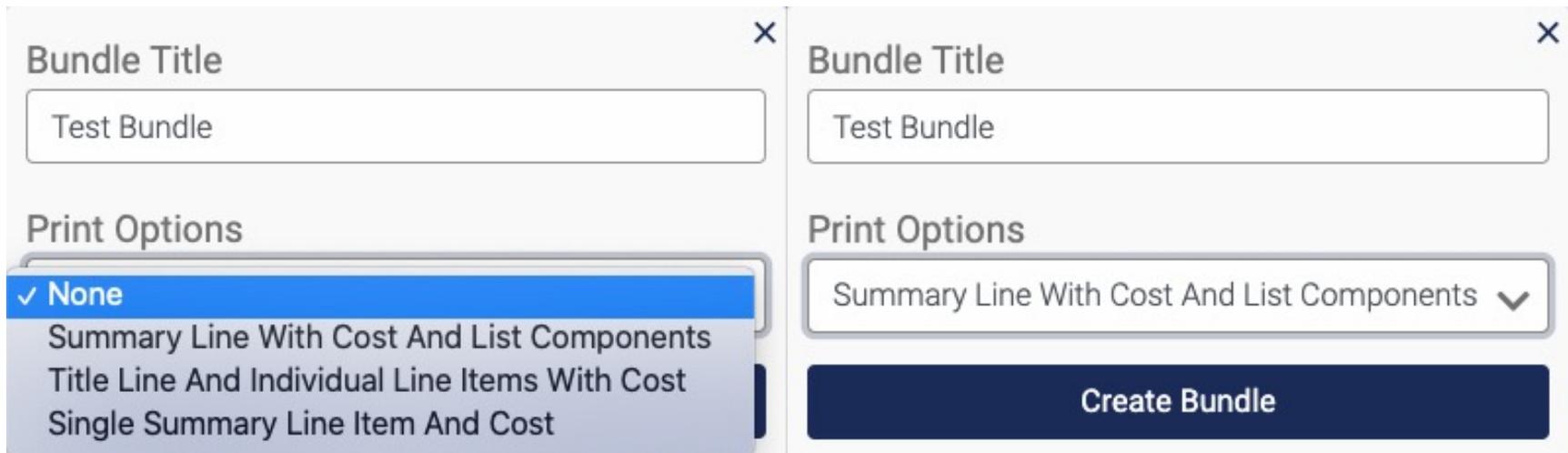


	Qty	MFI	Part #	Description	Retail	Customer C	Customer E	Stock Code	
☐	1				\$	\$	\$		🗑️
☐	1	DCI	DO5652	PMU w/Cuspidor,Gray	\$4500.00	\$2725.31	\$2725.31	642-0098	🗑️
☐	1	BRWCUS	11001VFRA	Century Stl.,Swing-Mnt w/Adjus	\$867.00	\$420.24	\$420.24	550-6356	🗑️
☐	1	DCI	DO5652	PMU w/Cuspidor,Gray	\$4500.00	\$1962.22	\$1962.22	642-0098	🗑️
☐	1	DCI	DO5652	PMU w/Cuspidor,Gray	\$4500.00	\$1962.22	\$1962.22	642-0098	🗑️
☐	1	BRWCUS	2052BLV	Asst Stool w/Backrest,Adj	\$1122.00	\$543.66	\$543.66	550-7796	🗑️
☐	1	BRWCUS	135ASP	Stl,Amazone,Std,UL,Pyprus	\$1126.00	\$545.70	\$545.70	550-2430	🗑️
☐	1	BRWCUS	2052LV	Asst Stool W/ Ratchet blue	\$968.00	\$469.20	\$469.20	550-1817	🗑️
☐	1	DCI	DO5652	PMU w/Cuspidor,Gray	\$4500.00	\$2589.05	\$2589.05	642-0098	🗑️
☑	1	DCI	DO5652	PMU w/Cuspidor,Gray	\$4500.00	\$2589.05	\$2589.05	642-0098	🗑️
☐	1	PLANM	FE001282	Exhibition Free Strnd Base	\$1469.26	\$899.19	\$899.19	445-9553	🗑️
☑	1	PLANM	FE003791U	ProSensor w/Sensor Size 0	\$8070.00	\$4692.00	\$4692.00	445-3450	🗑️
☑	1	PLANM	PX-1102	ProMax S3 2D Pan/Ceph w/	\$70175.00	\$40800.00	\$40800.00	445-3332	🗑️
☐	1	PLANM	CBVT-C-SP	Upgrade ProMax S3 to D3	\$87692.31	\$58140.00	\$58140.00	445-0811	🗑️
☐	1	PLANM	10005439	ProMax 2nd Std Wall Bracket	\$304.99	\$304.00	\$304.00	445-8922	🗑️
☐	1	PLANM	10004040U	Exposure Cord & Button	\$305.22	\$305.00	\$305.00	444-4040	🗑️
☑	1	PLANM	10004280	Promax Bite Sticks-Pkg,10	\$249.97	\$249.00	\$249.00	444-4280	🗑️
☑	1	PLANM	FE001353	Tools,Calib Promax N/Ser#	\$1921.40	\$1921.00	\$1921.00	445-0596	🗑️
<b>Subtotal:</b>					<b>\$196771.15</b>	<b>\$121116.84</b>	<b>\$121116.84</b>		

Once you have selected the items you wish to bundle, click on the Create Bundle icon (3 blocks in a pyramid shape). You will be presented with the popup in the following images.

Type a name for your bundle and select how you prefer the bundle to appear on Forms. These options work exactly as they do in DentaCAD Classic. (Ignore the “None” option, that is in the process of being removed).

Once you have given the bundle a name and chosen the Print Options click the Create Bundle button.



The image displays two side-by-side screenshots of a 'Create Bundle' dialog box. Both screenshots show a 'Bundle Title' text input field containing 'Test Bundle' and a 'Print Options' dropdown menu. In the left screenshot, the 'Print Options' dropdown is open, showing a list of options: 'None' (which is selected with a checkmark and a blue background), 'Summary Line With Cost And List Components', 'Title Line And Individual Line Items With Cost', and 'Single Summary Line Item And Cost'. In the right screenshot, the 'Print Options' dropdown is closed, and the selected option 'Summary Line With Cost And List Components' is visible in the dropdown box. A dark blue 'Create Bundle' button is located at the bottom right of the dialog box in both screenshots.

Clicking on the Bundle icon to the far right of an existing Bundle’s name will re-display the above dialogue and allow you to change the Bundle name and/or choose a different Print Option. (Bundle Edit functionality is in final QA testing and may not be available in UAT quite yet).

The selected items will now appear in a separate subtotaled section.

To modify contents of a bundle you can add a new item to that section via product search. You can also drag items from the Individual Line Items section and even from other bundles into your newly created bundle. Likewise you can drag items out of your bundle back into the Individual Line Items section (and other bundles).

### Order Lines

Individual Line Items

SmartCatalog Search

Configurator

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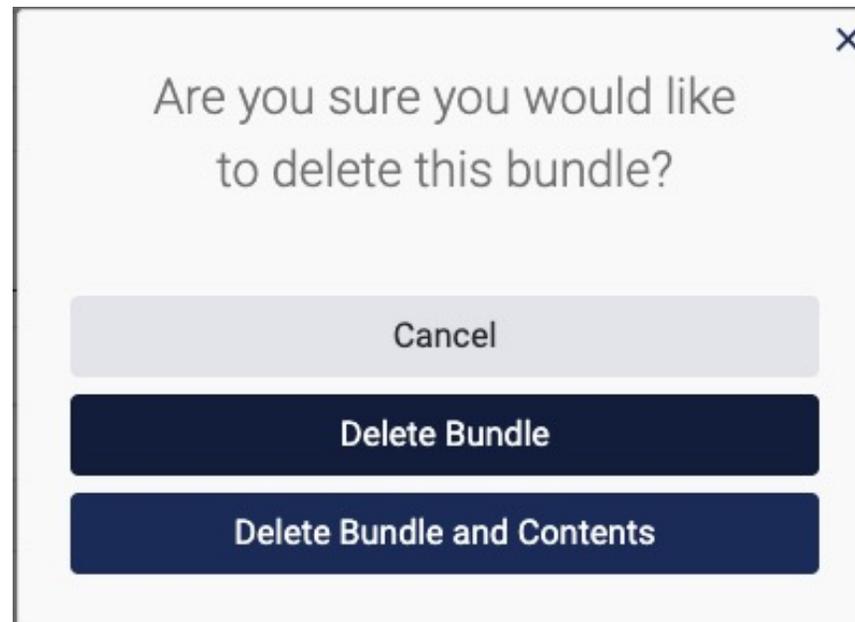
<input type="checkbox"/>	Qty	MFI	Part #	Description	Retail	Customer C	Customer E	Stock Code	
<input type="checkbox"/>	1	DCI	DO5652	PMU w/Cuspidor,Gray	\$4500.00	\$1962.22	\$1962.22	642-0098	
<input type="checkbox"/>	1	DCI	DO5652	PMU w/Cuspidor,Gray	\$4500.00	\$1962.22	\$1962.22	642-0098	
<input type="checkbox"/>	1	BRWCUS	2052BLV	Asst Stool w/Backrest,Adj	\$1122.00	\$543.66	\$543.66	550-7796	
<input type="checkbox"/>	1	BRWCUS	135ASP	Stl,Amazone,Std,UL,Pyryus	\$1126.00	\$545.70	\$545.70	550-2430	
<input type="checkbox"/>	1	BRWCUS	2052LV	Asst Stool W/ Ratchet blue	\$968.00	\$469.20	\$469.20	550-1817	
<input type="checkbox"/>	1	DCI	DO5652	PMU w/Cuspidor,Gray	\$4500.00	\$2589.05	\$2589.05	642-0098	
<input type="checkbox"/>	1	PLANM	FE001282	Exhibition Free Stnd Base	\$1469.26	\$899.19	\$899.19	445-9553	
<input type="checkbox"/>	1	PLANM	CBVT-C-SF	Upgrade ProMax S3 to D3	\$87692.31	\$58140.00	\$58140.00	445-0811	
<input type="checkbox"/>	1	PLANM	10005439	ProMax 2nd Std Wall Bracket	\$304.99	\$304.00	\$304.00	445-8922	
<input type="checkbox"/>	1	PLANM	10004040U	Exposure Cord & Button	\$305.22	\$305.00	\$305.00	444-4040	
<b>Subtotal:</b>					<b>\$106487.78</b>	<b>\$67720.24</b>	<b>\$67720.24</b>		

### Test Bundle

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<input type="checkbox"/>	Qty	MFI	Part #	Description	Retail	Customer C	Customer E	Stock Code	
<input type="checkbox"/>	1	DCI	DO5652	PMU w/Cuspidor,Gray	\$4500.00	\$2589.05	\$2589.05	642-0098	
<input type="checkbox"/>	1	PLANM	FE003791U	ProSensor w/Sensor Size 0	\$8070.00	\$4692.00	\$4692.00	445-3450	
<input type="checkbox"/>	1	PLANM	PX-1102	ProMax S3 2D Pan/Ceph w/	\$70175.00	\$40800.00	\$40800.00	445-3332	
<input type="checkbox"/>	1	PLANM	10004280	Promax Bite Sticks-Pkg.10	\$249.97	\$249.00	\$249.00	444-4280	
<input type="checkbox"/>	1	PLANM	FE001353	Tools,Calib Promax N/Ser#	\$1921.40	\$1921.00	\$1921.00	445-0596	
<b>Subtotal:</b>					<b>\$84916.37</b>	<b>\$50251.05</b>	<b>\$50251.05</b>		

If you decide you no longer need this bundle, click the Trash icon to the far right of the Bundle name. You will be presented with the following pop-up:



From here you can cancel the deletion command, delete just the bundle (the line items will be sent back to the Individual Order Line section) or delete the bundle as well as its contents.