


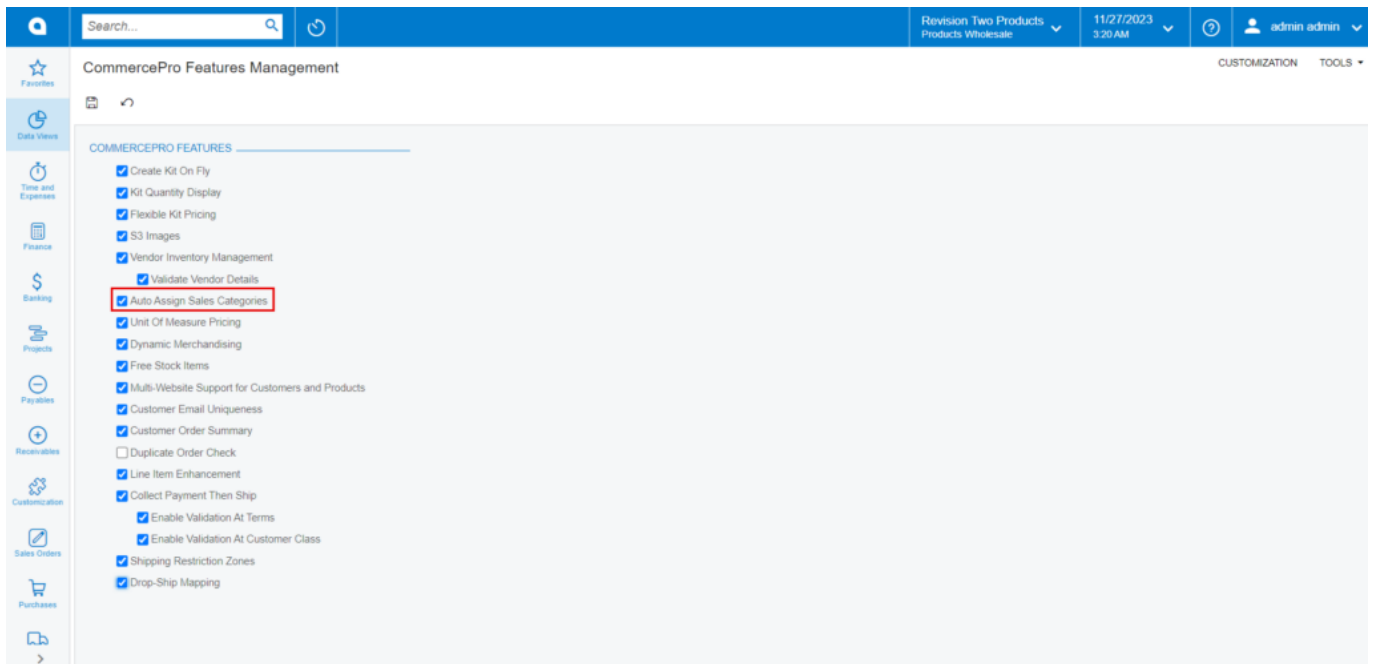
# Auto Assign Sales Categories

 The Category and Rule ID will automatically run the process for categorizing, once the defined conditions have been satisfied for existing or new products that previously had categories and rule ID's assigned, the newly created Category Rule will be assigned and remove the existing category.

- To access **[Auto Assign Sales Categories]**, you must enable the check box for **[Auto Assign Sales Categories]**, under CommercePro Features.
- Click on **[Save]**.

The Impacted areas for Auto Assign Sales Categories are below.

- Category Rules
- Update Item Category based on rules
- Stock Items
- Non-Stock Items
- Item Class Category



The screenshot shows the 'CommercePro Features Management' interface. The 'Auto Assign Sales Categories' feature is highlighted with a red box. The interface includes a search bar, a navigation menu on the left, and a list of features with checkboxes. The 'Auto Assign Sales Categories' checkbox is checked and highlighted.

- You need to navigate to the Category rules screen.



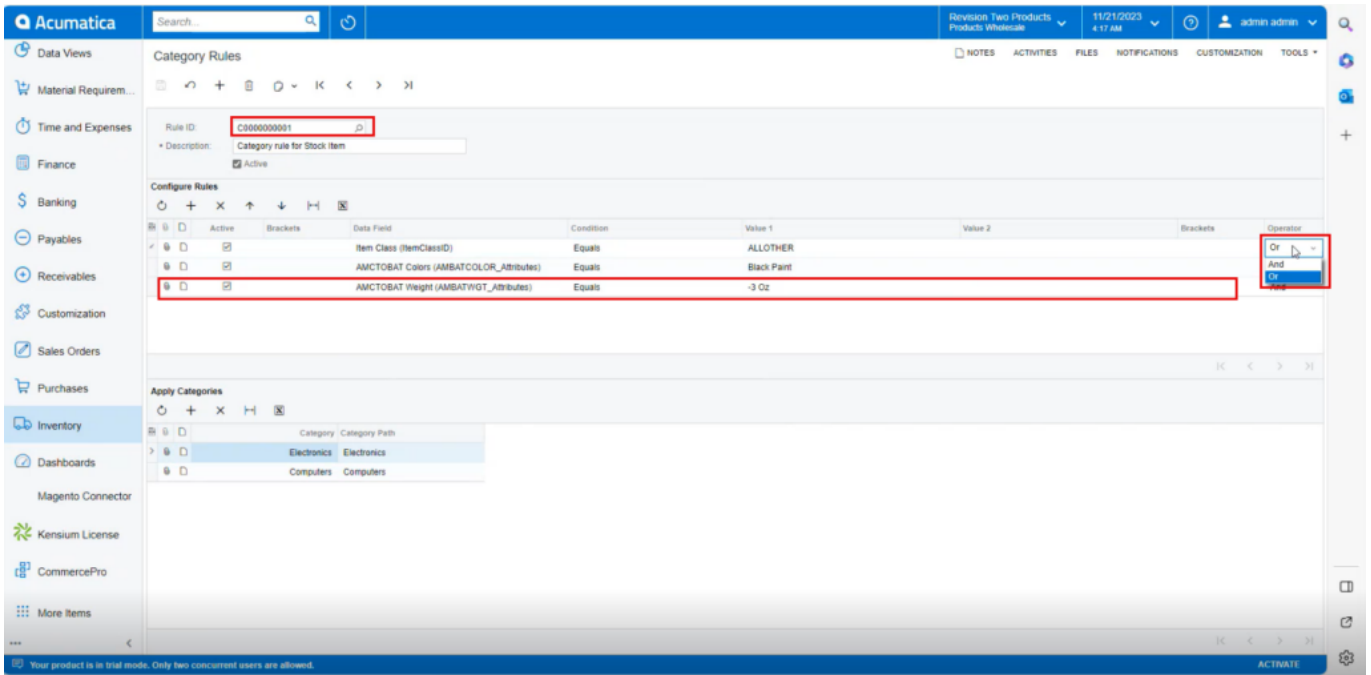
KENSIUM

CommercePro

The screenshot shows the Kensium CommercePro interface. At the top, there is a search bar with the text 'category' and a search icon. To the right of the search bar, there are several tabs: 'Revision Two Products', 'Products Wholesale', '11/27/2023 11:58 PM', and 'admin admin'. Below the search bar, there is a navigation menu with icons for 'Favorites', 'Data Views', 'Time and Expenses', 'Finance', 'Banking', 'Projects', 'Payables', 'Receivables', 'Customization', 'Sales Orders', and 'Purchases'. The main content area is divided into sections: 'MENU ITEMS (9)', 'TRANSACTIONS AND PROFILES', 'HELP TOPICS', and 'FILES'. Under 'MENU ITEMS (9)', there are three main categories: 'Inventory', 'Commerce Connector', and 'Commerce Pro'. Each category has a list of sub-items. For 'Inventory', the sub-items are 'Processes' (with a '+', 'Update Item Category based on...') and 'Preferences' (with 'Category Rules'). For 'Commerce Connector', the sub-items are 'Schema Management' (with 'Category'), 'APIs' (with 'Category Schema' and 'Category Data'), and 'Real Time-Processes' (with 'Category' and 'Batch Processes'). For 'Commerce Pro', the sub-items are 'Processes' (with a '+', 'Update Item Category based on...') and 'Preferences' (with 'Category Rules').

## Category Rules

- Click on **[+]** icon.
- You need to create a **[Rule ID]**
- You can provide the **[Description]**.
- Click on **[+]** icon under Configure Rules
- The **[Active]** check box will automatically pop up.
- Search for **[Data Field]**.
- Select the **[Conditions]** from the drop-down and add the **[Value 1]**.
- Select the **[Operator]** from the Drop-down.



The screenshot displays the 'Category Rules' configuration screen in Acumatica. The 'Configure Rules' section contains a table with the following data:

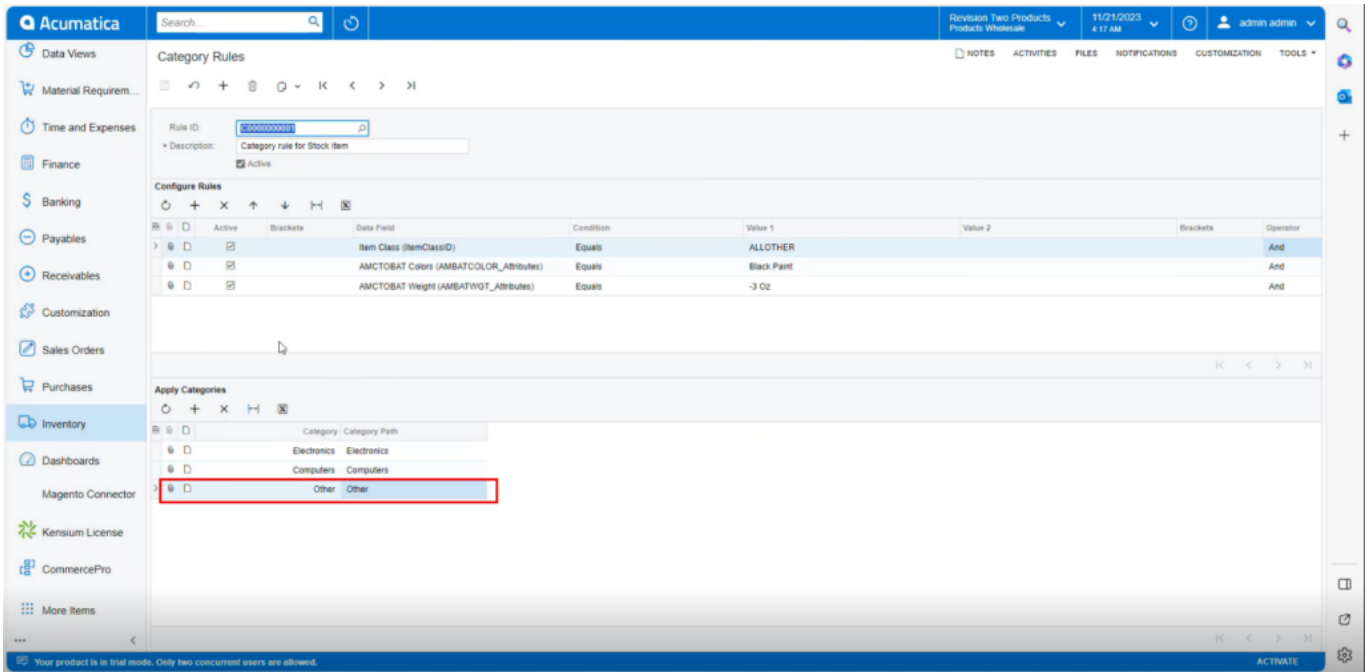
Active	Brackets	Data Field	Condition	Value 1	Value 2	Brackets	Operator
<input checked="" type="checkbox"/>		Item Class (ItemClassID)	Equals	ALLOTHER			Or
<input checked="" type="checkbox"/>		AMCTOBAT Colors (AMBATCOLOR_Attributes)	Equals	Black Paint			And
<input checked="" type="checkbox"/>		AMCTOBAT Weight (AMBATWGT_Attributes)	Equals	-3 Oz			None

The 'Apply Categories' section shows a tree view with the following structure:

- Category: Electronics
  - Category Path: Electronics
  - Category Path: Computers

## Category Rules

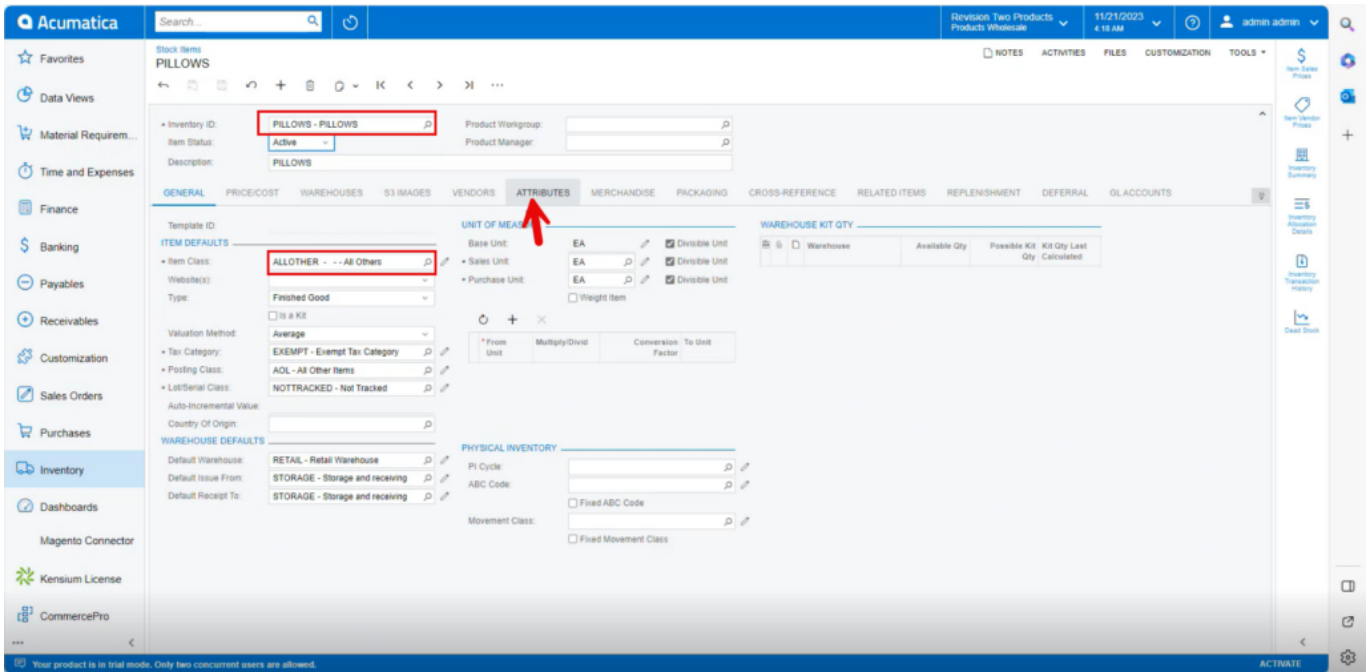
- Only when these configuration conditions are met will only the Apply Categories be available for both stock and non-stock items.
- You must be mapping the category that you wish to show in the stock items screen or non-stock items screen.
- Click on **[Save]**.



## Category Rules

## Stock Items

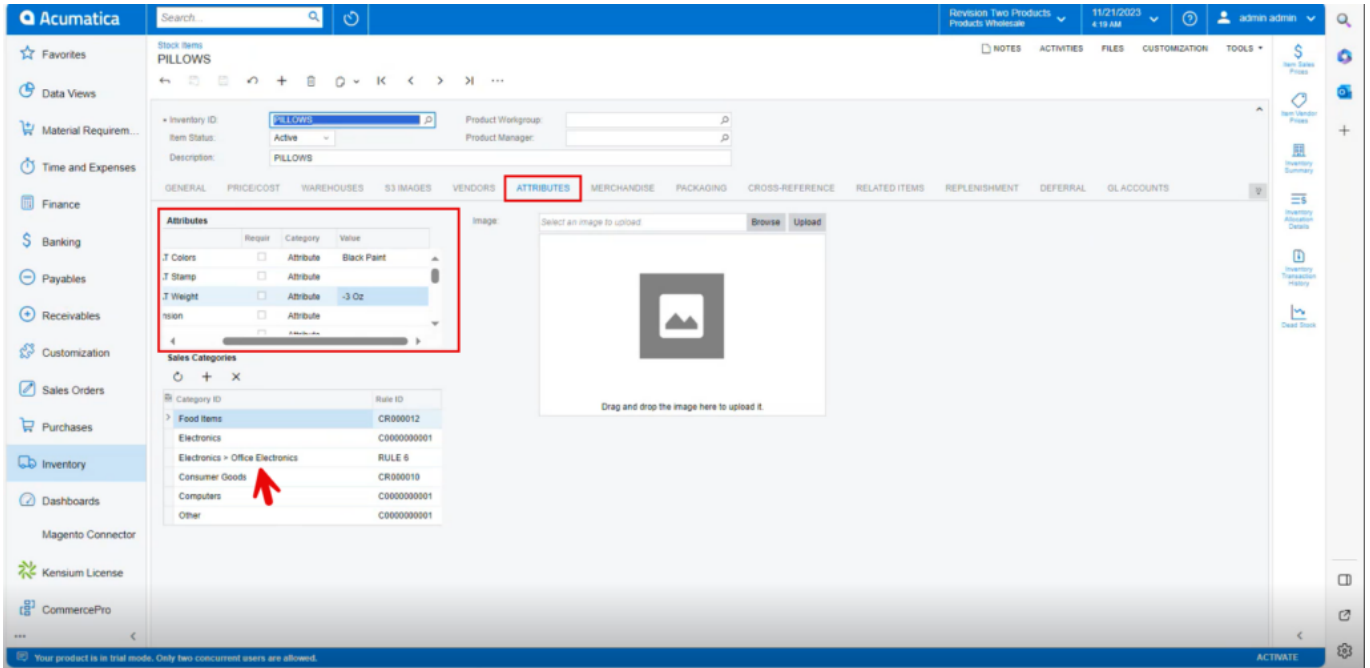
- Click on the **[+]** icon, then you will be redirected to the stock items screen.
- You need to create an **[Inventory ID]**.
- Select the Item status as **[Active]** from the drop-down.
- You can add the **[Description]**.
- Select the **[Item class]** which you have mapped in category rules.
- Click on **[Save]**.



The screenshot displays the Acumatica interface for a stock item named 'PILLOWS'. The 'Attributes' tab is selected, showing various configuration options. A red arrow points to the 'ATTRIBUTES' tab. The 'Item Class' is 'ALLOTHER - All Others'. The 'UNIT OF MEAS' section shows 'EA' for Base Unit, Sales Unit, and Purchase Unit, with 'Divisible Unit' checked for each. The 'WAREHOUSE KIT QTY' section shows 'Warehouse' as the kit type. The 'PHYSICAL INVENTORY' section shows 'PI Cycle' and 'ABC Code' fields.

## Stock Items

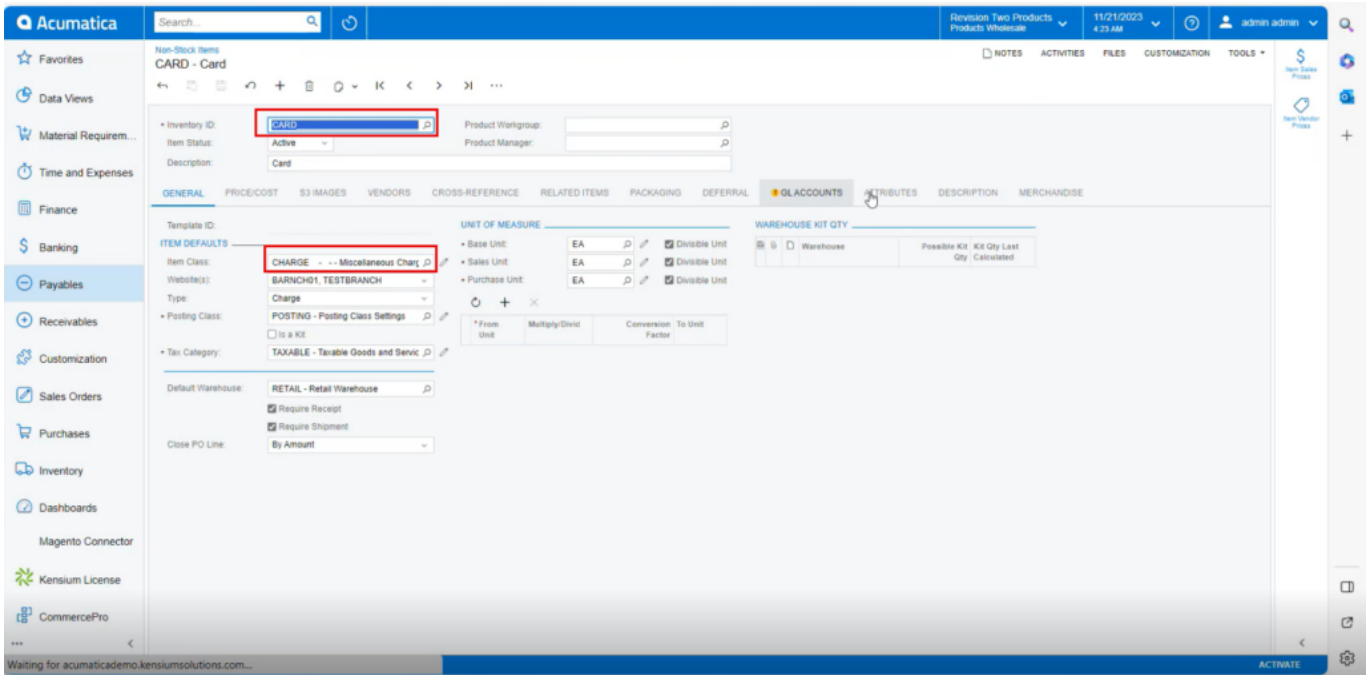
- Click on **the [Attributes]** tab.
- You can view the attributes that are mapped in **[Category Rules]**.



## Stock Items

## Non-Stock Items

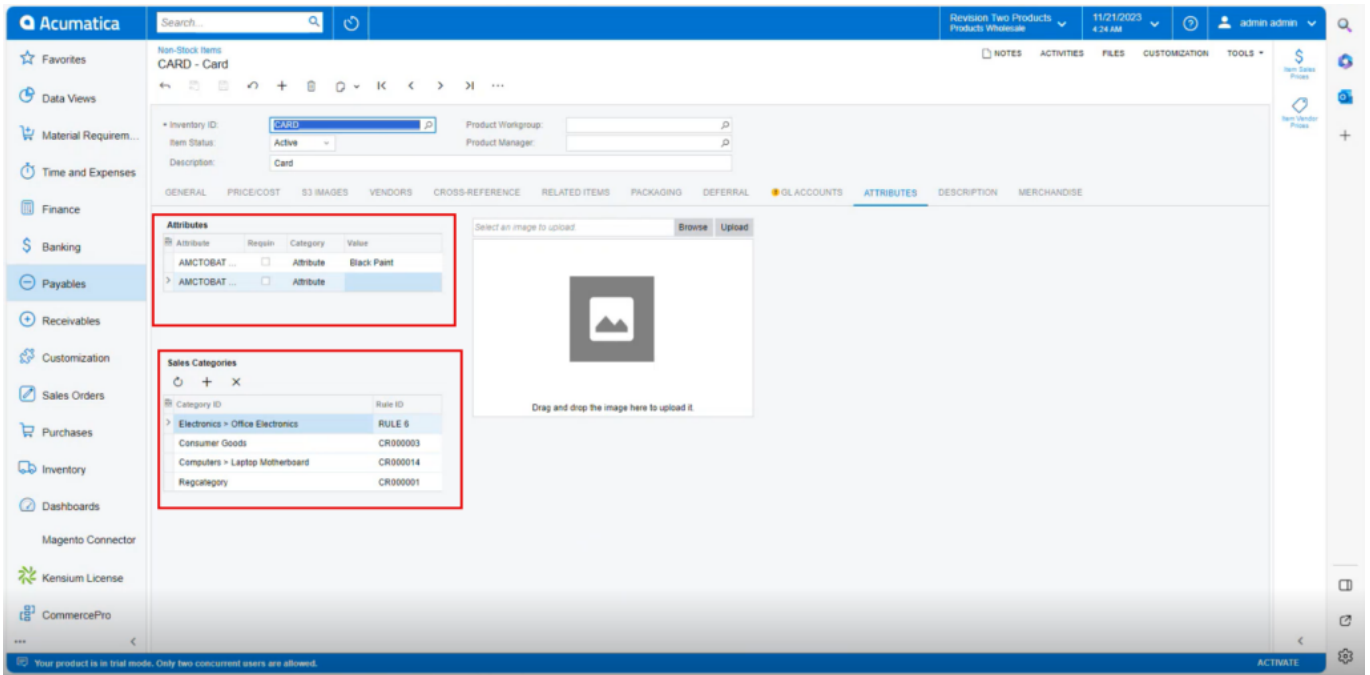
- Click on the **[+]** icon, then you will be redirected to the stock items screen.
- You need to create an **[Inventory ID]**.
- Select the Item status as **[Active]** from the drop-down.
- You can add the **[Description]**.
- Select the **[Item class]** which you have mapped in category rules.
- Click on **[Save]**.



The screenshot displays the Acumatica interface for a non-stock item named 'CARD - Card'. The 'Attributes' tab is selected, showing various configuration options. The 'Item Class' is 'CHARGE - Miscellaneous Charge', and the 'UNIT OF MEASURE' is set to 'EA' for Base, Sales, and Purchase units, all of which are marked as 'Divisible Unit'. The 'WAREHOUSE KIT QTY' section is also visible, showing a table with columns for Warehouse, Possible Kit Qty, and Kit Qty Last Qty Calculated.

## Non- Stock Items

- Click on **the [Attributes] tab**.
- You can view the attributes that are mapped in **[Category Rules]**.



Non- Stock Items

## Item Classes

You need to navigate to the Item Sales Category screen.



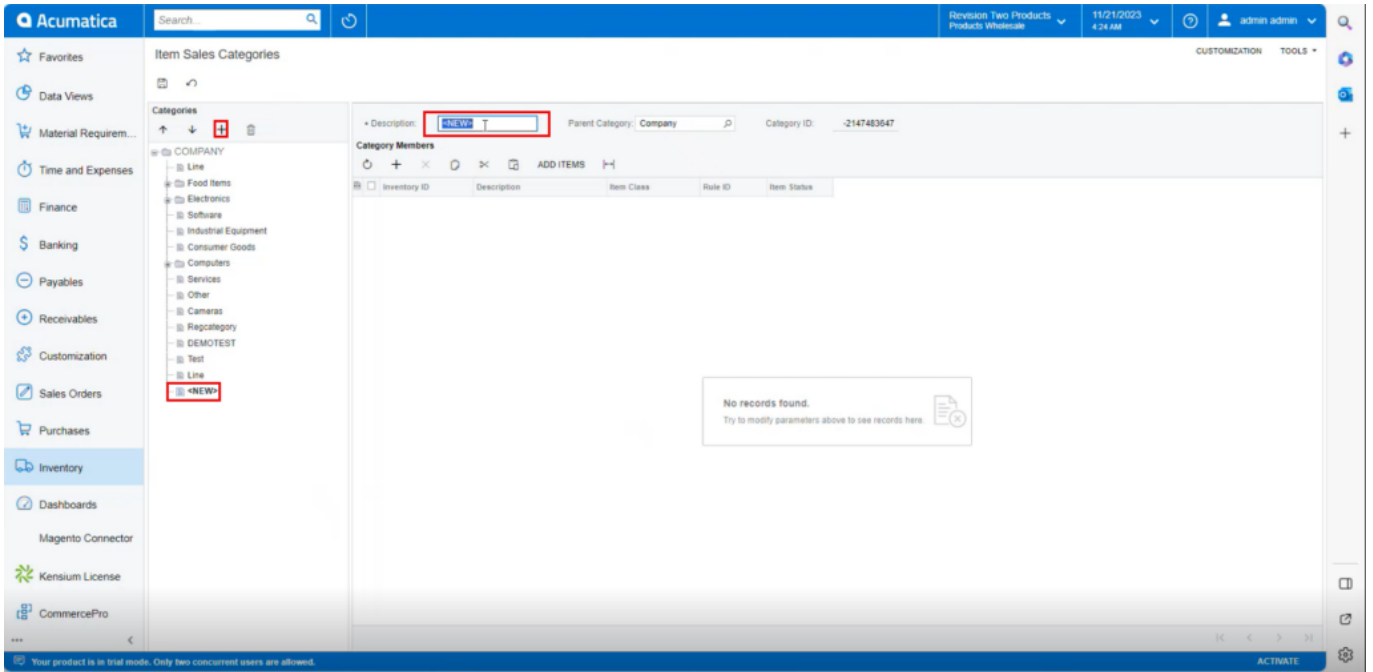


The screenshot shows the Kensium CommercePro interface. The top navigation bar includes a search bar with 'Item sales' entered, a refresh icon, and user information for 'admin admin'. The left sidebar contains a navigation menu with icons for Favorites, Data Views, Time and Expenses, Finance, Banking, Projects, Payables, Receivables, Customization, Sales Orders, Purchases, and a home icon. The main content area is divided into tabs: 'MENU ITEMS (6)', 'TRANSACTIONS AND PROFILES', 'HELP TOPICS', and 'FILES'. Under the 'MENU ITEMS (6)' tab, the following items are listed:

- Receivables
- Profitability Analysis
  - Sales Profitability by Item and O...
  - Sales Profitability by Item Class ...
- Sales Orders
- Reports
  - Sales Order Details by Inventory...
  - Sales Profitability by Item and O...
  - Sales Profitability by Item Class ...
- Inventory
- Preferences
  - Item Sales Categories

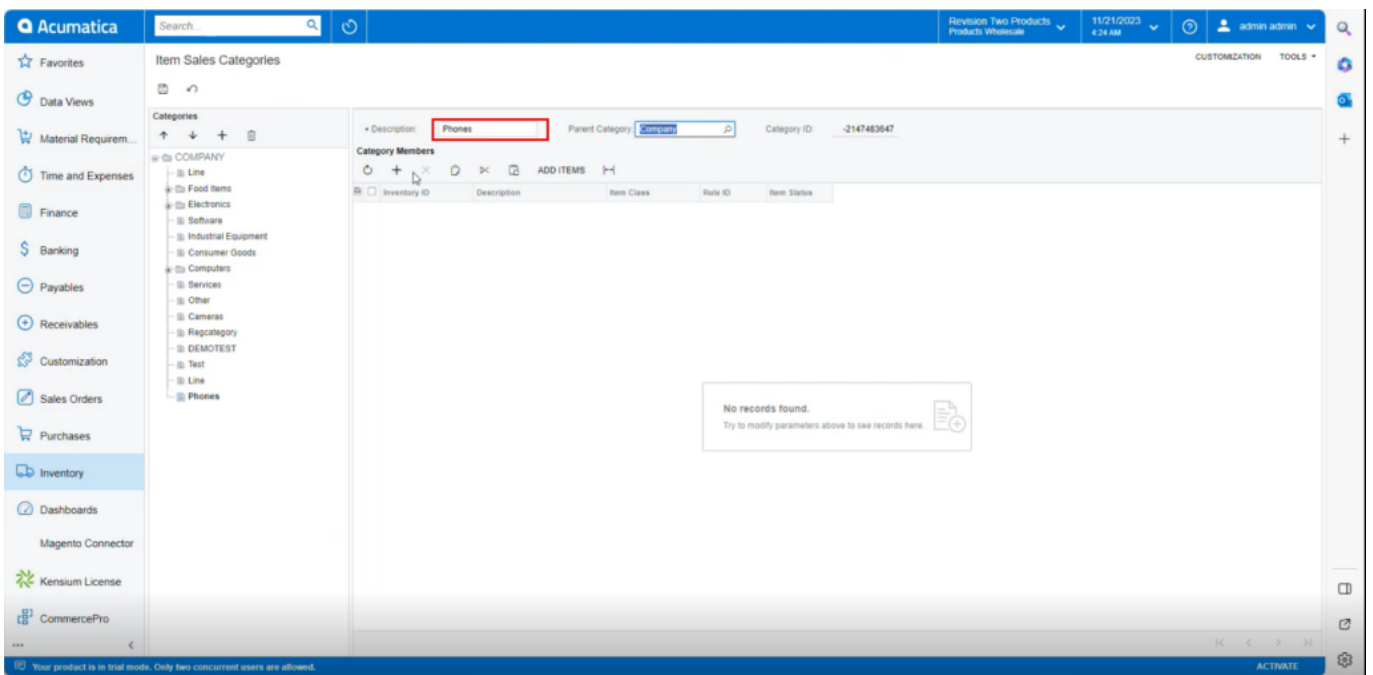
## Non- Stock Items

- Click on **[+]** icon.
- You can add latest items in **[Description]** Field.



The screenshot shows the Acumatica 'Item Sales Categories' interface. The left sidebar contains navigation options like Favorites, Data Views, Material Requirements, Time and Expenses, Finance, Banking, Payables, Receivables, Customization, Sales Orders, Purchases, Inventory, Dashboards, Magento Connector, Kensium License, and CommercePro. The main area is titled 'Item Sales Categories' and shows a search bar with 'NEW' entered. Below the search bar, there are fields for 'Parent Category' (Company) and 'Category ID' (-2147483647). A 'Category Members' table is visible, but it is empty, displaying a message: 'No records found. Try to modify parameters above to see records here.' The 'NEW' text in the search bar is highlighted with a red box.

### Non- Stock Items



This screenshot is similar to the one above, showing the 'Item Sales Categories' page. In this instance, the search bar contains the word 'Phones', which is highlighted with a red box. The 'Category Members' table remains empty, with the same 'No records found' message displayed. The 'Phones' category is also visible in the left-hand category tree.

Non- Stock Items

