


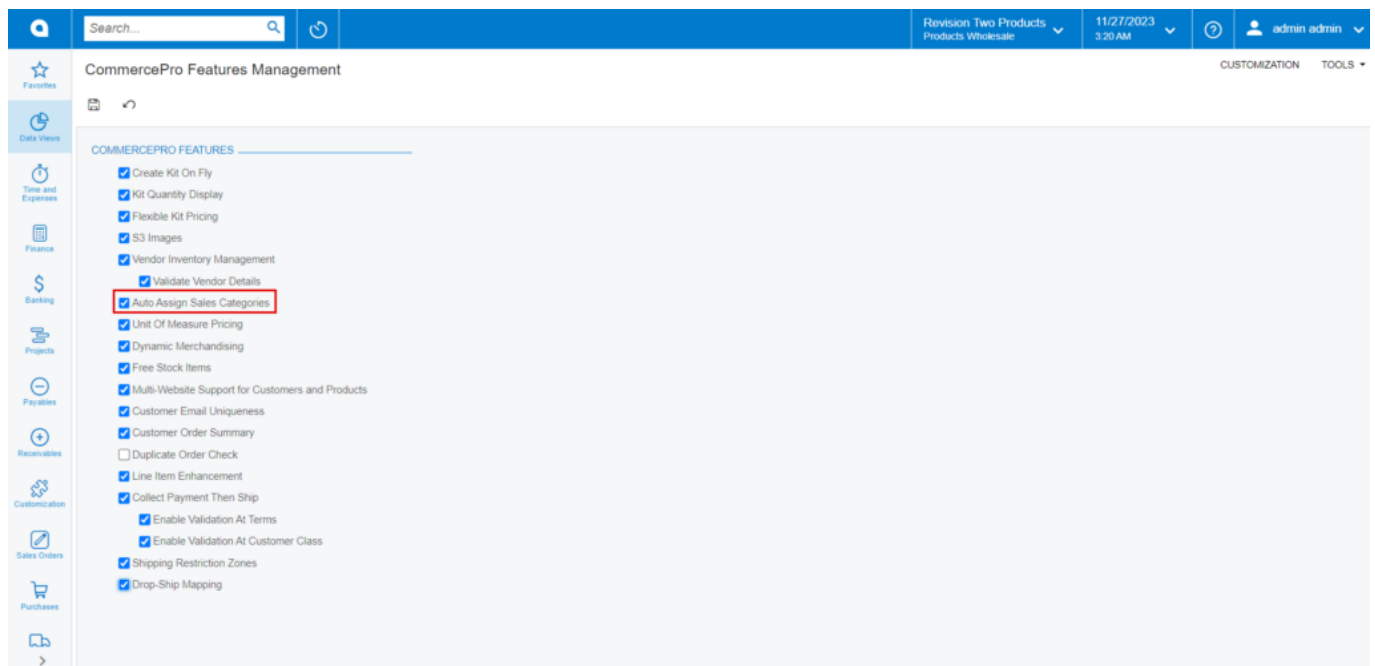
Auto Assign Sales Categories

 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

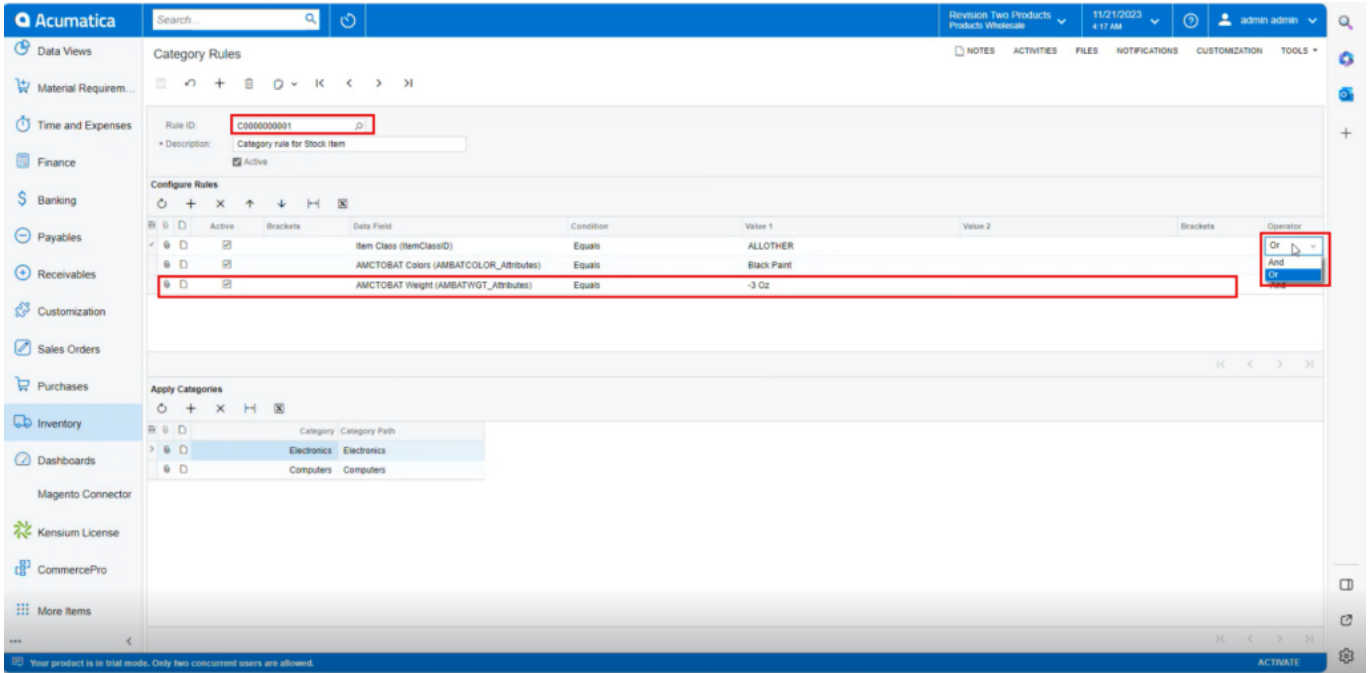


- You need to navigate to the Category rules screen.

	category	Revision Two Products Products Wholesale	11/27/2023 11:58 PM	admin admin
MENU ITEMS (9)	TRANSACTIONS AND PROFILES		HELP TOPICS	
Inventory				
Processes	Update Item Category based on...	Preferences	Category Rules	
Commerce Connector				
Schema Management	APIs	Real Time-Processes		
Category	Category Schema	Category		
	Category Data	Batch Processes		
		Category		
Commerce Pro				
Processes	Update Item Category based on...	Preferences	Category Rules	

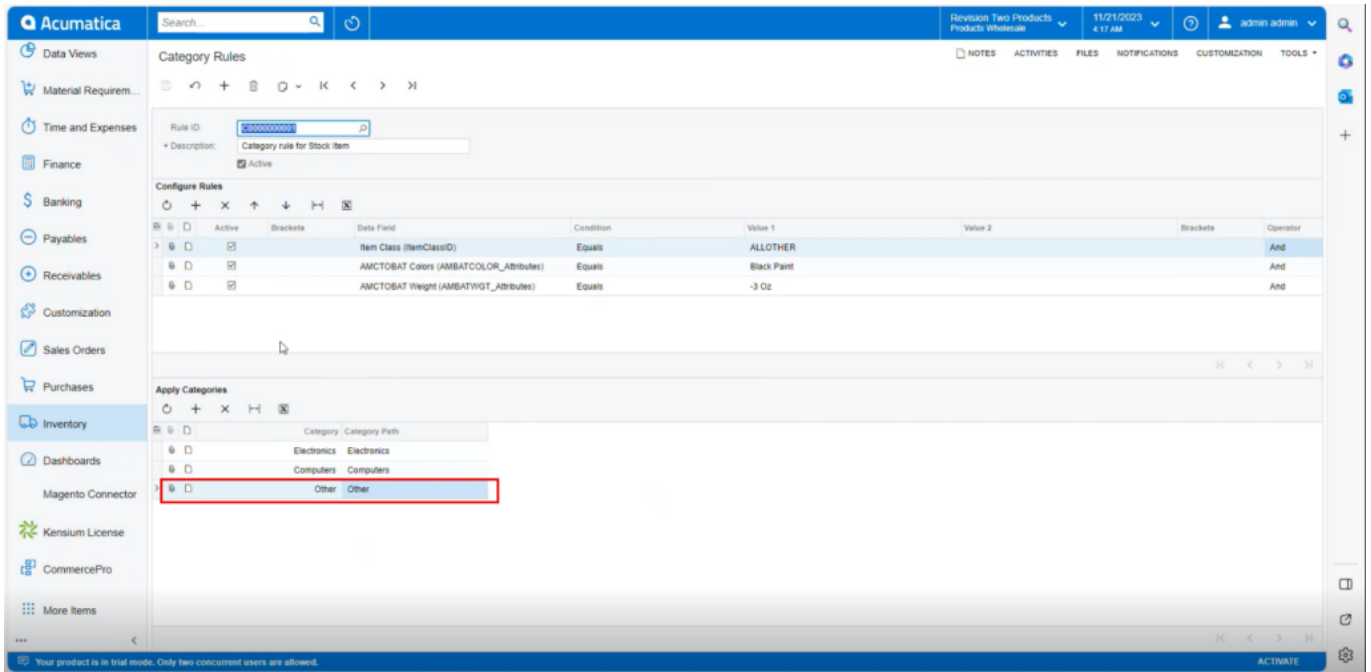
Category Rules

- 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.



Category Rules

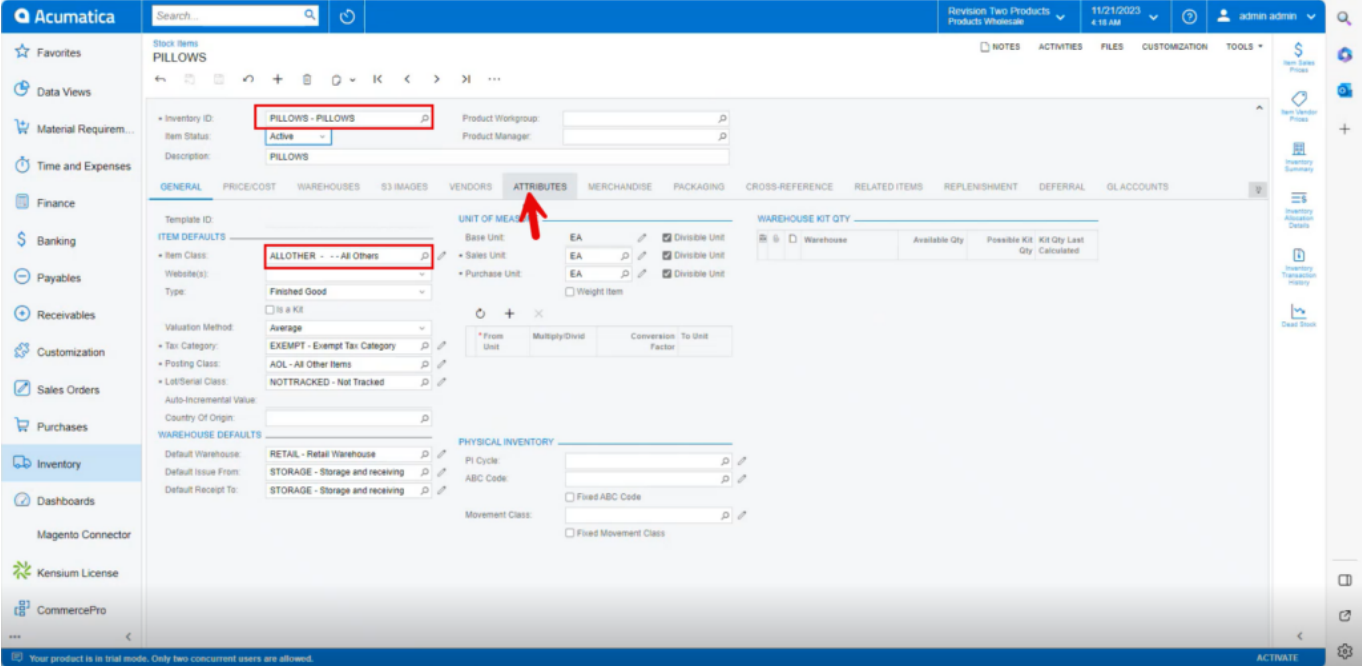
- Only when these configuration conditions are met will only the Apply Categories be available for both stock and non-stock items.
- You must be mapping the category that you wish to show in the stock items screen or non-stock items screen.
- Click on **[Save]**.



Category Rules

Stock Items

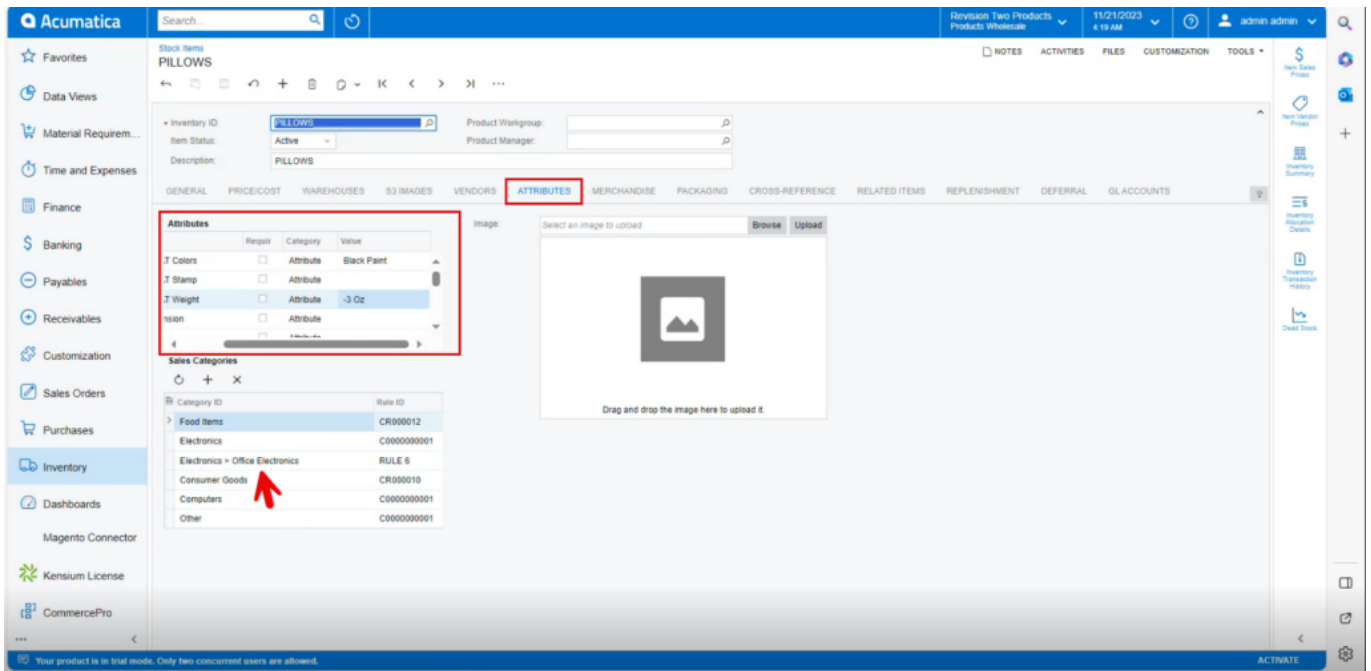
- Click on the **[+]** icon, then you will be redirected to the stock items screen.
- You need to create an **[Inventory ID]**.
- Select the Item status as **[Active]** from the drop-down.
- You can add the **[Description]**.
- Select the **[Item class]** which you have mapped in category rules.
- Click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



The screenshot shows the Acumatica CommercePro interface. The top navigation bar includes a search bar, a refresh button, and user information (Revision Two Products, Products: Wholesale, 11/21/2023 4:18 AM, admin admin). The left sidebar contains various modules 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 displays the 'Stock Items' form for 'PILLOWS'. The 'ATTRIBUTES' tab is selected, showing fields for Base Unit (EA), Sales Unit (EA), and Purchase Unit (EA). A red arrow points to the 'ATTRIBUTES' tab. The 'WAREHOUSE KIT QTY' section shows 'Available Qty' and 'Possible Kit Qty'. The 'PHYSICAL INVENTORY' section shows 'PI Cycle', 'ABC Code', and 'Movement Class'.

Stock Items

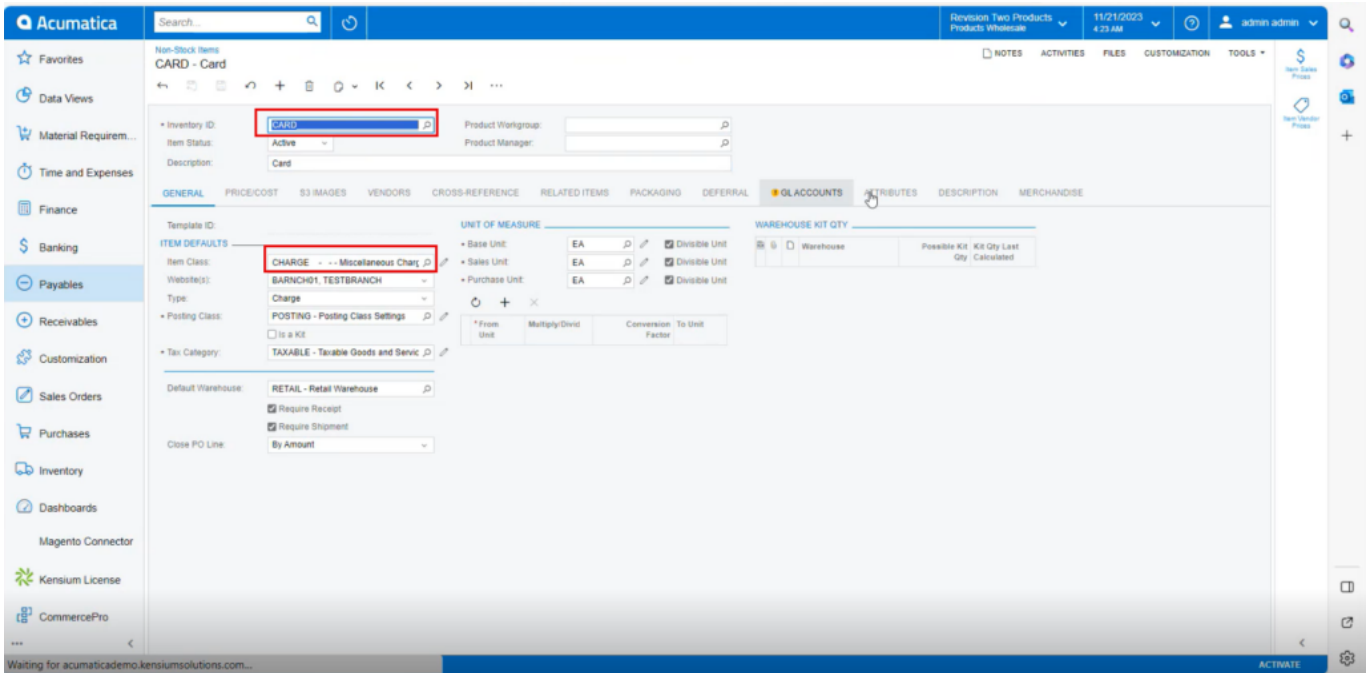
- Click on **the [Attributes] tab**.
- You can view the attributes that are mapped in **[Category Rules]**.



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]**.



Acumatica

Search

Revision Two Products
Products Wholesale

11/21/2023
4:23 AM

admin admin

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

Non-Stock Items
CARD - Card

Inventory ID: CARD

Item Status: Active

Description: Card

Product Workgroup:

Product Manager:

GENERAL PRICE/COST S3 IMAGES VENDORS CROSS-REFERENCE RELATED ITEMS PACKAGING DEFERRAL OLACCOUNTS ATTRIBUTES DESCRIPTION MERCHANDISE

Template ID:

ITEM DEFAULTS

Item Class: CHARGE - -- Miscellaneous Charge

Website(s): BARNCH01.TESTBRANCH

Type: Charge

Posting Class: POSTING - Posting Class Settings

Tax Category: TAXABLE - Taxable Goods and Service

Default Warehouse: RETAIL - Retail Warehouse

Require Receipt

Require Shipment

Close PO Line: By Amount

UNIT OF MEASURE

Base Unit: EA

Sales Unit: EA

Purchase Unit: EA

Warehouse KIT QTY

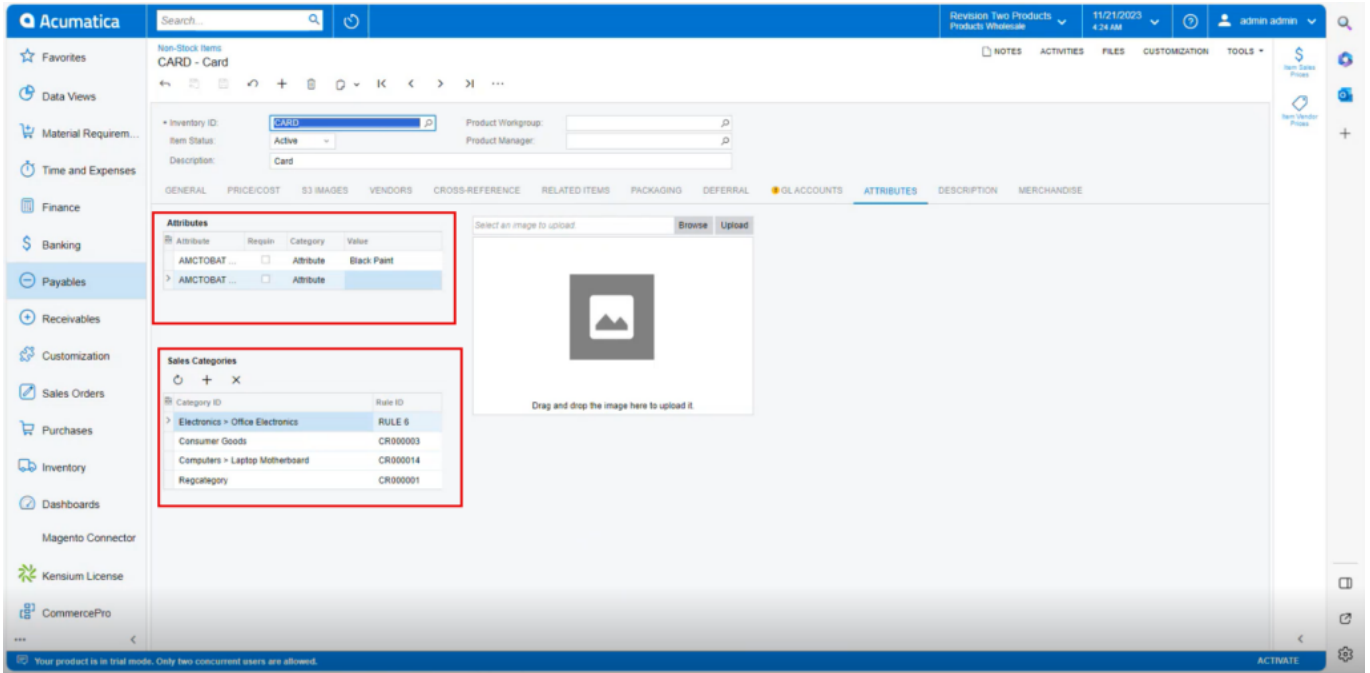
Warehouse: Possible Kit Kit Qty Last Qty Calculated

Waiting for acumaticademo.kensiumolutions.com...

ACTIVATE

Non- Stock Items

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



Acumatica

Search

Revision Two Products
Products Wholesale

11/21/2023
4:24 AM

admin admin

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

Non-Stock Items
CARD - Card

Inventory ID: CARD Product Workgroup: Product Manager:

Item Status: Active

Description: Card

GENERAL PRICE/COST 3D IMAGES VENDORS CROSS-REFERENCE RELATED ITEMS PACKAGING DEFERRAL GL ACCOUNTS ATTRIBUTES DESCRIPTION MERCHANDISE

Attributes

Attribute	Require	Category	Value
AMCTOBAT ...	<input type="checkbox"/>	Attribute	Black Pant
AMCTOBAT ...	<input type="checkbox"/>	Attribute	

Sales Categories

Category ID	Rule ID
Electronics > Office Electronics	RULE 6
Consumer Goods	CR000003
Computers > Laptop Motherboard	CR000014
Regcategory	CR000001

Select an image to upload: Browse Upload

Drag and drop the image here to upload it.

Your product is in trial mode. Only two concurrent users are allowed.

ACTIVATE

Non- Stock Items

Item Classes

You need to navigate to the Item Sales Category screen.

Item sales

Revision Two Products
Products Wholesale

11/28/2023
1:49 AM

admin admin

FAVORITES

DATA VIEWS

TIME AND EXPENSES

FINANCE

SALES

PROJECTS

PAYABLES

RECEIVABLES

CUSTOMIZATION

SALES ORDERS

PURCHASES

MENU ITEMS (6)

TRANSACTIONS AND PROFILES

HELP TOPICS

FILES

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 ...

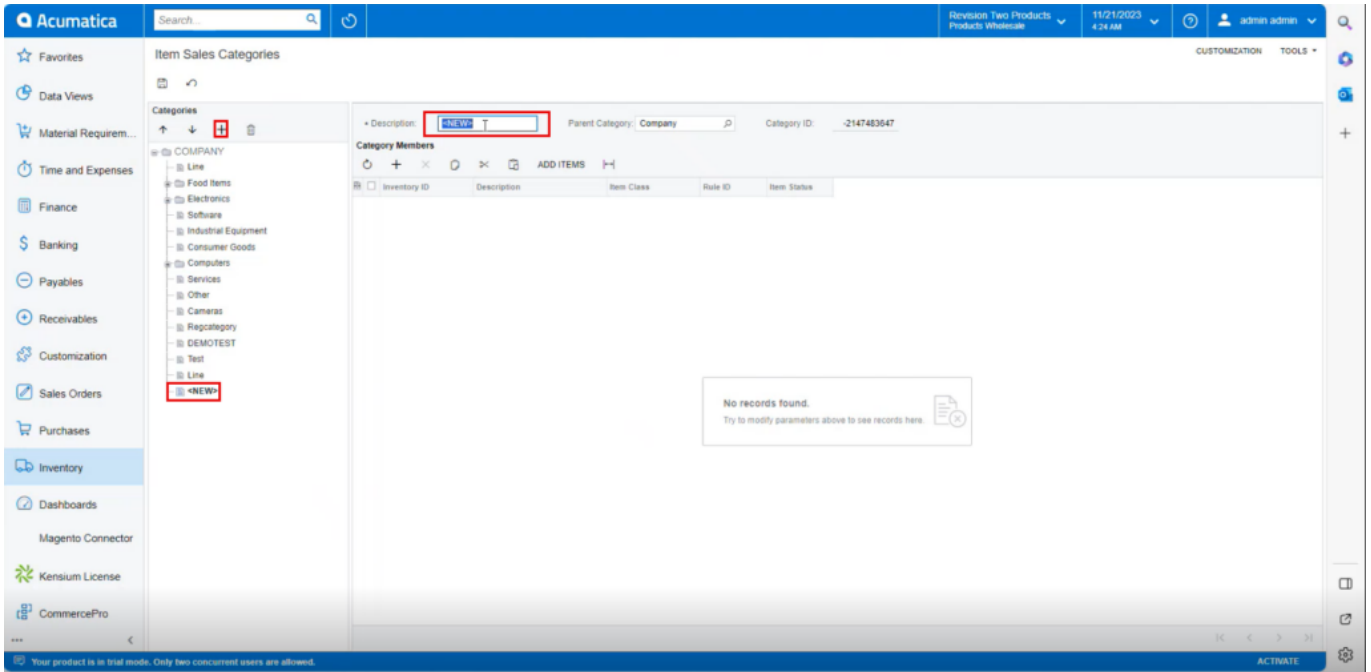
Inventory

Preferences

Item Sales Categories

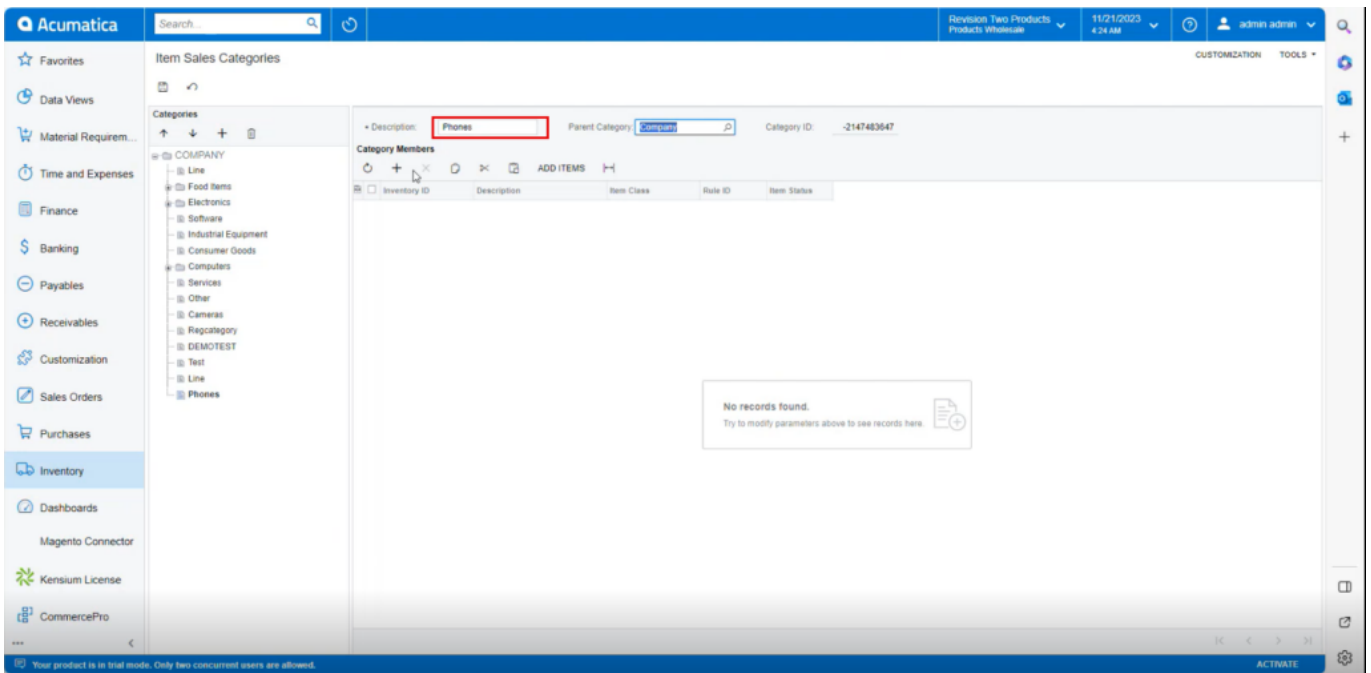
Non- Stock Items

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



The screenshot shows the Acumatica 'Item Sales Categories' interface. The left sidebar contains a navigation menu with 'Inventory' selected. The main area displays a form for 'Item Sales Categories'. The 'Description' field is highlighted with a red box and contains the text 'NEW'. The 'Parent Category' is set to 'Company' and the 'Category ID' is '-2147483647'. Below the form, a table titled 'Category Members' is shown, but it is empty. A message box states 'No records found. Try to modify parameters above to see records here.' The bottom status bar indicates 'Your product is in trial mode. Only two concurrent users are allowed.'

Non- Stock Items



The screenshot shows the Acumatica 'Item Sales Categories' interface. The left sidebar contains a navigation menu with 'Inventory' selected. The main area displays a form for 'Item Sales Categories'. The 'Description' field is highlighted with a red box and contains the text 'Phones'. The 'Parent Category' is set to 'Electronics' and the 'Category ID' is '-2147483647'. Below the form, a table titled 'Category Members' is shown, but it is empty. A message box states 'No records found. Try to modify parameters above to see records here.' The bottom status bar indicates 'Your product is in trial mode. Only two concurrent users are allowed.'

Non- Stock Items

