


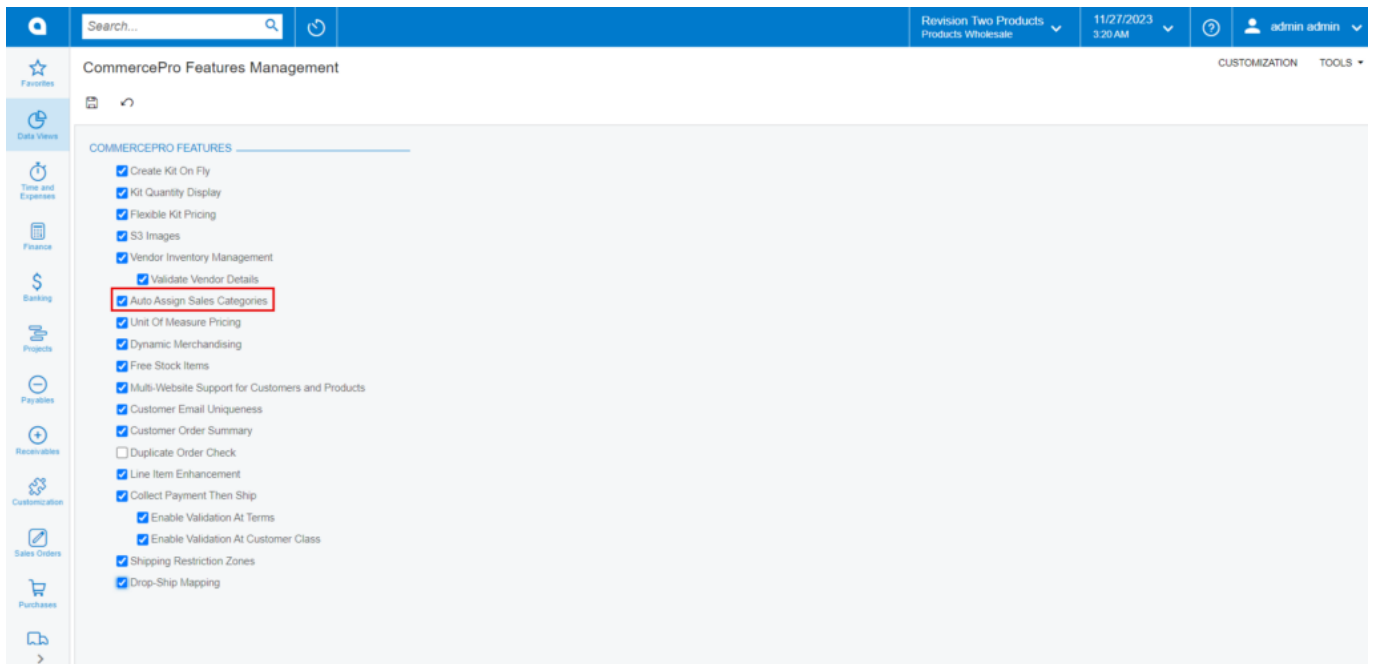
# Auto Assign Sales Categories

 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.

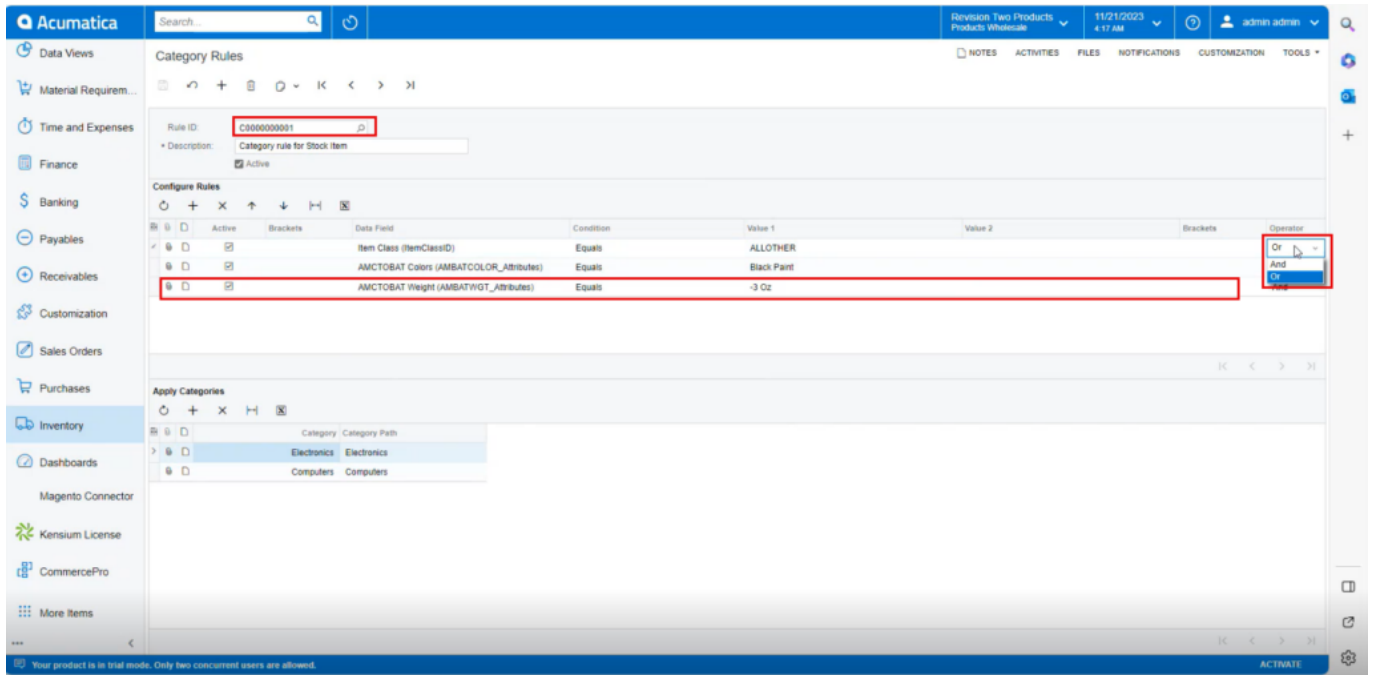
- You need to navigate to the Category rules screen.



The screenshot shows the Kensium CommercePro interface. At the top, there is a search bar with the text 'category'. To the right of the search bar, there are dropdown menus for 'Revision Two Products' (Products Wholesale) and the date '11/27/2023 11:58 PM'. The user profile 'admin admin' is also visible. The main content area is divided into sections: 'MENU ITEMS (9)', 'TRANSACTIONS AND PROFILES', 'HELP TOPICS', and 'FILES'. The 'MENU ITEMS (9)' section is expanded, showing a list of items under the 'category' search. The items are grouped into sections: 'Inventory', 'Commerce Connector', and 'Commerce Pro'. Each section contains sub-items like 'Processes', 'Preferences', 'APIs', 'Schema Management', 'Real Time-Processes', 'Batch Processes', 'Category Rules', 'Category Schema', and 'Category Data'. A left sidebar contains various icons for navigation, including 'Favorites', 'Data Views', 'Time and Expenses', 'Finance', 'Banking', 'Projects', 'Payables', 'Receivables', 'Customization', 'Sales Orders', and 'Purchases'.

## 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

Rule ID: C000000001  
 Description: Category rule for Stock Item  
 Active

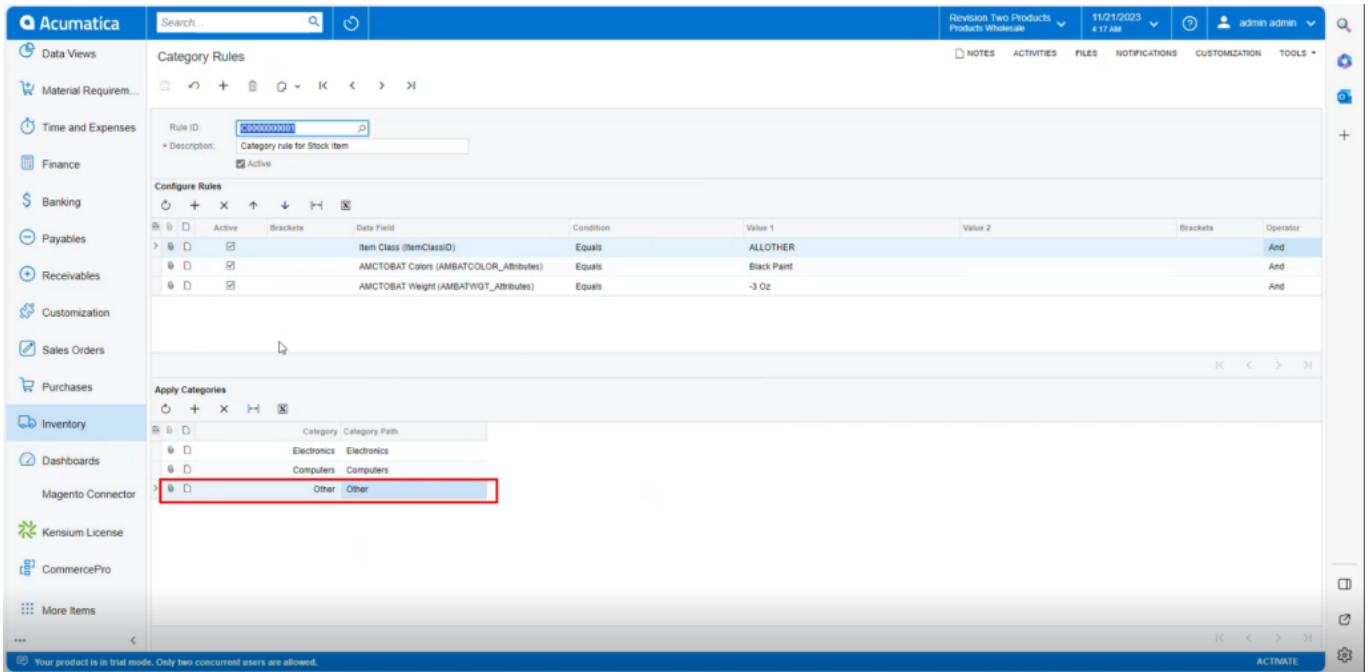
Active	Brackets	Data Field	Condition	Value 1	Value 2	Brackets	Operator
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Item Class (ItemClassID)	Equals	ALLOTHER			Or
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	AMCTOBAT Colors (AMBATCOLOR_Attributes)	Equals	Black Paint			And
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	AMCTOBAT Weight (AMBATWGT_Attributes)	Equals	-3 Oz			Or

Apply Categories

Category	Category Path
Electronics	Electronics
Computers	Computers

## Category Rules

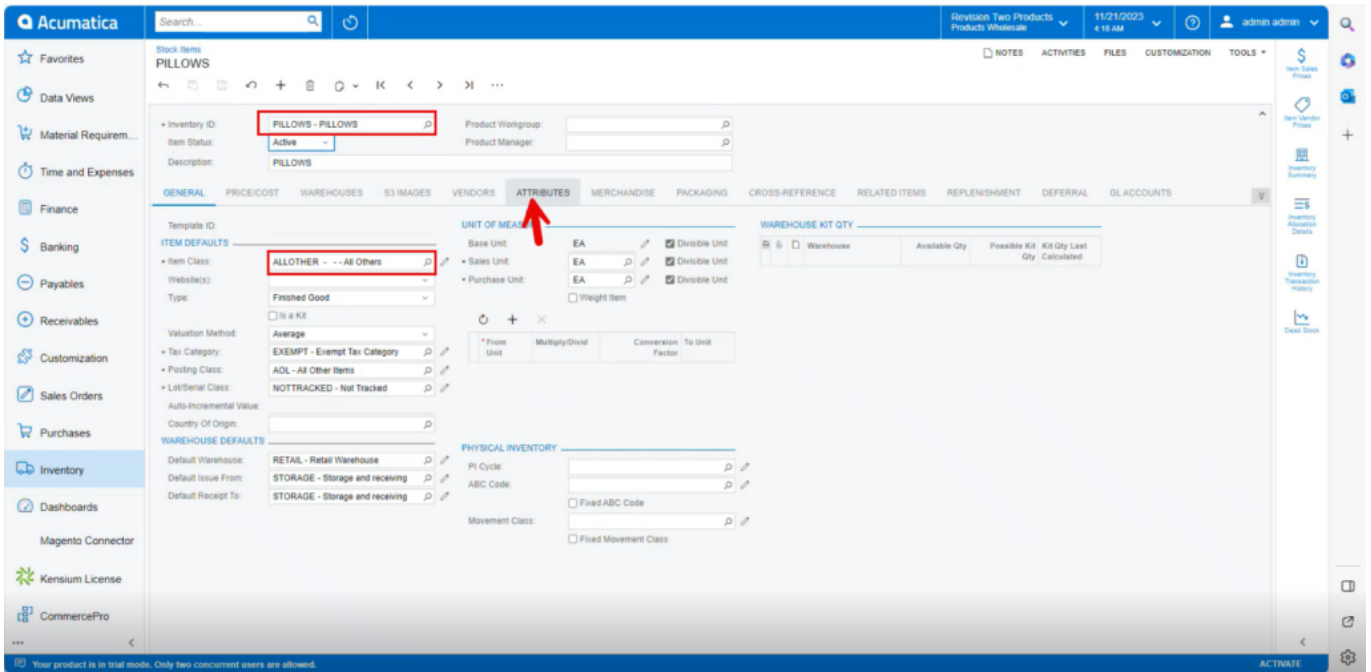
- Only when these configuration conditions are met will only the Apply Categories be available for both stock and non-stock items.
- You must be mapping the category that you wish to show in the stock items screen or non-stock items screen.
- Click on **[Save]**.



## Category Rules

## Stock Items

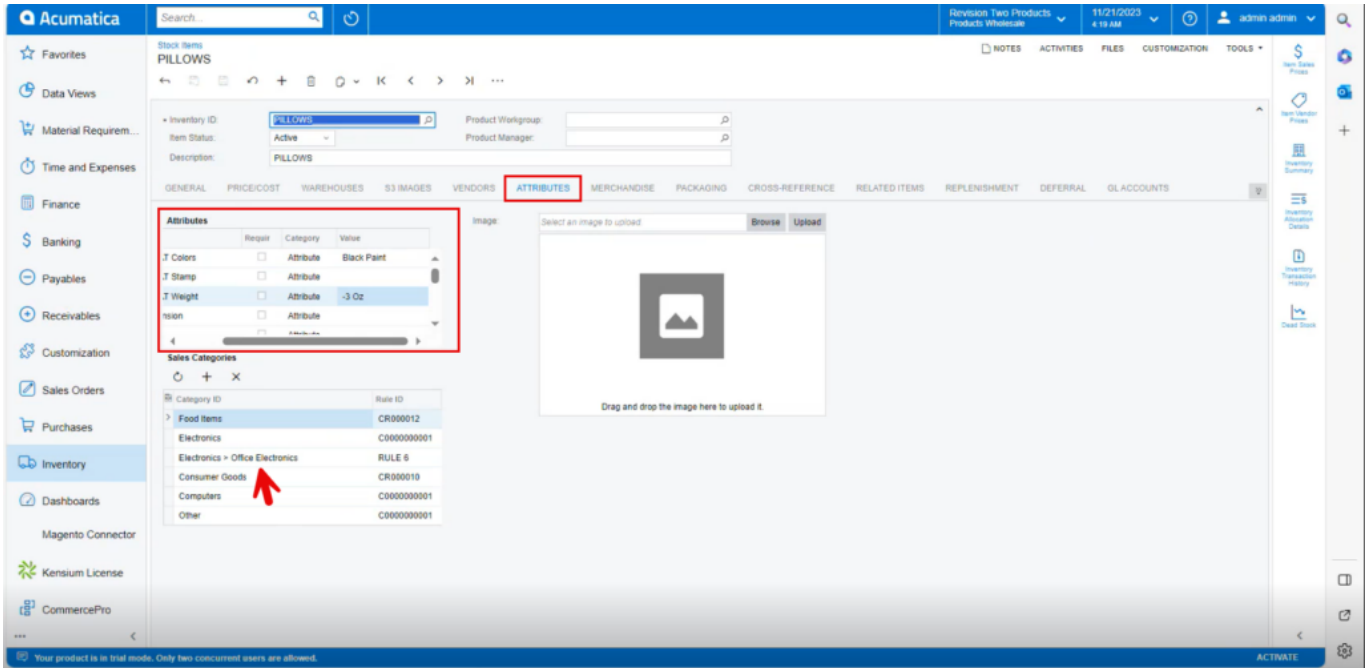
- Click on the **[+]** icon, then you will be redirected to the stock items screen.
- You need to create an **[Inventory ID]**.
- Select the Item status as **[Active]** from the drop-down.
- You can add the **[Description]**.
- Select the **[Item class]** which you have mapped in category rules.
- Click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



The screenshot shows the Acumatica interface for a stock item named 'PILLOWS'. The 'Attributes' tab is selected, and a red arrow points to it. The 'Item Class' is 'ALLOTHER - All Others'. The 'UNIT OF MEAS' section shows 'EA' as the 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. The 'WAREHOUSE DEFAULTS' section shows 'Default Warehouse' as 'RETAIL - Retail Warehouse' and 'Default Issue From' as 'STORAGE - Storage and receiving'.

## Stock Items

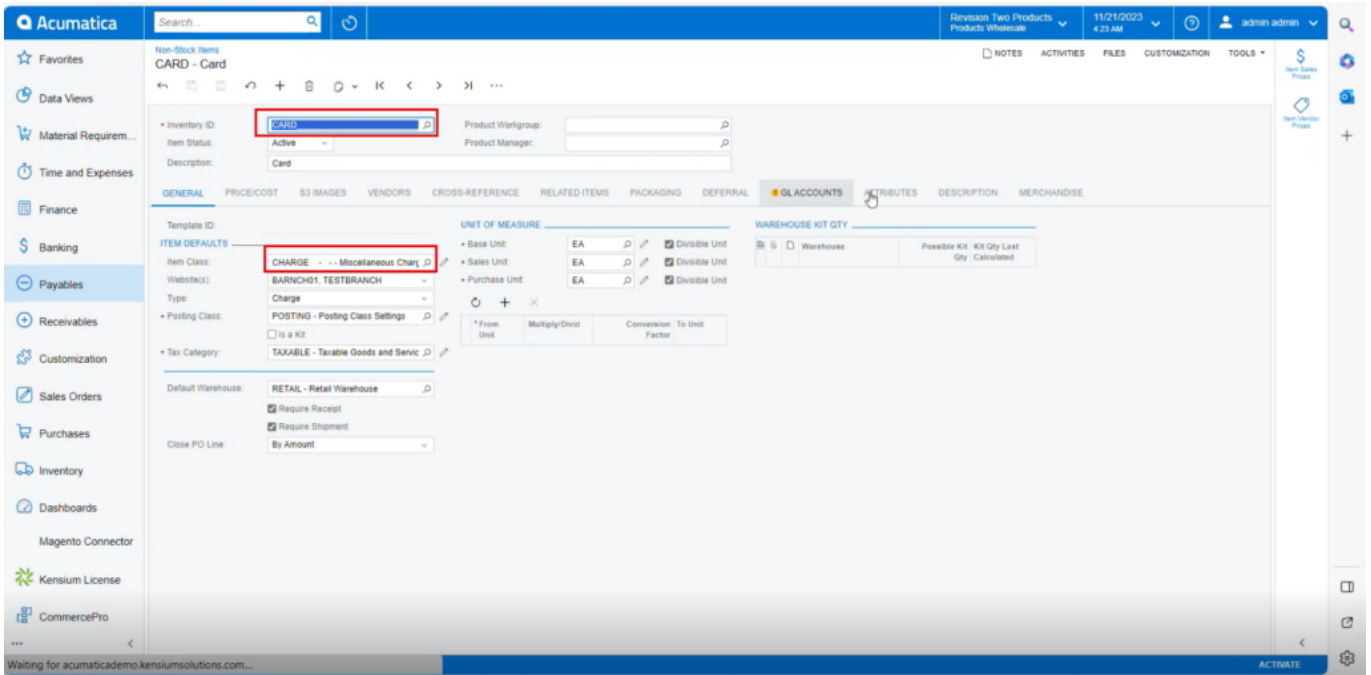
- Click on **the [Attributes] tab**.
- You can view the attributes that are mapped in **[Category Rules]**.



## Stock Items

## Non-Stock Items

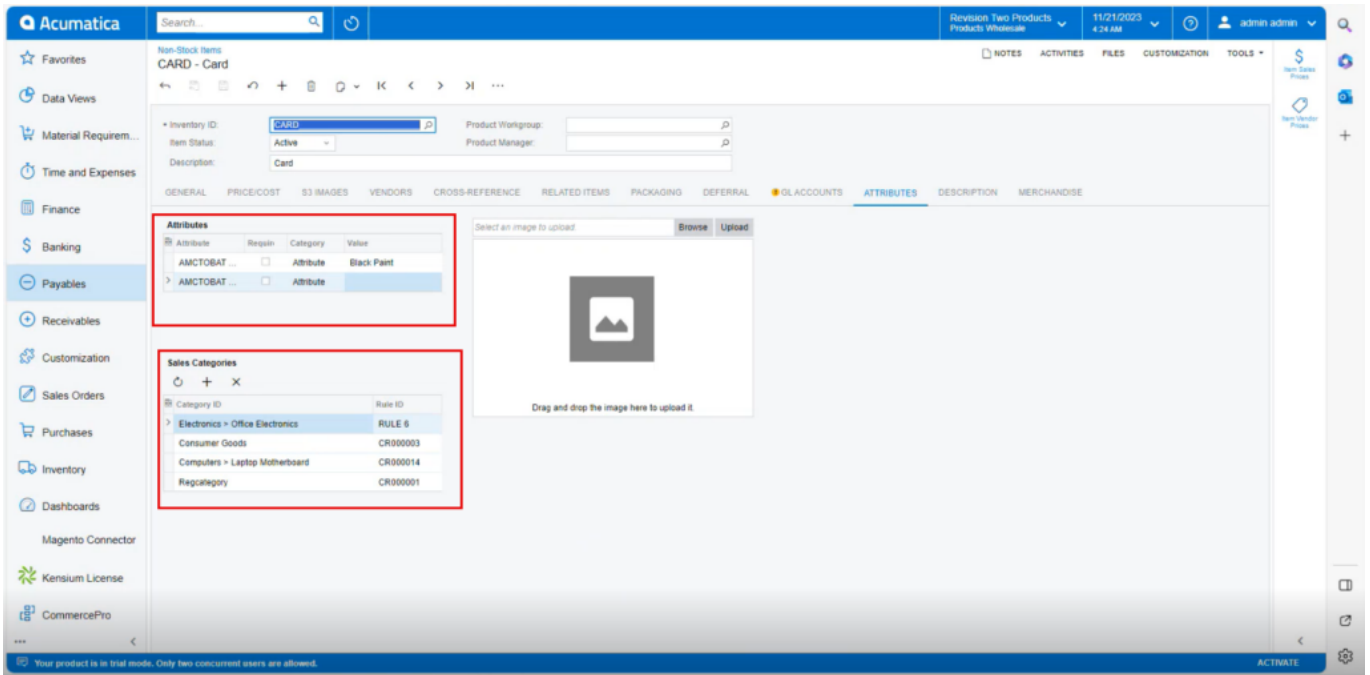
- Click on the **[+]** icon, then you will be redirected to the stock items screen.
- You need to create an **[Inventory ID]**.
- Select the Item status as **[Active]** from the drop-down.
- You can add the **[Description]**.
- Select the **[Item class]** which you have mapped in category rules.
- Click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



The screenshot shows the Acumatica software interface for a 'CARD - Card' item. The 'Attributes' tab is selected, and the 'CHARGE - --Miscellaneous Charge' item class is highlighted. The interface includes a sidebar with navigation options like Favorites, Data Views, and Payables, and a main content area with various configuration fields and tabs.

## Non- Stock Items

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



Non- Stock Items

## Item Classes

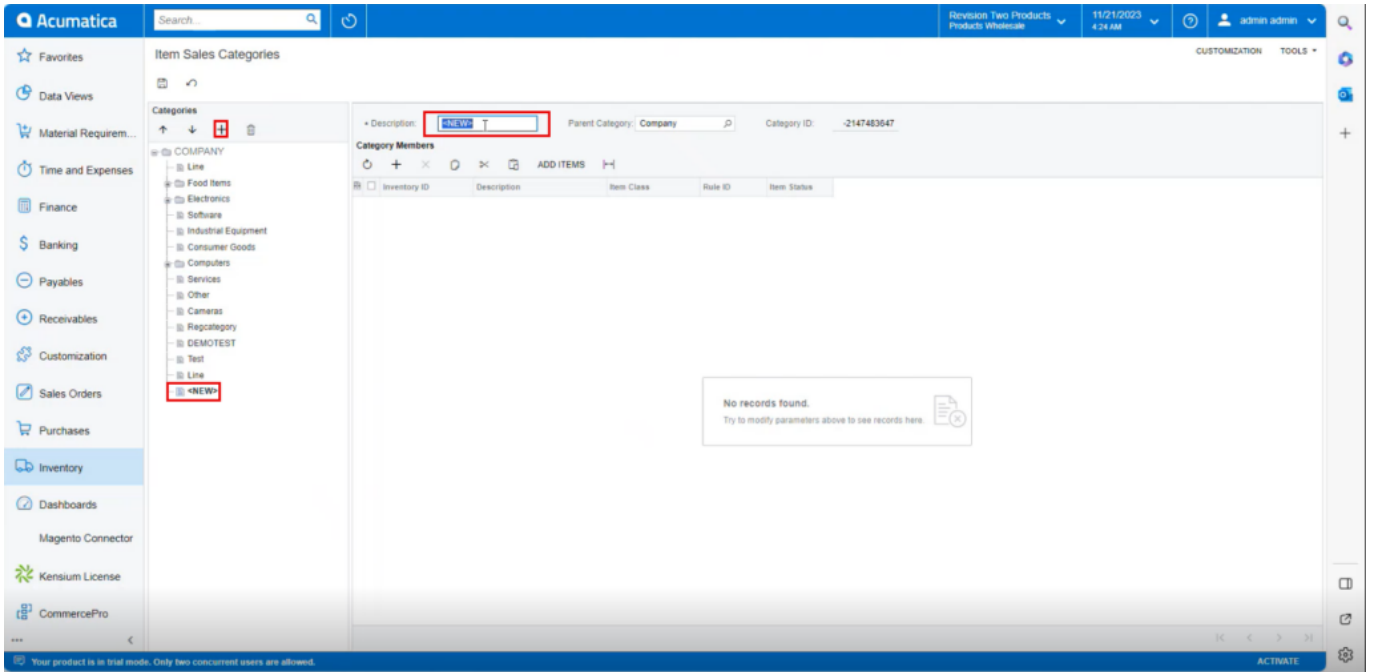
You need to navigate to the Item Sales Category screen.





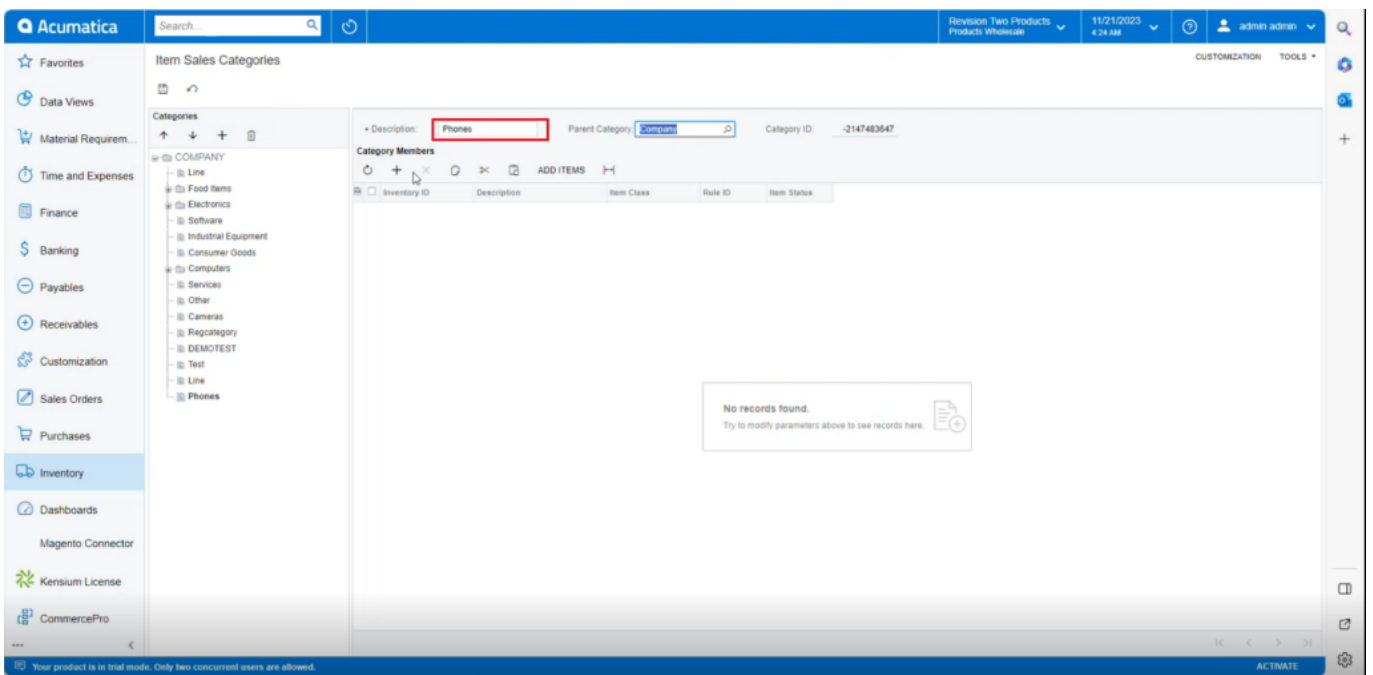
### Non- Stock Items

- 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 category tree on the left and a search form on the right. The search form has 'Description' set to 'NEW' (highlighted with a red box), 'Parent Category' set to 'Company', and 'Category ID' set to '-2147483647'. Below the search form is a 'Category Members' table with columns for 'Inventory ID', 'Description', 'Item Class', 'Rule ID', and 'Item Status'. The table is empty, and 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 with the search parameters updated. The 'Description' field now contains 'Phones' (highlighted with a red box). The 'Parent Category' is now 'Electronics' and the 'Category ID' remains '-2147483647'. The 'Category Members' table remains empty, and the 'No records found' message is still present. The bottom status bar is the same as in the previous screenshot.

Non- Stock Items

