
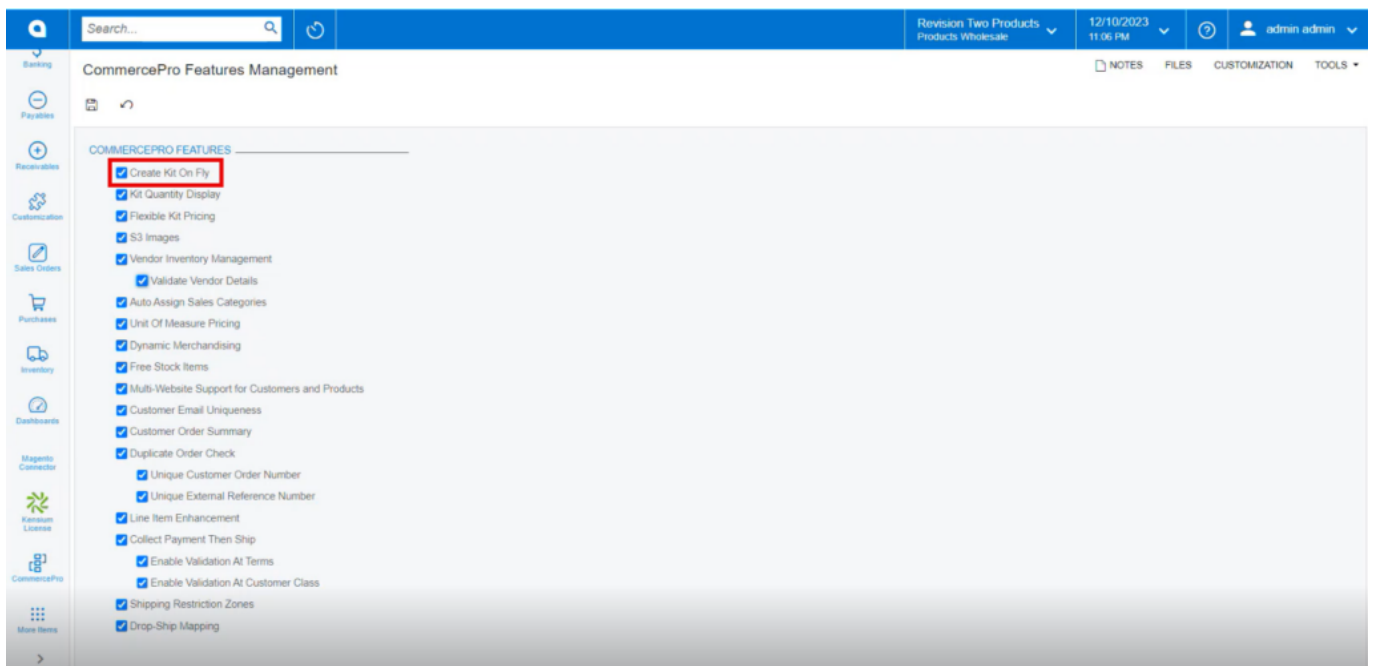


Create Kit On Fly

 Bypass Acumatica's kit Assembly screen and assemble kits while speaking to customers or anytime on the fly.

- To access **[Create Kit on Fly]**, you must enable the check box for **[Create Kit on Fly]** under CommercePro Features.
- Click on **[Save]**.

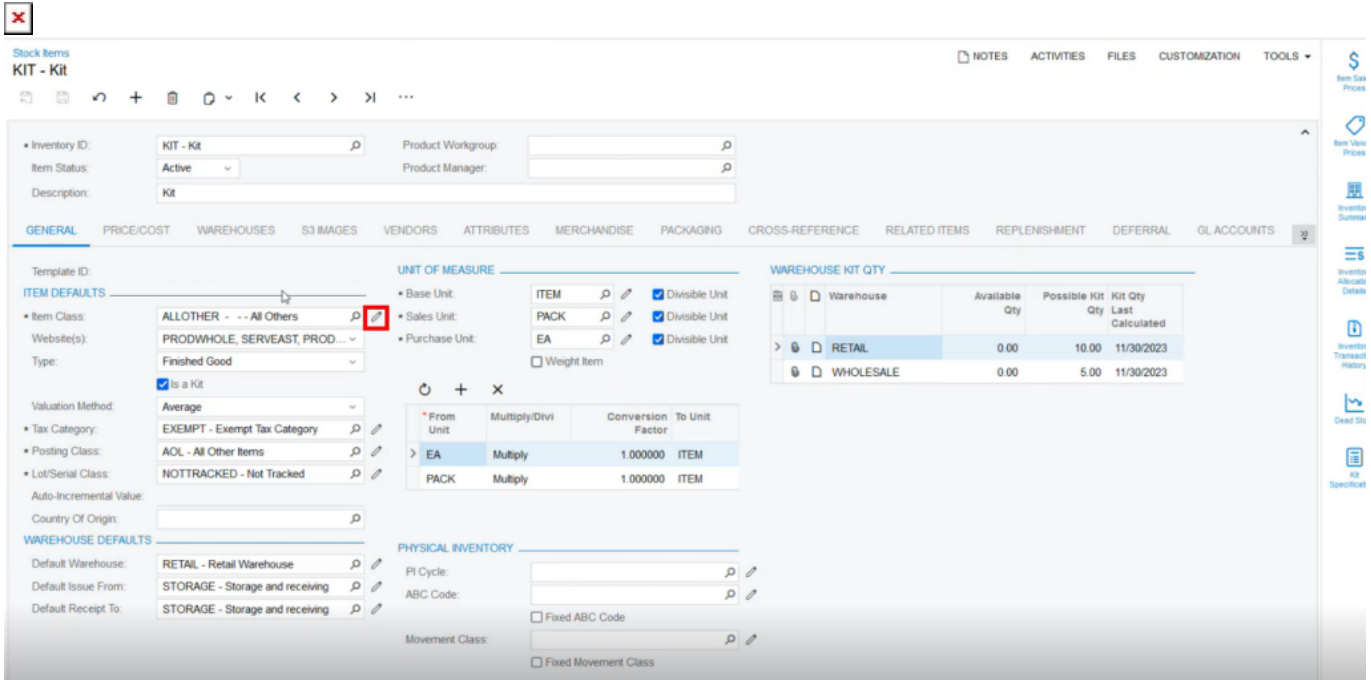


Commerce Pro Feature Management

- Create Kit on fly effects the following screens.
 - Stock Items
 - Kit Specifications
 - Sales Orders Preference
 - Sales Orders
 - Order Types
 - Process Quick Kit
 - Kit Assembly

Configuration-1

- Click on the Pencil icon in the stock Items screen.



Stock Items
KIT - Kit

Inventory ID: KIT - Kit
Item Status: Active
Description: Kit

Product Workgroup:
Product Manager:

GENERAL PRICE/COST WAREHOUSES S3 IMAGES VENDORS ATTRIBUTES MERCHANDISE PACKAGING CROSS-REFERENCE RELATED ITEMS REPLENISHMENT DEFERRAL GL ACCOUNTS

Template ID:
Item Class: ALLOTHER - All Others
Website(s): PRODWHOLE, SERVEAST, PROD...
Type: Finished Good
☒ Is a Kit

Valuation Method: Average
Tax Category: EXEMPT - Exempt Tax Category
Posting Class: AOL - All Other Items
Lot/Serial Class: NOTTRACKED - Not Tracked

Auto-Incremental Value:
Country Of Origin:

WAREHOUSE DEFAULTS
Default Warehouse: RETAIL - Retail Warehouse
Default Issue From: STORAGE - Storage and receiving
Default Receipt To: STORAGE - Storage and receiving

UNIT OF MEASURE
Base Unit: ITEM
Sales Unit: PACK
Purchase Unit: EA
☒ Divisible Unit
☒ Divisible Unit
☒ Divisible Unit
☐ Weight Item

From Unit Multiply/Divi Conversion To Unit Factor
EA Multiply 1.000000 ITEM
PACK Multiply 1.000000 ITEM

WAREHOUSE KIT QTY

Warehouse	Available Qty	Possible Kit Qty	Kit Qty Last Calculated
RETAIL	0.00	10.00	11/30/2023
WHOLESALE	0.00	5.00	11/30/2023

PHYSICAL INVENTORY
PI Cycle:
ABC Code:
☐ Fixed ABC Code
Movement Class:
☐ Fixed Movement Class

Stock Items

- You will be redirected to the below item classes screen enable the check box **Display Kit Available Qty** then only the shipping, possible quantity, and available quantity be displayed in the sales orders screen's footer.

Item Classes NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

Item Class Tree

- ALLOTHER** All Others
- APPARELS** APPARELS
- BAG** BAG
- BASH**
- CHARGE** Miscellaneous Ch
- COMPONENTS** COMPONENTS
- CONSUMER** CONSUMER
- COSMETICS** COSMETICS
- CPCLASS** CPCLASS
- CPTST** CP Test
- DEMO** Demo
- DEMOCLASS** Demo Class
- DEPOSIT** Deposit Item
- DIARY** DIARY
- DISTRIB** Supply Distribution
- ELECCOMP** ELECTRO
- EXPENSES** Expenses
- FACILITIES** FACILITIES
- FIRECRACKERS** FIRECRACKER
- FOOD** FOOD ITEMS
- FOODS** Food Item - NonSt
- INDAC** Air Conditioning Item
- INDACMODEL** Air Conditioning I
- INDACOUT** Air Conditioning O
- INDEQUIP** INDUSTRIAL
- INSTALL** Installation
- INTERNAL** Internal Service
- KIRA** KIRA

Class ID:

Description: All Others

GENERAL REPLENISHMENT RESTRICTION GROUPS ATTRIBUTES MERCHANDISING SECTION

GENERAL SETTINGS

☒ Stock Item

☐ Allow Negative Quantity

☐ Accrue Cost

Item Type:

Valuation Method:

Tax Category:

Posting Class:

Lot/Serial Class:

Price Class:

Default Warehouse:

Availability Calculation:

Country Of Origin:

UNIT OF MEASURE

Overship Threshold (%):

KIT AVAILABILITY ON SO

Base Unit: ☒ Divisible Unit

Sales Unit: ☒ Divisible Unit

Purchase Unit: ☒ Divisible Unit

From Unit	Multiply/Divide	Conversion Factor	To Unit
EA	Multiply	1.000000	ITEM
PACK	Multiply	1.000000	ITEM

PRICE MANAGEMENT

Price Workgro...

Price Manager:

Min. Markup %:

Markup %:

INTERNATIONAL SHIPPING

Commodity Code Type:

Commodity Code:

SHIPPING THRESHOLDS

Undership Threshold (%):

KIT AVAILABILITY ON SO

☒ Display Kit Available Qty

MULTI BRANCH SUPPORT

Website(s):

EXCLUSION ZONES

ZoneID	Description

Item classes

Sales Orders Settings for Generic Configuration-2 for all the orders

- You need to search for **[Sales Orders Preferences]** in the global search.

Acumatica Search... Revision Two Products Products Wholesale 11/30/2023 10:16 PM admin admin

Sales Orders Preferences

Default Sales Order Type: SO - Sales Order
 Default Transfer Order Type: TR - Transfer
 Shipment Numbering Sequence: SOSHMENT - SO Shipment
 Picking Worksheet Numbering Sequence: PICKWORKSH - SO Picking Worksheet
☐ Advanced Availability Validation

PRICE SETTINGS
 Validate Min. Markup: Warning
☐ Use a Price Adjustment Multiplier
 Ignore Min. Markup Validation for Prices Specific To:
☐ Customer
☐ Customer Price Class
☐ Promotional Prices

FREIGHT CALCULATION SETTINGS
 Freight Allocation on Partial Shipping: Allocate Proportionally

SHIPMENT SETTINGS
 Free Item Shipping: Proportional
☐ Hold Shipments on Entry
☐ Validate Shipment Total on Confirmation
☐ Add Zero Lines for Items Not in Stock
☐ Create Zero Shipments

INVOICE SETTINGS
☒ Hold Invoices on Failed Credit Check
☒ Use Shipment Date for Invoice Date

SALES PROFITABILITY SETTINGS
☒ Automatically Release IN Documents
 Cost Calculation Basis for Non-Stock Kits: Non-Stock Kit Standard Cost Plus St...

INTERCOMPANY ORDER SETTINGS
 Default Type for Intercompany Sales: SI - Sales Order - related company
 Default Type for Intercompany Returns: RM - RMA Order
☐ Disable Adding Items to Orders
☐ Disable Editing Prices and Discounts

RELATED ITEM SETTINGS
☒ Show Only Available Items

ORDER UNIQUENESS
 Order Types: Unique Customer Order Number
 EO-Sales Order, MO-Mixed Order, R...
☒ Unique External Reference Number
 Order Types: CT - Counter Sale, EO - Sales Order...

QUICK KITS ASSEMBLY MANAGEMENT
☐ Allow Dynamic Kit Assembly for Quick Kits

Sales Orders Preferences

- Enable the check box for **[Allow Dynamic Kit Assembly for Quick Kits]**.

Acumatica Search... Revision Two Products Products Wholesale 11/30/2023 10:15 PM admin admin

Sales Orders Preferences

Default Sales Order Type: SO - Sales Order
 Default Transfer Order Type: TR - Transfer
 Shipment Numbering Sequence: SOSHMENT - SO Shipment
 Picking Worksheet Numbering Sequence: PICKWORKSH - SO Picking Worksheet
☐ Advanced Availability Validation

PRICE SETTINGS
 Validate Min. Markup: Warning
☐ Use a Price Adjustment Multiplier
 Ignore Min. Markup Validation for Prices Specific To:
☐ Customer
☐ Customer Price Class
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 Freight Allocation on Partial Shipping: Allocate Proportionally

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 Free Item Shipping: Proportional
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INTERCOMPANY ORDER SETTINGS
 Default Type for Intercompany Sales: SI - Sales Order - related company
 Default Type for Intercompany Returns: RM - RMA Order
☐ Disable Adding Items to Orders
☐ Disable Editing Prices and Discounts

RELATED ITEM SETTINGS
☒ Show Only Available Items

ORDER UNIQUENESS
 Order Types: Unique Customer Order Number
 EO-Sales Order, MO-Mixed Order, R...
☒ Unique External Reference Number
 Order Types: CT - Counter Sale, EO - Sales Order...

QUICK KITS ASSEMBLY MANAGEMENT
☒ Allow Dynamic Kit Assembly for Quick Kits
☒ Set Default to Checked for Quick Kits needing Assembly
☒ Create Kit Assembly on Sales Order Save
☐ Create Kit Assembly on Shipment Creation
☒ Enable Kit Assembly Log

Sales Orders Preferences

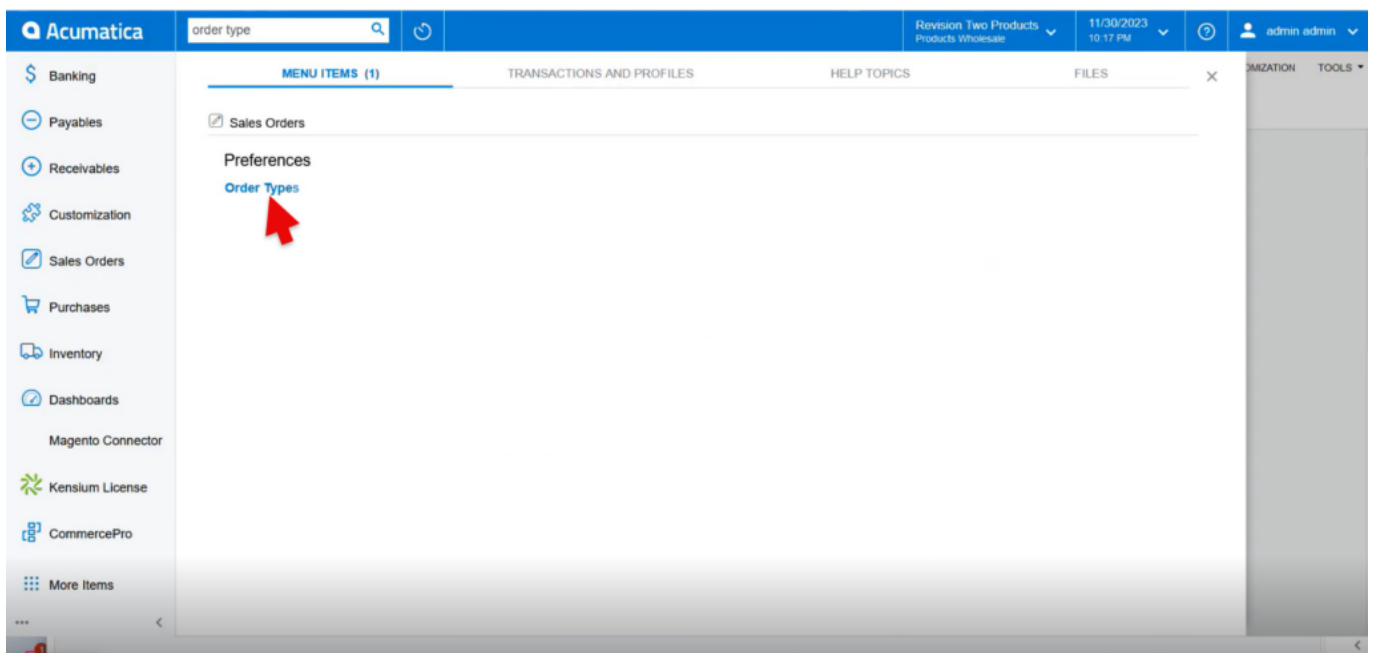
- ✖ • Upon enabling the 4 check boxes will display on the screen.
 - **Set Default to Checked for Quick kits needing Assembly-** By default the check box will be activated in sales orders. This check box, indicates that this is connected to Quick Kits,
 - **Create Kit Assembly on Sales Orders Save-** If this check box is enabled Kit Assembly will happen at Sales order level.
 - **Create Kit Assembly on Shipment Creation-** If this check box is enabled Kit Assembly will happen at Sales orders level.

Only one of the two check boxes will be enabled at once.

- **Enable Kit Assembly Log** - To view the logs info.

Order Types for individual order type Configuration-3

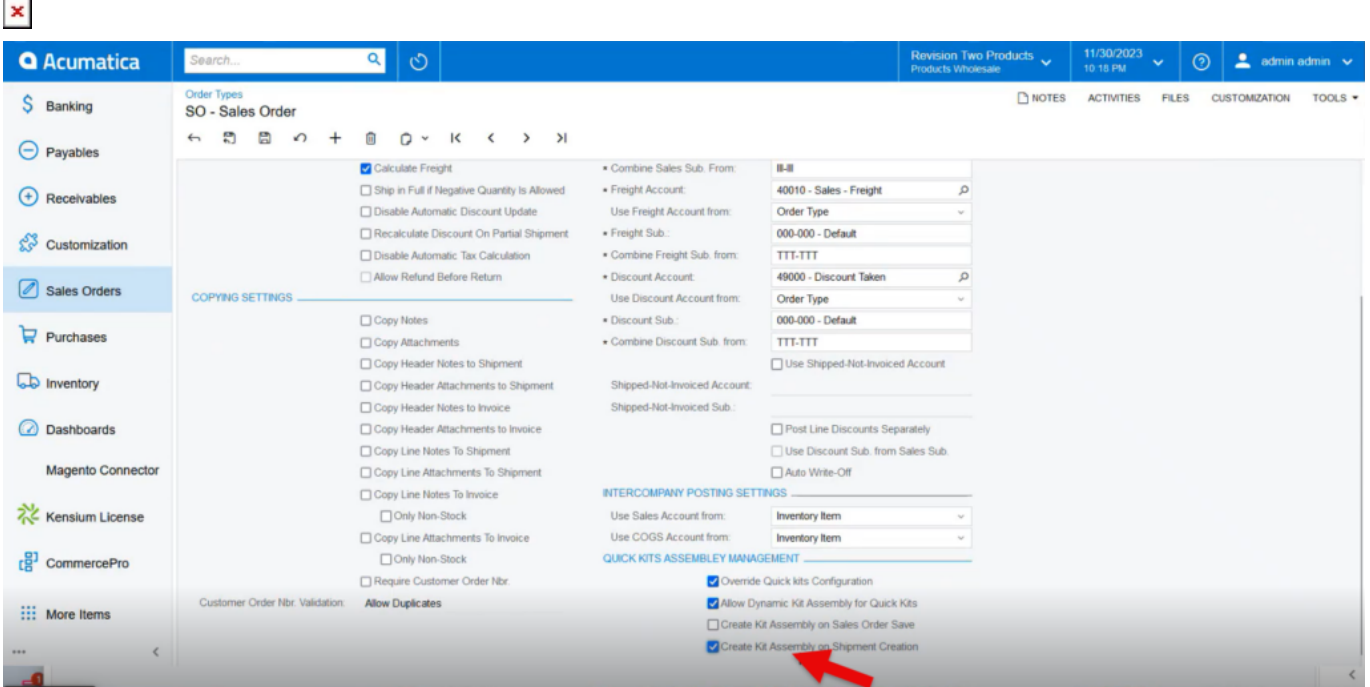
- You need to search for **[Order Types]** in the global search.



Order Types

You can provide your own settings for each **[Order Types]**.

For example, you can choose to **“Create Kit Assembly On Shipment Creation,”** which indicates that the kit assembly will be created at the shipment level whenever an order is submitted with a shipment creation type.



The screenshot shows the Acumatica interface for configuring Sales Order (SO) types. The left sidebar lists various modules like Banking, Payables, Receivables, Customization, Sales Orders, Purchases, Inventory, Dashboards, Magento Connector, Kensium License, CommercePro, and More Items. The main area is titled 'SO - Sales Order' and contains several configuration sections:

- Order Types:** SO - Sales Order
- Calculate Freight:**
 - ☒ Calculate Freight
 - ☐ Ship in Full if Negative Quantity Is Allowed
 - ☐ Disable Automatic Discount Update
 - ☐ Recalculate Discount On Partial Shipment
 - ☐ Disable Automatic Tax Calculation
 - ☐ Allow Refund Before Return
- COPYING SETTINGS:**
 - ☐ Copy Notes
 - ☐ Copy Attachments
 - ☐ Copy Header Notes to Shipment
 - ☐ Copy Header Attachments to Shipment
 - ☐ Copy Header Notes to Invoice
 - ☐ Copy Header Attachments to Invoice
 - ☐ Copy Line Notes To Shipment
 - ☐ Copy Line Attachments To Shipment
 - ☐ Copy Line Notes To Invoice
 - ☐ Only Non-Stock
 - ☐ Copy Line Attachments To Invoice
 - ☐ Only Non-Stock
 - ☐ Require Customer Order Nbr
- Customer Order Nbr. Validation:** Allow Duplicates
- Combine Sales Sub. From:** B-B
- Freight Account:** 40010 - Sales - Freight
- Use Freight Account from:** Order Type
- Freight Sub.:** 000-000 - Default
- Combine Freight Sub. from:** TTT-TTT
- Discount Account:** 49000 - Discount Taken
- Use Discount Account from:** Order Type
- Discount Sub.:** 000-000 - Default
- Combine Discount Sub. from:** TTT-TTT
- ☐ Use Shipped-Not-Invoiced Account
- Shipped-Not-Invoiced Account:**
- Shipped-Not-Invoiced Sub.:**
- ☐ Post Line Discounts Separately
- ☐ Use Discount Sub. from Sales Sub.
- ☐ Auto Write-Off
- INTERCOMPANY POSTING SETTINGS:**
 - Use Sales Account from:** Inventory Item
 - Use COGS Account from:** Inventory Item
- QUICK KITS ASSEMBLY MANAGEMENT:**
 - ☒ Override Quick kits Configuration
 - ☒ Allow Dynamic Kit Assembly for Quick Kits
 - ☐ Create Kit Assembly on Sales Order Save
 - ☒ Create Kit Assembly on Shipment Creation

Order Types

Note: You cannot choose both checkbox at a time, the system will uncheck the option Automatically, if you add SO preferences and Order Type then Order type configuration will be prioritized by the system because it is the individual configuration.