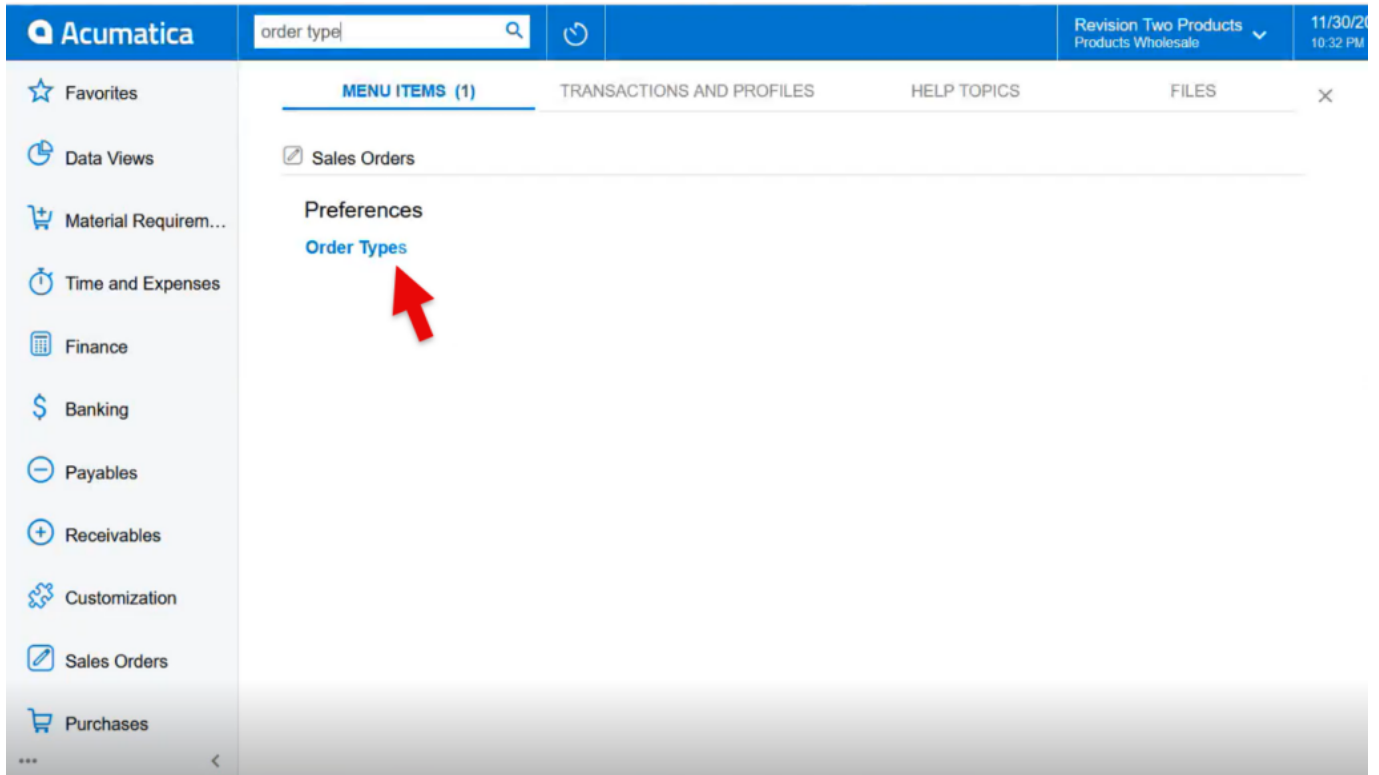


Create Kit Assembly on Shipment Creation



- Navigate to **[Order Types]** screen.



Order Types

- Enable the check box for **[Create Kit Assembly on Shipment Creation]**.

Acumatica

Search...

Revision Two Products Products Wholesale 11/30/2023 10:32 PM admin admin

Order Types
SO - Sales Order

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

COPYING SETTINGS

☐ Recalculate Discount On Partial Shipment
☐ Disable Automatic Tax Calculation
☐ Allow Refund Before Return

☐ 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**

• 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

- You need to navigate to the sales orders screen and add the quantity for shipping.

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Search...

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Sales Orders
SO - Alta Ace 100.

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

QUICK PROCESS CREATE SHIPMENT HOLD ...

• Order Type: SO
 Order Nbr.: <NEW>
 Status: Open
 Date: 11/30/2023
 Requested On: 11/30/2023
 Customer Ord.:
 External Refer.:

• Customer: AACUSTOMER - Alta Ace 100.
 Location: MAIN - Primary Location
 Contact: Amelia Armstrong
 Currency: USD 1.00
 Project: X - Non-Project Code

Ordered Qty: 1.00
 Discount Total: 0.00
 VAT Exempt To: 0.00
 VAT Taxable To: 0.00
 Tax Total: 0.00
 Order Total: 500.00

DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS PAYMENTS RELATIONS TOTALS

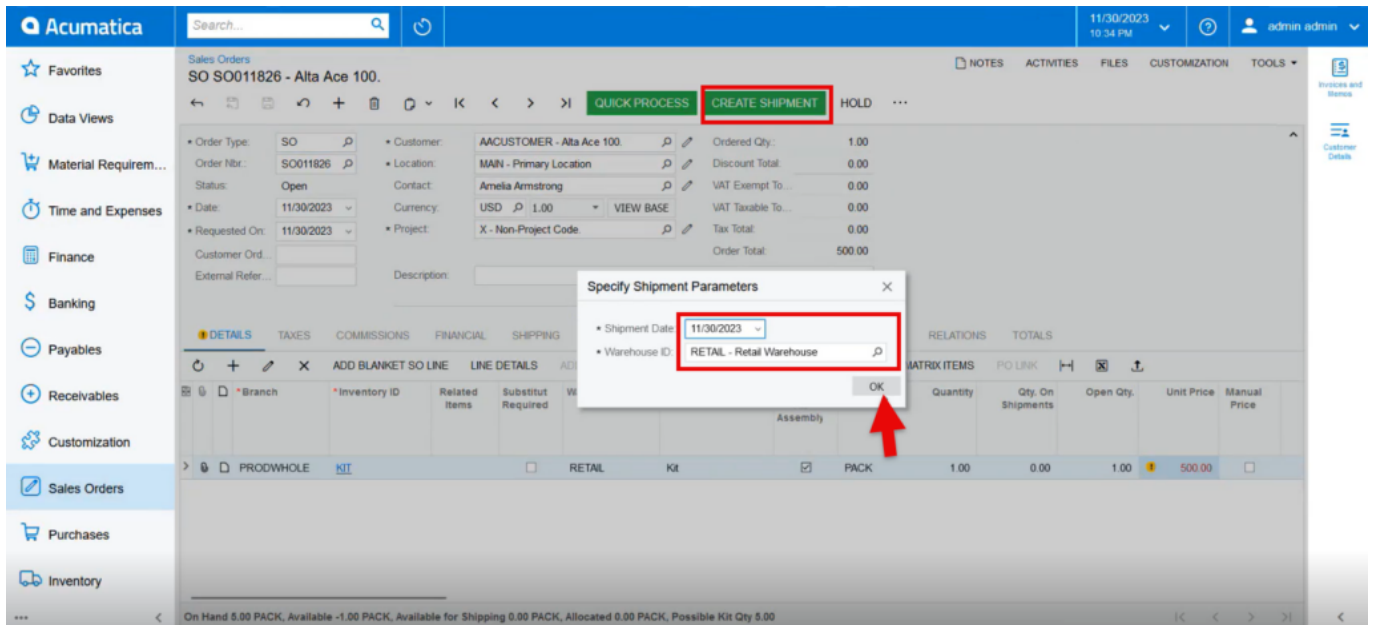
ADD BLANKET SO LINE LINE DETAILS ADD INVOICE LINE ITEM ENHANCEMENT ADD ITEMS ADD MATRIX ITEMS PO LINK

Branch	Inventory ID	Related Items	Substitut Required	Warehouse	Line Description	Create Kit Assembly	UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Manual Price
	PRODWHOLE	KIT		RETAIL	Kit		PACK	1.00	0.00	1.00	500.00	

On Hand 5.00 PACK, Available -1.00 PACK, Available for Shipping 0.00 PACK, Allocated 0.00 PACK, Possible Kit Qty 5.00

Order Types

- Click on **[Create Shipment]**.
- A pop-up will appear on the screen enter the **[Shipment Date]** and **[Warehouse ID]**.
- Click on **[Ok]**.

The screenshot shows the Acumatica software interface. The top navigation bar includes 'Acumatica', a search bar, and user information. The left sidebar lists various modules like Favorites, Data Views, Material Requirements, Time and Expenses, Finance, Banking, Payables, Receivables, Customization, Sales Orders, Purchases, and Inventory. The main window displays 'Sales Orders' for 'SO SO011826 - Alta Ace 100'. A 'CREATE SHIPMENT' button is highlighted in the top right. A 'Specify Shipment Parameters' pop-up is open, showing 'Shipment Date' as 11/30/2023 and 'Warehouse ID' as RETAIL - Retail Warehouse. A red arrow points to the 'OK' button in the pop-up.

Order Types

Acumatica

Search...

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Shipments

005352 - Alta Ace 100.

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

CONFIRM SHIPMENT HOLD

Shipment Nbr.: 005352 Customer: AACUSTOMER - Alta Ace 100 Shipped Quant.: 1.00

Type: Shipment Location: MAIN - Primary Location Shipped Weight: 0.000000

Status: Open Warehouse ID: RETAIL - Retail Warehouse Shipped Volume: 0.000000

Operation: Issue Workgroup: Packages: 0

Shipment Date: 11/30/2023 Owner: Maxwell Baker Package Weight: 0.000000

Description:

DETAILS ORDERS SHIPPING PACKAGES

LINE DETAILS ADD ORDER INVENTORY SUMMARY

Order Type	Order Nbr.	Inventory ID	Free Item	Warehouse	Location	UOM	Shipped Qty.	Ordered Qty.	Open Qty.	Picked Qty.	Packed Qty.	Lot/Serial Nbr.
SO	SO011926	KIT		RETAIL	STORAGE	PACK	1.00	1.00	0.00	0.00	0.00	

On Hand 6.00 PACK, Available 3.00 PACK, Available for Shipping 3.00 PACK

Shipments

- Click on **[Confirm Shipment]**.
- No kit process is required for shipment; the order will be added in the Kit Assembly.

Acumatica

Search...

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Kit Assembly

CUSTOMIZATION TOOLS

Type: All Status: All Date: All

Type	Reference Nbr.	Status	Date	Post Period	Inventory ID	Revision	Quantity	UOM	Warehouse	Batch Nbr.	Created On
Production	000128	Released	11/30/2023	11-2023	KIT	1	1.00	PACK	RETAIL	00008984	11/30/2023
Production	000127	Released	11/30/2023	11-2023	KIT	1	3.00	PACK	RETAIL	00008983	11/30/2023
Production	000126	Released	11/30/2023	11-2023	KIT	1	2.00	PACK	RETAIL	00008982	11/30/2023
Production	000125	Released	11/28/2023	11-2023	CMOBLE	10	2.00	PACK	RETAIL	00008977	11/28/2023
Production	000124	Released	11/28/2023	11-2023	ALAPTOP	10	2.00	PACK	RETAIL	00008974	11/28/2023
Production	000123	Released	11/20/2023	11-2023	CRICKETSKIT	1	0.00	EA	RETAIL	00008953	11/8/2023
Production	000122	Released	11/6/2023	11-2023	CRICKETSKIT	1	0.00	EA	RETAIL	00008951	11/8/2023
Production	000121	Released	11/2/2023	11-2023	AACOMPUT01	1	0.00	EA	WHOLESALE	00008949	11/2/2023
Production	000120	Released	11/1/2023	11-2023	QAKITITEM	1	2.00	EA	RETAIL	00008946	11/1/2023
Production	000119	Released	11/1/2023	11-2023	QAKITITEM	1	2.00	EA	RETAIL	00008945	11/1/2023
Production	000118	Released	8/29/2023	08-2023	QUICKKIT	2	1.00	EA	WHOLESALE	00008890	8/29/2023
Production	000117	Released	8/29/2023	08-2023	QAKITITEM	1	1.00	EA	SMWARE	00008889	8/29/2023
Production	000116	Released	8/25/2023	08-2023	QUICKKITASSEM...	1	1.00	EA	RETAIL	00008887	8/25/2023
Production	000115	Released	8/24/2023	08-2023	QUICKKITASSEM...	1	2.00	EA	SMWARE	00008884	8/24/2023
Production	000114	Released	8/24/2023	08-2023	QUICKKITASSEM...	1	1.00	EA	WHOLESALE	00008881	8/24/2023
Production	000113	Released	8/24/2023	08-2023	QUICKKITASSEM...	1	1.00	EA	SMWARE	00008880	8/24/2023
Production	000112	Released	8/23/2023	08-2023	QUICKKITASSEM...	1	2.00	EA	WHOLESALE	00008875	8/23/2023

1-17 of 125 records

1 of 8 pages

Kit Assembly

