

Auto Assign Sales Categories

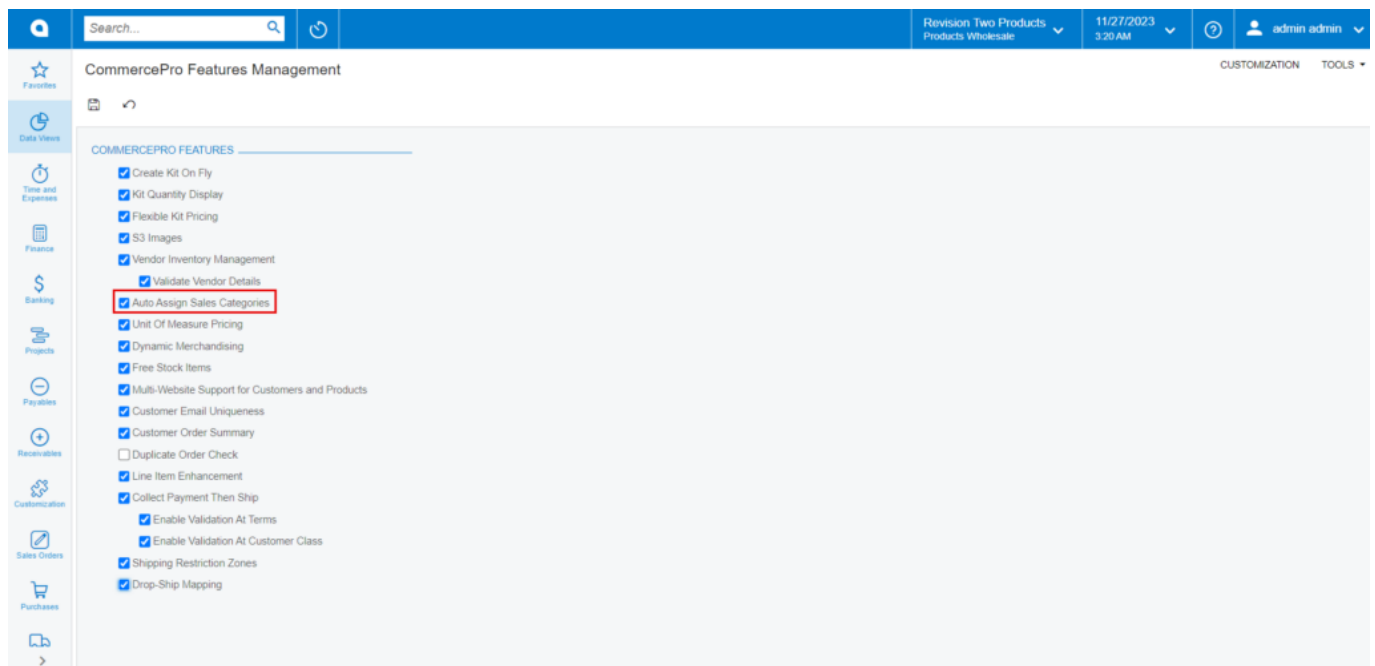


The Category and Rule ID will automatically run the process for categorizing, once the defined conditions have been satisfied for existing or new products that previously had categories and rule ID's assigned, the newly created Category Rule will be assigned and remove the existing category.

- 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.

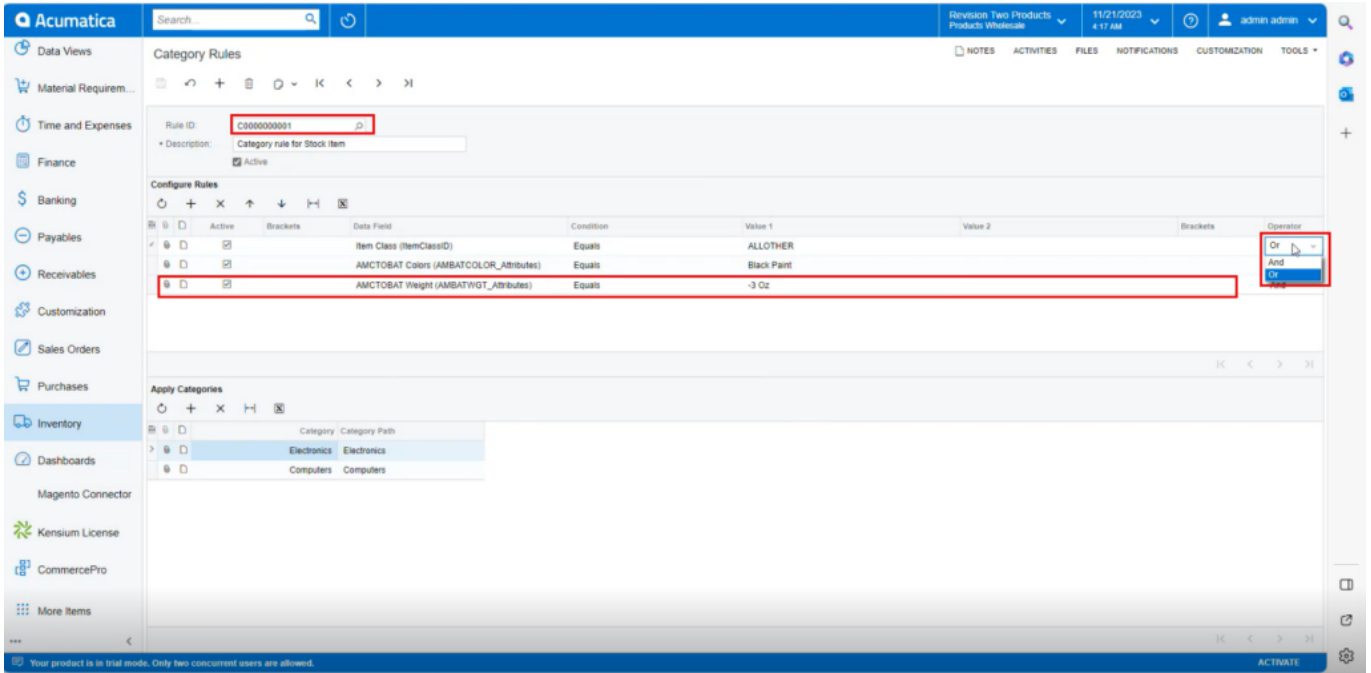
- Category Rules
- Update Item Category based on rules
- Stock Items
- Non-Stock Items
- Item Class Category



- You need to navigate to the Category rules screen.

Category 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.



Acumatica

Search

Revision Two Products
Products Wholesale

11/21/2023
4:17 AM

admin admin

NOTES ACTIVITIES FILES NOTIFICATIONS CUSTOMIZATION TOOLS

Data Views

Material Requirements Planning

Time and Expenses

Finance

Banking

Payables

Receivables

Customization

Sales Orders

Purchases

Inventory

Dashboards

Magento Connector

Kensium License

CommercePro

More Items

Category Rules

Rule ID: C000000001

Description: Category rule for Stock Item

Active

Configure Rules

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"/>		AMCTOAT Color (AMBATCOLOR_Attributes)	Equals	Black Paint			And
<input checked="" type="checkbox"/>		AMCTOAT Weight (AMBATWGT_Attributes)	Equals	-3 Oz			Not

Apply Categories

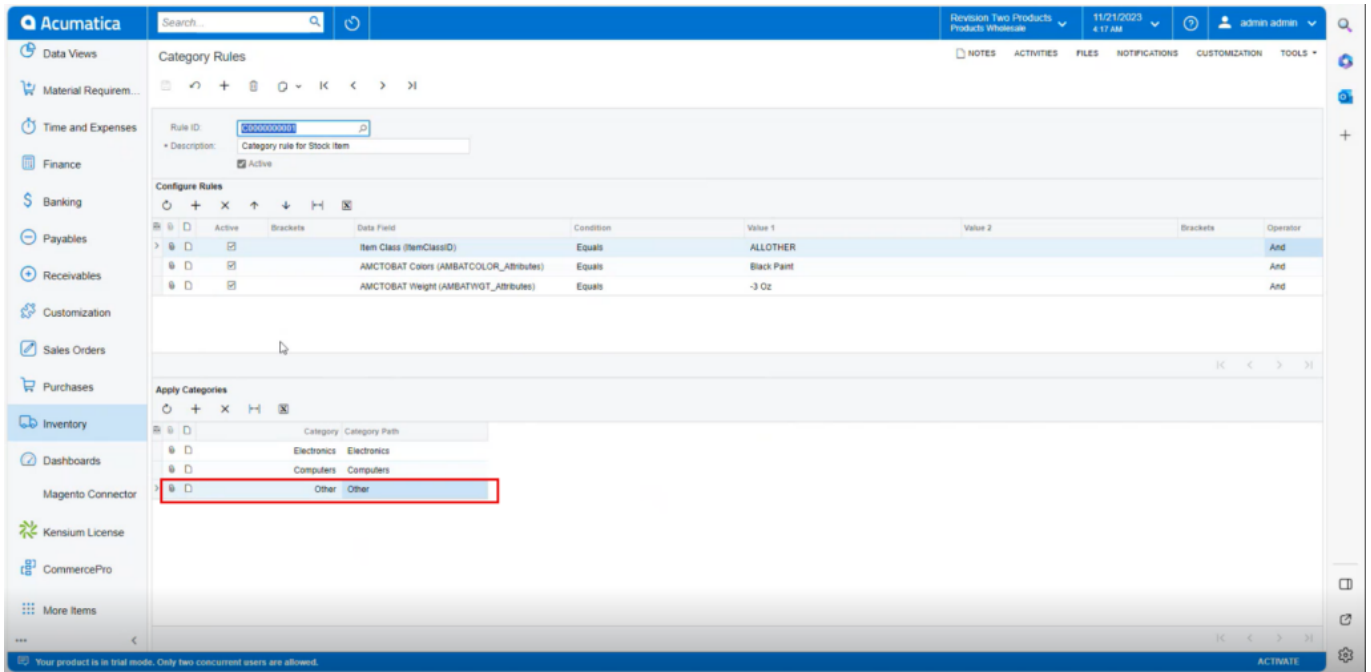
Category	Category Path
Electronics	Electronics
Computers	Computers

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

ACTIVATE

Category Rules

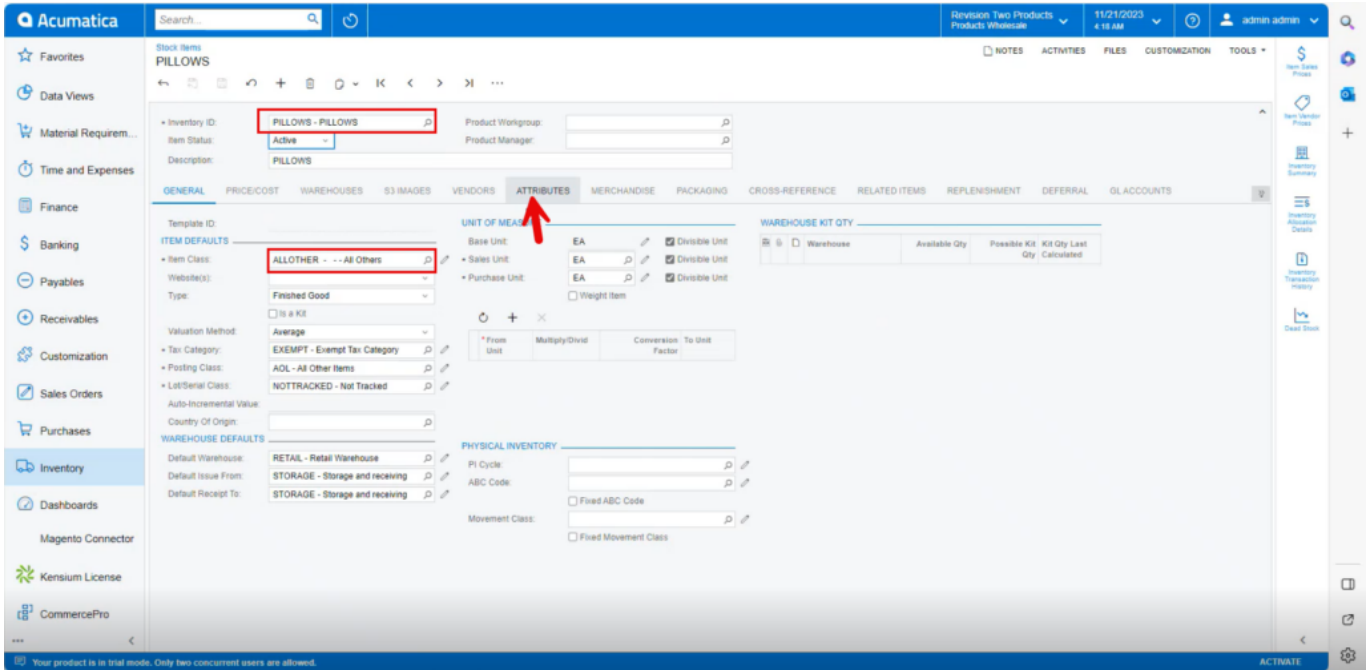
- Only when these configuration conditions are met will only the Apply Categories be available for both stock and non-stock items.
- You must be mapping the category that you wish to show in the stock items screen or non-stock items screen.
- Click on **[Save]**.



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]**.



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Revision Two Products
Products: Warehouse

11/21/2023
4:18 AM

admin admin

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

Stock Items
PILLOWS

Inventory ID: PILLOWS - PILLOWS

Item Status: Active

Description: PILLOWS

Product Workgroup:

Product Manager:

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

Template ID:

ITEM DEFAULTS

Item Class: ALLOTHER - ... All Others

WebSite(s):

Type: Finished Good

Valuation Method: Average

Tax Category: EXEMPT - Exempt Tax Category

Posting Class: AOL - All Other Items

List/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 MEAS

Base Unit: EA

Sales Unit: EA

Purchase Unit: EA

Divisible Unit: ☒ Divisible Unit

Weight Item: ☐ Weight Item

WAREHOUSE KIT QTY

Warehouse: Available Qty: Possible Kit: Kit Qty: Last Qty: Calculated

PHYSICAL INVENTORY

PI Cycle:

ABC Code:

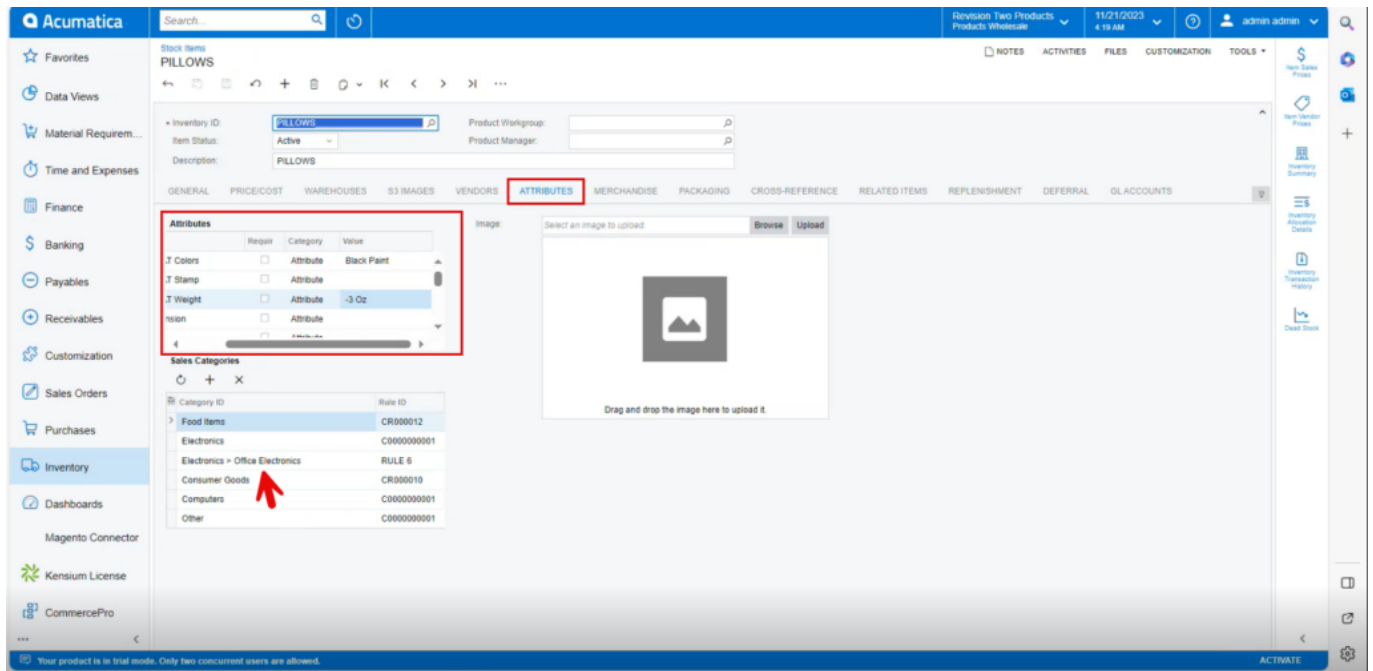
Movement Class: ☐ Fixed ABC Code ☐ Fixed Movement Class

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

ACTIVATE

Stock Items

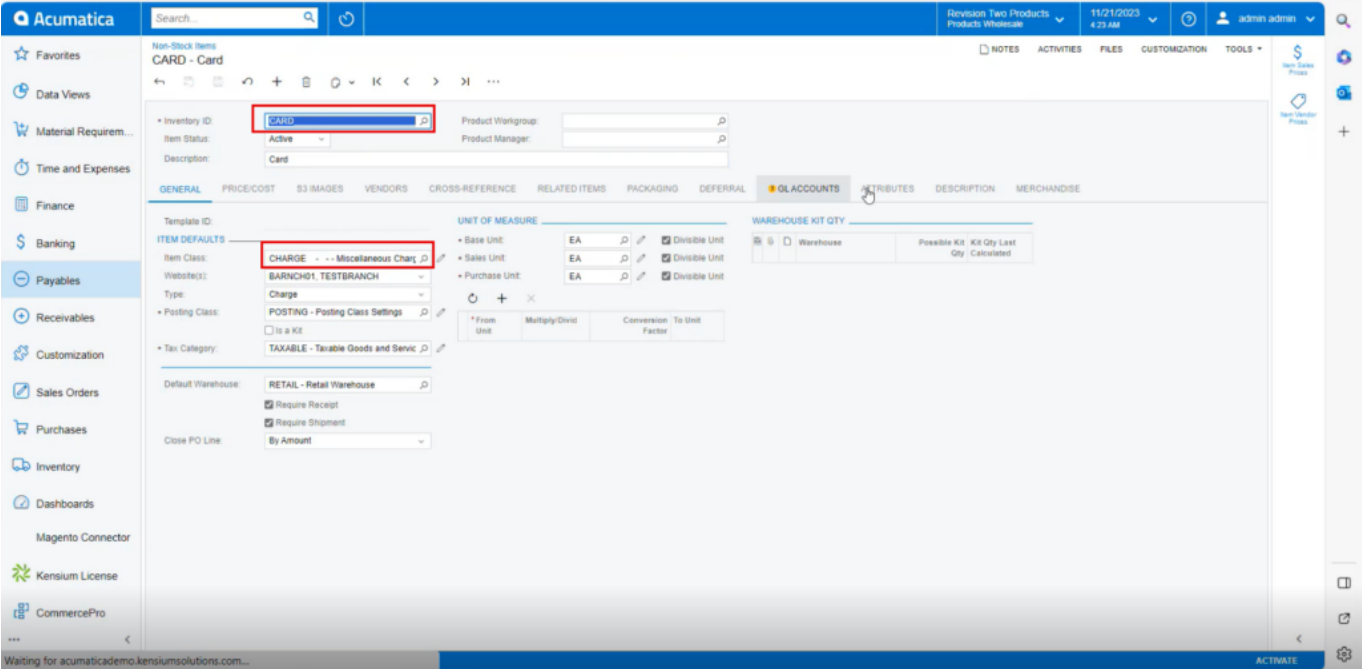
- Click on **the [Attributes] tab**.
- You can view the attributes that are mapped in **[Category Rules]**.



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** Product Workgroup: Product Manager:

Item Status: Active Description: Card

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): BARNCHOT, 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 Divisible Unit: ☒

Sales Unit: EA Divisible Unit: ☒

Purchase Unit: EA Divisible Unit: ☒

WAREHOUSE KIT QTY

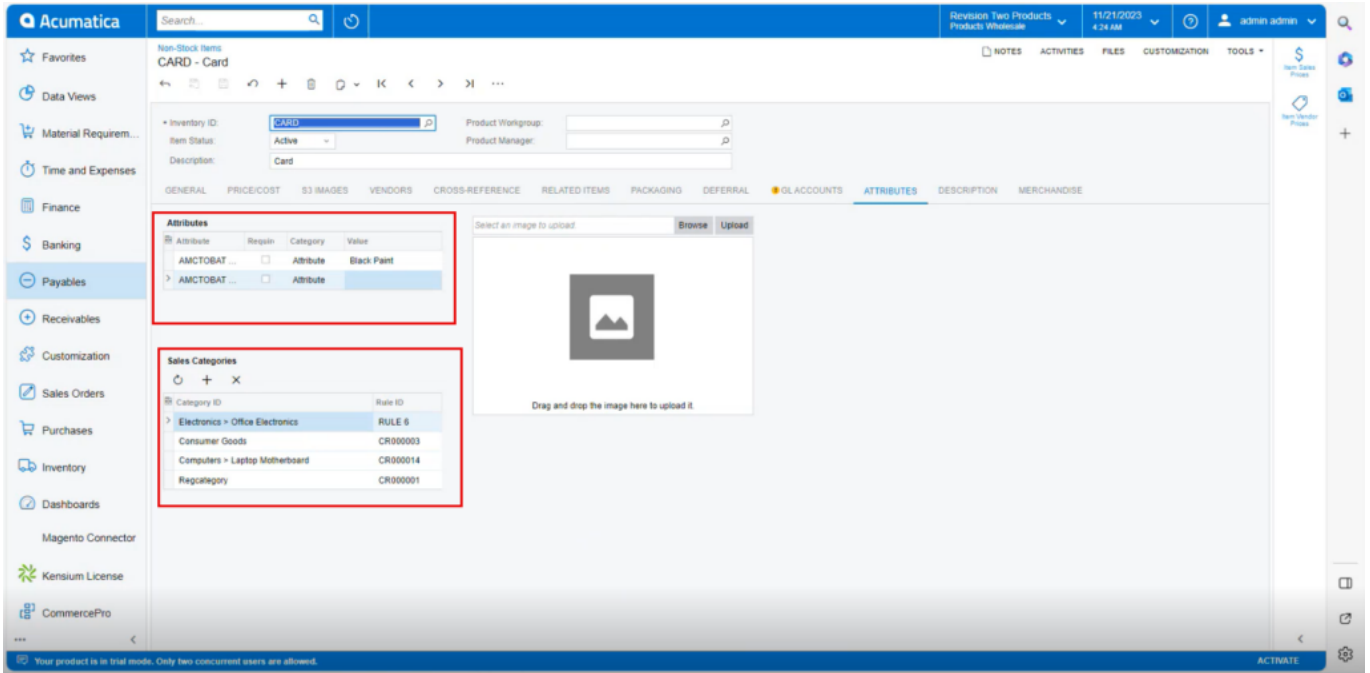
Warehouse: Possible Kit Kit Qty Last Qty Calculated

Waiting for acumaticademo.kensiumsolutions.com...

ACTIVATE

Non- Stock Items

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



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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.

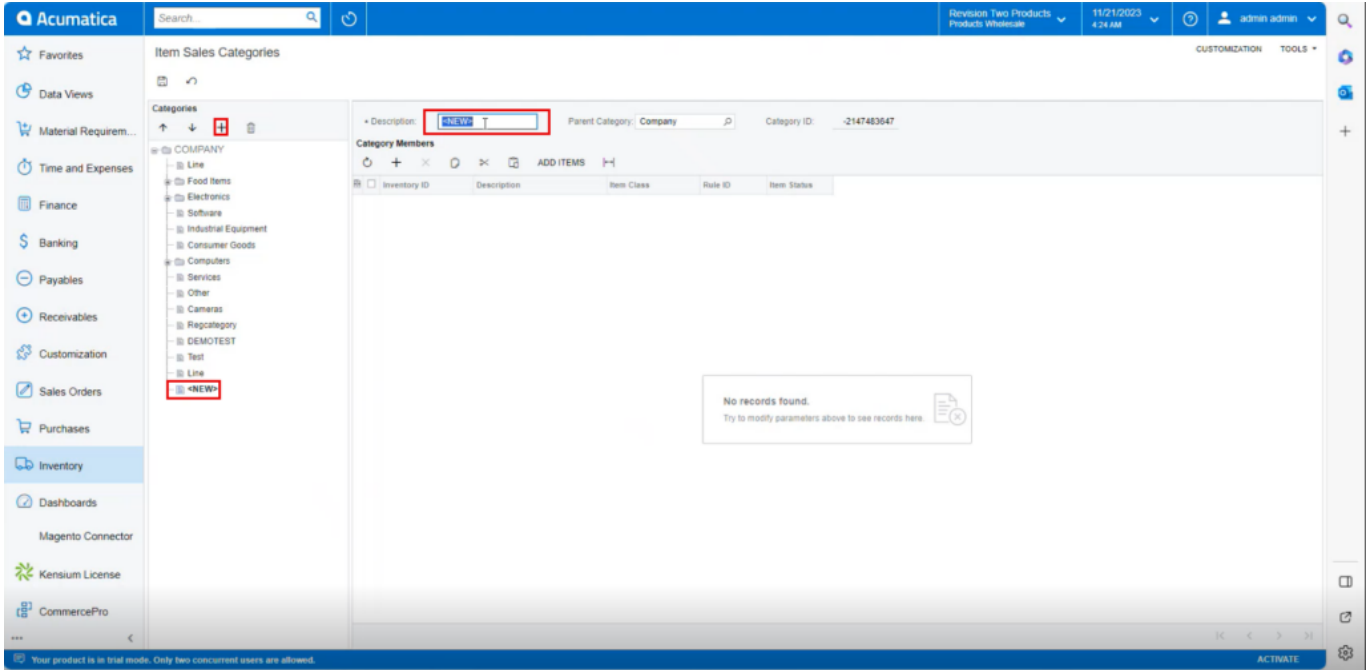


fusion
CommercePro

	Item sales	Revision Two Products Products Wholesale	11/28/2023 1:43 AM	admin admin
MENU ITEMS (6)	TRANSACTIONS AND PROFILES			
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				

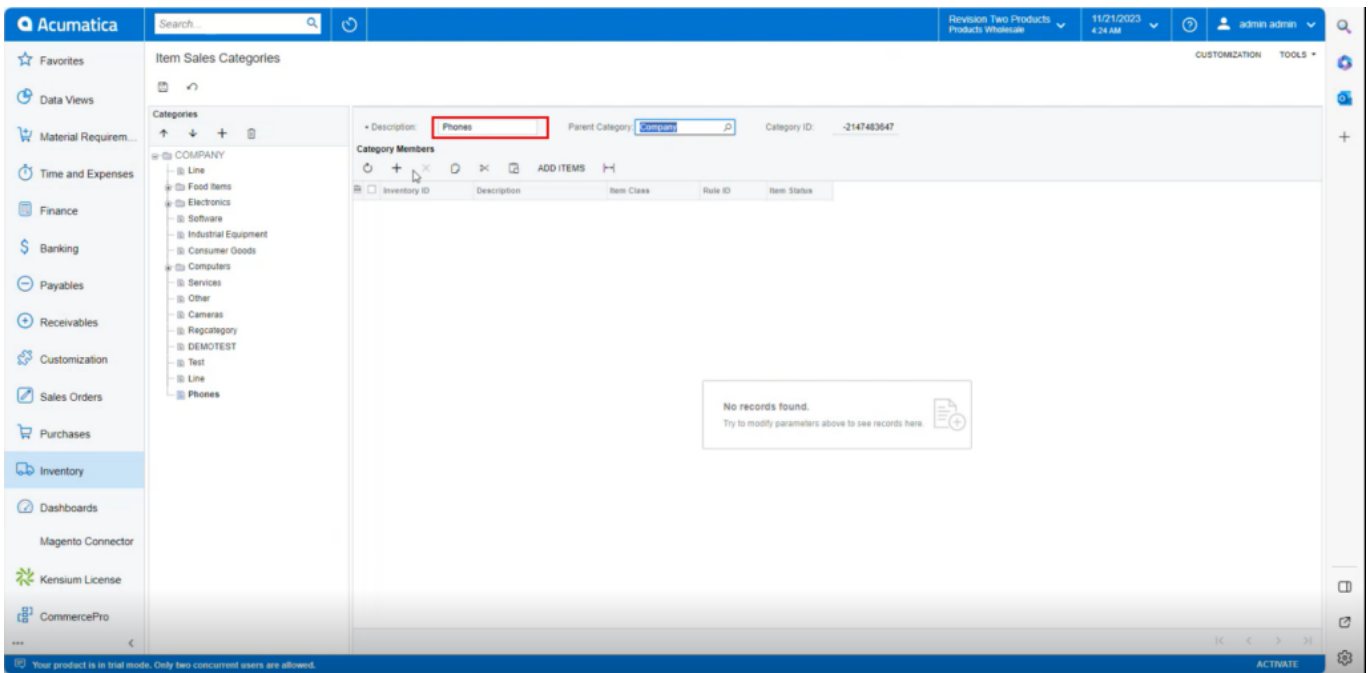
Non- Stock Items

- 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 category tree on the left and a details pane on the right. The details pane shows the 'Description' field with the value 'NEW' highlighted in a red box. The 'Parent Category' is set to 'Company' and the 'Category ID' is '-2147483647'. Below the details pane, a table titled 'Category Members' is shown, but it is empty with a message: 'No records found. Try to modify parameters above to see records here.'

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 category tree on the left and a details pane on the right. The details pane shows the 'Description' field with the value 'Phones' highlighted in a red box. The 'Parent Category' is set to 'Electronics' and the 'Category ID' is '-2147483647'. Below the details pane, a table titled 'Category Members' is shown, but it is empty with a message: 'No records found. Try to modify parameters above to see records here.'

Non- Stock Items

