



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

- To access 🜠 you must enable the check box for 🕱 under
  - CommercePro Features.
- Click on **§**

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na	CommercePro Features Management		NOTES	FILES	CUSTOMIZATION	TOOLS
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)	COMMERCEPRO FEATURES					
bles	Create Kit On Fly					
ation	✓ Kit Quantity Display					
ation	Flexible Kit Pricing					
	S3 Images					
) Iders	Vendor Inventory Management					
	✓ Validate Vendor Details					
	Auto Assign Sales Categories					
	Unit Of Measure Pricing					
2	Dynamic Merchandising					
ory	Free Stock Items					
	Multi-Website Support for Customers and Products					
) ards	Customer Email Uniqueness					
	Customer Order Summary					
tio	Duplicate Order Check					
chor	Unique Customer Order Number					
	Unique External Reference Number					
	Line Item Enhancement					
	Collect Payment Then Ship					
1	Enable Validation At Terms					
ePro	Enable Validation At Customer Class					
	Shipping Restriction Zones					
errs	Crop-Ship Mapping					

## Commerce Pro Feature Management

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





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

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Inventory ID:	KIT - Kit	Q,	Product Workgroup	p:		Q								^
Item Status:	Active v		Product Manager:			Q								
Description	Kit													
GENERAL PRICE/CO	DST WAREHOUSES \$3 IMAG	BES			ERCHANDISE	PACKAGING				ED ITEMS REPL	ENISHMENT	DEFERRAL	GL ACCOUNTS	ÿ
Template ID:			UNIT OF MEASURE			_			USE KIT QTY				-	
ITEM DEFAULTS			Base Unit:	ITEM	0 0	Divisible Unit	8	6 0	) Warehouse	Available Qty	Possible Kit	Kit Qty Last		
<ul> <li>Item Class:</li> <li>Website(s);</li> </ul>	ALLOTHER All Others	20	Sales Unit:     Purchase Unit:	PACK	0 0	Divisible Unit					-4	Calculated		
Type:	PRODWHOLE, SERVEAST, PROD. Finished Good		Purchase Unit:	EA Weig		Divisible Unit	>	0 0	RETAIL	0.00	10.00	11/30/2023		
Type:	Finished Good ✓ Is a Kit	v			grit nerri			0 0	WHOLESALE	0.00	5.00	11/30/2023		
Valuation Method:	Average	~	0 +	×										
<ul> <li>Tax Category:</li> </ul>	EXEMPT - Exempt Tax Category	20	From Unit	Multiply/Divi		actor								
* Posting Class:	AOL - All Other Items	20		Multiply		00000 ITEM								
* Lot/Serial Class:	NOTTRACKED - Not Tracked	20				0000 ITEM								
Auto-Incremental Value:			PACK	Multiply	1.00	NOOD TIEM								
Country Of Origin:		Q												
WAREHOUSE DEFAULTS			PHYSICAL INVENT	DOW										
Default Warehouse:	RETAIL - Retail Warehouse	20		URT			0							
Default Issue From:	STORAGE - Storage and receiving	20					0							
Default Receipt To:	STORAGE - Storage and receiving	20		Eve	d ABC Code	~	ø							
			Movement Class:	L Pixe	THEO CODE	0	0							
			movernetik Glass.			~	0							

## Stock Items

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

Item classes

• You need to search for **P** 

in the global search.





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\$ Banking	Sales Orders Preferences							0	USTOMIZATION	TOOLS .
Payables	☐ ∩									
• • • • • • • • • • • • • • • • • • • •	Default Sales Order Type:	SO - Sales Order	Q		Automatically Release IN Document	ts				
(+) Receivables	Default Transfer Order Type:	TR - Transfer	Q	SALES PROFITABILITY SETTINGS		_				
•	* Shipment Numbering Sequence:	SOSHIPMENT - SO Shipment	Q	Cost Calculation Basis for Non-Stock Kits	Non-Stock Kit Standard Cost Plus St					
Customization	Picking Worksheet Numbering Sequence:	PICKWORKSH - SO Picking W	forkshe ,0	INTERCOMPANY ORDER SETTINGS						
		Advanced Availability Validation	n (	Default Type for Intercompany Sales:	SI - Sales Order - related company	Q				
Sales Orders	PRICE SETTINGS			Default Type for Intercompany Returns:	RM - RMA Order	Q				
C Gales Gradis	Validate Min. Markup:	Warning	~		Disable Adding Items to Orders					
Purchases	Ignore Min. Markup Validation for Prices Sp	Use a Price Adjustment Multip pecific To	lier	RELATED ITEM SETTINGS	Disable Editing Prices and Discount	ts				
_		Customer			Show Only Available Items					
La Inventory		Customer Price Class		ORDER UNIQUENESS						
-		Promotional Prices			Unique Customer Order Number					
Dashboards	FREIGHT CALCULATION SETTINGS			Order Types:	EO-Sales Order, MO-Mixed Order, R.					
	Freight Allocation on Partial Shipping:	Allocate Proportionally	~		Unique External Reference Number					
Magento Connector	SHIPMENT SETTINGS			Order Types:	CT - Counter Sale, EO - Sales Orde	. •				
N.	Free Item Shipping:	Proportional	~	QUICK KITS ASSEMBLY MANAGEMENT						
Kensium License		Hold Shipments on Entry			Allow Dynamic Kit Assembly for Qui	ick Kits				
		Validate Shipment Total on Co								
CommercePro		Add Zero Lines for Items Not in	Stock							
		Create Zero Shipments								
More Items	INVOICE SETTINGS									
		Hold Invoices on Failed Credit								
<		Use Shipment Date for Invoice	e Date							
										<

## Sales Orders Preferences

• Enable the check box for 💭

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\$ Banking	Sales Orders Preferences							(	CUSTOMIZATION	TOOLS
Payables	<u>م</u>									
	Default Sales Order Type:	SO - Sales Order	Q			Automatically Release IN Documents				
+ Receivables	Default Transfer Order Type:	TR - Transfer	Q		SALES PROFITABILITY SETTINGS					
	Shipment Numbering Sequence:	SOSHIPMENT - SO Shipment	P	0	Cost Calculation Basis for Non-Stock Kits:	Non-Stock Kit Standard Cost Plus St v				
Customization	Picking Worksheet Numbering Sequence:	PICKWORKSH - SO Picking Wo	orkshe ,0	0	INTERCOMPANY ORDER SETTINGS					
S. Customization		Advanced Availability Validation			Default Type for Intercompany Sales:	SI - Sales Order - related company ,0				
	PRICE SETTINGS				Default Type for Intercompany Returns:	RM - RMA Order ,0				
Sales Orders	Validate Min. Markup:	Warning	v			Disable Adding Items to Orders				
_		Use a Price Adjustment Multipli	er			Disable Editing Prices and Discounts				
Purchases	Ignore Min. Markup Validation for Prices Sp	pecific To			RELATED ITEM SETTINGS					
		Customer				Show Only Available Items				
Inventory		Customer Price Class			ORDER UNIQUENESS					
		Promotional Prices				Unique Customer Order Number				
Dashboards	FREIGHT CALCULATION SETTINGS				Order Types:	EO-Sales Order, MO-Mixed Order, R ~				
	Freight Allocation on Partial Shipping:	Allocate Proportionally	v			Unique External Reference Number				
Magento Connector	SHIPMENT SETTINGS				Order Types:	CT - Counter Sale, EO - Sales Orde v				
	Free Item Shipping:	Proportional	v		QUICK KITS ASSEMBLY MANAGEMENT _	or council out, co couce orden a				
Kensium License		Hold Shipments on Entry				Allow Dynamic Kit Assembly for Quick Kits				
		Validate Shipment Total on Con	firmation			Set Default to Checked for Quick Kits need				
CommercePro		Add Zero Lines for Items Not in	Stock			Create Kit Assembly on Sales Order Save	ing resources			
		Create Zero Shipments				Create Kit Assembly on Shipment Creation				
More Items	INVOICE SETTINGS					Enable Kit Assembly Log				
More Items		Hold Invoices on Failed Credit (	Check			Chable NEPosenioy Log				
		Use Shipment Date for Invoice	Date							
<b>`</b>										





## Sales Orders Preferences

• Upon enabling the 4 check boxes will display on the screen.

- By default the check box will be activated in sales orders. This check box, indicates that this is connected to Quick Kits,
   If this check box is enabled Kit Assembly will happen at Sales order level.
  - 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.

• **b** To view the logs info.

• You need to search for **P** 

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in the global search.

Acumatica	order type Q		Revision Two F Products Wholesa	Products  11/30/2023 10:17 PM	0	💄 admin admin 🗸
\$ Banking	MENU ITEMS (1)	TRANSACTIONS AND PROFILES	HELP TOPICS	FILES	×	MIZATION TOOLS -
Payables	Zales Orders					_
+ Receivables	Preferences					
Customization	Order Types					
Sales Orders						
Purchases						
Inventory						
Dashboards						
Magento Connector						
🔆 Kensium License						
CommercePro						
More Items						
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# Order Types

You can provide your own settings for each **P** 





For example, you can choose to **p** which indicates that the kit assembly will be created at the shipment level whenever an order is submitted with a shipment **creation** type.

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\$ Banking	Order Types SO - Sales Order					NOTES	ACTIVITIES	FILES (	USTOMIZATION	TOOLS -
Payables	< Ω Ξ ν +	©~к<>>								
		Calculate Freight	Combine Sales Sub. From:	1-1						
Receivables		Ship in Full if Negative Quantity Is Allowed	<ul> <li>Freight Account:</li> </ul>	40010 - Sales - Freight	Q					
		Disable Automatic Discount Update	Use Freight Account from:	Order Type	~					
Customization		Recalculate Discount On Partial Shipment	<ul> <li>Freight Sub.:</li> </ul>	000-000 - Default						
		Disable Automatic Tax Calculation	Combine Freight Sub. from:	111-111						
Sales Orders	COPYING SETTINGS	Allow Refund Before Return	Discount Account:     Use Discount Account from:	49000 - Discount Taken	Q					
_	COPTING SETTINGS	Copy Notes	Discount Sub.:	Order Type 000-000 - Default	~					
Purchases			Combine Discount Sub. from:	TTT-TTT						
		Copy Attachments Copy Header Notes to Shipment	Combine Discount Sub. Irom.	Use Shipped-Not-Invoiced	Account					
Inventory		Copy Header Attachments to Shipment	Shipped-Not-Invoiced Account:	Cose Shipped-Hot-Involced	ACCOURT					
of muchary		Copy Header Notes to Invoice	Shipped-Not-Invoiced Sub.:							
Dashboards		Copy Header Attachments to Invoice	complete and a monetal care.	Post Line Discounts Sepa	rataly					
Dashboards		Copy Line Notes To Shipment		Use Discount Sub. from S						
Magento Connector		Copy Line Attachments To Shipment		Auto Write-Off	and state.					
		Copy Line Notes To Invoice	INTERCOMPANY POSTING SETT							
Kensium License		Only Non-Stock	Use Sales Account from:	Inventory Item	~					
		Copy Line Attachments To Invoice	Use COGS Account from:	Inventory Item	~					
CommercePro		Only Non-Stock	QUICK KITS ASSEMBLEY MANAG							
La Commercerto		Require Customer Order Nbr.	Override	Quick kits Configuration						
	Customer Order Nbr. Validation:	Allow Duplicates	Allow Dy	namic Kit Assembly for Quick K	lits					_
More Items			Create K	it Assembly on Sales Order Sa	ve					
<			Create K	it Assembly on Shipment Creat	ion					
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## Order Types

**N** 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.

