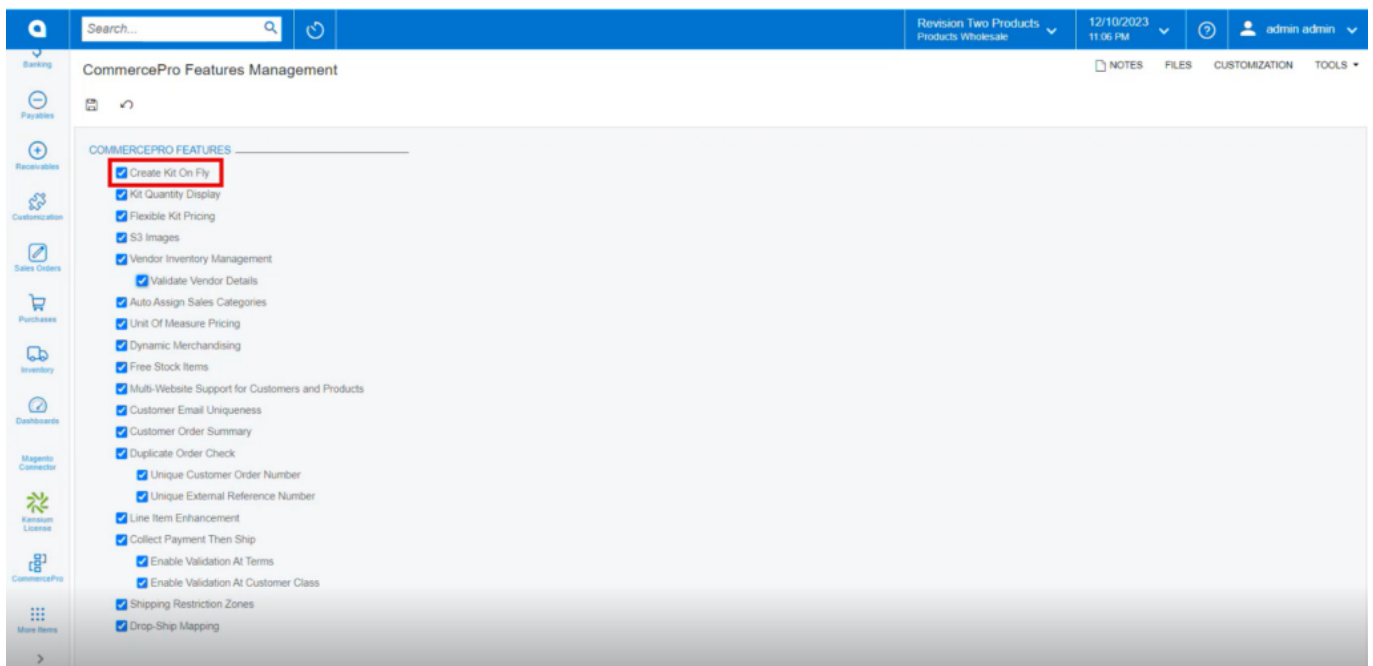


# Create Kit On Fly



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

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

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

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: ☒ Divisible Unit: ☐ Weight Item

From Unit Multiply/Divide Conversion Factor To Unit

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: Movement Class:

Fixed ABC Code: 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**  
☒ Unique Customer Order Number  
 Order Types: 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 CALCULATION SETTINGS**  
 Freight Allocation on Partial Shipping: Allocate Proportionally

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☒ Show Only Available Items

**ORDER UNIQUENESS**  
☒ Unique Customer Order Number  
 Order Types: 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

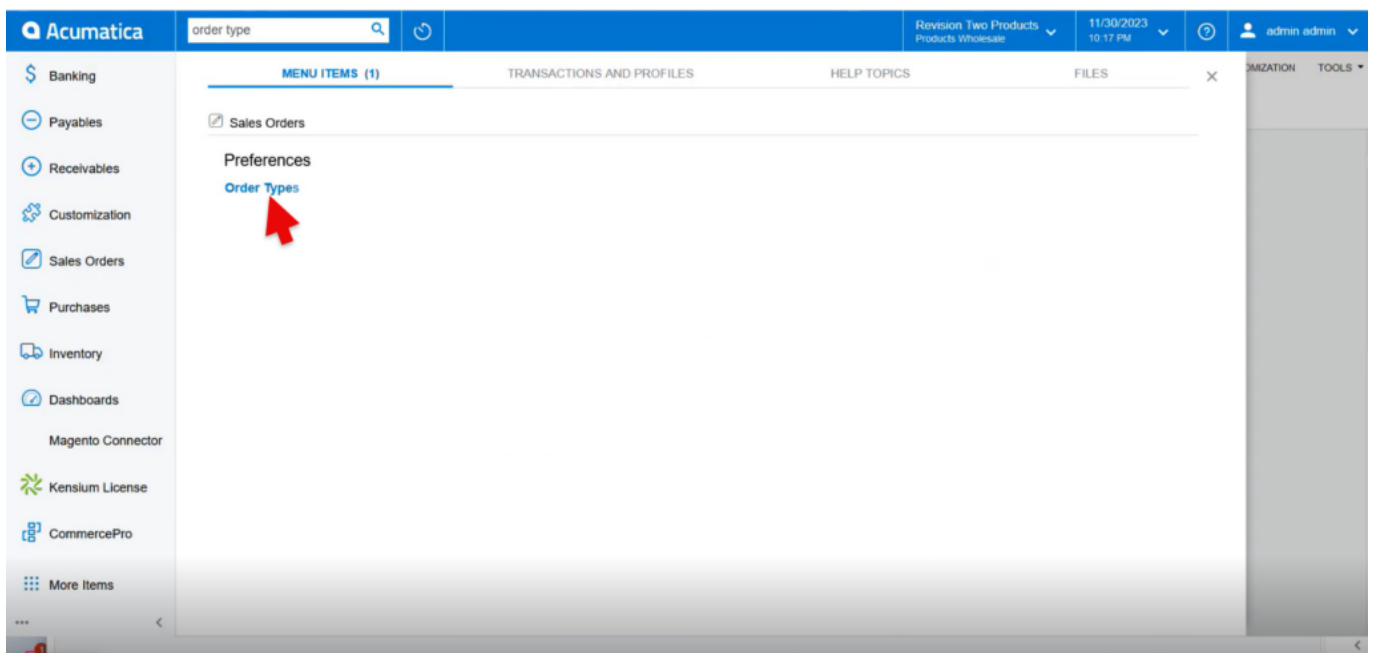
- ✖ • Upon enabling the 4 check boxes will display on the screen.
  - **Set Default to Checked for Quick kits needing Assembly-** By default the check box will be activated in sales orders. This check box, indicates that this is connected to Quick Kits,
  - **Create Kit Assembly on Sales Orders Save-**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

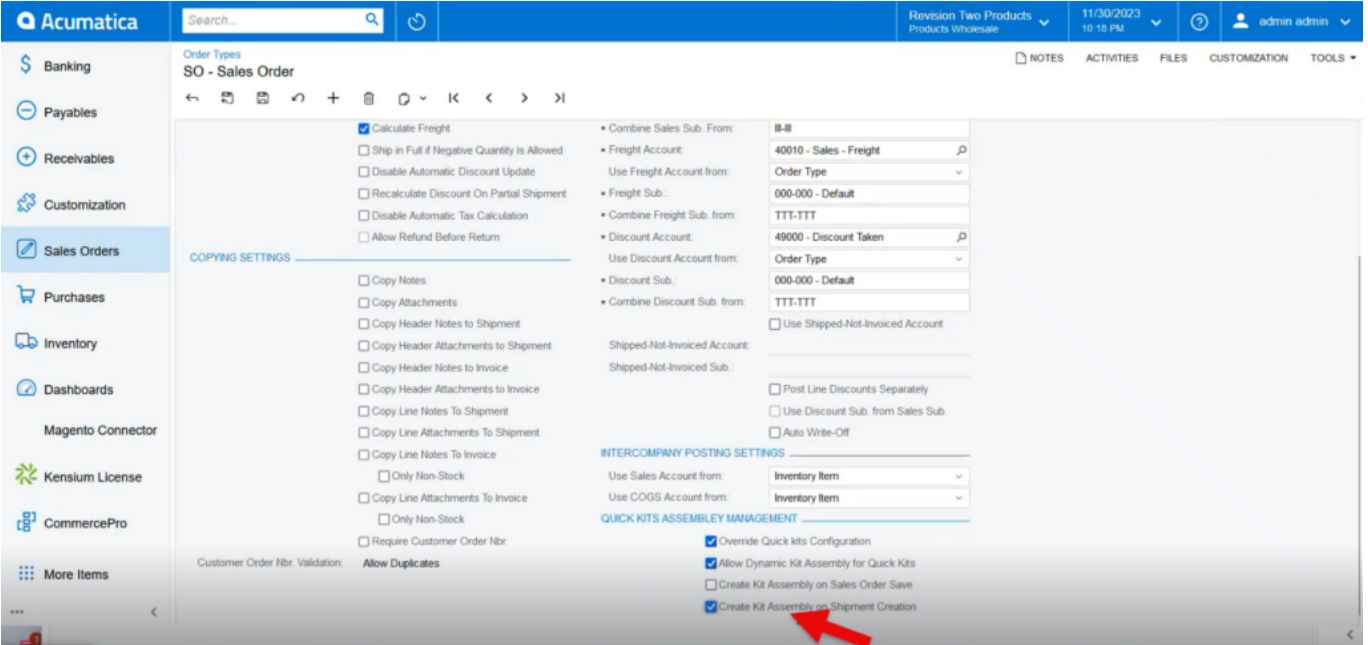
- You need to search for **[Order Types]** in the global search.



## 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 Order 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 'Order Types' and 'SO - Sales Order'. It contains several sections of settings:

- Calculate Freight:** Includes checkboxes for 'Ship in Full if Negative Quantity Is Allowed', 'Disable Automatic Discount Update', 'Recalculate Discount On Partial Shipment', 'Disable Automatic Tax Calculation', and 'Allow Refund Before Return'.
- COPYING SETTINGS:** Includes checkboxes for copying notes, attachments, and header/line notes to various documents (Shipment, Invoice, etc.).
- INTERCOMPANY POSTING SETTINGS:** Includes dropdowns for 'Use Sales Account from' and 'Use COGS Account from', both set to 'Inventory Item'.
- QUICK KITS ASSEMBLY MANAGEMENT:** Includes checkboxes for 'Override Quick kits Configuration', 'Allow Dynamic Kit Assembly for Quick Kits', 'Create Kit Assembly on Sales Order Save', and 'Create Kit Assembly on Shipment Creation'. A red arrow points to the 'Create Kit Assembly on Shipment Creation' checkbox.

## 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.