


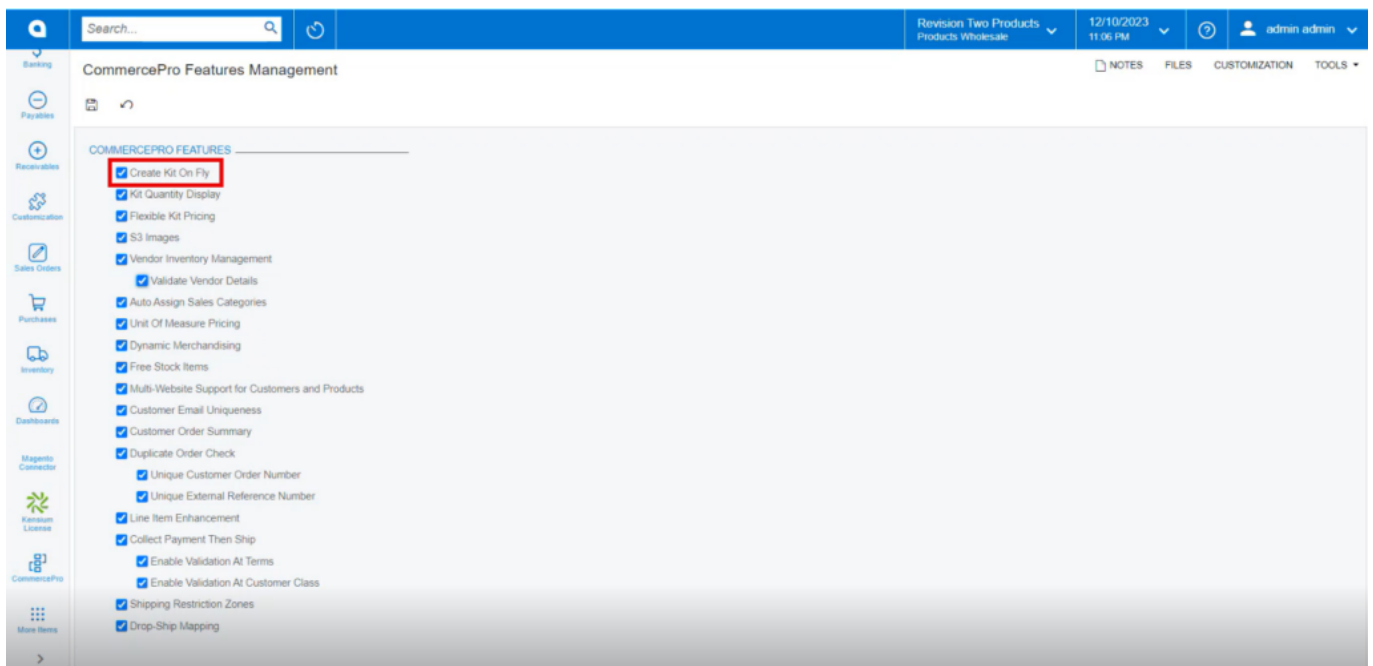




Bypass Acumatica's kit Assembly screen and assemble kits while speaking to customers or anytime on the fly.

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

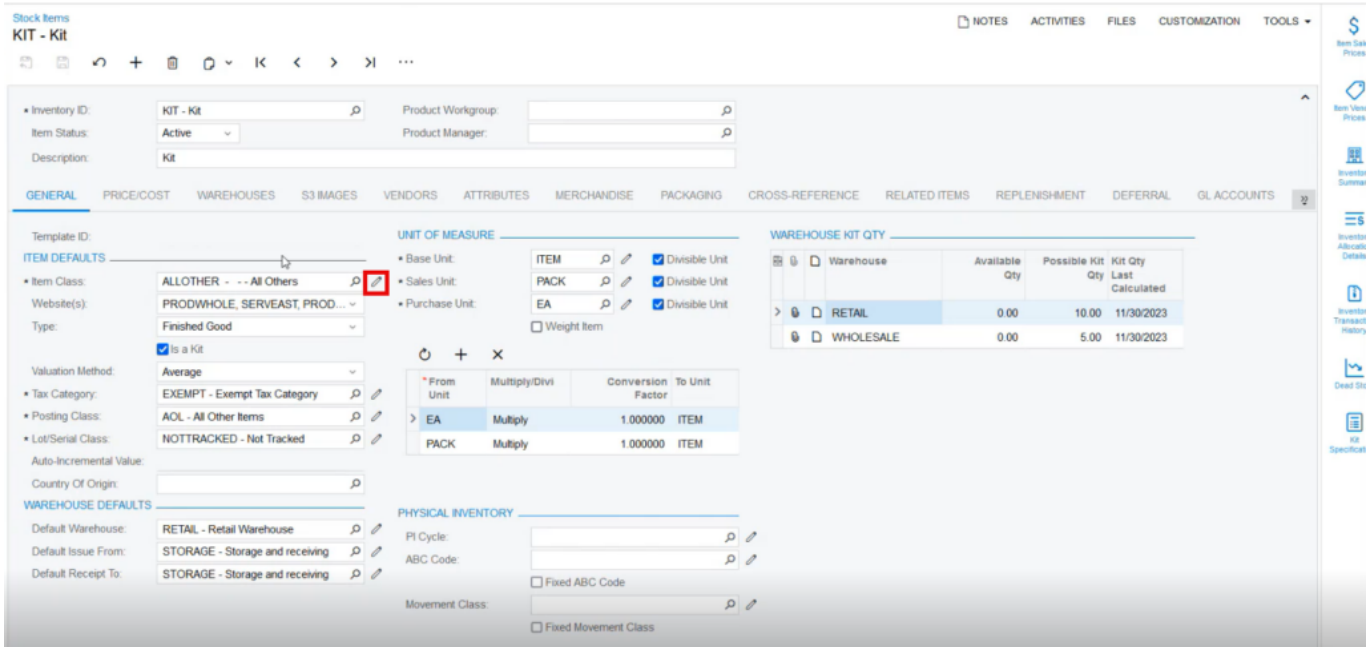


### Commerce Pro Feature Management



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



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



### Stock Items

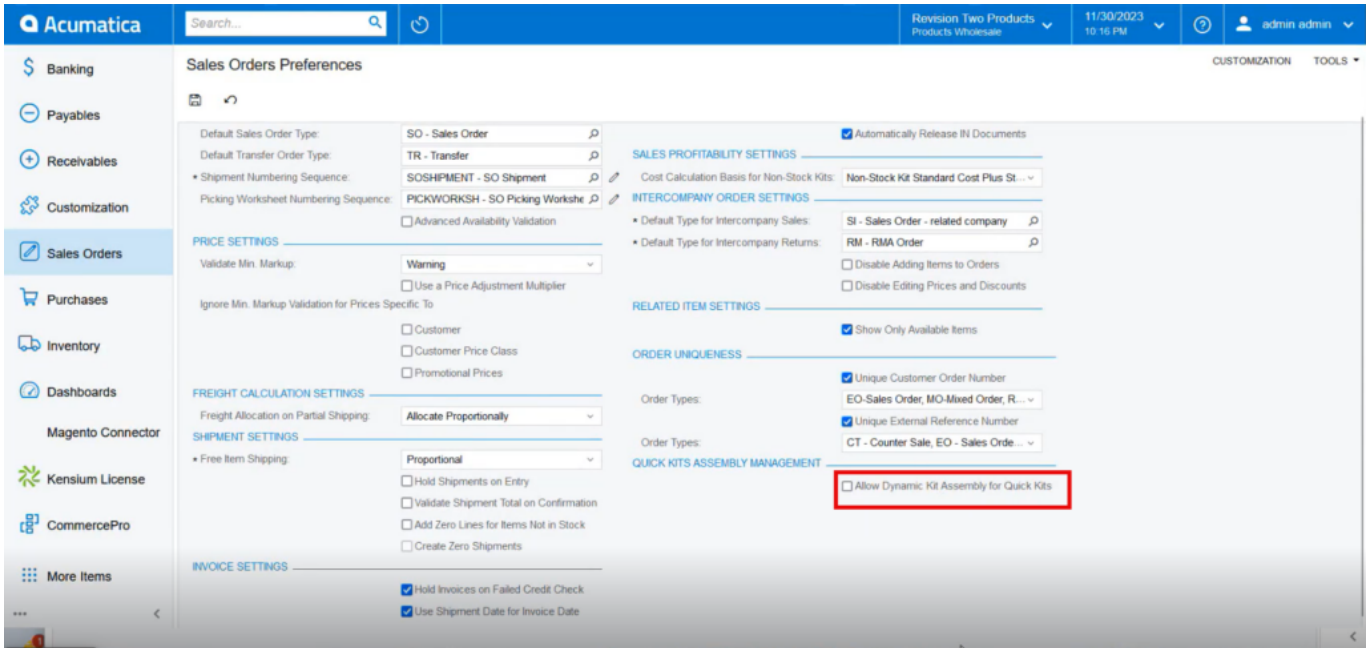
- You will be redirected to the below item classes screen enable the check box   then only the shipping, possible quantity, and available quantity be displayed in the sales orders screen's footer.



### Item classes



- You need to search for  in the global search.



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

Banking Payables Receivables Customization **Sales Orders** Purchases Inventory Dashboards Magento Connector Kensium License CommercePro More Items

**Sales Orders Preferences** CUSTOMIZATION TOOLS

Default Sales Order Type: SO - Sales Order  
 Default Transfer Order Type: TR - Transfer  
 Shipment Numbering Sequence: SOSHPMENT - SO Shipment  
 Picking Worksheet Numbering Sequence: PICKWORKSH - SO Picking Workshe  
 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

Automatically Release IN Documents


**SALES PROFITABILITY SETTINGS**  
 Cost Calculation Basis for Non-Stock Kits: Non-Stock Kit Standard Cost Plus St...

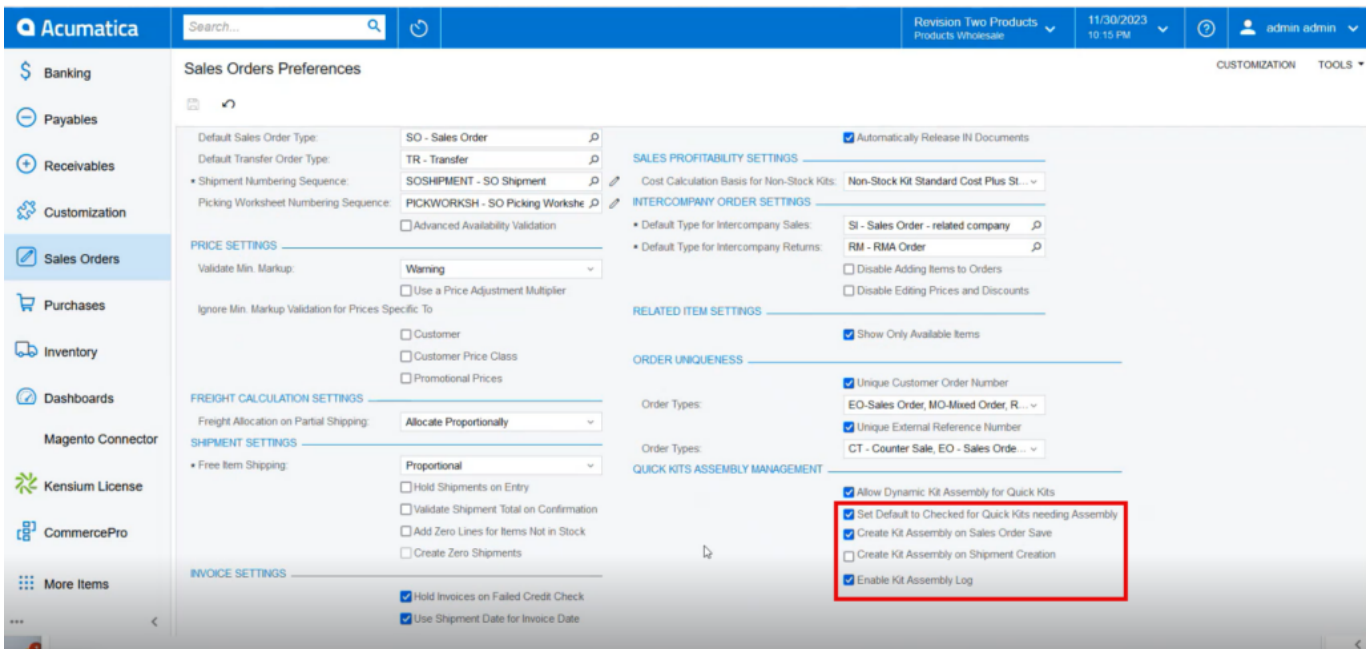
**INTERCOMPANY ORDER SETTINGS**  
 Default Type for Intercompany Sales: SI - Sales Order - related company  
 Default Type for Intercompany Returns: RM - RMA Order  
 Disable Adding Items to Orders  
 Disable Editing Prices and Discounts

**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 Orde...  
 Allow Dynamic Kit Assembly for Quick Kits

### Sales Orders Preferences

- Enable the check box for 



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

Banking Payables Receivables Customization **Sales Orders** Purchases Inventory Dashboards Magento Connector Kensium License CommercePro More Items

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 Default Transfer Order Type: TR - Transfer  
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 Unique External Reference Number  
 Order Types: CT - Counter Sale, EO - Sales Orde...  
 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

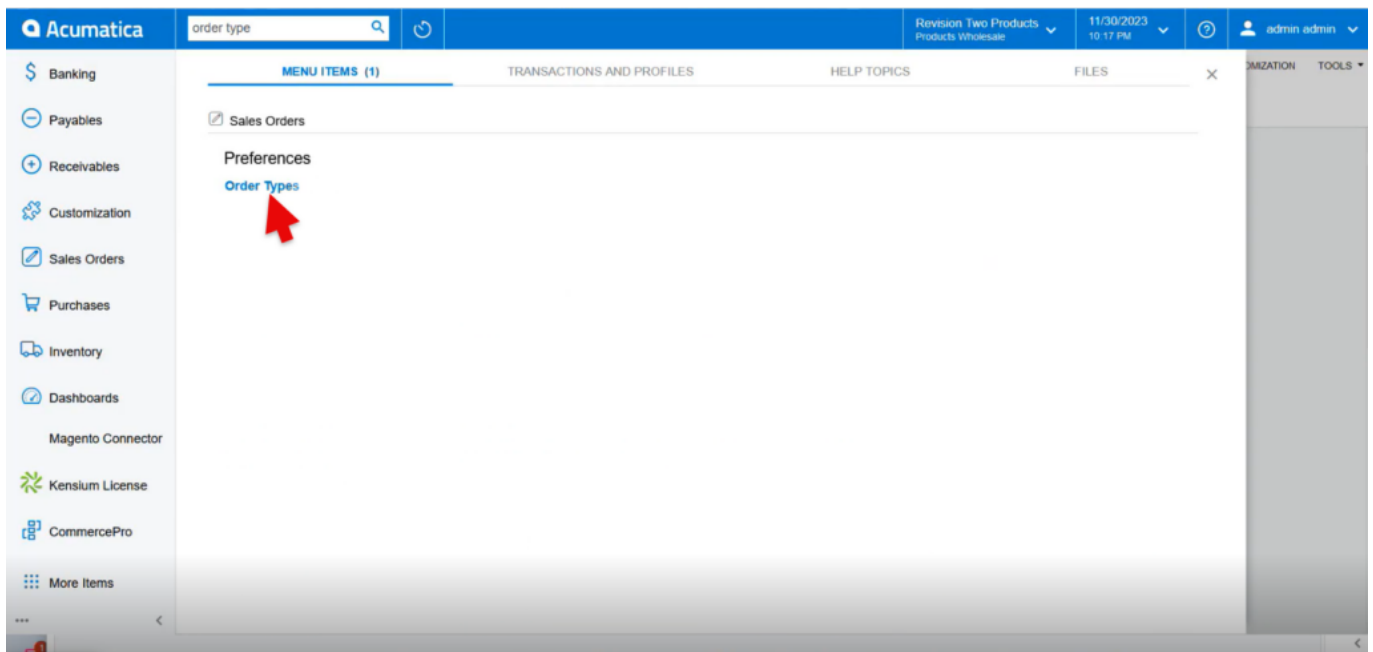
- ✖ • Upon enabling the 4 check boxes will display on the screen.
  -  By default the check box will be activated in sales orders. This check box, indicates that this is connected to Quick Kits,
  -  If this check box is enabled Kit Assembly will happen at Sales order level.
  -  If this check box is enabled Kit Assembly will happen at Sales orders level.

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

-  To view the logs info.



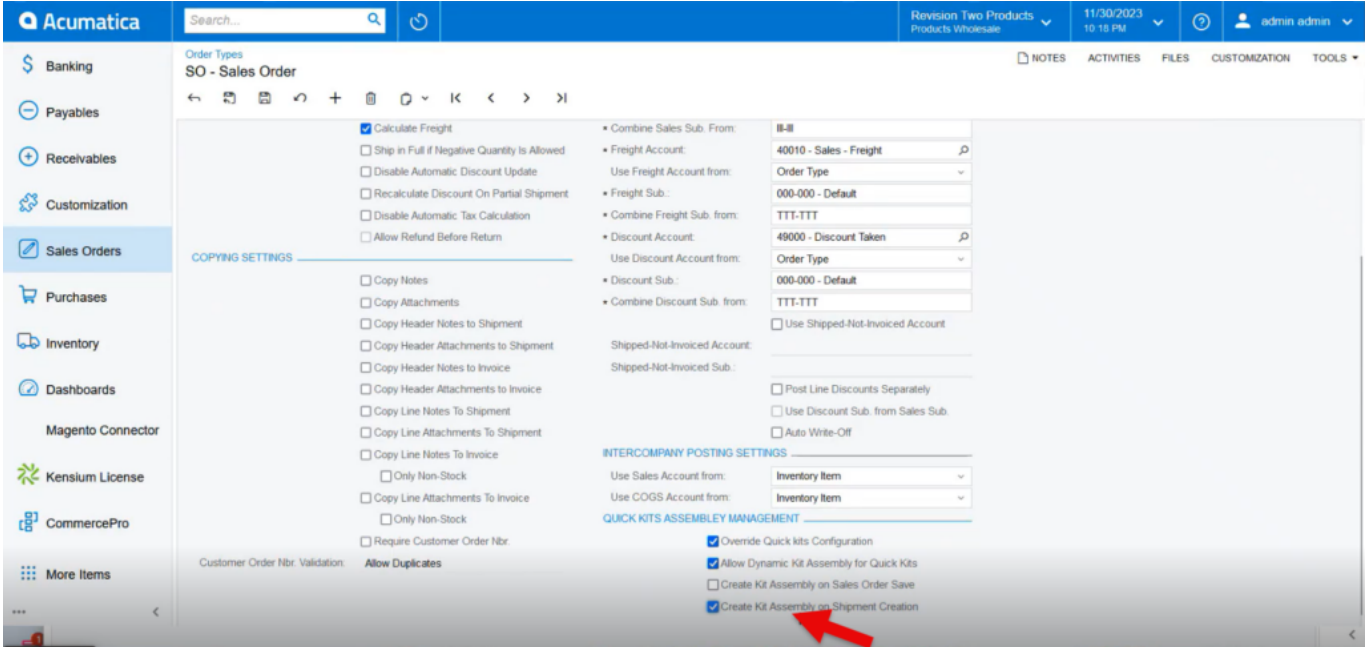
- You need to search for  in the global search.



## Order Types

You can provide your own settings for each 

For example, you can choose to  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 contains navigation options 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 SO - Sales Order' and contains various settings sections:

- 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.
- Accounting Settings:**
  - Combine Sales Sub. From:
  - 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:  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 (highlighted with a red arrow)

## 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.