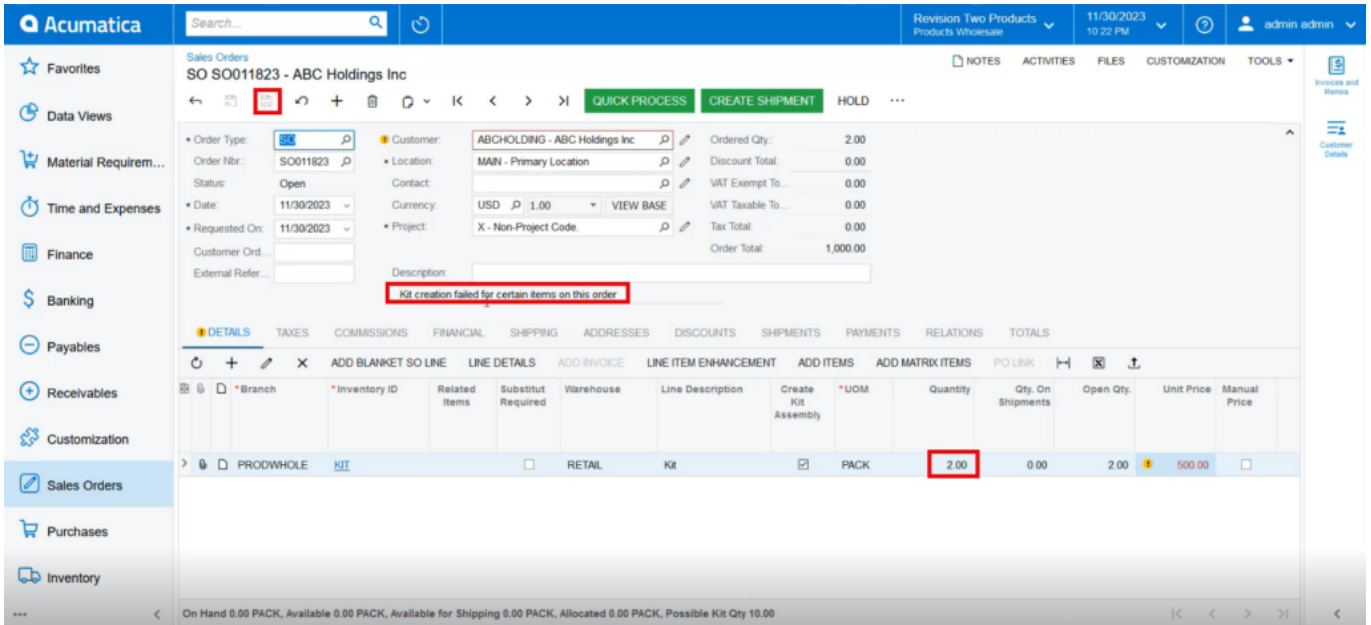


Create Kit Assembly on Sales Orders Save



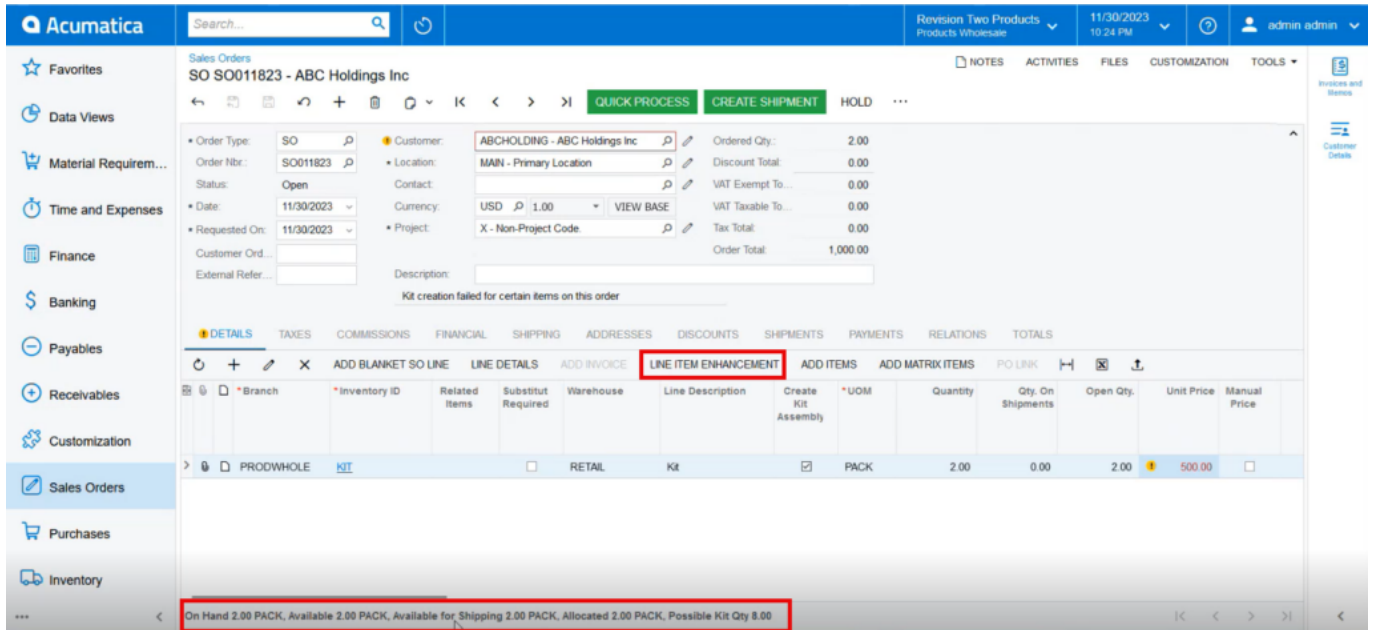
- You must navigate to the left panel of Acumatica and click on **[Inventory]** and then click on **[Stock Items]** under **[Profiles]**.
- Search for the **[Customer]**.
- Click on the **[+]** icon.
- Search for **[Branch]**, **[Warehouse]**.
- Enable the check box for **[Create Kit Assembly]**.



The screenshot shows the Acumatica Sales Order form for SO SO011823 - ABC Holdings Inc. The form is in the 'DETAILS' tab. A red box highlights the error message: 'Kit creation failed for certain items on this order'. The 'Kit Assembly' checkbox is checked. The 'Quantity' field is highlighted with a red box and contains the value '2.00'. The 'Unit Price' field contains '500.00'. The 'Manual Price' checkbox is unchecked. The 'On Hand' and 'Available' quantities are 0.00. The 'Allocated' and 'Possible Kit Qty' are 0.00 and 10.00 respectively.

Sales Orders

- Enter the required kit **[Quantity]**.
- Click on **[save]**.
- If it is not processed, you will get a validation as **[Kit creation failed certain items on this order]**.



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Search...

Revision Two Products
Products Wholesale

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admin admin

Sales Orders

SO SO011823 - ABC Holdings Inc

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

QUICK PROCESS CREATE SHIPMENT HOLD

Order Type: SO Customer: ABC HOLDING - ABC Holdings Inc Ordered Qty: 2.00

Order Nbr: SO011823 Location: MAIN - Primary Location Discount Total: 0.00

Status: Open Contact: VAT Exempt To: 0.00

Date: 11/30/2023 Currency: USD 1.00 VIEW BASE VAT Taxable To: 0.00

Requested On: 11/30/2023 Project: X - Non-Project Code Tax Total: 0.00

Customer Ord: Order Total: 1,000.00

External Refer: Description: Kit creation failed for certain items on this order

DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS PAYMENTS RELATIONS TOTALS

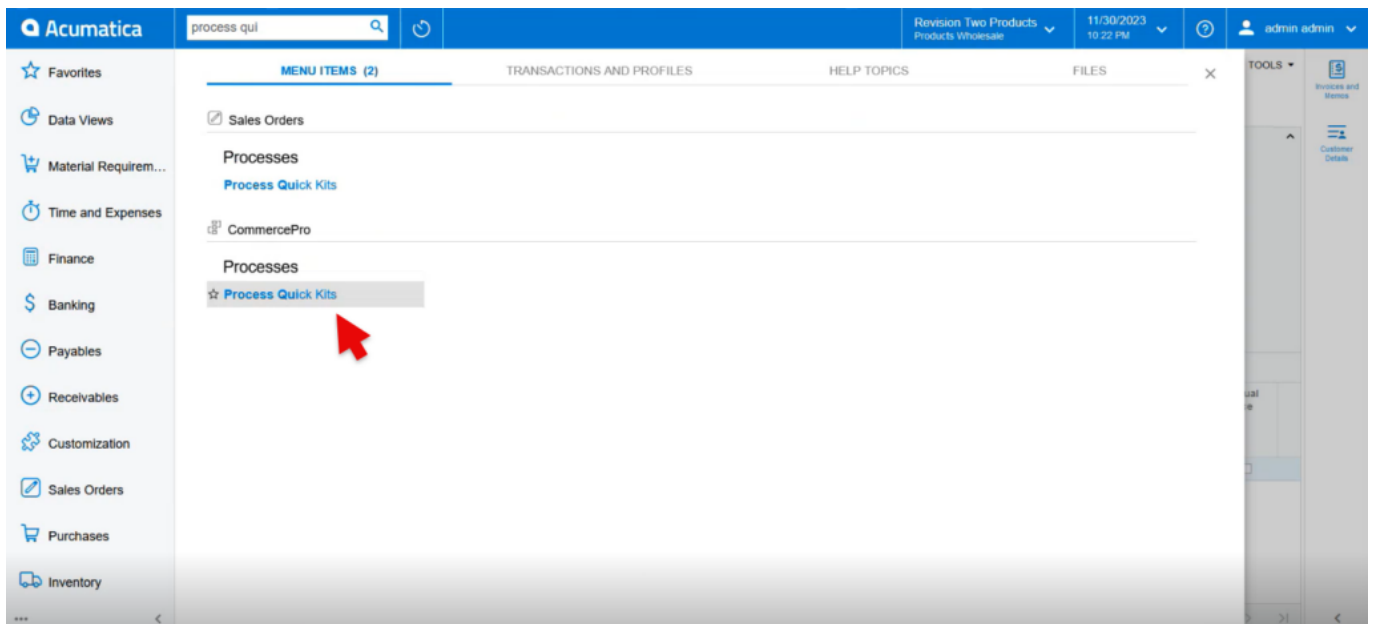
ADD BLANKET SO LINE LINE DETAILS ADD INVOICE LINE ITEM ENHANCEMENT ADD ITEMS ADD MATRIX ITEMS PO LINK

| 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 | 2.00 | 0.00 | 2.00 | 500.00 | |

On Hand 2.00 PACK, Available 2.00 PACK, Available for Shipping 2.00 PACK, Allocated 2.00 PACK, Possible Kit Qty 8.00

Sales Orders

- You must search for **[Process Quick Kits]** in the Global search bar.



Acumatica

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Revision Two Products
Products Wholesale

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MENU ITEMS (2) TRANSACTIONS AND PROFILES HELP TOPICS FILES

Sales Orders

Processes

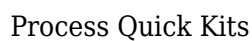
Process Quick Kits

CommercePro

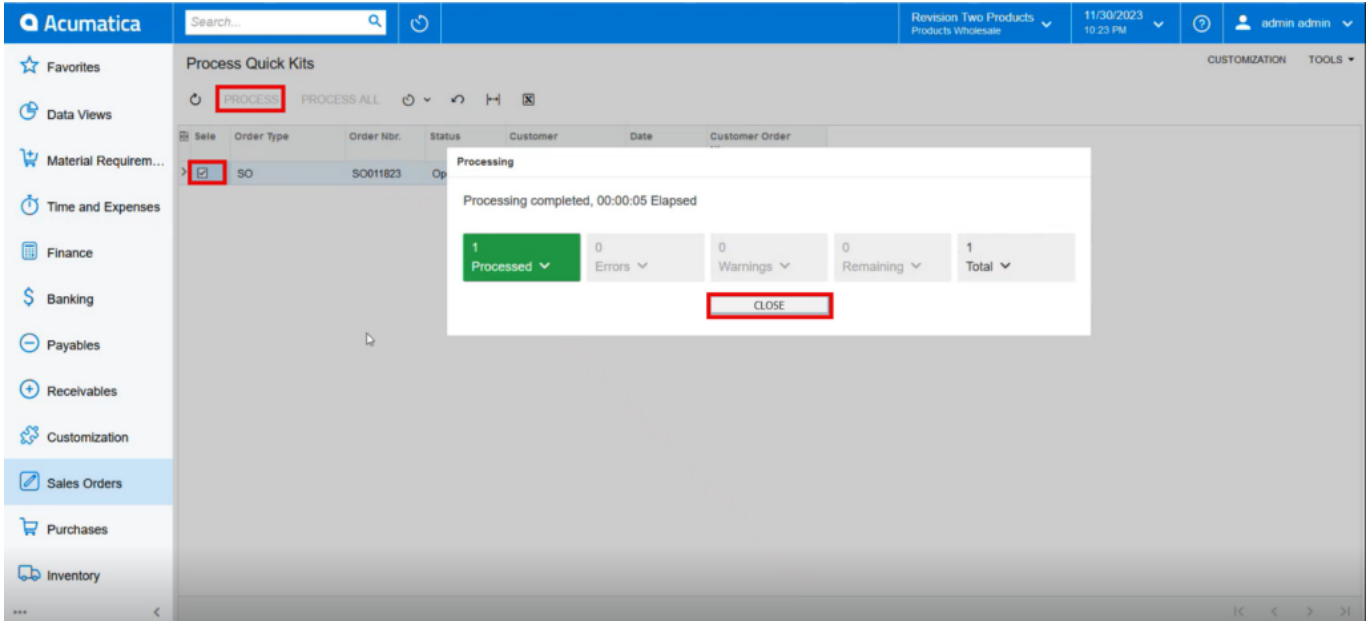
Processes

Process Quick Kits

Process Quick Kits



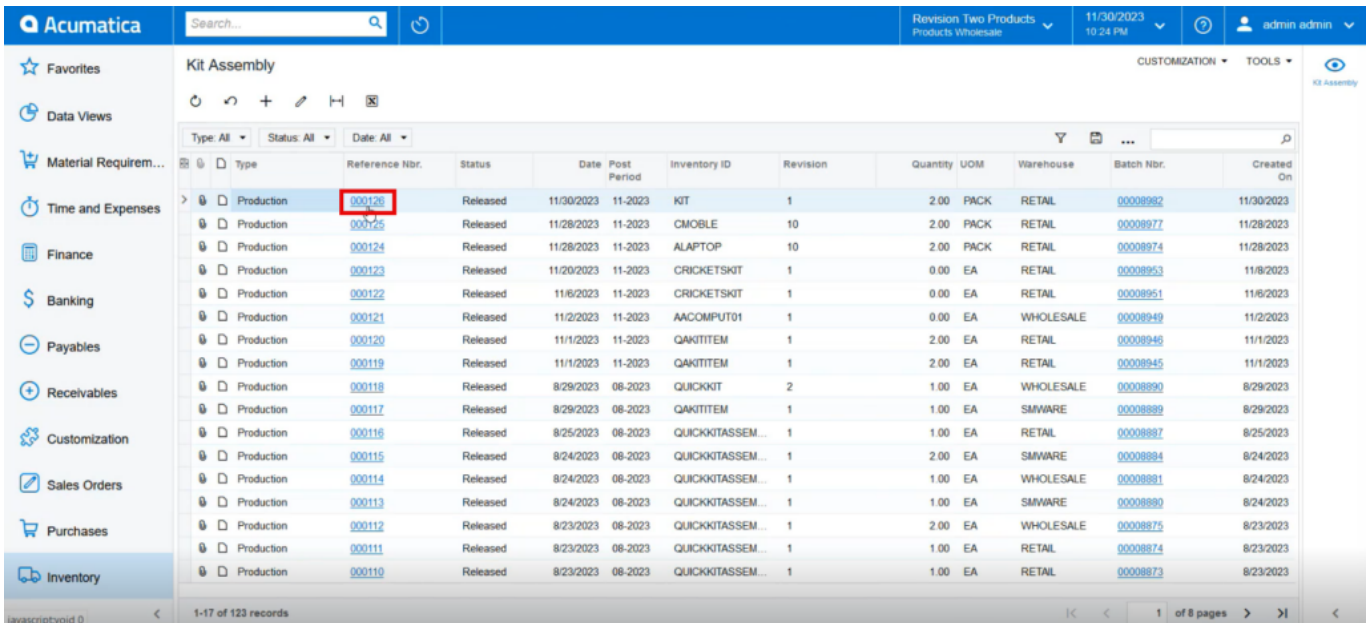
- Enable the check box for the **[SO]** and click on **[Process]** you get a message as **[Processing Completed]**.



The screenshot shows the Acumatica interface with the 'Process Quick Kits' window open. A 'Processing' dialog box is displayed, indicating 'Processing completed, 00:00:05 Elapsed'. The dialog shows a summary of results: 1 Processed, 0 Errors, 0 Warnings, 0 Remaining, and 1 Total. A 'CLOSE' button is highlighted with a red box. In the background, the 'Process Quick Kits' table is visible, with the 'SO' row selected and its checkbox also highlighted with a red box.

Process Quick Kits

- To view the processed order, you must search for **[Kit Assembly]** in the Global search bar.

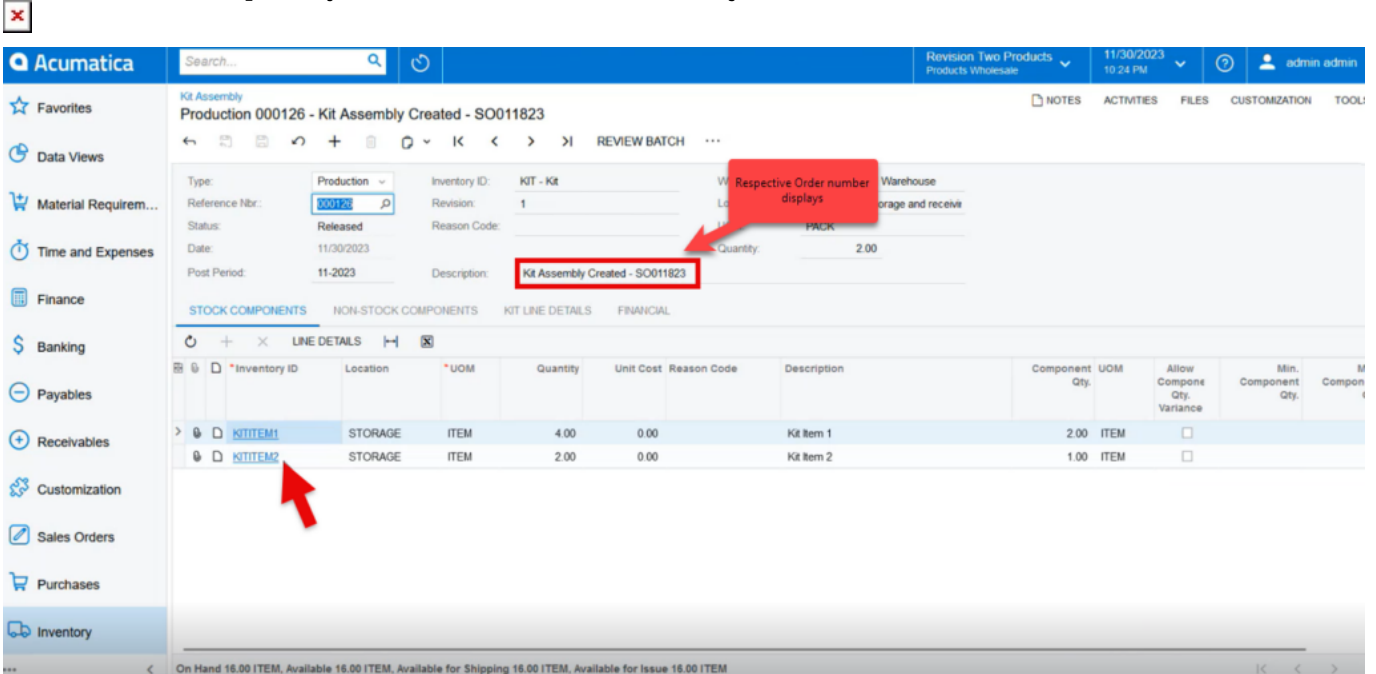


The screenshot shows the Acumatica 'Kit Assembly' window. A table of production orders is displayed, with the first row highlighted. The table columns include Type, Reference Nbr., Status, Date, Post Period, Inventory ID, Revision, Quantity, UOM, Warehouse, Batch Nbr., and Created On. The first row is for a 'Production' order with Reference Nbr. 000120, Status 'Released', and Date 11/30/2023. The '000120' is highlighted with a red box. The table shows 17 of 123 records.

| Type | Reference Nbr. | Status | Date | Post Period | Inventory ID | Revision | Quantity | UOM | Warehouse | Batch Nbr. | Created On |
|------------|----------------|----------|------------|-------------|------------------|----------|----------|------|-----------|------------|------------|
| Production | 000120 | Released | 11/30/2023 | 11-2023 | KIT | 1 | 2.00 | PACK | RETAIL | 00008982 | 11/30/2023 |
| Production | 000125 | Released | 11/28/2023 | 11-2023 | CMOBL | 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 | 11/6/2023 |
| 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 | 00008945 | 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 |
| Production | 000111 | Released | 8/23/2023 | 08-2023 | QUICKKITASSEM... | 1 | 1.00 | EA | RETAIL | 00008874 | 8/23/2023 |
| Production | 000110 | Released | 8/23/2023 | 08-2023 | QUICKKITASSEM... | 1 | 1.00 | EA | RETAIL | 00008873 | 8/23/2023 |

Kit Assembly

- Click on **[Reference Nbr.]**.
- In the description, you can view the **[kit Assembly created with SO no]**.



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Revision: Two Products
Products Wholesale

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admin admin

Kit Assembly
Production 000126 - Kit Assembly Created - SO011823

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

Type: Production
Reference Nbr.: 000126
Status: Released
Date: 11/30/2023
Post Period: 11-2023

Inventory ID: KIT - Kit
Revision: 1
Reason Code:
Quantity: 2.00

Warehouse: storage and receive

Description: Kit Assembly Created - SO011823

STOCK COMPONENTS NON-STOCK COMPONENTS KIT LINE DETAILS FINANCIAL

LINE DETAILS

| Inventory ID | Location | *UOM | Quantity | Unit Cost | Reason Code | Description | Component Qty. | UOM | Allow Component Qty. Variance | Min. Component Qty. | Max. Component Qty. |
|--------------|----------|------|----------|-----------|-------------|-------------|----------------|------|-------------------------------|---------------------|---------------------|
| KITITEM1 | STORAGE | ITEM | 4.00 | 0.00 | | Kit Item 1 | 2.00 | ITEM | <input type="checkbox"/> | | |
| KITITEM2 | STORAGE | ITEM | 2.00 | 0.00 | | Kit Item 2 | 1.00 | ITEM | <input type="checkbox"/> | | |

On Hand 16.00 ITEM, Available 16.00 ITEM, Available for Shipping 16.00 ITEM, Available for Issue 16.00 ITEM

Kit Assembly

- Navigate to the sales orders screen and check the possible kit quantity. If the quantity is less than the possible kit quantity, this indicates that kit has been Created and quantity is forwarded to Parent item.

Acumatica

Search...

Revision Two Products
Products Wholesale

11/30/2023
10:24 PM

admin admin

Sales Orders

SO SO011823 - ABC Holdings Inc

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

QUICK PROCESS CREATE SHIPMENT HOLD

Order Type: SO Customer: ABC HOLDING - ABC Holdings Inc Ordered Qty: 2.00

Order Nbr: SO011823 Location: MAIN - Primary Location Discount Total: 0.00

Status: Open Contact: VAT Exempt To: 0.00

Date: 11/30/2023 Currency: USD 1.00 VIEW BASE VAT Taxable To: 0.00

Requested On: 11/30/2023 Project: X - Non-Project Code Tax Total: 0.00

Customer Ord: Order Total: 1,000.00

External Refer: Description: Kit creation failed for certain items on this order

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 | 2.00 | 0.00 | 2.00 | 500.00 | |

On Hand 2.00 PACK, Available 2.00 PACK, Available for Shipping 2.00 PACK, Allocated 2.00 PACK, Possible Kit Qty 8.00

Sales Orders

- Click on **[Line Item Enhancement]**.
- This screen shows the allocated quantity for the order.

Acumatica

Search...

Revision Two Products
Products Wholesale

11/30/2023
10:25 PM

admin

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

Sales Orders
SO SO011823 - ABC Holdings Inc

QUICK PROCESS CREATE SHIPMENT HOLD

Line Details

Order T

Order N

Status: Active

Ship On Allocated Alloc. Warehouse Completed Lot/Serial Nbr. Quantity Qty. On Shipments Qty. Received UOM Mark for PO Related Document

11/30/2023 ☒ RETAIL ☐ 2.00 0.00 0.00 PACK ☐

On Hand 2.00 PACK, Available 2.00 PACK, Available for Shipping 2.00 PACK, Allocated 2.00 PACK, Possible Kit Qty 8.00

Line Details