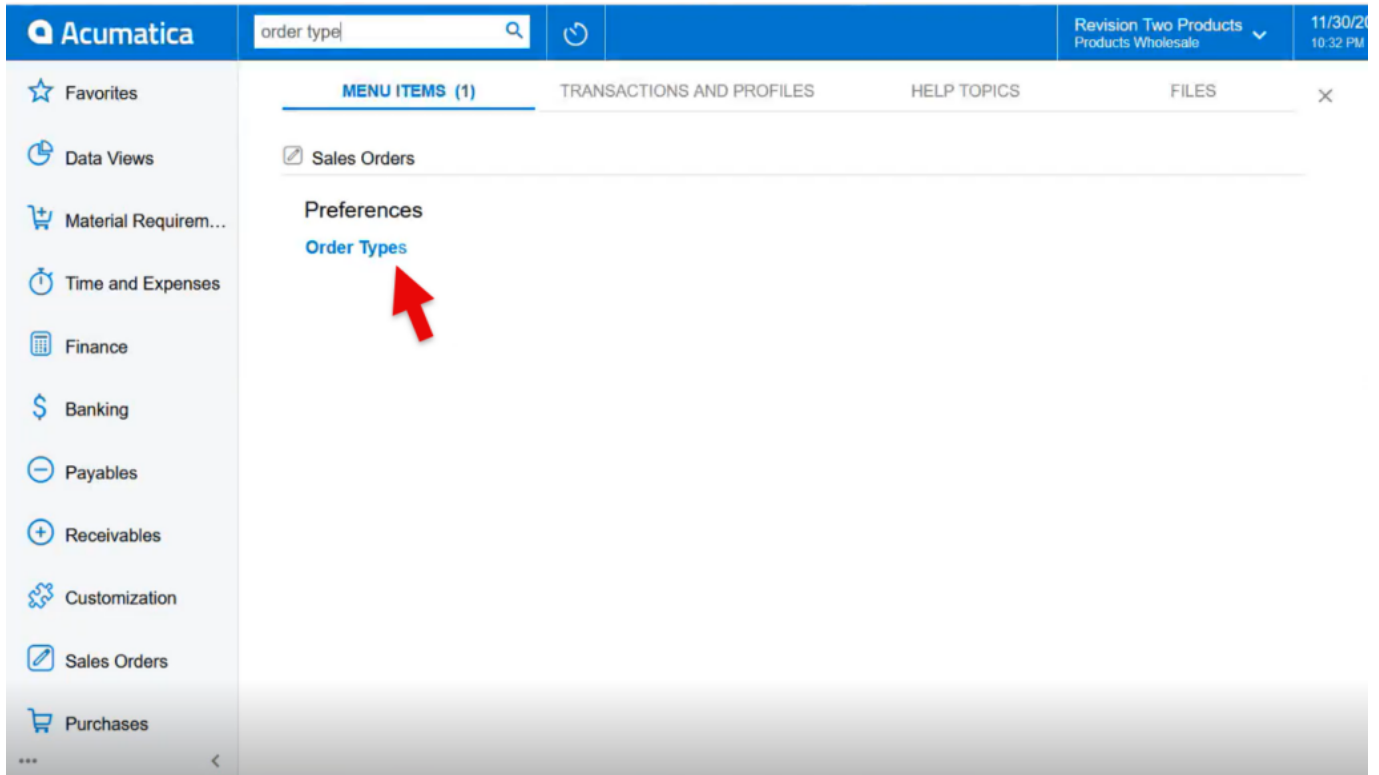


Create Kit Assembly on Shipment Creation



- Navigate to **[Order Types]** screen.



Order Types

- Enable the check box for **[Create Kit Assembly on Shipment Creation]**.

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Revision Two Products
Products Wholesale

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admin admin

Order Types
SO - Sales Order

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

COPYING SETTINGS

☐ Recalculate Discount On Partial Shipment
☐ Disable Automatic Tax Calculation
☐ Allow Refund Before Return

☐ 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**

• 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
 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

Order Types

- You need to navigate to the sales orders screen and add the quantity for shipping.

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admin admin

Sales Orders
SO - Alta Ace 100.

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

QUICK PROCESS CREATE SHIPMENT HOLD ...

• Order Type: SO
 Order Nbr.: <NEW>
 Status: Open
 Date: 11/30/2023
 Requested On: 11/30/2023
 Customer Ord.:
 External Refer.:

• Customer: AACUSTOMER - Alta Ace 100.
 Location: MAIN - Primary Location
 Contact: Amelia Armstrong
 Currency: USD 1.00
 Project: X - Non-Project Code

Ordered Qty.: 1.00
 Discount Total: 0.00
 VAT Exempt To: 0.00
 VAT Taxable To: 0.00
 Tax Total: 0.00
 Order Total: 500.00

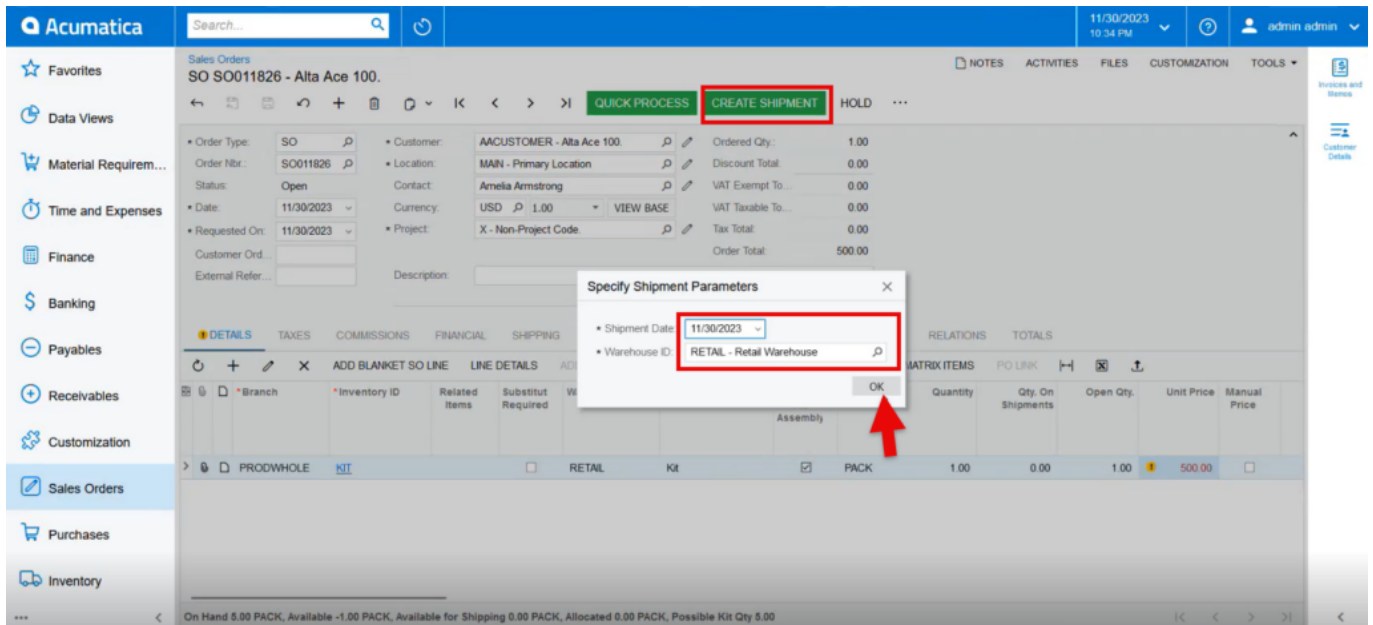
DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS PAYMENTS RELATIONS TOTALS

| ADD BLANKET SO LINE | LINE DETAILS | ADD INVOICE | LINE ITEM ENHANCEMENT | ADD ITEMS | ADD MATRIX ITEMS | PO LINK | Qty. On Shipments | Open Qty. | Unit Price | Manual Price |
|------------------------------------|---|---------------|-----------------------|-----------|------------------|--|-------------------|-----------|------------|--------------|
| <input type="checkbox"/> Branch | <input type="checkbox"/> Inventory ID | Related Items | Substitut Required | Warehouse | Line Description | Create Kit Assembly | UOM | Quantity | | |
| <input type="checkbox"/> PRODWHOLE | <input checked="" type="checkbox"/> KIT | | | RETAIL | Kit | <input checked="" type="checkbox"/> PACK | | 1.00 | 0.00 | 1.00 |
| | | | | | | | | | 500.00 | |

On Hand 5.00 PACK, Available -1.00 PACK, Available for Shipping 0.00 PACK, Allocated 0.00 PACK, Possible Kit Qty 5.00

Order Types

- Click on **[Create Shipment]**.
- A pop-up will appear on the screen enter the **[Shipment Date]** and **[Warehouse ID]**.
- Click on **[Ok]**.



Order Types

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Shipments

005352 - Alta Ace 100.

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

CONFIRM SHIPMENT HOLD

Shipment Nbr.: 005352 Customer: AACUSTOMER - Alta Ace 100 Shipped Quant.: 1.00

Type: Shipment Location: MAIN - Primary Location Shipped Weight: 0.000000

Status: Open Warehouse ID: RETAIL - Retail Warehouse Shipped Volume: 0.000000

Operation: Issue Workgroup: Packages: 0

Shipment Date: 11/30/2023 Owner: Maxwell Baker Package Weight: 0.000000

Description:

DETAILS ORDERS SHIPPING PACKAGES

| Order Type | Order Nbr. | Inventory ID | Free Item | Warehouse | Location | UOM | Shipped Qty. | Ordered Qty. | Open Qty. | Picked Qty. | Packed Qty. | Lot/Serial Nbr. |
|------------|------------|--------------|-----------|-----------|----------|------|--------------|--------------|-----------|-------------|-------------|-----------------|
| SO | SO011926 | KIT | | RETAIL | STORAGE | PACK | 1.00 | 1.00 | 0.00 | 0.00 | 0.00 | |

On Hand 6.00 PACK, Available 3.00 PACK, Available for Shipping 3.00 PACK

Shipments

- Click on **[Confirm Shipment]**.
- No kit process is required for shipment; the order will be added in the Kit Assembly.

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Kit Assembly

CUSTOMIZATION TOOLS

Type: All Status: All Date: All

| Type | Reference Nbr. | Status | Date | Post Period | Inventory ID | Revision | Quantity | UOM | Warehouse | Batch Nbr. | Created On |
|------------|----------------|----------|------------|-------------|------------------|----------|----------|------|-----------|------------|------------|
| Production | 000128 | Released | 11/30/2023 | 11-2023 | KIT | 1 | 1.00 | PACK | RETAIL | 00008984 | 11/30/2023 |
| Production | 000127 | Released | 11/30/2023 | 11-2023 | KIT | 1 | 3.00 | PACK | RETAIL | 00008983 | 11/30/2023 |
| Production | 000126 | Released | 11/30/2023 | 11-2023 | KIT | 1 | 2.00 | PACK | RETAIL | 00008982 | 11/30/2023 |
| Production | 000125 | Released | 11/28/2023 | 11-2023 | CMOBLE | 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 | 11/8/2023 |
| 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 | 00008946 | 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 |

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Kit Assembly

