

Item Assembly (Bundle) - How to Create and Build

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Overview

An **Assembly** is an Item made up of multiple component items.

Use the Assembly feature to define the components required to create a finished item and build the finished item into inventory.

1. Create an Assembly Item

1. Go to **Items** → **Item List**.
2. Click **New**.
3. Enter the **Item Number** and **Description**.
4. Set **Type** to **Assembly (Bundle)**.
5. Check **Assembly**.
6. Select the appropriate **Assembly Type**.

Assembly Type	Description
Pre-Assembled Assembly	Build the assembly in advance and add the finished assembly to stock.
Automated Assembly	The assembly is automatically created when the item is shipped on a Sales Order.
Editable Assembly	The assembly components are copied to the Sales Order as sub-components and can be edited on the fly.

7. Complete any other required item information.
8. Save the item.

2. Add Assembly Components

1. Open the Assembly item's **Item Detail** screen.
2. Select **Bundles (Assemblies)**.
3. Add the component items that make up the assembly.
4. Enter the **Qty Needed** for each component.
5. Add **Assembly Notes** when needed.

6. Save the Assembly.

The Assembly screen displays information such as:

- Component Item
- Item Description
- Qty Needed
- Assembly Notes
- Qty Can Build
- Qty in Stock
- Qty on SO/BO
- Vendor
- Cost
- Extended Cost

3. Check How Many Assemblies Can Be Built

Click **Refresh**.

The **Qty Can Build** column calculates how many complete assemblies can be built based on the available component inventory.

Review the quantities before building the Assembly.

4. Build the Assembly

For a **Pre-Assembled Assembly**:

1. Click **Refresh**.
2. Review the **Qty Can Build**.
3. Enter the quantity to build in the **Build** field.
4. Click **Build Bundle(s)**.
5. Verify that the finished Assembly was added to inventory.
6. Verify that the component inventory was reduced accordingly.

5. Print Assembly Documents

The Assembly screen provides options to print:

- **Assembly (Bundle) Stock Picking Ticket**
- **Assembly (Bundle) Build List**

Use these documents as needed for the warehouse assembly process.

QA / Testing Checklist

The following functions should be tested before this KBA is finalized.

- ☐

Refresh correctly calculates **Qty Can Build**.

- ☐

Qty Can Build correctly considers the required quantity of each component.

- ☐

Fractional component quantities calculate correctly.

- ☐

Build Bundle(s) creates the correct quantity of finished Assemblies.

- ☐

Component inventory is reduced correctly after a build.

- ☐

Finished Assembly inventory increases correctly.

- ☐

System prevents building more than the available quantity when appropriate.

- ☐

Assembly components can be added, edited, and removed.

- ☐

Assembly Notes can be entered and retained.

- ☐

Stock Picking Ticket prints correctly.

- ☐

Build List prints correctly.

- ☐

Assembly inventory transactions are recorded correctly.

Support Request Rule

If a function does not behave as expected during testing, **do not document the behavior as part of the final KBA**.

Instead, record it as a potential Support Request with:

- **Support Request Title**
- **Current Behavior**
- **Expected Behavior**
- **Steps to Reproduce**
- **Version**
- **Screenshot / Evidence**

The KBA will be finalized after the Assembly workflow and identified issues have been confirmed.

