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Assemblies

Cavallo Support - 2025-08-06 - [Modules](#)

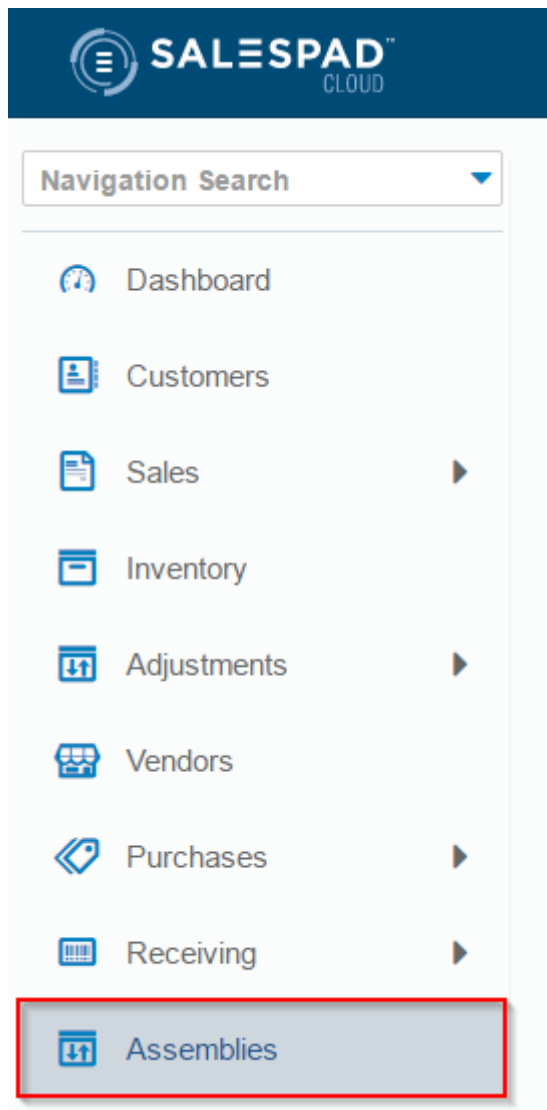
Overview

SalesPad Cloud's Assemblies module is where you adjust pre-assembled bundles into your inventory. Before you can adjust a pre-assembled bundle into inventory, though, you must create the pre-assembled bundle in the Inventory module.

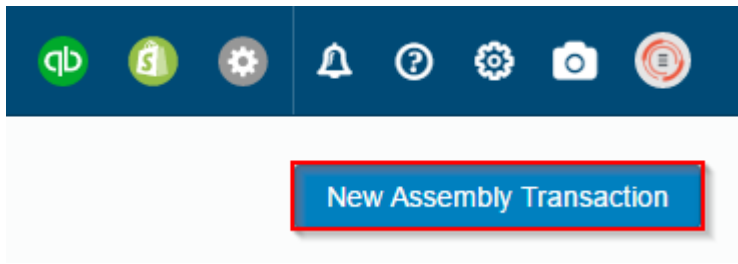
Adjust a Pre-Assembled Bundle into Inventory

Once you've created your pre-assembled bundle, you must adjust it into inventory through an assembly transaction.

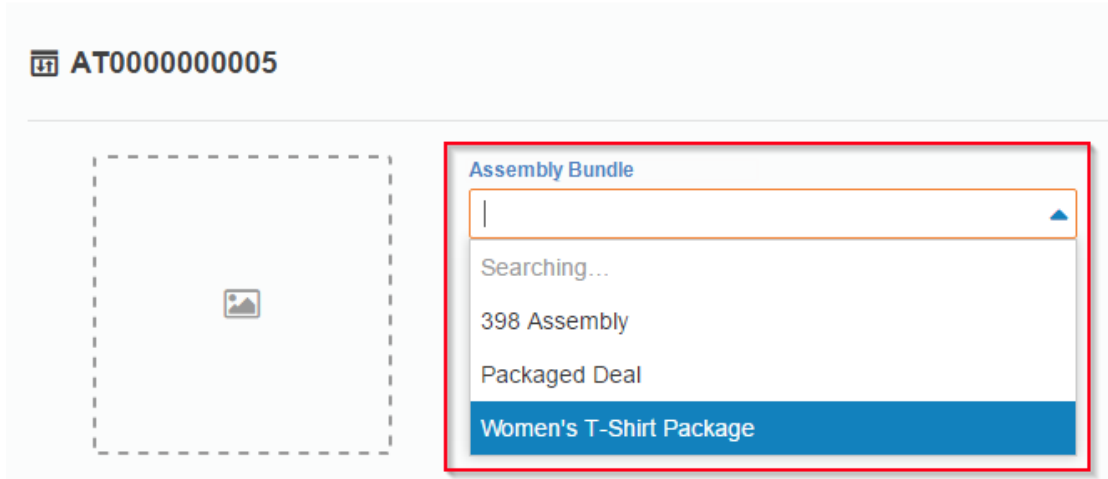
Navigate to **Assemblies**.



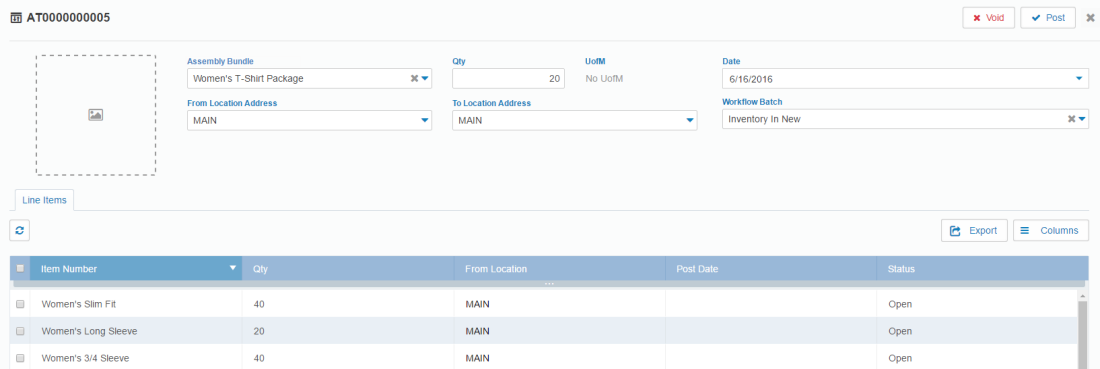
Click **New Assembly Transaction** in the upper right-hand corner of the screen.



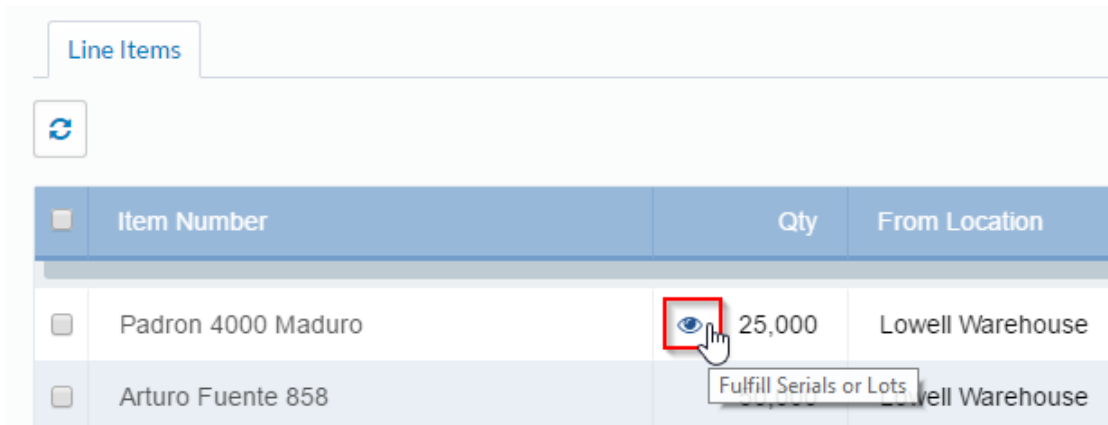
Select your pre-assembled bundle from the Assembly Bundle dropdown.



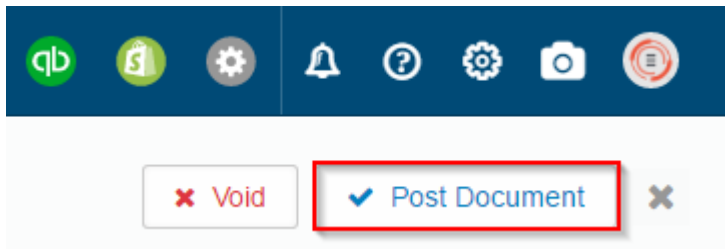
Fill in the remaining information fields. Notice that the Line Items field automatically populates when you select your Assembly Bundle (the components of your pre-assembled bundles appear here).



Note: To fulfill a serial or lot item, click the **Eye** icon in the Qty cell.



When you've filled in all the pertinent information, click **Post Document** to post the transaction.



Your pre-assembled bundle is now available in the Inventory module.

Inventory By location

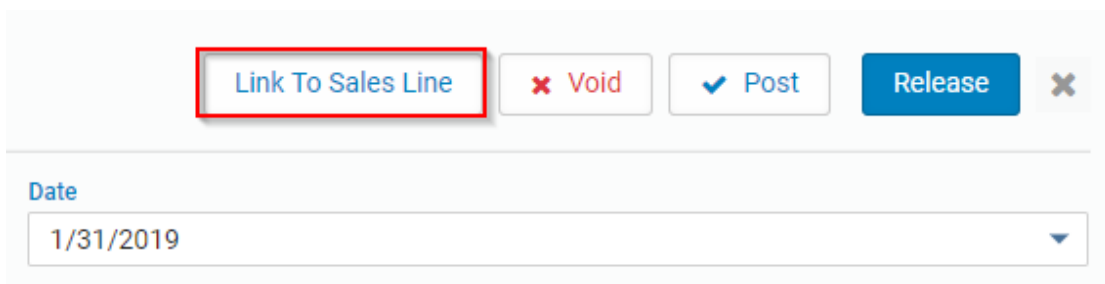
women Hide Inactive Items Hide Discontinued Items

Item	Description	Type	Onhand	Allocated	Available
Women's T-Shirt Pac...	five t-shirts	Pre_Assembled_Bun...	20 Ea	0 Ea	20 Ea
Women's Long Sleeve	long sleeve women's...	Inventory	0 Ea	0 Ea	0 Ea
Women's 3/4 Sleeve	3/4 sleeve women's ...	Inventory	0 Ea	0 Ea	0 Ea
Women's Slim Fit	slim-cut women's t s...	Inventory	0 Ea	0 Ea	0 Ea

Note: Pre-assembled bundles can be added to a purchase order and received like a regular inventory tracked item.

Links to Sales Documents

To link an assembly to back-ordered assembled bundle sales lines, click the **Link to Sales Line** button in the upper right-hand corner.



The Link to Sales Line drawer will open. Indicate the quantity to link in the Link Qty column of the sales document, then click **Link** in the lower right-hand corner to link the sales lines.

Link To Sales Line

AT0000000005 Remaining Qty: 0 (Each)

Sales Line Items

Sales Doc Num	Item Number	Needed	Link Qty
ORD0000000001	112-Complete	4 0	1
ORD0000000003	112-Complete	1	0

If there are sales lines linked to your assembly, they will appear in the Links tab of the Assembly card.

Assembly Bundle
112-Complete

From Location Address
MAIN

Line Items **Links**

Search for an Assembly

Once you've opened the Assemblies module, you will see a grid displaying your existing assemblies.

Assemblies

Find Assembly Transaction

Hide Voided Transactions
 Hide Posted Transactions

Assembly Transaction Num	Created On	Qty	Status
AT0000000004	7/1/2016	1	Open
AT0000000005	7/12/2016	1	Open
AT0000000007	7/20/2016	1	Open

There are several ways to search for an assembly. Before you begin your search, though, decide whether or not you want voided or posted assemblies to be displayed in your search results. Check the boxes just to the right of the search bar accordingly.

Assemblies

Find Assembly Transaction

Hide Voided Transactions
 Hide Posted Transactions

To search for a specific assembly by number, simply type the number (or partial number, if you don't know the exact number) into the search bar located just above your grid.

Find Assembly Transaction

Assembly Transaction Num	Created On	Qty
AT0000000004	7/1/2016	1

You can also search each column in your grid. To reveal the auto filter row for your columns, click the gray **ellipses** found just below the column headers.

Created On
7/1/2016



Created On
<input type="text"/>
7/1/2016

Clicking the gray ellipses will reveal the auto filter row

Enter your search criteria into whichever auto filter row is most useful for your particular search.

Certain assembly columns, such as Status, also offer dropdown option in the auto filter row.

If the column you'd like to search is not visible in your grid, click the **Columns** button in the upper right-hand side of the screen.

New Assembly Transaction

Export Columns

Clicking this button reveals the Edit Columns drawer. Check the boxes for columns you want visible and uncheck the boxes for those you'd rather not see.

Edit Columns



Fit columns to grid

Reset Columns

Clear Column Filters

Find a Column

Changed By

Changed On

The **Reset Columns** button in the Edit Columns drawer will restore your grid to its default view, and the **Clear Column Filters** button will clear any search criteria you have currently entered into the auto filter row.

ASSEMBLIES

Posting assembly transactions will result in two journal entries, one for adjusting out the raw materials and one for adjusting in the assembled product. The journal entries will be created exactly as if the user had manually created the inventory in/out transactions within SalesPad Cloud, either debiting or crediting the inventory asset account and then using a SalesPad Cloud inventory variance account to balance the journal entry.