

Sales (Legacy)

Guides and resources for doing sales in your NCompass system.

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Stock Selection Option After Creating a Sale

Overview

As of NCompass 11.04, a new stock selection experienced was added to improve sales efficiency, allowing stock allocation to be selected at the same time as the pricing.

You can use the old method, by enabling the *Use Advanced Stock Selection by Default*. Contact [the support team](#) if you need help setting this up.

How To

The options you can select on the item selection screen when adding items are:

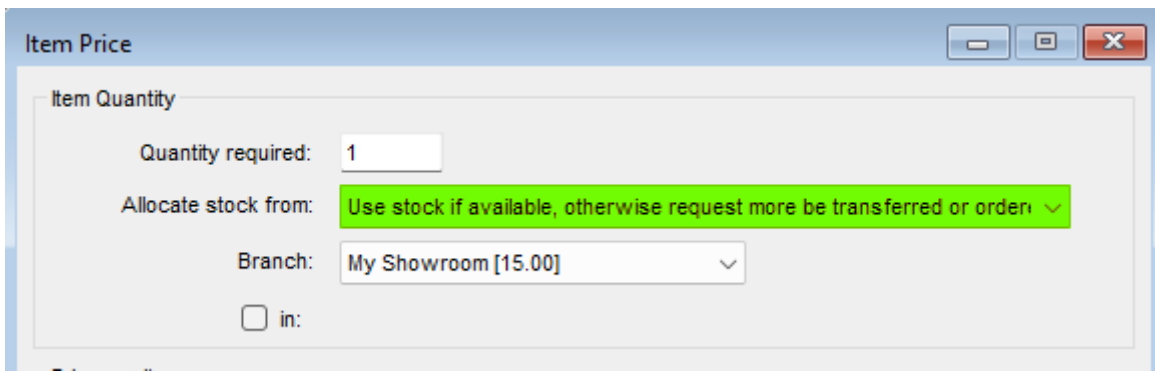
- Take from stock now
- Use stock if available, otherwise request more be transferred or ordered
- Request stock be ordered
- Request stock be ordered for direct delivery
- Pick stock number then select price

These options can be controlled if they appear in the dropdown, using the below configurations:

- Item Price Stock Selection: Allow Pick Stock Number
- Item Price Stock Selection: Allow Use stock if available
- Item Price Stock Selection: Allow Request stock be ordered
- Item Price Stock Selection: Allow Request stock be ordered for direct delivery
- Item Price Stock Selection - Allow Requesting if Selecting Stock
- Item Price Stock Selection: Allow Pick Stock Number Before Price

They all default to yes, setting to ☐ No will block a user selecting that option.

The dropdown will default to the first item in the list, or you can have it default to by setting the configuration to your desired branch.



The screenshot shows a software window titled "Item Price". Inside, there is a section labeled "Item Quantity". It contains three main fields: "Quantity required:" with a text input containing the number "1"; "Allocate stock from:" with a dropdown menu showing the text "Use stock if available, otherwise request more be transferred or order" and a downward arrow; and "Branch:" with a dropdown menu showing "My Showroom [15.00]" and a downward arrow. Below these is a checkbox labeled "in:" which is currently unchecked. The window has standard Windows-style controls (minimize, maximize, close) in the top right corner.

Additional Information

If you require assistance setting up the configurations, please [contact support](#).

Frequently Asked Questions

None currently.

Count Only Transfers - Auto Transfer When Direct Selecting Stock From Other Branch At Same Site

Overview

As of NCompass 11.09, when a count only item is sold on the customer website the stock will be taken from the configured branch & stockroom for web orders.

Prior to this version it would take stock from the **sale branch**.

How To

When a count only item is added to a sale, if the following conditions are met, then an auto transfer will be raised to send the stock to the sale branch, and the stock will be allocated to the sale:

- Stock branch and sale branch have a site set, and the sites are the same;
- Config `Allow stock selection for any branch at the same site` is enabled;
- Workstation site of the workstation adding the item matches the branch site.

Additional Information

If an auto transfer for that from/to location has already been raised today, then further items will be added to the existing transfer rather than creating a new one.

Frequently Asked Questions

How do I know if I'm configured correctly?

Contact the [support team](#) who will be able to verify your workstation site setup. You'll need to advise which sites you would like count only stock to be allocated from.

Invoice and Order Output - Emailing Only Where a Specific Address Is Held

Overview

NCompass can be told what to do with a quote, order or invoice at the moment the sale is saved – print it to A4, print it on the receipt printer, email it, or hold it as a pending print. Sites that need more than one of those use the custom output style, where the required outputs are listed one after another and each one is produced in turn.

Many account customers hold two email addresses: a general address for the day-to-day contact, and a separate accounts or billing address recorded in **Email Invoices to** or **Email Orders to** on the customer record. Until now, an output list that emailed a document would fall back to the customer's general address whenever no billing address had been entered, so paperwork could reach the wrong person. Three new output options make emailing conditional on that specific address actually being held.

The new output options

- **EmailSpecificOnly** – email the document to the customer's specific invoice or order address. If the customer has no such address, nothing at all is produced for that line of the output list.
- **EmailSpecificOnlyPrint** – the same, except that where no specific address is held the document is printed to A4 instead.
- **EmailSpecificOnlyTrx** – the same, except that where no specific address is held the document is printed on the receipt (thermal) printer instead.

Where a specific address is held, the document is emailed to *that* address rather than to the customer's general one, and behaves in every other respect exactly like the existing Email option – same document title, same duplicate and gift copy handling, same email template.

The keywords are not case sensitive, and they can be used on any line of an output list, so a site can email the accounts copy only where a billing address is held while still printing the customer copy every time.

Which customer field is used

- Invoices use **Email Invoices to** on the customer record.
- Orders use **Email Orders to**.
- Quotes have no equivalent field, so a quote always takes the fallback – nothing, A4 or receipt printer, depending on which of the three options was used.

Only that one field is looked at. The customer's general email address, and the system-wide address used when a customer has no email address at all, are both ignored by these options; that is the whole point of them. The **Email Invoices Automatically** and **Email Orders Automatically** ticks on the customer record are separate settings and are not part of this decision.

If a line of the output list names an explicit email address of its own, that address still receives the document as before – the customer's specific address is only what decides whether the line runs at all.

Where the fallback is "produce nothing", the operator is not prompted either, even if the line was set up to ask first. NCompass does not ask about a document it is not going to produce.

Where it applies

The new options apply wherever the custom output list is used: when a sale is saved on screen, and when invoices are produced automatically in the background.

Setting it up

These are system-wide settings and are normally configured by Support. In **Tools > Configuration**:

1. Set **New Invoice Output**, **New Order Output** or **New Quote Output** to the custom output style, so that the custom list is used for that sale type.
2. In the matching **New Invoice Output - Custom Output**, **New Order Output - Custom Output** or **New Quote Output - Custom Output** setting, use one of the three keywords above in place of *Email* on any line that should only go out when a specific address is held.

Nothing changes for sites that do not use the new keywords. Existing output lists behave exactly as before, and the existing *Email*, *EmailPrint* and *EmailTrx* options are unchanged. No customer records need to be edited and no data is converted.

If a customer stops receiving documents

If a customer reports that invoices or order confirmations have stopped arriving after one of these options is switched on, check the **Email Invoices to** or **Email Orders to** field on their customer record. With these options an empty field is a deliberate instruction not to email, so the fix is normally to enter the correct billing address rather than to change the output setting.

How an output list entry is written

The three keywords above are not used on their own. Each entry in an output list also names the document it produces, and that name goes in curly brackets at the end of the entry. Leaving it out is the most common mistake when one of these settings is typed by hand.

A single entry looks like this:

```
EmailSpecificOnly {Customer Copy}
```

Entries are separated by semicolons, and NCompass carries them out in the order they are listed:

```
Print {Customer Copy};EmailSpecificOnly {Accounts Copy};Pending {Accounts Copy}
```

Reading that from left to right: print a Customer Copy on A4; email an Accounts Copy, but only where a specific invoice or order address is held; and hold an Accounts Copy as a pending print.

The parts of an entry

Part	Required?	What it does
Prompt	Optional, first	Ask the operator before producing this one, rather than producing it automatically. For example Prompt TRX {Customer Copy}.

Part	Required?	What it does
The output keyword	Required	One of Print , TRX (receipt printer), Email , EmailPrint , EmailTrx , Pending , or one of the three EmailSpecificOnly options described above.
An email address	Optional	Send this one to a fixed address instead of the customer, for example <code>Email sales@example.com {Accounts Copy}</code> .
<code>{Document name}</code>	Required	The name of the document to produce, in curly brackets — for example <code>{Customer Copy}</code> or <code>{Accounts Copy}</code> . This is the part most often forgotten.

Two words that can go inside the brackets

Either or both of these may be put in front of the document name, in this order:

- `{DUPLICATE: Customer Copy}` — mark the document as a duplicate.
- `{GIFT: Customer Copy}` — produce it as a gift copy, with prices suppressed.
- `{DUPLICATE: GIFT: Customer Copy}` — both together.

A full example

```
Print {Customer Copy};Email {DUPLICATE: Customer Copy};Email sales@example.com {DUPLICATE:
GIFT: Customer Copy};Prompt TRX {Customer Copy};Pending {Accounts Copy}
```

If the document name in curly brackets is missing, that entry is skipped. The rest of the list still runs, and the skipped entry is recorded in the NCompass log naming the entry and the setting it came from, so it can be found and corrected. Check the log if a document that used to be produced has stopped appearing after a setting was edited.

The keywords themselves are not case sensitive, so `emailspecificonly` works as well as `EmailSpecificOnly`. The document name inside the brackets is used exactly as typed, since it appears on the document.