

Sales

Guides and resources for doing sales in your NCompass system.

- [Stock Selection Option After Creating a Sale](#)

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 Use stock if available, otherwise request more be transferred or ordered by setting the configuration Request Stock by Default from Branch to your desired branch.

The screenshot shows a software window titled "Item Price" with standard Windows window controls (minimize, maximize, close) in the top right corner. Inside the window, there is a section titled "Item Quantity" which contains the following fields:

- "Quantity required:" with a text input field containing the number "1".
- "Allocate stock from:" with a dropdown menu showing the selected option "Use stock if available, otherwise request more be transferred or order".
- "Branch:" with a dropdown menu showing the selected option "My Showroom [15.00]".
- A checkbox labeled "in:" which is currently unchecked.

Additional Information

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

Frequently Asked Questions

None currently.