

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:

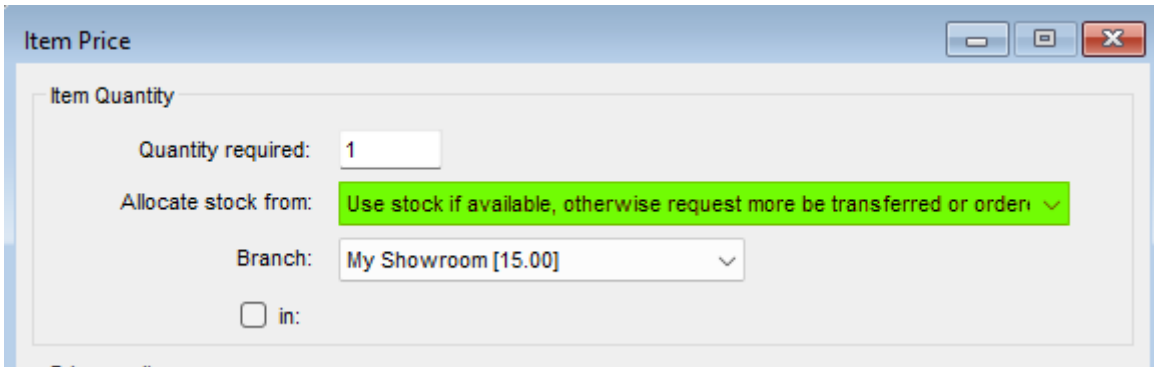
- Take from stock now
- Use stock if available, otherwise request more be transferred or ordered
- Request stock be ordered
- Request stock be ordered for direct delivery
- Pick stock number then select price

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 window titled "Item Price" with a standard Windows-style title bar (minimize, maximize, close buttons). Inside the window, there is a section titled "Item Quantity". Below this title, there are four configuration options:

- "Quantity required:" followed by a text input field containing the number "1".
- "Allocate stock from:" followed by a dropdown menu. The selected option is "Use stock if available, otherwise request more be transferred or ordered", which is highlighted in green.
- "Branch:" followed by a dropdown menu showing "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.

Created 2025-12-05 13:10:18 UTC by Sam Newsome
Updated 2025-12-05 14:04:35 UTC by Sam Newsome