

Stock request rules

There are certain rules that apply on stock requests relating to Documents.

In most cases this is a great way for staff to capture a document telling admin and accounting staff what has happened to stock.

Stock request to Invoice

This will not update any lines on the job, but create a debtors invoice which is linked to a job.

Stock request to credit note

This will try and unmanage any items on the job as long as they have not been locked due to invoicing or re opening of job.

The stock request will attempt to unmanage any items managed and produce a credit note.

If the stock request cannot unmanage any lines, it will still create the credit note for you.

This is a great way for staff to log that a customer brought goods back to be credited.

WARNING

If you have not invoiced the customer and the job is still open with no invoices.

You will unmanage items on a job prior to invoicing and then produce a credit note of stock that is already off the job.

One can land up giving a customer an unnecessary credit.

Stock request to stock return note (supplier credit)

This will try and unmanage any items on the job as long as they have not been locked due to invoicing or re opening of job.

The stock request will attempt to unmanage any items managed and produce a stock return note.

If the stock request cannot unmanage any lines, it will still create the stock return note for you.

Stock request to Purchase Order

This will not update any lines on the job, but create a Purchase order which is linked to a job.

The reason no lines will be updated on the job is that when the purchase order receives the stock, it will manage add and manage the stock on the job.

Stock request to stock return to stock

When this option is selected and we process, the item is found on the job and unmanages the quantity

If the item is marked as “Is Complete”, this flag to be removed and then unmanage the item

If the item cannot be found on the job, ignore taking it off the job. Give a message to this affect

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