Add Inventory from Invoicing

Definition

The option to add parts to inventory from the invoicing screen has been enhanced so when in use, non-stocked parts added to an invoice which are in the price book will automatically be added to inventory after the quantity is entered without user intervention using the category assigned on the invoice.

Processing

Billing Parameter Maintenance

Menu path System Utilities > Sales Desk > Parameter File Reset.

Screen 2

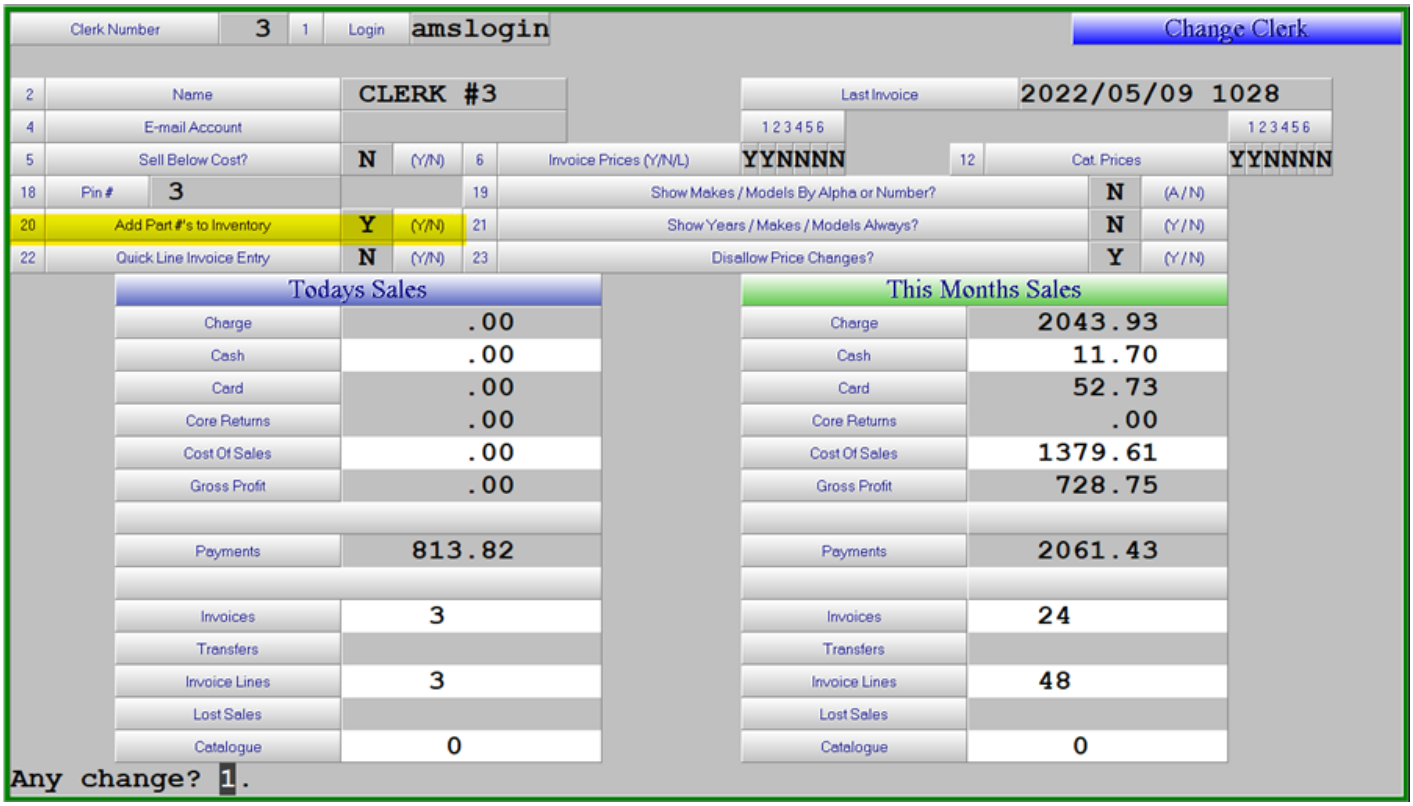
The Reorder Allowed setting for newly added parts from invoicing is controlled by the Default Reorder Allowed setting shown in field 38.

Screen 4

The setting for “Invoice Qty (F11) Key Use” must be set to “I” field 46

Sales Clerk

In the Sales Clerk maintenance, the clerk MUST be set to “Y” for Add Part #’s to Inventory.



Invoicing

When adding a non-stock part from the price book to an invoice the line will display as a “P” line to start. After the quantity is entered the part will be added to inventory using the price and description from the price book then using the price multipliers to calculate the selling prices.

> A new screen will display showing a message “Adding Stocked Part” and there will be a slight pause while the part number is being added as it is added to all locations.

As the part number is added to inventory the invoice line type will change from “P” to Space.

The new part will be treated the same as any other stocked part after it has been added

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