Sell by Units Only

Overview

The system allows users to enable the option to sell by units only. To have this option enabled on the system for One-Location and Multi-Location companies, please refer to Sell By Units Setting. Only users with Admin, Credit Manager, Sales, Sales Allocation, and Sales Manager roles can access this option.

Roles enabled to perform this action: Admin, Sales Manager, Cashier, Sales, Allocations.

Create Order

Once the user has this option enabled on the system when creating orders, the system will show the **Add Units** button instead of the **Add Items** button.

1
Go to **Order Entry> Add Order.**
2
Enter the customer, the carrier, and the ship date.
3
When clicking on **Add Units,** the "**Choose Product"** window will pop-up, where the user can enter the information about the product needed in units:
4
When adding the Product, the system will show the number of units available in the inventory next to the product name. The user can select the units available in the inventory or enter additional units if needed.
5
Finally, click on **Add** to enter the product in units.
6
As units are added, they will appear in units per line as shown below.
7
If the user needs to delete a line order for any particular reason, go to the **Actions** column and select **Delete.**
8
A **Confirmation** window will pop-up asking the user to confirm the action Select **Yes or No** as needed. The items will go back to the inventory and the user can continue working on the order.

Editing the Units Amount

You can also edit the number of units in the invoice both in stems or bunches.

Keep in Mind

- The setting Sell by units only must be enabled.

1
Click on **Edit** in the Actions column
2
The **Edit Item** window will be displayed where you will be able to edit the units quantity and the price. Click on **Save** to confirm.

Display Only Products from Price Lists

🔒 **Roles enabled to perform this action:** Admin, Setup.

When the **Sell by Units Only** setting is enabled, the system will display an option that allows to show only products associated to a price list for the selected customer when adding products to an order from the **Order Entry** screen.

How to Invoice Additional Units?

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In case you want to invoice additional units to those available in the units inventory follow the instructions explained above to add products to an order. The system will look for the available products in the units inventory and add them to the order. In case there are not units available, the system will create and add them to the order, considering the following rules:

- The system will take into account the rollup product while creating additional product.
- The cost of new product lines created through this process when there are not units available, will be the average cost of the last 10 identical items that were available in the inventory during the past 6 months. In case the product was not in the inventory during the past 6 months, the cost will be set to zero.