

TIPS & TRICKS 2



Allocating Stock to Customers – the Magic Button

You have created a customer invoice based on the quantities requested by your customer. Now you need to allocate specific stock.

You can issue stock by double-clicking on each item and selecting stock – or you can use the:



Magic Button: Issue Stock for All Placeholder Lines.

This will automatically allocate stock to all item lines according to the First to Expire, First Out (FEFO) stock management principle.



As shown by Amoxicillin here:

- Items without enough quantity in one batch will be allocated across multiple batches (based on the FEFO principle).
- Items not available will remain in **red font**.

Notes	Line	Location	Item code	Item Name	Quan	Pack Size	Batch	Exp date	Sell Price	Price exten
	1	Blue	amo500t	Amoxicillin 500mg tab	47	100				
	2	Blue	amo500t	Amoxicillin 500mg tab	100	10	AMX998	28/02/26	31.25	1,468.75
	3		amo500t	Amoxicillin 500mg tab	230	10		31/12/27	0.00	0.00
	4		cef250i	Ceftriaxone 250mg inj	5	10	Cef123	31/08/25	0.00	0.00
	5		met500t	Metformin 500mg tab	8	100	met123	31/07/26	0.00	0.00
	6	Blue	par500t	Paracetamol 500mg tab	46	10	par123	31/12/27	0.00	0.00

You should always review the automatic allocation to make sure that is the best allocation of your stock.

For example, in some situations the FEFO principle may not be the best choice for allocating stock:

- You may not have sufficient stock for the item given other expected demands.
- FEFO may result in splitting of packs whereas you may wish to choose different stock with different pack sizes.

The magic button will save a lot of time when processing large customer orders – but there will always be a role for local knowledge and experience.