

# Stock Type User Guide

## Stock Type Actions

### Add Stock Type

To start this action, click the **Add Stock Type** button above the Stock Type listing.

Creates a new Stock Type.

When this action starts a form is displayed to enter the details of the Stock Type.

Each field customises or controls some aspect of the Stock Type display or behaviour.

Some fields are required and must be entered before the Stock Type can be added, the required fields are Name.

Although some fields are not required, it is best practice to populate these, including .

Most fields are optional, and are often prefilled with a good default so these may not need to be changed. These optional fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

### View

To start this action, select the Stock Type you need to work on, and click the  **View** button in the  More Menu on that row.

Display the selected Stock Type.

This action displays the Stock Type similarly as for an Edit Action, except none of the fields are editable.

Useful for reviewing records without making any changes.

### Edit

To start this action, select the Stock Type you need to work on, and click the  button on that row.

Edits an existing Stock Type.

When this action starts a form is displayed with the existing Stock Type and any previous information entered.

Each field customises or controls some aspect of the Stock Type display or behaviour.

When editing it is advisable to only change what is needed and most fields may not need to be changed. These other fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

### Copy

To start this action, select the Stock Type you need to work on, and click the  **Copy** button in the  More Menu on that row.

Copies an existing Stock Type.

The selected Stock Type is copied and the word (Copy) will be added to the name of the new Copy

### Delete

To start this action, either select the Stock Type to work on and click the  button on that row. Or CTRL+click to select multiple Stock Types and click the  button above the Stock Type listing.

Deletes an existing Stock Type.

When this action starts a screen is displayed to check for Confirmation before the Action continues.

On this screen a list of warnings may be provided to show the impact of deleting this Stock Type.

### Search

To start this action, click the  button above the Stock Type listing.

Allows a Search of Stock Types.

This allows a simple text search across all Stock Types.

To search a specific field select the field from the drop down list

### Adv. Search

To start this action, click the  **Adv. Search** button above the Stock Type listing in the  More Menu.

Allows an Advanced Search of Stock Types.

The Advanced Search opens a new section at the bottom of the Stock Types and allows several distinct features:

- Multiple Search Lines : allows Stock Type matches to be identified where more than one search criteria is required
- Nested Searches : allows a combination of AND and OR logic to find results
- Saved Filters : allows a search to be saved as a Filter
- Export : allows the results of the search to be exported and worked on separately

## Refresh

To start this action, click the  **Refresh** button above the Stock Type listing in the  More Menu.

Refresh the list of Stock Types.

Allows the list of records to be refreshed.

Although the records in the system will automatically update if a another Admin is using the system at the same time, the Refresh button allows the list to be manually updated.

## Export to List

To start this action, click the  **Export to List** button above the Stock Type listing in the  More Menu.

Export the Stock Type results shown to a List.

An Export List can be downloaded as a CSV file, or through any number of customised Export Templates.

Export to List will begin the process of Exporting the Stock Types shown.

Once the data is exported it is available to download as a CSV file with all columns.

A list of Export Templates for Stock Types will be shown, select the Export Template to Print, Export to Document, Export to CSV or Email.

Before using a template an opportunity to amend the template is provided.

See Export Templates for more information on Managing Export Templates.

## Export All

To start this action, click the  **Export All** button above the Stock Type listing in the  More Menu.

Export all the Stock Types to a List.

Exactly as for "Export to List" except rather than just Exporting the Stock Type results shown, all Stock Types will be exported.

## Export Item

To start this action, select the Stock Type you need to work on, and click the  **Export Item** button in the  More Menu on that row.

Export only the selected Stock Type to a List.

Exactly as for "Export to List" except rather than just Exporting the Stock Type results shown, only the selected Stock Type is exported.

## Choose Columns

To start this action, click the  **Choose Columns** button above the Stock Type listing in the  More Menu.

Changes the Columns shown in the Stock Type Listing.

The Choose Columns screen shows the Selected Columns on the left, and the Stock Type Columns available on the right.

Drag and Drop column names between the two columns.

Alternatively double click on a column name to move it from one list to the other.

On the left the Selected Columns can be dragged up and down to change the ordering in the Stock Type Listing.

## Manage Filters

To start this action, click the  **Manage Filters** button above the Stock Type listing in the  More Menu.

Creates custom Filters for Stock Types.

A Filter is a saved Advanced Search. Multiple Filters can be created for Stock Types.

These Filters appear at the top of the Stock Type listing.

When the Filter is selected the results are restricted to only include those which match the Filter.

The Manage Filters action shows a list of existing Filters for Stock Types where these can be managed.

## Stock Type Field Reference

### Name

This field is mandatory.

Name for reference