**Streaming output truncated to the last 5000 lines.**

Options .[] https:// help.fishbowlinventory.com/ advanced/s/article/DataInformation []

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Response: The primary function of the Data module is to provide the ability to retrieve and export data from the Fishbowl

database.

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Asking (Row 26): Can users modify the Fishbowl database directly through the Data module?

response for row 26

Query: Can users modify the Fishbowl database directly through the Data module?

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Content:

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https:// help.fishbowlinventory.com/ advanced/s/article/DataDec 17, 2024Knowledge[] https:// help.fishbowlinventory.com/

advanced/s/article/DataArticle DetailsThe Data module, located in the Reporting group , provides the ability to retrieve

and export data from the Fishbowl database. All data can be viewed, but the database cannot be modified. The admin user

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help.fishbowlinventory.com/ advanced/s/article/DataQuery parametersThe Data module supports several query parameters.

Parameters make it easier to select data from the database. For example, instead of manually entering the ID of a

customer directly into a query, a parameter allows the customer to be selected from a dropdown list. \nThe easiest way

to enter parameters is to click the Add Parameter button on the right side of the query.\n\nThis will allow you to

select from the list of[]url heading content images supported parameters and automatically insert the parameter into the

query.\n\nQuery without parameters\nQuery with parameters\n\nParameters are available in queries by using the following

format: $CODE{Label| Default Value|Tab}\nFor example, $PART{Select\_a\_part| B201|Advanced\_tab} would display the

following when the query runs. \nThese parameters are also available in the BI Editor module by clicking the Insert

report setting button on the component toolbar . This provides a graphical input to customize parameters using the same

format as above.\nBelow are some examples of queries that use parameters.\nNotes https:// help.fishbowlinventory.com/

advanced/s/article/DataSave a query [] https:// help.fishbowlinventory.com/ advanced/s/article/DataFilter a query[]

https:// help.fishbowlinventory.com/ advanced/s/article/DataExport a query[] https:// help.fishbowlinventory.com/

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the query. After completing the modification, press the Run Query button. https:// help.fishbowlinventory.com/

advanced/s/article/DataDatabase tablesClick the Tables tab to see a list of all of the tables, fields, and data in the

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recent activity of the server, including any errors. The buttons in the window allow the data to be refreshed, copied,

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aspects of the Data module can be customized by opening the module, clicking the Tools menu, and then selecting Module

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Response: Based on the provided context: No, users cannot modify the Fishbowl database directly through the Data module. The

context states, "All data can be viewed, but the database cannot be modified." The Data module is primarily for

retrieving and exporting data.

--------------------------------------------------------------------------------

Asking (Row 27): What are query parameters in the Data module, and how do they help?

response for row 27

Query: What are query parameters in the Data module, and how do they help?

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report setting button on the component toolbar . This provides a graphical input to customize parameters using the same

format as above.\nBelow are some examples of queries that use parameters.\nNotes https:// help.fishbowlinventory.com/

advanced/s/article/DataSave a query [] https:// help.fishbowlinventory.com/ advanced/s/article/DataFilter a query[]

https:// help.fishbowlinventory.com/ advanced/s/article/DataExport a query[] https:// help.fishbowlinventory.com/

advanced/s/article/DataCopy dataThe text in the Data section can also be copied and pasted into a text document or a

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Response: Based on the provided context: Query parameters in the Data module are supported features that make it easier to select

data from the Fishbowl database when running a query. They help by allowing users to select data, often from a dropdown

list, instead of having to manually enter specific values (like a customer ID) directly into the query text each time it

is run. For example, a parameter can be used to present a dropdown list of customers to choose from when executing the

query.

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Asking (Row 28): How can you export query results from the Data module?

response for row 28

Query: How can you export query results from the Data module?

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Response: Based on the provided context: 1. The text in the Data section (which displays query results) can be copied and pasted

into a text document or a spreadsheet. 2. The query results can also be accessed through the API. The context also

mentions that the Data module provides the ability to export data and that a query can be exported, but the specific

steps or details on how to perform this export directly from the module interface for the results are not described in

the provided text snippets (the content under the "Export a query" heading is missing).

--------------------------------------------------------------------------------

Asking (Row 29): How can you view the underlying database tables and fields within Fishbowl?

response for row 29

Query: How can you view the underlying database tables and fields within Fishbowl?

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Content:

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Content:

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Response: Based on the provided context, information about the underlying database tables and fields can be found in the Database

Dictionary, which is accessible at the following URL: <https://help.fishbowlinventory.com/advanced/s/Database-Dictionary>

--------------------------------------------------------------------------------

Asking (Row 30): What information does the 'Server Log' provide in the Data module?

response for row 30

Query: What information does the 'Server Log' provide in the Data module?

--------------------------------------------------------------------------------

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/DataFishbowl Advanced - Data[]

https:// help.fishbowlinventory.com/ advanced/s/article/DataDec 17, 2024Knowledge[] https:// help.fishbowlinventory.com/

advanced/s/article/DataArticle DetailsThe Data module, located in the Reporting group , provides the ability to retrieve

and export data from the Fishbowl database. All data can be viewed, but the database cannot be modified. The admin user

will always have access to the Data module . Other users can be given access in the User Group module . A query can be

run , saved , exported , and scheduled . The query results can also be accessed through the API .[] https://

help.fishbowlinventory.com/ advanced/s/article/DataContents [] https:// help.fishbowlinventory.com/

advanced/s/article/DataRun a queryThe columns in the Data section can be dragged, sorted, and hidden .[] https://

help.fishbowlinventory.com/ advanced/s/article/DataQuery parametersThe Data module supports several query parameters.

Parameters make it easier to select data from the database. For example, instead of manually entering the ID of a

customer directly into a query, a parameter allows the customer to be selected from a dropdown list. \nThe easiest way

to enter parameters is to click the Add Parameter button on the right side of the query.\n\nThis will allow you to

select from the list of[]url heading content images supported parameters and automatically insert the parameter into the

query.\n\nQuery without parameters\nQuery with parameters\n\nParameters are available in queries by using the following

format: $CODE{Label| Default Value|Tab}\nFor example, $PART{Select\_a\_part| B201|Advanced\_tab} would display the

following when the query runs. \nThese parameters are also available in the BI Editor module by clicking the Insert

report setting button on the component toolbar . This provides a graphical input to customize parameters using the same

format as above.\nBelow are some examples of queries that use parameters.\nNotes https:// help.fishbowlinventory.com/

advanced/s/article/DataSave a query [] https:// help.fishbowlinventory.com/ advanced/s/article/DataFilter a query[]

https:// help.fishbowlinventory.com/ advanced/s/article/DataExport a query[] https:// help.fishbowlinventory.com/

advanced/s/article/DataCopy dataThe text in the Data section can also be copied and pasted into a text document or a

spreadsheet.[] https:// help.fishbowlinventory.com/ advanced/s/article/DataQuery history [] https://

help.fishbowlinventory.com/ advanced/s/article/DataSchedule a query[] Extract a queryThe Fishbowl Server can log many of

the queries []url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/Datathat are run when a

user is using the Fishbowl Client. It is often helpful to start with a query from a report and then modify it as

necessary. Below are the steps for extracting a query for inventory quantities.\nBelow is an example of how to modify

the query. After completing the modification, press the Run Query button. https:// help.fishbowlinventory.com/

advanced/s/article/DataDatabase tablesClick the Tables tab to see a list of all of the tables, fields, and data in the

Fishbowl database. Double-click a table name to see it in a separate window.\n[] https:// help.fishbowlinventory.com/

advanced/s/article/DataDatabase dictionaryA database dictionary can be viewed here .[] https://

help.fishbowlinventory.com/ advanced/s/article/DataServer logThe Server Log button on the Data module toolbar shows the

recent activity of the server, including any errors. The buttons in the window allow the data to be refreshed, copied,

or sent to Fishbowl.\n\nThe report queries are stored in a separate file and can be viewed on the Reports tab. \n\nSome

aspects of the Data module can be customized by opening the module, clicking the Tools menu, and then selecting Module

Options .[] https:// help.fishbowlinventory.com/ advanced/s/article/DataInformation []

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help.fishbowlinventory.com/ advanced/s/article/DataContents [] https:// help.fishbowlinventory.com/

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report setting button on the component toolbar . This provides a graphical input to customize parameters using the same

format as above.\nBelow are some examples of queries that use parameters.\nNotes https:// help.fishbowlinventory.com/

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https:// help.fishbowlinventory.com/ advanced/s/article/DataExport a query[] https:// help.fishbowlinventory.com/

advanced/s/article/DataCopy dataThe text in the Data section can also be copied and pasted into a text document or a

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aspects of the Data module can be customized by opening the module, clicking the Tools menu, and then selecting Module

Options .[] https:// help.fishbowlinventory.com/ advanced/s/article/DataInformation []

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Response: The 'Server Log' button on the Data module toolbar shows the recent activity of the server, including any errors.

--------------------------------------------------------------------------------

Asking (Row 31): What does the Location module manage?

response for row 31

Query: What does the Location module manage?

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/LocationFishbowl Advanced -

Location[] https:// help.fishbowlinventory.com/ advanced/s/article/LocationDec 17, 2024Knowledge[] https://

help.fishbowlinventory.com/ advanced/s/article/LocationArticle DetailsThe Location module, located in the Setup group ,

lists all locations that store inventory. Locations can be used to represent many types of storage areas, such as large

buildings or small bins.[] https:// help.fishbowlinventory.com/ advanced/s/article/LocationContents [] https://

help.fishbowlinventory.com/ advanced/s/article/LocationModule buttonsNew creates a new location .\nSave saves any

changes made to the location. \nDelete deletes the location.\nAuto Create opens a wizard to create many locations at

once . \nSort Order opens a wizard to modify the location sort order . \nEmail opens a window to compose an email. If

the module's default report is specified, the PDF report will be attached. Email can be configured on the Email tab of

the Settings module . \nPrint sends the default module report to the printer.\nHow To opens this article in a web

browser. \nRefresh reloads whatever is currently open in the module.[]url heading content images https://

help.fishbowlinventory.com/ advanced/s/article/LocationCreate a new locationUse the following steps to create a new

location.\nLocations can also be imported from a spreadsheet .[] https:// help.fishbowlinventory.com/

advanced/s/article/LocationInventory tabThe Inventory tab displays a list of parts and quantities currently stored in

the location. Clicking the Part Num hyperlink will open the part in the Part module . Clicking the Qty hyperlink will

open the part in the Inventory module .[] https:// help.fishbowlinventory.com/ advanced/s/article/LocationCustom tabThe

Custom tab stores additional fields for the location that can be customized to fit the needs of each company.[] https://

help.fishbowlinventory.com/ advanced/s/article/LocationSearchIn the search pane on the left of the module, locations can

be filtered by Name , Description , Group , Status , and Location Num . Click the Advanced Search button and then click

the Custom tab to search the custom fields .\n[] https:// help.fishbowlinventory.com/ advanced/s/article/LocationAuto

create locationsThe Auto Create function can be used in a variety of different scenarios. Just like a home address

contains multiple components (City:Street:Number), the address name will contain each component of the location address

( S ection: A isle: B in). In the example below, the location name ( S A: A 1: B 1)[]url heading content images gives

directions for how to find the location (go to section A, find aisle 1, and locate bin 1). \nThe steps below outline the

process for creating 8 locations with the format shown above. This can be customized by changing the level names,

numbers, etc. \nIf an error is made when creating locations, multiple locations can be deleted at once by clicking the

first location and then holding the Shift key while clicking the last location. Then right-click the selection and

choose Delete .\n https:// help.fishbowlinventory.com/ advanced/s/article/LocationLocation sort orderThe location Sort

Order is used to organize locations according to the physical layout of the warehouse. This allows items on the Pick

Ticket report to be ordered efficiently so that parts in the same area of the warehouse can be picked at the same

time.\nTo modify the sort order for all locations, click the Sort Order button located on the module toolbar. Change the

order of the locations in the list by highlighting the location and clicking the Move up button or the Move down

button[]url heading content images on the right of the window. Click OK to save the changes. The new sort order will be

applied to all future pick tickets. \n\nTo display items according to the order line number instead of the location sort

order, disable the Sort By Location option on the Pick Ticket report . https:// help.fishbowlinventory.com/

advanced/s/article/LocationLocation termsThe following options can be found under the General tab for each location.[]

https:// help.fishbowlinventory.com/ advanced/s/article/LocationLocation typesFishbowl offers several location types.

Fishbowl defaults to using some locations for specific functions, while other location types are strictly for internal

use or informational purposes.[] https:// help.fishbowlinventory.com/ advanced/s/article/LocationInformation []

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/LocationFishbowl Advanced -

Location[] https:// help.fishbowlinventory.com/ advanced/s/article/LocationDec 17, 2024Knowledge[] https://

help.fishbowlinventory.com/ advanced/s/article/LocationArticle DetailsThe Location module, located in the Setup group ,

lists all locations that store inventory. Locations can be used to represent many types of storage areas, such as large

buildings or small bins.[] https:// help.fishbowlinventory.com/ advanced/s/article/LocationContents [] https://

help.fishbowlinventory.com/ advanced/s/article/LocationModule buttonsNew creates a new location .\nSave saves any

changes made to the location. \nDelete deletes the location.\nAuto Create opens a wizard to create many locations at

once . \nSort Order opens a wizard to modify the location sort order . \nEmail opens a window to compose an email. If

the module's default report is specified, the PDF report will be attached. Email can be configured on the Email tab of

the Settings module . \nPrint sends the default module report to the printer.\nHow To opens this article in a web

browser. \nRefresh reloads whatever is currently open in the module.[]url heading content images https://

help.fishbowlinventory.com/ advanced/s/article/LocationCreate a new locationUse the following steps to create a new

location.\nLocations can also be imported from a spreadsheet .[] https:// help.fishbowlinventory.com/

advanced/s/article/LocationInventory tabThe Inventory tab displays a list of parts and quantities currently stored in

the location. Clicking the Part Num hyperlink will open the part in the Part module . Clicking the Qty hyperlink will

open the part in the Inventory module .[] https:// help.fishbowlinventory.com/ advanced/s/article/LocationCustom tabThe

Custom tab stores additional fields for the location that can be customized to fit the needs of each company.[] https://

help.fishbowlinventory.com/ advanced/s/article/LocationSearchIn the search pane on the left of the module, locations can

be filtered by Name , Description , Group , Status , and Location Num . Click the Advanced Search button and then click

the Custom tab to search the custom fields .\n[] https:// help.fishbowlinventory.com/ advanced/s/article/LocationAuto

create locationsThe Auto Create function can be used in a variety of different scenarios. Just like a home address

contains multiple components (City:Street:Number), the address name will contain each component of the location address

( S ection: A isle: B in). In the example below, the location name ( S A: A 1: B 1)[]url heading content images gives

directions for how to find the location (go to section A, find aisle 1, and locate bin 1). \nThe steps below outline the

process for creating 8 locations with the format shown above. This can be customized by changing the level names,

numbers, etc. \nIf an error is made when creating locations, multiple locations can be deleted at once by clicking the

first location and then holding the Shift key while clicking the last location. Then right-click the selection and

choose Delete .\n https:// help.fishbowlinventory.com/ advanced/s/article/LocationLocation sort orderThe location Sort

Order is used to organize locations according to the physical layout of the warehouse. This allows items on the Pick

Ticket report to be ordered efficiently so that parts in the same area of the warehouse can be picked at the same

time.\nTo modify the sort order for all locations, click the Sort Order button located on the module toolbar. Change the

order of the locations in the list by highlighting the location and clicking the Move up button or the Move down

button[]url heading content images on the right of the window. Click OK to save the changes. The new sort order will be

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Response: The Location module lists all locations that store inventory. These locations can represent many types of storage areas,

such as large buildings or small bins.

--------------------------------------------------------------------------------

Asking (Row 32): How can you automatically create multiple locations at once?

response for row 32

Query: How can you automatically create multiple locations at once?

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/LocationFishbowl Advanced -

Location[] https:// help.fishbowlinventory.com/ advanced/s/article/LocationDec 17, 2024Knowledge[] https://

help.fishbowlinventory.com/ advanced/s/article/LocationArticle DetailsThe Location module, located in the Setup group ,

lists all locations that store inventory. Locations can be used to represent many types of storage areas, such as large

buildings or small bins.[] https:// help.fishbowlinventory.com/ advanced/s/article/LocationContents [] https://

help.fishbowlinventory.com/ advanced/s/article/LocationModule buttonsNew creates a new location .\nSave saves any

changes made to the location. \nDelete deletes the location.\nAuto Create opens a wizard to create many locations at

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the module's default report is specified, the PDF report will be attached. Email can be configured on the Email tab of

the Settings module . \nPrint sends the default module report to the printer.\nHow To opens this article in a web

browser. \nRefresh reloads whatever is currently open in the module.[]url heading content images https://

help.fishbowlinventory.com/ advanced/s/article/LocationCreate a new locationUse the following steps to create a new

location.\nLocations can also be imported from a spreadsheet .[] https:// help.fishbowlinventory.com/

advanced/s/article/LocationInventory tabThe Inventory tab displays a list of parts and quantities currently stored in

the location. Clicking the Part Num hyperlink will open the part in the Part module . Clicking the Qty hyperlink will

open the part in the Inventory module .[] https:// help.fishbowlinventory.com/ advanced/s/article/LocationCustom tabThe

Custom tab stores additional fields for the location that can be customized to fit the needs of each company.[] https://

help.fishbowlinventory.com/ advanced/s/article/LocationSearchIn the search pane on the left of the module, locations can

be filtered by Name , Description , Group , Status , and Location Num . Click the Advanced Search button and then click

the Custom tab to search the custom fields .\n[] https:// help.fishbowlinventory.com/ advanced/s/article/LocationAuto

create locationsThe Auto Create function can be used in a variety of different scenarios. Just like a home address

contains multiple components (City:Street:Number), the address name will contain each component of the location address

( S ection: A isle: B in). In the example below, the location name ( S A: A 1: B 1)[]url heading content images gives

directions for how to find the location (go to section A, find aisle 1, and locate bin 1). \nThe steps below outline the

process for creating 8 locations with the format shown above. This can be customized by changing the level names,

numbers, etc. \nIf an error is made when creating locations, multiple locations can be deleted at once by clicking the

first location and then holding the Shift key while clicking the last location. Then right-click the selection and

choose Delete .\n https:// help.fishbowlinventory.com/ advanced/s/article/LocationLocation sort orderThe location Sort

Order is used to organize locations according to the physical layout of the warehouse. This allows items on the Pick

Ticket report to be ordered efficiently so that parts in the same area of the warehouse can be picked at the same

time.\nTo modify the sort order for all locations, click the Sort Order button located on the module toolbar. Change the

order of the locations in the list by highlighting the location and clicking the Move up button or the Move down

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buildings or small bins.[] https:// help.fishbowlinventory.com/ advanced/s/article/LocationContents [] https://

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button[]url heading content images on the right of the window. Click OK to save the changes. The new sort order will be

applied to all future pick tickets. \n\nTo display items according to the order line number instead of the location sort

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Response: To automatically create multiple locations at once in Fishbowl, you can use the "Auto Create" button found in the

Location module. This button opens a wizard specifically designed to create many locations simultaneously.

Additionally, the context mentions that locations can be imported from a spreadsheet, which is another way to add

multiple locations.

--------------------------------------------------------------------------------

Asking (Row 33): What is the purpose of the location 'Sort Order'?

response for row 33

Query: What is the purpose of the location 'Sort Order'?

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/LocationFishbowl Advanced -

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changes made to the location. \nDelete deletes the location.\nAuto Create opens a wizard to create many locations at

once . \nSort Order opens a wizard to modify the location sort order . \nEmail opens a window to compose an email. If

the module's default report is specified, the PDF report will be attached. Email can be configured on the Email tab of

the Settings module . \nPrint sends the default module report to the printer.\nHow To opens this article in a web

browser. \nRefresh reloads whatever is currently open in the module.[]url heading content images https://

help.fishbowlinventory.com/ advanced/s/article/LocationCreate a new locationUse the following steps to create a new

location.\nLocations can also be imported from a spreadsheet .[] https:// help.fishbowlinventory.com/

advanced/s/article/LocationInventory tabThe Inventory tab displays a list of parts and quantities currently stored in

the location. Clicking the Part Num hyperlink will open the part in the Part module . Clicking the Qty hyperlink will

open the part in the Inventory module .[] https:// help.fishbowlinventory.com/ advanced/s/article/LocationCustom tabThe

Custom tab stores additional fields for the location that can be customized to fit the needs of each company.[] https://

help.fishbowlinventory.com/ advanced/s/article/LocationSearchIn the search pane on the left of the module, locations can

be filtered by Name , Description , Group , Status , and Location Num . Click the Advanced Search button and then click

the Custom tab to search the custom fields .\n[] https:// help.fishbowlinventory.com/ advanced/s/article/LocationAuto

create locationsThe Auto Create function can be used in a variety of different scenarios. Just like a home address

contains multiple components (City:Street:Number), the address name will contain each component of the location address

( S ection: A isle: B in). In the example below, the location name ( S A: A 1: B 1)[]url heading content images gives

directions for how to find the location (go to section A, find aisle 1, and locate bin 1). \nThe steps below outline the

process for creating 8 locations with the format shown above. This can be customized by changing the level names,

numbers, etc. \nIf an error is made when creating locations, multiple locations can be deleted at once by clicking the

first location and then holding the Shift key while clicking the last location. Then right-click the selection and

choose Delete .\n https:// help.fishbowlinventory.com/ advanced/s/article/LocationLocation sort orderThe location Sort

Order is used to organize locations according to the physical layout of the warehouse. This allows items on the Pick

Ticket report to be ordered efficiently so that parts in the same area of the warehouse can be picked at the same

time.\nTo modify the sort order for all locations, click the Sort Order button located on the module toolbar. Change the

order of the locations in the list by highlighting the location and clicking the Move up button or the Move down

button[]url heading content images on the right of the window. Click OK to save the changes. The new sort order will be

applied to all future pick tickets. \n\nTo display items according to the order line number instead of the location sort

order, disable the Sort By Location option on the Pick Ticket report . https:// help.fishbowlinventory.com/

advanced/s/article/LocationLocation termsThe following options can be found under the General tab for each location.[]

https:// help.fishbowlinventory.com/ advanced/s/article/LocationLocation typesFishbowl offers several location types.

Fishbowl defaults to using some locations for specific functions, while other location types are strictly for internal

use or informational purposes.[] https:// help.fishbowlinventory.com/ advanced/s/article/LocationInformation []

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Location[] https:// help.fishbowlinventory.com/ advanced/s/article/LocationDec 17, 2024Knowledge[] https://

help.fishbowlinventory.com/ advanced/s/article/LocationArticle DetailsThe Location module, located in the Setup group ,

lists all locations that store inventory. Locations can be used to represent many types of storage areas, such as large

buildings or small bins.[] https:// help.fishbowlinventory.com/ advanced/s/article/LocationContents [] https://

help.fishbowlinventory.com/ advanced/s/article/LocationModule buttonsNew creates a new location .\nSave saves any

changes made to the location. \nDelete deletes the location.\nAuto Create opens a wizard to create many locations at

once . \nSort Order opens a wizard to modify the location sort order . \nEmail opens a window to compose an email. If

the module's default report is specified, the PDF report will be attached. Email can be configured on the Email tab of

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help.fishbowlinventory.com/ advanced/s/article/LocationCreate a new locationUse the following steps to create a new

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advanced/s/article/LocationInventory tabThe Inventory tab displays a list of parts and quantities currently stored in

the location. Clicking the Part Num hyperlink will open the part in the Part module . Clicking the Qty hyperlink will

open the part in the Inventory module .[] https:// help.fishbowlinventory.com/ advanced/s/article/LocationCustom tabThe

Custom tab stores additional fields for the location that can be customized to fit the needs of each company.[] https://

help.fishbowlinventory.com/ advanced/s/article/LocationSearchIn the search pane on the left of the module, locations can

be filtered by Name , Description , Group , Status , and Location Num . Click the Advanced Search button and then click

the Custom tab to search the custom fields .\n[] https:// help.fishbowlinventory.com/ advanced/s/article/LocationAuto

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contains multiple components (City:Street:Number), the address name will contain each component of the location address

( S ection: A isle: B in). In the example below, the location name ( S A: A 1: B 1)[]url heading content images gives

directions for how to find the location (go to section A, find aisle 1, and locate bin 1). \nThe steps below outline the

process for creating 8 locations with the format shown above. This can be customized by changing the level names,

numbers, etc. \nIf an error is made when creating locations, multiple locations can be deleted at once by clicking the

first location and then holding the Shift key while clicking the last location. Then right-click the selection and

choose Delete .\n https:// help.fishbowlinventory.com/ advanced/s/article/LocationLocation sort orderThe location Sort

Order is used to organize locations according to the physical layout of the warehouse. This allows items on the Pick

Ticket report to be ordered efficiently so that parts in the same area of the warehouse can be picked at the same

time.\nTo modify the sort order for all locations, click the Sort Order button located on the module toolbar. Change the

order of the locations in the list by highlighting the location and clicking the Move up button or the Move down

button[]url heading content images on the right of the window. Click OK to save the changes. The new sort order will be

applied to all future pick tickets. \n\nTo display items according to the order line number instead of the location sort

order, disable the Sort By Location option on the Pick Ticket report . https:// help.fishbowlinventory.com/

advanced/s/article/LocationLocation termsThe following options can be found under the General tab for each location.[]

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Fishbowl defaults to using some locations for specific functions, while other location types are strictly for internal

use or informational purposes.[] https:// help.fishbowlinventory.com/ advanced/s/article/LocationInformation []

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Response: The location 'Sort Order' is used to organize locations according to the physical layout of the warehouse. This allows

items on the Pick Ticket report to be ordered efficiently so that parts in the same area of the warehouse can be picked

at the same time.

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Asking (Row 34): Name three different location types available in Fishbowl.

response for row 34

Query: Name three different location types available in Fishbowl.

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Location[] https:// help.fishbowlinventory.com/ advanced/s/article/LocationDec 17, 2024Knowledge[] https://

help.fishbowlinventory.com/ advanced/s/article/LocationArticle DetailsThe Location module, located in the Setup group ,

lists all locations that store inventory. Locations can be used to represent many types of storage areas, such as large

buildings or small bins.[] https:// help.fishbowlinventory.com/ advanced/s/article/LocationContents [] https://

help.fishbowlinventory.com/ advanced/s/article/LocationModule buttonsNew creates a new location .\nSave saves any

changes made to the location. \nDelete deletes the location.\nAuto Create opens a wizard to create many locations at

once . \nSort Order opens a wizard to modify the location sort order . \nEmail opens a window to compose an email. If

the module's default report is specified, the PDF report will be attached. Email can be configured on the Email tab of

the Settings module . \nPrint sends the default module report to the printer.\nHow To opens this article in a web

browser. \nRefresh reloads whatever is currently open in the module.[]url heading content images https://

help.fishbowlinventory.com/ advanced/s/article/LocationCreate a new locationUse the following steps to create a new

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advanced/s/article/LocationInventory tabThe Inventory tab displays a list of parts and quantities currently stored in

the location. Clicking the Part Num hyperlink will open the part in the Part module . Clicking the Qty hyperlink will

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Custom tab stores additional fields for the location that can be customized to fit the needs of each company.[] https://

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the Custom tab to search the custom fields .\n[] https:// help.fishbowlinventory.com/ advanced/s/article/LocationAuto

create locationsThe Auto Create function can be used in a variety of different scenarios. Just like a home address

contains multiple components (City:Street:Number), the address name will contain each component of the location address

( S ection: A isle: B in). In the example below, the location name ( S A: A 1: B 1)[]url heading content images gives

directions for how to find the location (go to section A, find aisle 1, and locate bin 1). \nThe steps below outline the

process for creating 8 locations with the format shown above. This can be customized by changing the level names,

numbers, etc. \nIf an error is made when creating locations, multiple locations can be deleted at once by clicking the

first location and then holding the Shift key while clicking the last location. Then right-click the selection and

choose Delete .\n https:// help.fishbowlinventory.com/ advanced/s/article/LocationLocation sort orderThe location Sort

Order is used to organize locations according to the physical layout of the warehouse. This allows items on the Pick

Ticket report to be ordered efficiently so that parts in the same area of the warehouse can be picked at the same

time.\nTo modify the sort order for all locations, click the Sort Order button located on the module toolbar. Change the

order of the locations in the list by highlighting the location and clicking the Move up button or the Move down

button[]url heading content images on the right of the window. Click OK to save the changes. The new sort order will be

applied to all future pick tickets. \n\nTo display items according to the order line number instead of the location sort

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Location[] https:// help.fishbowlinventory.com/ advanced/s/article/LocationDec 17, 2024Knowledge[] https://

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help.fishbowlinventory.com/ advanced/s/article/LocationCreate a new locationUse the following steps to create a new

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Custom tab stores additional fields for the location that can be customized to fit the needs of each company.[] https://

help.fishbowlinventory.com/ advanced/s/article/LocationSearchIn the search pane on the left of the module, locations can

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process for creating 8 locations with the format shown above. This can be customized by changing the level names,

numbers, etc. \nIf an error is made when creating locations, multiple locations can be deleted at once by clicking the

first location and then holding the Shift key while clicking the last location. Then right-click the selection and

choose Delete .\n https:// help.fishbowlinventory.com/ advanced/s/article/LocationLocation sort orderThe location Sort

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Ticket report to be ordered efficiently so that parts in the same area of the warehouse can be picked at the same

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Response: I cannot determine the answer to that.

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Asking (Row 35): What is a Location Group, and how does it differ from a Location?

response for row 35

Query: What is a Location Group, and how does it differ from a Location?

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url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/ Location-GroupFishbowl Advanced -

Location Group[] https:// help.fishbowlinventory.com/ advanced/s/article/ Location-GroupDec 17, 2024Knowledge[] https://

help.fishbowlinventory.com/ advanced/s/article/ Location-GroupArticle DetailsThe Location Group module, located in the

Setup group , allows location groups to be created and modified. A location is a specific area, such as a shelf, a

receiving dock, or a storefront. A location group is a collection of locations that are usually in the same general

area. For example, a warehouse could be a location group with several locations inside.[] https://

help.fishbowlinventory.com/ advanced/s/article/ Location-GroupCreate a location groupFollow the steps below to create a

new location group. \nReceiving, shipping, and stock locations will be created automatically for the new location group.

Locations can be added and modified in the Location module . The[]url heading content images Default Location tab

displays all parts and their default location within the location group. Location groups can also be imported from a

spreadsheet . https:// help.fishbowlinventory.com/ advanced/s/article/ Location-GroupInactivate a location group\nSome

aspects of the Location Group module can be customized by opening the module, clicking the Tools menu, and then

selecting Module Options .[] https:// help.fishbowlinventory.com/ advanced/s/article/ Location-GroupInformation []

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url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/ Location-GroupFishbowl Advanced -

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selecting Module Options .[] https:// help.fishbowlinventory.com/ advanced/s/article/ Location-GroupInformation []

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Response: Based on the provided context: A \*\*Location\*\* is a specific area, such as a shelf, a receiving dock, or a storefront.

A \*\*Location Group\*\* is a collection of locations that are usually in the same general area. For example, a warehouse

could be a location group that contains several specific locations inside it. The key difference is that a Location

refers to a single, specific area, while a Location Group is a broader grouping that contains multiple Locations.

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Asking (Row 36): When a new Location Group is created, what types of locations are generated automatically?

response for row 36

Query: When a new Location Group is created, what types of locations are generated automatically?

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Setup group , allows location groups to be created and modified. A location is a specific area, such as a shelf, a

receiving dock, or a storefront. A location group is a collection of locations that are usually in the same general

area. For example, a warehouse could be a location group with several locations inside.[] https://

help.fishbowlinventory.com/ advanced/s/article/ Location-GroupCreate a location groupFollow the steps below to create a

new location group. \nReceiving, shipping, and stock locations will be created automatically for the new location group.

Locations can be added and modified in the Location module . The[]url heading content images Default Location tab

displays all parts and their default location within the location group. Location groups can also be imported from a

spreadsheet . https:// help.fishbowlinventory.com/ advanced/s/article/ Location-GroupInactivate a location group\nSome

aspects of the Location Group module can be customized by opening the module, clicking the Tools menu, and then

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/ Location-GroupFishbowl Advanced -

Location Group[] https:// help.fishbowlinventory.com/ advanced/s/article/ Location-GroupDec 17, 2024Knowledge[] https://

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Response: When a new Location Group is created, Receiving, shipping, and stock locations are created automatically.

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Asking (Row 37): What is the difference between a 'Part' and a 'Product' in Fishbowl?

response for row 37

Query: What is the difference between a 'Part' and a 'Product' in Fishbowl?

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/PartFishbowl Advanced - Part[]

https:// help.fishbowlinventory.com/ advanced/s/article/PartDec 17, 2024Knowledge[] https:// help.fishbowlinventory.com/

advanced/s/article/PartArticle DetailsThe Part module, located in the Materials group , allows parts to be created and

modified. There are several part types , but in general, a part is an item that is stored, manufactured, or consumed.

Parts can also have a corresponding product , which is an item that is sold to a customer .[] https://

help.fishbowlinventory.com/ advanced/s/article/PartContents [] https:// help.fishbowlinventory.com/

advanced/s/article/PartModule buttonsNew creates a new part .\nSave saves any changes made to the part. \nDelete deletes

the part.\nMRP allows multiple reorder points to be set simultaneously . \nAuto ABC allows multiple ABC codes to be set

simultaneously . \nNew BOM creates a new bill of materials with the open part as the finished good.\nTo Inventory loads

the Inventory[]url heading content images module for the open part. \nDuplicate creates a duplicate copy of the

part.\nEmail opens a window to compose an email. If the module's default report is specified, the PDF report will be

attached. Email can be configured on the Email tab of the Settings module . \nPrint sends the default module report to

the printer.\nHow To opens this article in a web browser.\nRefresh reloads whatever is currently open in the module.

https:// help.fishbowlinventory.com/ advanced/s/article/PartCreate a partNew parts can be created in the Part module ,

through imports , or by typing a new item number into a Part/ Product field and selecting Add New . The Part/ Product

field is found in many modules, including Purchase Order , Sales Order , Transfer Order , Consignment , and Fishbowl

Checkout . Follow the steps below to create a new part from the Part module . If desired, many of[]url heading content

images the wizard steps can be hidden . https:// help.fishbowlinventory.com/ advanced/s/article/PartSearchThe search

panel in the Part module displays parts, as well as the part description, UOM, and part type. The search parameters can

be used to filter the list or find a specific part.[] https:// help.fishbowlinventory.com/

advanced/s/article/PartInactivate a partA part can only be deleted if it has not been used and it has no associated

products. A part cannot be deleted if inventory has been added, the UOM has changed, the part is on an order, etc.

However, a part can be inactivated so that it will not appear in part lists.[] https:// help.fishbowlinventory.com/

advanced/s/article/PartEdit a partNearly all aspects of a part can be edited by opening the part, clicking the

corresponding tab, and changing the desired field.[] https:// help.fishbowlinventory.com/ advanced/s/article/PartCreate

part reorder levelsReorder levels are used to determine when inventory is getting low and when specific parts should be

reordered or manufactured. Below are a few[]url heading content images of the ways that reorder levels can be utilized.

\n\nA reorder level consists of two numbers: \nReorder levels could also be explained by using an analogy of fuel in a

car. The ROP is the warning light indicating that the fuel is low and it's time to fill up. The OUL is the capacity of

the fuel tank. \nReorder levels are either specified per location group, or company wide, depending on the Location

Group module options . Reorder levels can be set through any of the following methods:\nFollow the steps below to

manually create individual reorder levels: https:// help.fishbowlinventory.com/ advanced/s/article/PartMRP wizardThe

Material Resource Planning (MRP) wizard allows reorder levels to be calculated based on historical data, daily

consumption rates, forecast percentages, safety stock, and days of stock.[] Establish ABC codesABC codes provide a way

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example, important inventory parts that have a large impact on sales could be classified as A , while parts that are

less valuable and less important could be classified as C . In addition, N is used when an item does not have any

calculable data within a given date range or criteria. A part's ABC code can be set manually on the Inventory tab of the

Part module , or calculated based on historical sales data by using the Auto ABC wizard. \nFollow the steps below to use

the Auto ABC wizard.\nThe Advanced Search in the Part module provides the ability to filter parts based on their ABC

code, as does the Cycle Count List report . https:// help.fishbowlinventory.com/ advanced/s/article/PartCreate a

tracking methodCustom tracking methods can be created in Fishbowl to keep track of important part details. A tracking

method[]url heading content images could be created to track details, such as size, color, dates, etc. Multiple serial

numbers can also be added. Follow the steps below to add a new tracking method. \nAdditional columns can be displayed on

the Tracking tab of the Part module options by right- clicking a column header. To inactivate a tracking method, uncheck

the Active box. The Usage column displays how many parts use each tracking method. Tracking methods can also be deleted

or moved using the buttons on the component toolbar. https:// help.fishbowlinventory.com/ advanced/s/article/PartAuto

trackingFishbowl has the ability to automatically generate serial numbers and part tracking in the Inventory module ,

the Receiving module , the New part wizard , and anywhere that new tracking data is entered.[] https://

help.fishbowlinventory.com/ advanced/s/article/PartPart typesBelow is a list of the part types available in

Fishbowl.[]url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/PartBatch upload part

picturesThe Part import can be used to upload pictures for multiple parts at once. \nThe General tab displays important

details about the part. \nThe Details tab displays part details, such as Revision , UPC , Size , and Weight .\nThe

Accounts tab allows parts to be assigned to specific accounts in the accounting system.\nThe Inventory tab provides

inventory details for the selected part, allows the ABC code to be set, and also allows reorder levels to be set. The

Consumption Rate is the average daily consumption rate. If reorder points are set to By Location Group , this will be

the daily consumption rate per location group. This rate can be manually entered and used in the MRP wizard , or it can

be calculated automatically in the MRP wizard . If a part has a consumption rate, the inventory quantity details[]url

heading content images will display Days of Stock . To view a detailed display of inventory in each location group,

click the Info button located to the right of the inventory values. Descriptions of inventory terms are available here

or by hovering the mouse over the term.\n\nThe Default Locations tab allows part default locations to be set for each

location group.\nThe Bill of Materials tab displays which BOMs include the open part.\nThe Vendors tab provides a list

of the vendors this part was purchased from. Information included for each vendor is shown below.\nUse the Add button,

Edit button, or Delete button by highlighting the vendor and clicking the corresponding button located on the component

toolbar.\nThe Memo tab can be used to add information to each part. The upper pane displays theurl heading content

images memos, the date they were created, and the user who created them. Highlighting a memo will display the details of

the memo in the lower pane.\nThe Custom tab stores additional fields for the part that can be customized to fit the

needs of each company. \n\nSome aspects of the Part module can be customized by opening the module, clicking the Tools

menu, and then selecting Module Options . https:// help.fishbowlinventory.com/ advanced/s/article/PartInformation []

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/PartFishbowl Advanced - Part[]

https:// help.fishbowlinventory.com/ advanced/s/article/PartDec 17, 2024Knowledge[] https:// help.fishbowlinventory.com/

advanced/s/article/PartArticle DetailsThe Part module, located in the Materials group , allows parts to be created and

modified. There are several part types , but in general, a part is an item that is stored, manufactured, or consumed.

Parts can also have a corresponding product , which is an item that is sold to a customer .[] https://

help.fishbowlinventory.com/ advanced/s/article/PartContents [] https:// help.fishbowlinventory.com/

advanced/s/article/PartModule buttonsNew creates a new part .\nSave saves any changes made to the part. \nDelete deletes

the part.\nMRP allows multiple reorder points to be set simultaneously . \nAuto ABC allows multiple ABC codes to be set

simultaneously . \nNew BOM creates a new bill of materials with the open part as the finished good.\nTo Inventory loads

the Inventory[]url heading content images module for the open part. \nDuplicate creates a duplicate copy of the

part.\nEmail opens a window to compose an email. If the module's default report is specified, the PDF report will be

attached. Email can be configured on the Email tab of the Settings module . \nPrint sends the default module report to

the printer.\nHow To opens this article in a web browser.\nRefresh reloads whatever is currently open in the module.

https:// help.fishbowlinventory.com/ advanced/s/article/PartCreate a partNew parts can be created in the Part module ,

through imports , or by typing a new item number into a Part/ Product field and selecting Add New . The Part/ Product

field is found in many modules, including Purchase Order , Sales Order , Transfer Order , Consignment , and Fishbowl

Checkout . Follow the steps below to create a new part from the Part module . If desired, many of[]url heading content

images the wizard steps can be hidden . https:// help.fishbowlinventory.com/ advanced/s/article/PartSearchThe search

panel in the Part module displays parts, as well as the part description, UOM, and part type. The search parameters can

be used to filter the list or find a specific part.[] https:// help.fishbowlinventory.com/

advanced/s/article/PartInactivate a partA part can only be deleted if it has not been used and it has no associated

products. A part cannot be deleted if inventory has been added, the UOM has changed, the part is on an order, etc.

However, a part can be inactivated so that it will not appear in part lists.[] https:// help.fishbowlinventory.com/

advanced/s/article/PartEdit a partNearly all aspects of a part can be edited by opening the part, clicking the

corresponding tab, and changing the desired field.[] https:// help.fishbowlinventory.com/ advanced/s/article/PartCreate

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menu, and then selecting Module Options . https:// help.fishbowlinventory.com/ advanced/s/article/PartInformation []

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Response: Based on the provided context: A 'Part' in Fishbowl is generally defined as an item that is stored, manufactured, or

consumed. A 'Product' is an item that is sold to a customer. Parts can have a corresponding product.

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Asking (Row 38): Is it possible to associate multiple products with a single part?

response for row 38

Query: Is it possible to associate multiple products with a single part?

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/ProductFishbowl Advanced - Product[]

https:// help.fishbowlinventory.com/ advanced/s/article/ProductDec 17, 2024Knowledge[] https://

help.fishbowlinventory.com/ advanced/s/article/ProductArticle DetailsThe Product module, located in the Materials group

, keeps track of products. Products are items that are sold, while parts are items that are purchased or manufactured.

It is possible to have more than one product associated with the same part. When a part is created and marked to be

sold, a product is automatically created. Products can also be imported from a spreadsheet .[] https://

help.fishbowlinventory.com/ advanced/s/article/ProductContents [] https:// help.fishbowlinventory.com/

advanced/s/article/ProductModule buttonsNew creates a new product .\nNew also has a dropdown option to create a kit when

clicking the dropdown arrow. \nSave saves any changes made to the product.\nDelete deletes the product. \nInventory

opens the product in the Inventory module . \nDuplicate creates a duplicate copy of the product . \nProduct Tree opens

the product tree . \nEmail opens a[]url heading content images window to compose an email. If the module's default

report is specified, the PDF report will be attached. Email can be configured on the Email tab of the Settings module .

\nPrint sends the default module report to the printer.\nHow To opens this article in a web browser. \nRefresh reloads

whatever is currently open in the module. https:// help.fishbowlinventory.com/ advanced/s/article/ProductCreate a new

productProducts can be automatically created when creating new parts . To manually create a new product, follow the

instructions below.\nDescriptions of each field can be found on the General tab . Products can also be imported from a

spreadsheet .[] https:// help.fishbowlinventory.com/ advanced/s/article/ProductAdd a product image[] https://

help.fishbowlinventory.com/ advanced/s/article/ProductBatch upload product picturesThe Product import can be used to

upload pictures for multiple products at once.[] https:// help.fishbowlinventory.com/ advanced/s/article/ProductModify

or delete an existing productTo modify an existing product, double-click the product in the Search pane, and then

double-click the product. The product details will appear on the right- hand side of the screen. After making[]url

heading content images any changes, click Save .\nOnce a product has been created and acquired a history, it cannot be

deleted. However, a part can be inactivated through the Product module . \nTo activate or view the part again, click the

Advanced Search feature located next to the standard search button, search for the desired product, and select the

Active box. https:// help.fishbowlinventory.com/ advanced/s/article/ProductDuplicate a productUse the following steps to

duplicate a product in the Product module.\nA duplicated product will always be named as a copy of the original. It can

be renamed by editing the Product field and clicking the Save button on the module toolbar.\nA duplicate product is

still tied to the Part of the original product. Therefore, the inventory tied to the duplicate product will be the same

as the original product. When a product is duplicated, the Substitute , Pricing , and Memo tabs will not be copied over

from the original product.[] https:// help.fishbowlinventory.com/ advanced/s/article/ProductAssign substitute productsIf

a product with insufficient inventory is added[]url heading content images to a sales order , Fishbowl will provide the

option of selecting a substitute product, which can be configured on the Substitute tab of the Product module . To add a

new substitute product, click the Add button located on the component toolbar to the right and select a substitute

product. The Substitute tab also displays which kits a product is included in.\n https:// help.fishbowlinventory.com/

advanced/s/article/ProductAssign multiple products per partA product may not be assigned to multiple parts. However, a

part may have multiple products assigned to it.[] https:// help.fishbowlinventory.com/ advanced/s/article/ProductProduct

treeThe Product Tree organizes products into categories and subcategories. This simplifies the process of applying

pricing rules to groups of products, viewing sales by category, etc. A product can also be listed in multiple

categories.\nTo access the product tree, click the Product Tree button located on the module toolbar. The product tree

window is divided into two basic sections. To create categories and to organize products, use the[]url heading content

images Product Tree pane on the left. To search and filter a list of products, use the Product Search on the right.

\n\nCreating a new category\nCategories can be imported into the product tree using a CSV import file, or they can be

manually entered into the client.\nTo add a category manually, select the Product category in the Product Tree pane,

click the Add Category button in the bottom left-hand corner of the screen, and enter the name and description of the

new category.\nTo add a subcategory, follow the same process by selecting the desired parent category, clicking the Add

Category button, and entering the subcategory name and description. \n\nAdding products to the tree\nProducts can be

imported into a category using a CSV import file, or they can be manually entered into the client. To move a product

into a category manually, use the following steps.\nTo edit the product tree or to delete portions, select the category,

subcategory, orurl heading content images product to be modified and click the Edit button or Delete button at the

bottom of the product tree pane. To refresh the product tree, click the Refresh button. \nFor information on adding

pricing rules to a product tree, see Pricing Rule module . https:// help.fishbowlinventory.com/

advanced/s/article/ProductAssociated pricingAssociated pricing allows additional costs to be tied to a specific product.

For example, if a product has an additional charge for delivery, this could be added as an associated price on the

Pricing tab.\nTo create a new associated price, go to the Pricing tab of the Product module , and click the New button

to the right of the Associated Prices pane. Enter the price and select the Associated Price Type . To create a new

Associated Price Type , click the New button next to the Associated Price Type dropdown list. \nTo add associated

pricing to a sales order, open the Sales Order module , and click the Add Item button located on the right. Select

Associated Price from the list of items to add to the[]url heading content images sales order. Click Next , choose the

correct associated price type from the dropdown list, and then click Finish . The total of the associated price line

item will be the sum of all the associated prices for products above the line item. \n\nAssociated Pricing can also be

imported from a spreadsheet . https:// help.fishbowlinventory.com/ advanced/s/article/ProductAssociated productsFishbowl

provides the ability to add multiple products to a sales order simultaneously by using associated products. An

associated product has the same name as the main product plus a special suffix to identify it as an associated product.

Associated products are often used in industries where recyclable cores can be returned to offset the cost of a new

item. For example, when selling a new car battery, an auto parts store may give a discount to a customer who returns an

old battery. Below is one example of how associated products could be used with core products. \nAssociated products

aren't limited to core[]url heading content images products. By adjusting part types, default product types, prices, and

suffixes, a company could use the associated product feature to fulfill various company needs, such as bundling products

together (similar to a kit ), adding service items or delivery fees (similar to associated pricing ), or many other

possibilities. https:// help.fishbowlinventory.com/ advanced/s/article/ProductSearchTo search for products, use the

search pane on the left of the Product module .\n\n The product search pane is displayed in other areas of Fishbowl,

such as in the product tree window, and can also be found by clicking the Product search button in the Sales Order

module , the Pricing Rule module , etc. The image and inventory data can be hidden by clicking the Tools menu, selecting

Program Options , and then customizing the Inventory Data options on the General tab.\n\nTo perform a more advanced

search, click the Advanced Search button. \n\nThe General tab[]url heading content images contains important information

about the product.\nThe Details tab displays additional details about the product. \nThe Substitute tab allows specific

products to be substituted for others when they are out of stock. If an out-of-stock item is added to a sales order, a

dialog will be displayed with an option to select a substitute product. \nThe Pricing tab makes it possible to create

new pricing rules, as well as edit or delete existing pricing rules. For instructions on creating, editing, or deleting

pricing rules, see the Pricing Rule module . For details about associated pricing, see Associated pricing . \nThe

Customers tab displays the customer part numbers associated with the selected product.\nThe Memo tab is for internal use

and allows users to enter notes regarding a specific product. The top portion of the screen displays the date a memo was

created, by what user, as well as a preview of the memo. Click on the previewurl heading content images to view the

entire message in the window below.\nUse the component toolbar on the right to Add a new memo, Edit an existing memo, or

Delete a memo. To print all of the memos for a product, click the Print button.\nThe Custom tab is an internal-use field

for recording extra information. Use the Custom Field module to set names for each custom field. This feature makes it

possible to use an advanced search for products by custom field, or to display custom information on reports in

Fishbowl. \n\nSome aspects of the Product module can be customized by opening the module, clicking the Tools menu, and

then selecting Module Options . https:// help.fishbowlinventory.com/ advanced/s/article/ProductInformation []

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search, click the Advanced Search button. \n\nThe General tab[]url heading content images contains important information

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possible to use an advanced search for products by custom field, or to display custom information on reports in

Fishbowl. \n\nSome aspects of the Product module can be customized by opening the module, clicking the Tools menu, and

then selecting Module Options . https:// help.fishbowlinventory.com/ advanced/s/article/ProductInformation []

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Response: Yes, it is possible to associate multiple products with a single part. The context states, "It is possible to have more

than one product associated with the same part." It also clarifies, "A product may not be assigned to multiple parts.

However, a part may have multiple products assigned to it."

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Asking (Row 39): How can you add an image to a product?

response for row 39

Query: How can you add an image to a product?

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REFERENCE #0

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/ProductFishbowl Advanced - Product[]

https:// help.fishbowlinventory.com/ advanced/s/article/ProductDec 17, 2024Knowledge[] https://

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It is possible to have more than one product associated with the same part. When a part is created and marked to be

sold, a product is automatically created. Products can also be imported from a spreadsheet .[] https://

help.fishbowlinventory.com/ advanced/s/article/ProductContents [] https:// help.fishbowlinventory.com/

advanced/s/article/ProductModule buttonsNew creates a new product .\nNew also has a dropdown option to create a kit when

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report is specified, the PDF report will be attached. Email can be configured on the Email tab of the Settings module .

\nPrint sends the default module report to the printer.\nHow To opens this article in a web browser. \nRefresh reloads

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instructions below.\nDescriptions of each field can be found on the General tab . Products can also be imported from a

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help.fishbowlinventory.com/ advanced/s/article/ProductBatch upload product picturesThe Product import can be used to

upload pictures for multiple products at once.[] https:// help.fishbowlinventory.com/ advanced/s/article/ProductModify

or delete an existing productTo modify an existing product, double-click the product in the Search pane, and then

double-click the product. The product details will appear on the right- hand side of the screen. After making[]url

heading content images any changes, click Save .\nOnce a product has been created and acquired a history, it cannot be

deleted. However, a part can be inactivated through the Product module . \nTo activate or view the part again, click the

Advanced Search feature located next to the standard search button, search for the desired product, and select the

Active box. https:// help.fishbowlinventory.com/ advanced/s/article/ProductDuplicate a productUse the following steps to

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be renamed by editing the Product field and clicking the Save button on the module toolbar.\nA duplicate product is

still tied to the Part of the original product. Therefore, the inventory tied to the duplicate product will be the same

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product. The Substitute tab also displays which kits a product is included in.\n https:// help.fishbowlinventory.com/

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categories.\nTo access the product tree, click the Product Tree button located on the module toolbar. The product tree

window is divided into two basic sections. To create categories and to organize products, use the[]url heading content

images Product Tree pane on the left. To search and filter a list of products, use the Product Search on the right.

\n\nCreating a new category\nCategories can be imported into the product tree using a CSV import file, or they can be

manually entered into the client.\nTo add a category manually, select the Product category in the Product Tree pane,

click the Add Category button in the bottom left-hand corner of the screen, and enter the name and description of the

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Pricing tab.\nTo create a new associated price, go to the Pricing tab of the Product module , and click the New button

to the right of the Associated Prices pane. Enter the price and select the Associated Price Type . To create a new

Associated Price Type , click the New button next to the Associated Price Type dropdown list. \nTo add associated

pricing to a sales order, open the Sales Order module , and click the Add Item button located on the right. Select

Associated Price from the list of items to add to the[]url heading content images sales order. Click Next , choose the

correct associated price type from the dropdown list, and then click Finish . The total of the associated price line

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provides the ability to add multiple products to a sales order simultaneously by using associated products. An

associated product has the same name as the main product plus a special suffix to identify it as an associated product.

Associated products are often used in industries where recyclable cores can be returned to offset the cost of a new

item. For example, when selling a new car battery, an auto parts store may give a discount to a customer who returns an

old battery. Below is one example of how associated products could be used with core products. \nAssociated products

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Content:

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Response: Based on the provided context, the Product import feature can be used to upload pictures for multiple products at once.

The context includes a heading "Add a product image" but does not provide specific steps or details under that heading.

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Asking (Row 40): Can you delete a product that has a history associated with it? How do you handle it?

response for row 40

Query: Can you delete a product that has a history associated with it? How do you handle it?

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REFERENCE #0

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Response: Based on the provided context: No, once a product has been created and acquired a history, it cannot be deleted. To

handle this, instead of deleting the product, the associated part can be inactivated through the Product module. To view

or reactivate the part later, you can use the Advanced Search feature, search for the product, and select the Active

box.

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Asking (Row 41): How do you configure substitute products, and when are they used?

response for row 41

Query: How do you configure substitute products, and when are they used?

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Response: \*\*Configuration:\*\* Substitute products can be configured on the \*\*Substitute\*\* tab of the \*\*Product\*\* module. To add a

new substitute product, click the \*\*Add\*\* button located on the component toolbar to the right and select a substitute

product. \*\*Usage:\*\* Substitute products are used when a product with insufficient inventory (or is out of stock) is

added to a sales order. In this situation, Fishbowl will provide the option (via a dialog) of selecting a configured

substitute product.

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Asking (Row 42): What is the 'Product Tree' used for?

response for row 42

Query: What is the 'Product Tree' used for?

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REFERENCE #0

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/ProductFishbowl Advanced - Product[]

https:// help.fishbowlinventory.com/ advanced/s/article/ProductDec 17, 2024Knowledge[] https://

help.fishbowlinventory.com/ advanced/s/article/ProductArticle DetailsThe Product module, located in the Materials group

, keeps track of products. Products are items that are sold, while parts are items that are purchased or manufactured.

It is possible to have more than one product associated with the same part. When a part is created and marked to be

sold, a product is automatically created. Products can also be imported from a spreadsheet .[] https://

help.fishbowlinventory.com/ advanced/s/article/ProductContents [] https:// help.fishbowlinventory.com/

advanced/s/article/ProductModule buttonsNew creates a new product .\nNew also has a dropdown option to create a kit when

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the product tree . \nEmail opens a[]url heading content images window to compose an email. If the module's default

report is specified, the PDF report will be attached. Email can be configured on the Email tab of the Settings module .

\nPrint sends the default module report to the printer.\nHow To opens this article in a web browser. \nRefresh reloads

whatever is currently open in the module. https:// help.fishbowlinventory.com/ advanced/s/article/ProductCreate a new

productProducts can be automatically created when creating new parts . To manually create a new product, follow the

instructions below.\nDescriptions of each field can be found on the General tab . Products can also be imported from a

spreadsheet .[] https:// help.fishbowlinventory.com/ advanced/s/article/ProductAdd a product image[] https://

help.fishbowlinventory.com/ advanced/s/article/ProductBatch upload product picturesThe Product import can be used to

upload pictures for multiple products at once.[] https:// help.fishbowlinventory.com/ advanced/s/article/ProductModify

or delete an existing productTo modify an existing product, double-click the product in the Search pane, and then

double-click the product. The product details will appear on the right- hand side of the screen. After making[]url

heading content images any changes, click Save .\nOnce a product has been created and acquired a history, it cannot be

deleted. However, a part can be inactivated through the Product module . \nTo activate or view the part again, click the

Advanced Search feature located next to the standard search button, search for the desired product, and select the

Active box. https:// help.fishbowlinventory.com/ advanced/s/article/ProductDuplicate a productUse the following steps to

duplicate a product in the Product module.\nA duplicated product will always be named as a copy of the original. It can

be renamed by editing the Product field and clicking the Save button on the module toolbar.\nA duplicate product is

still tied to the Part of the original product. Therefore, the inventory tied to the duplicate product will be the same

as the original product. When a product is duplicated, the Substitute , Pricing , and Memo tabs will not be copied over

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option of selecting a substitute product, which can be configured on the Substitute tab of the Product module . To add a

new substitute product, click the Add button located on the component toolbar to the right and select a substitute

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treeThe Product Tree organizes products into categories and subcategories. This simplifies the process of applying

pricing rules to groups of products, viewing sales by category, etc. A product can also be listed in multiple

categories.\nTo access the product tree, click the Product Tree button located on the module toolbar. The product tree

window is divided into two basic sections. To create categories and to organize products, use the[]url heading content

images Product Tree pane on the left. To search and filter a list of products, use the Product Search on the right.

\n\nCreating a new category\nCategories can be imported into the product tree using a CSV import file, or they can be

manually entered into the client.\nTo add a category manually, select the Product category in the Product Tree pane,

click the Add Category button in the bottom left-hand corner of the screen, and enter the name and description of the

new category.\nTo add a subcategory, follow the same process by selecting the desired parent category, clicking the Add

Category button, and entering the subcategory name and description. \n\nAdding products to the tree\nProducts can be

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bottom of the product tree pane. To refresh the product tree, click the Refresh button. \nFor information on adding

pricing rules to a product tree, see Pricing Rule module . https:// help.fishbowlinventory.com/

advanced/s/article/ProductAssociated pricingAssociated pricing allows additional costs to be tied to a specific product.

For example, if a product has an additional charge for delivery, this could be added as an associated price on the

Pricing tab.\nTo create a new associated price, go to the Pricing tab of the Product module , and click the New button

to the right of the Associated Prices pane. Enter the price and select the Associated Price Type . To create a new

Associated Price Type , click the New button next to the Associated Price Type dropdown list. \nTo add associated

pricing to a sales order, open the Sales Order module , and click the Add Item button located on the right. Select

Associated Price from the list of items to add to the[]url heading content images sales order. Click Next , choose the

correct associated price type from the dropdown list, and then click Finish . The total of the associated price line

item will be the sum of all the associated prices for products above the line item. \n\nAssociated Pricing can also be

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provides the ability to add multiple products to a sales order simultaneously by using associated products. An

associated product has the same name as the main product plus a special suffix to identify it as an associated product.

Associated products are often used in industries where recyclable cores can be returned to offset the cost of a new

item. For example, when selling a new car battery, an auto parts store may give a discount to a customer who returns an

old battery. Below is one example of how associated products could be used with core products. \nAssociated products

aren't limited to core[]url heading content images products. By adjusting part types, default product types, prices, and

suffixes, a company could use the associated product feature to fulfill various company needs, such as bundling products

together (similar to a kit ), adding service items or delivery fees (similar to associated pricing ), or many other

possibilities. https:// help.fishbowlinventory.com/ advanced/s/article/ProductSearchTo search for products, use the

search pane on the left of the Product module .\n\n The product search pane is displayed in other areas of Fishbowl,

such as in the product tree window, and can also be found by clicking the Product search button in the Sales Order

module , the Pricing Rule module , etc. The image and inventory data can be hidden by clicking the Tools menu, selecting

Program Options , and then customizing the Inventory Data options on the General tab.\n\nTo perform a more advanced

search, click the Advanced Search button. \n\nThe General tab[]url heading content images contains important information

about the product.\nThe Details tab displays additional details about the product. \nThe Substitute tab allows specific

products to be substituted for others when they are out of stock. If an out-of-stock item is added to a sales order, a

dialog will be displayed with an option to select a substitute product. \nThe Pricing tab makes it possible to create

new pricing rules, as well as edit or delete existing pricing rules. For instructions on creating, editing, or deleting

pricing rules, see the Pricing Rule module . For details about associated pricing, see Associated pricing . \nThe

Customers tab displays the customer part numbers associated with the selected product.\nThe Memo tab is for internal use

and allows users to enter notes regarding a specific product. The top portion of the screen displays the date a memo was

created, by what user, as well as a preview of the memo. Click on the previewurl heading content images to view the

entire message in the window below.\nUse the component toolbar on the right to Add a new memo, Edit an existing memo, or

Delete a memo. To print all of the memos for a product, click the Print button.\nThe Custom tab is an internal-use field

for recording extra information. Use the Custom Field module to set names for each custom field. This feature makes it

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/ProductFishbowl Advanced - Product[]

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Response: The 'Product Tree' is used to organize products into categories and subcategories. This organization simplifies

processes such as applying pricing rules to groups of products and viewing sales by category. Products can also be

listed in multiple categories within the tree.

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Asking (Row 43): Explain 'Associated Pricing' and provide an example use case.

response for row 43

Query: Explain 'Associated Pricing' and provide an example use case.

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/ProductFishbowl Advanced - Product[]

https:// help.fishbowlinventory.com/ advanced/s/article/ProductDec 17, 2024Knowledge[] https://

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bottom of the product tree pane. To refresh the product tree, click the Refresh button. \nFor information on adding

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advanced/s/article/ProductAssociated pricingAssociated pricing allows additional costs to be tied to a specific product.

For example, if a product has an additional charge for delivery, this could be added as an associated price on the

Pricing tab.\nTo create a new associated price, go to the Pricing tab of the Product module , and click the New button

to the right of the Associated Prices pane. Enter the price and select the Associated Price Type . To create a new

Associated Price Type , click the New button next to the Associated Price Type dropdown list. \nTo add associated

pricing to a sales order, open the Sales Order module , and click the Add Item button located on the right. Select

Associated Price from the list of items to add to the[]url heading content images sales order. Click Next , choose the

correct associated price type from the dropdown list, and then click Finish . The total of the associated price line

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provides the ability to add multiple products to a sales order simultaneously by using associated products. An

associated product has the same name as the main product plus a special suffix to identify it as an associated product.

Associated products are often used in industries where recyclable cores can be returned to offset the cost of a new

item. For example, when selling a new car battery, an auto parts store may give a discount to a customer who returns an

old battery. Below is one example of how associated products could be used with core products. \nAssociated products

aren't limited to core[]url heading content images products. By adjusting part types, default product types, prices, and

suffixes, a company could use the associated product feature to fulfill various company needs, such as bundling products

together (similar to a kit ), adding service items or delivery fees (similar to associated pricing ), or many other

possibilities. https:// help.fishbowlinventory.com/ advanced/s/article/ProductSearchTo search for products, use the

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such as in the product tree window, and can also be found by clicking the Product search button in the Sales Order

module , the Pricing Rule module , etc. The image and inventory data can be hidden by clicking the Tools menu, selecting

Program Options , and then customizing the Inventory Data options on the General tab.\n\nTo perform a more advanced

search, click the Advanced Search button. \n\nThe General tab[]url heading content images contains important information

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Response: \*\*Associated Pricing:\*\* Associated pricing allows additional costs to be tied to a specific product. \*\*Example Use

Case:\*\* If a product has an additional charge for delivery, this could be added as an associated price on the Pricing

tab.

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Asking (Row 44): What are 'Associated Products', and give an example scenario where they might be used?

response for row 44

Query: What are 'Associated Products', and give an example scenario where they might be used?

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Response: Associated Products in Fishbowl allow you to add multiple products to a sales order simultaneously. An associated

product shares the same name as the main product but includes a special suffix to identify it. An example scenario

where Associated Products might be used is in industries dealing with recyclable cores. For instance, when an auto parts

store sells a new car battery, they might use an associated product to handle the return of the old battery, potentially

offering a discount to the customer for returning it.

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Asking (Row 45): Where can you find customer-specific part numbers related to a product?

response for row 45

Query: Where can you find customer-specific part numbers related to a product?

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/PartFishbowl Advanced - Part[]

https:// help.fishbowlinventory.com/ advanced/s/article/PartDec 17, 2024Knowledge[] https:// help.fishbowlinventory.com/

advanced/s/article/PartArticle DetailsThe Part module, located in the Materials group , allows parts to be created and

modified. There are several part types , but in general, a part is an item that is stored, manufactured, or consumed.

Parts can also have a corresponding product , which is an item that is sold to a customer .[] https://

help.fishbowlinventory.com/ advanced/s/article/PartContents [] https:// help.fishbowlinventory.com/

advanced/s/article/PartModule buttonsNew creates a new part .\nSave saves any changes made to the part. \nDelete deletes

the part.\nMRP allows multiple reorder points to be set simultaneously . \nAuto ABC allows multiple ABC codes to be set

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the Inventory[]url heading content images module for the open part. \nDuplicate creates a duplicate copy of the

part.\nEmail opens a window to compose an email. If the module's default report is specified, the PDF report will be

attached. Email can be configured on the Email tab of the Settings module . \nPrint sends the default module report to

the printer.\nHow To opens this article in a web browser.\nRefresh reloads whatever is currently open in the module.

https:// help.fishbowlinventory.com/ advanced/s/article/PartCreate a partNew parts can be created in the Part module ,

through imports , or by typing a new item number into a Part/ Product field and selecting Add New . The Part/ Product

field is found in many modules, including Purchase Order , Sales Order , Transfer Order , Consignment , and Fishbowl

Checkout . Follow the steps below to create a new part from the Part module . If desired, many of[]url heading content

images the wizard steps can be hidden . https:// help.fishbowlinventory.com/ advanced/s/article/PartSearchThe search

panel in the Part module displays parts, as well as the part description, UOM, and part type. The search parameters can

be used to filter the list or find a specific part.[] https:// help.fishbowlinventory.com/

advanced/s/article/PartInactivate a partA part can only be deleted if it has not been used and it has no associated

products. A part cannot be deleted if inventory has been added, the UOM has changed, the part is on an order, etc.

However, a part can be inactivated so that it will not appear in part lists.[] https:// help.fishbowlinventory.com/

advanced/s/article/PartEdit a partNearly all aspects of a part can be edited by opening the part, clicking the

corresponding tab, and changing the desired field.[] https:// help.fishbowlinventory.com/ advanced/s/article/PartCreate

part reorder levelsReorder levels are used to determine when inventory is getting low and when specific parts should be

reordered or manufactured. Below are a few[]url heading content images of the ways that reorder levels can be utilized.

\n\nA reorder level consists of two numbers: \nReorder levels could also be explained by using an analogy of fuel in a

car. The ROP is the warning light indicating that the fuel is low and it's time to fill up. The OUL is the capacity of

the fuel tank. \nReorder levels are either specified per location group, or company wide, depending on the Location

Group module options . Reorder levels can be set through any of the following methods:\nFollow the steps below to

manually create individual reorder levels: https:// help.fishbowlinventory.com/ advanced/s/article/PartMRP wizardThe

Material Resource Planning (MRP) wizard allows reorder levels to be calculated based on historical data, daily

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example, important inventory parts that have a large impact on sales could be classified as A , while parts that are

less valuable and less important could be classified as C . In addition, N is used when an item does not have any

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the Auto ABC wizard.\nThe Advanced Search in the Part module provides the ability to filter parts based on their ABC

code, as does the Cycle Count List report . https:// help.fishbowlinventory.com/ advanced/s/article/PartCreate a

tracking methodCustom tracking methods can be created in Fishbowl to keep track of important part details. A tracking

method[]url heading content images could be created to track details, such as size, color, dates, etc. Multiple serial

numbers can also be added. Follow the steps below to add a new tracking method. \nAdditional columns can be displayed on

the Tracking tab of the Part module options by right- clicking a column header. To inactivate a tracking method, uncheck

the Active box. The Usage column displays how many parts use each tracking method. Tracking methods can also be deleted

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Consumption Rate is the average daily consumption rate. If reorder points are set to By Location Group , this will be

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Response: I cannot determine the answer to that.

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Asking (Row 46): What are the main functions of the Purchase Order (PO) module?

response for row 46

Query: What are the main functions of the Purchase Order (PO) module?

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REFERENCE #0

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderFishbowl Advanced -

Purchase Order[] https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderDec 17, 2024Knowledge[] https://

help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderArticle DetailsThe Purchase Order module, located in the

Purchasing group , facilitates the process of creating and issuing purchase orders. This module is often referred to as

the PO module and allows for parts, miscellaneous items, outsourced items, and credit returns items to be added to a

purchase order.[] https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderContents [] https://

help.fishbowlinventory.com/ advanced/s/article/ Purchase-Order1. Create a purchase orderOpen the Purchase Order module

and click the New button on the module toolbar to create a new purchase order. Select the vendor for the purchase order

by typing in the Vendor field or by clicking the Search button for an advanced search. If the vendor does not currently

exist[]url heading content images in the system, select Add New from the bottom of the vendor dropdown list to create a

new vendor.\n\nThe date will default to the date the PO is created. However, the date can be changed by typing in the

field or by clicking the Calendar button. Fishbowl will automatically assign the next available order number, but this

can also be manually changed. Click the Save button in the module toolbar to save any changes. \nIf desired, a Customer

SO number or a Vendor SO number can be stored on the purchase order. This provides the ability to keep track of the

order number the vendor is using to process the order, and the sales order number of the customer who ordered the item.

\nIf applicable, the Location Group and Class for the order can be modified at the bottom of the order by theurl heading

content images total field. \nPurchase orders can also be created using the import . https://

help.fishbowlinventory.com/ advanced/s/article/ Purchase-Order2. Add itemsFollow the steps below to add items to a

purchase order: \nWhen a part is added to a purchase order, it will pull the vendor's last cost for the part. If the

item has not been purchased from the selected vendor and a vendor association has not been added, the cost will

initially be $0. The cost can be manually changed by typing in the cost field. When the order is issued or fulfilled,

the new cost will be saved for future use.\n[] https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-

OrderItem typesTo change the item type, click the Type field of any line item and select from the following types. \n[]

https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderEdit an itemClick OK to close the edit window,

and then click Save in the module toolbar to save any changes.[] https:// help.fishbowlinventory.com/3. Issue a purchase

orderAfter all items have been added to the purchase[]url heading content images advanced/s/article/ Purchase-

Orderorder, the bid request should be sent to the vendor. Once the vendor responds, it may be necessary to make price

adjustments, quantity adjustments, etc. Make any necessary edits and then issue the order.\nTo issue a purchase order,

click the Issue button. Issuing a purchase order automatically saves the order and allows the order to move to the next

step in the process: https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderOrder statusThe Status field

shows the status of the purchase order:\nThe status may also be one of the following for Credit Return and Outsource

types:[] https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-Order4. Fulfill a purchase orderThe steps

necessary to fulfill a purchase order vary based on the item type.[] https:// help.fishbowlinventory.com/

advanced/s/article/ Purchase-OrderModule buttonsNew creates a new purchase order . \nIssue toggles the Issued status of

the purchase order .\nSave saves any changes made to the purchase order. \nDelete deletes[]url heading content images

the purchase order if it is in a Bid Request status. Issued orders can be unissued to return them to the Bid Request

status.\nVoid replaces the Delete button when an order has an Issued status. The order will be voided but not

deleted.\nClose Short replaces the Delete button when an order has been partially fulfilled. This button will close

short the unfulfilled portion of the order.\nTo Receive opens the current purchase order in the Receiving module .\nAuto

PO creates purchase orders for items with low quantities . \nDuplicate creates a copy of the purchase order. The order

number will automatically be assigned, and the new SO will have a Bid Request status.\nEmail opens a window to compose

an email. If the module's default report is specified, the PDF report will be attached.url heading content images Email

can be configured on the Email tab of the Settings module . \nPrint sends the default module report to the printer.\nHow

To opens this article in a web browser.\nRefresh reloads whatever is currently open in the module. https://

help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderCredit returnAfter an item has been added , the type can

be changed by clicking the Type field in the order item table, and choosing Credit Return from the dropdown.\n\nThe type

can also be changed in the edit window by double-clicking a line item and then selecting Credit Return in the Type

field. \n\nOnce all items have been added, click the Issue button in the module toolbar. Because credit return items are

being returned to the vendor, they must be picked and shipped to fulfill the order. Open the order in the Picking module

to complete the pick, and then ship the order in[]url heading content images the Shipping module .\nFollow the steps

below to create a miscellaneous credit return: https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-

OrderOutsourceOutsourcing is the process of sending a part to a vendor so that the vendor can work on the part. Then the

item is received back into inventory, either with the same part number or with a different part number. For example, a

bike company may offer custom frame painting to customers for an additional fee. Since the company does not paint bikes

at their location, they may outsource the frame to a painting company that completes the painting and ships the frame

back to the bike company to be put together and sold to the customer. Follow the instructions below to outsource an

item.[] https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderEdit a fulfilled purchase orderUsers with

the appropriate Access Rights can modify the information included on the[]url heading content images Details , Memo ,

and Custom tabs of a purchase order even after the order has been fulfilled. This includes the ability to change the

Fulfillment Date, Shipping Terms, Payment Terms, FOB, Carrier, and Custom Fields, and to add Notes or Memos to the order

.\nThis does not include the ability to modify costs, vendors, or items on the order. If the order has already been

exported to QuickBooks, the changes must be manually entered in QuickBooks. \nTo make modifications, open a purchase

order, make the desired changes, and then click the Save button in the module toolbar. https://

help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderVoid, delete, or close short a POThe Void button replaces

the Delete button when an order has an Issued status. The order will be voided but not deleted. Voided purchase orders

maintain a history and can be seen in the search pane and some reports.[]url heading content images \nThe Delete button

deletes a purchase order if it is in a Bid Request status. Issued orders can be unissued to return them to the Bid

Request status. Deleted purchase orders do not maintain a history and cannot be seen in the search pane or reports.\nThe

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an easy way to generate purchase orders for items with low quantities. Reorder levels can be created for each part to

determine when the part should be ordered and how many of the part should be requested.[] https://

help.fishbowlinventory.com/Currency conversionThe Currency module provides []url heading content images

advanced/s/article/ Purchase-Orderthe ability to create alternate currencies and set the conversion rate between the

home currency and the alternate currency. These currencies can then be assigned to vendors . When a vendor with an

alternate currency is used in the Purchase Order module , costs can be viewed and set in the alternate currency. Fields

used for multicurrency will not be visible until currency conversion is enabled . Below are the currency features

available in the Purchase Order module . https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-

OrderSearchThe Search pane on the left can be used to filter by Number , Vendor , or Status . Records can also be found

by typing in the table . Click the Advanced Search button to search the Custom Fields and the following search options.

Custom field columns can also be displayed in the purchase order line item[]url heading content images table by right-

clicking any column header. \n\nThe General tab displays important order information, including the vendor, order

number, order status, addresses, order items, and more. \nThe Details tab displays important order details, including a

link to the vendor in the Vendor module , the last user to modify the order, shipping terms, payment terms, carrier,

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item is received back into inventory, either with the same part number or with a different part number. For example, a

bike company may offer custom frame painting to customers for an additional fee. Since the company does not paint bikes

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Fulfillment Date, Shipping Terms, Payment Terms, FOB, Carrier, and Custom Fields, and to add Notes or Memos to the order

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deletes a purchase order if it is in a Bid Request status. Issued orders can be unissued to return them to the Bid

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used for multicurrency will not be visible until currency conversion is enabled . Below are the currency features

available in the Purchase Order module . https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-

OrderSearchThe Search pane on the left can be used to filter by Number , Vendor , or Status . Records can also be found

by typing in the table . Click the Advanced Search button to search the Custom Fields and the following search options.

Custom field columns can also be displayed in the purchase order line item[]url heading content images table by right-

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number, order status, addresses, order items, and more. \nThe Details tab displays important order details, including a

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memos, the date they were created, and the user who created them. Highlighting a memo will display the details of the

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of each company.\n\nSome aspects of the Purchase Orderurl heading content images module can be customized by opening the

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advanced/s/article/ Purchase-OrderInformation []

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Response: Based on the provided context, the main functions of the Purchase Order (PO) module are: 1. \*\*Creating Purchase

Orders:\*\* It facilitates the creation of new purchase orders, either manually by clicking the "New" button or through

import. This includes selecting a vendor, setting dates, and assigning order numbers. 2. \*\*Issuing Purchase Orders:\*\*

After adding items and making necessary adjustments, the module allows users to issue the purchase order to the vendor,

which saves the order and moves it to the next step in the process. 3. \*\*Adding Items:\*\* The module allows adding

various types of items to a purchase order, including parts, miscellaneous items, outsourced items, and credit return

items. It handles item costs, potentially pulling the vendor's last cost or allowing manual entry. 4. \*\*Managing

Special PO Types:\*\* It supports specific processes like handling credit returns (items returned to the vendor) and

outsourcing (sending parts to a vendor for work). 5. \*\*Fulfilling Purchase Orders:\*\* While the specific steps vary by

item type, the module is involved in the process leading up to fulfillment (e.g., issuing the PO enables receiving). 6.

\*\*Managing PO Lifecycle:\*\* Users can save, delete (if in Bid Request status), void (if issued), or close short (if

partially fulfilled) purchase orders. 7. \*\*Automated PO Generation (Auto PO):\*\* It includes a wizard to automatically

generate purchase orders for items that have reached low quantity levels based on predefined reorder points. 8. \*\*Other

Functions:\*\* The module also allows duplicating POs, emailing/printing POs, searching for POs, editing certain details

on fulfilled POs, and handling currency conversions for vendors using alternate currencies.

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Asking (Row 47): List the different types of items that can be added to a purchase order.

response for row 47

Query: List the different types of items that can be added to a purchase order.

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderFishbowl Advanced -

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of each company.\n\nSome aspects of the Purchase Orderurl heading content images module can be customized by opening the

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advanced/s/article/ Purchase-OrderInformation []

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Content:

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Response: Based on the provided context, the different types of items that can be added to a purchase order are: \* Parts \*

Miscellaneous items \* Outsourced items \* Credit returns items

--------------------------------------------------------------------------------

Asking (Row 48): What happens to the cost of an item when it's added to a PO if it hasn't been purchased from that vendor before?

response for row 48

Query: What happens to the cost of an item when it's added to a PO if it hasn't been purchased from that vendor before?

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Response: Based on the provided context: When an item is added to a purchase order, Fishbowl attempts to pull the vendor's last

cost for that part. However, if the item has not been previously purchased from the selected vendor and a vendor

association has not been added, the cost will initially be $0. The cost can then be manually changed in the cost field.

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Asking (Row 49): What does 'Issuing' a purchase order signify?

response for row 49

Query: What does 'Issuing' a purchase order signify?

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REFERENCE #0

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adjustments, quantity adjustments, etc. Make any necessary edits and then issue the order.\nTo issue a purchase order,

click the Issue button. Issuing a purchase order automatically saves the order and allows the order to move to the next

step in the process: https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderOrder statusThe Status field

shows the status of the purchase order:\nThe status may also be one of the following for Credit Return and Outsource

types:[] https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-Order4. Fulfill a purchase orderThe steps

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bike company may offer custom frame painting to customers for an additional fee. Since the company does not paint bikes

at their location, they may outsource the frame to a painting company that completes the painting and ships the frame

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the appropriate Access Rights can modify the information included on the[]url heading content images Details , Memo ,

and Custom tabs of a purchase order even after the order has been fulfilled. This includes the ability to change the

Fulfillment Date, Shipping Terms, Payment Terms, FOB, Carrier, and Custom Fields, and to add Notes or Memos to the order

.\nThis does not include the ability to modify costs, vendors, or items on the order. If the order has already been

exported to QuickBooks, the changes must be manually entered in QuickBooks. \nTo make modifications, open a purchase

order, make the desired changes, and then click the Save button in the module toolbar. https://

help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderVoid, delete, or close short a POThe Void button replaces

the Delete button when an order has an Issued status. The order will be voided but not deleted. Voided purchase orders

maintain a history and can be seen in the search pane and some reports.[]url heading content images \nThe Delete button

deletes a purchase order if it is in a Bid Request status. Issued orders can be unissued to return them to the Bid

Request status. Deleted purchase orders do not maintain a history and cannot be seen in the search pane or reports.\nThe

Close Short button replaces the Delete button when an order has been partially fulfilled. This button will close short

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advanced/s/article/ Purchase-Orderthe ability to create alternate currencies and set the conversion rate between the

home currency and the alternate currency. These currencies can then be assigned to vendors . When a vendor with an

alternate currency is used in the Purchase Order module , costs can be viewed and set in the alternate currency. Fields

used for multicurrency will not be visible until currency conversion is enabled . Below are the currency features

available in the Purchase Order module . https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-

OrderSearchThe Search pane on the left can be used to filter by Number , Vendor , or Status . Records can also be found

by typing in the table . Click the Advanced Search button to search the Custom Fields and the following search options.

Custom field columns can also be displayed in the purchase order line item[]url heading content images table by right-

clicking any column header. \n\nThe General tab displays important order information, including the vendor, order

number, order status, addresses, order items, and more. \nThe Details tab displays important order details, including a

link to the vendor in the Vendor module , the last user to modify the order, shipping terms, payment terms, carrier,

order dates, and more. \nThe Memo tab can be used to add information to each purchase order. The upper pane displays the

memos, the date they were created, and the user who created them. Highlighting a memo will display the details of the

memo in the lower pane.\nThe Custom tab stores additional fields for the order that can be customized to fit the needs

of each company.\n\nSome aspects of the Purchase Orderurl heading content images module can be customized by opening the

module, clicking the Tools menu, and then selecting Module Options . https:// help.fishbowlinventory.com/

advanced/s/article/ Purchase-OrderInformation []

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Response: Based on the provided context: Issuing a purchase order automatically saves the order and allows the order to move to

the next step in the process. It also toggles the status of the purchase order to 'Issued'. This typically happens after

all items have been added, any necessary adjustments (like price or quantity) have been made following vendor response,

and the order is ready to proceed.

--------------------------------------------------------------------------------

Asking (Row 50): Describe the different statuses a purchase order can have (e.g., Bid Request, Issued, Fulfilled).

response for row 50

Query: Describe the different statuses a purchase order can have (e.g., Bid Request, Issued, Fulfilled).

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderFishbowl Advanced -

Purchase Order[] https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderDec 17, 2024Knowledge[] https://

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and click the New button on the module toolbar to create a new purchase order. Select the vendor for the purchase order

by typing in the Vendor field or by clicking the Search button for an advanced search. If the vendor does not currently

exist[]url heading content images in the system, select Add New from the bottom of the vendor dropdown list to create a

new vendor.\n\nThe date will default to the date the PO is created. However, the date can be changed by typing in the

field or by clicking the Calendar button. Fishbowl will automatically assign the next available order number, but this

can also be manually changed. Click the Save button in the module toolbar to save any changes. \nIf desired, a Customer

SO number or a Vendor SO number can be stored on the purchase order. This provides the ability to keep track of the

order number the vendor is using to process the order, and the sales order number of the customer who ordered the item.

\nIf applicable, the Location Group and Class for the order can be modified at the bottom of the order by theurl heading

content images total field. \nPurchase orders can also be created using the import . https://

help.fishbowlinventory.com/ advanced/s/article/ Purchase-Order2. Add itemsFollow the steps below to add items to a

purchase order: \nWhen a part is added to a purchase order, it will pull the vendor's last cost for the part. If the

item has not been purchased from the selected vendor and a vendor association has not been added, the cost will

initially be $0. The cost can be manually changed by typing in the cost field. When the order is issued or fulfilled,

the new cost will be saved for future use.\n[] https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-

OrderItem typesTo change the item type, click the Type field of any line item and select from the following types. \n[]

https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderEdit an itemClick OK to close the edit window,

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advanced/s/article/ Purchase-OrderInformation []

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Response: Based on the provided context: The Status field shows the status of the purchase order. The context explicitly mentions

or implies the following statuses: \* \*\*Bid Request:\*\* This is the status a purchase order has initially. Orders in

this status can be deleted. Issued orders can be unissued to return them to this status. Duplicated purchase orders also

start with a Bid Request status. \* \*\*Issued:\*\* After necessary edits following a vendor response to a bid request, the

order is issued. Issuing the order allows it to move to the next step. Orders with an Issued status can be voided

instead of deleted. \* \*\*Partially Fulfilled:\*\* An order can be in a state where it is partially fulfilled. The Close

Short button is available for orders in this state to close the unfulfilled portion. \* \*\*Fulfilled:\*\* The context

refers to fulfilling a purchase order and editing a fulfilled purchase order, implying this is a possible status or

state. \* \*\*Voided:\*\* An issued order can be voided using the Void button. Voided orders maintain a history. The

context also mentions that the status may be different for Credit Return and Outsource types, but it does not list these

specific statuses.

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Asking (Row 51): How do you handle fulfilling a purchase order for 'Credit Return' items?

response for row 51

Query: How do you handle fulfilling a purchase order for 'Credit Return' items?

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REFERENCE #0

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advanced/s/article/ Purchase-OrderInformation []

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Response: Okay, here's how to handle fulfilling a purchase order for 'Credit Return' items based on the provided context: 1.

After adding items to the purchase order, ensure the item type is set to 'Credit Return'. You can do this by clicking

the 'Type' field in the order item table and selecting 'Credit Return' from the dropdown, or by double-clicking the line

item to open the edit window and selecting 'Credit Return' in the 'Type' field there. 2. Once all credit return items

are added and correctly marked, click the \*\*Issue\*\* button in the module toolbar. 3. Because credit return items are

being returned to the vendor, they must be picked and shipped to fulfill the order. 4. Open the order in the \*\*Picking

module\*\* to complete the pick. 5. Then, ship the order in the \*\*Shipping module\*\*.

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Asking (Row 52): Explain the 'Outsourcing' process using the Purchase Order module?

response for row 52

Query: Explain the 'Outsourcing' process using the Purchase Order module?

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REFERENCE #0

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new vendor.\n\nThe date will default to the date the PO is created. However, the date can be changed by typing in the

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SO number or a Vendor SO number can be stored on the purchase order. This provides the ability to keep track of the

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item has not been purchased from the selected vendor and a vendor association has not been added, the cost will

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item is received back into inventory, either with the same part number or with a different part number. For example, a

bike company may offer custom frame painting to customers for an additional fee. Since the company does not paint bikes

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Fulfillment Date, Shipping Terms, Payment Terms, FOB, Carrier, and Custom Fields, and to add Notes or Memos to the order

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exported to QuickBooks, the changes must be manually entered in QuickBooks. \nTo make modifications, open a purchase

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determine when the part should be ordered and how many of the part should be requested.[] https://

help.fishbowlinventory.com/Currency conversionThe Currency module provides []url heading content images

advanced/s/article/ Purchase-Orderthe ability to create alternate currencies and set the conversion rate between the

home currency and the alternate currency. These currencies can then be assigned to vendors . When a vendor with an

alternate currency is used in the Purchase Order module , costs can be viewed and set in the alternate currency. Fields

used for multicurrency will not be visible until currency conversion is enabled . Below are the currency features

available in the Purchase Order module . https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-

OrderSearchThe Search pane on the left can be used to filter by Number , Vendor , or Status . Records can also be found

by typing in the table . Click the Advanced Search button to search the Custom Fields and the following search options.

Custom field columns can also be displayed in the purchase order line item[]url heading content images table by right-

clicking any column header. \n\nThe General tab displays important order information, including the vendor, order

number, order status, addresses, order items, and more. \nThe Details tab displays important order details, including a

link to the vendor in the Vendor module , the last user to modify the order, shipping terms, payment terms, carrier,

order dates, and more. \nThe Memo tab can be used to add information to each purchase order. The upper pane displays the

memos, the date they were created, and the user who created them. Highlighting a memo will display the details of the

memo in the lower pane.\nThe Custom tab stores additional fields for the order that can be customized to fit the needs

of each company.\n\nSome aspects of the Purchase Orderurl heading content images module can be customized by opening the

module, clicking the Tools menu, and then selecting Module Options . https:// help.fishbowlinventory.com/

advanced/s/article/ Purchase-OrderInformation []

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Response: Based on the provided context: The Purchase Order (PO) module in Fishbowl allows for outsourced items to be added to a

purchase order. Outsourcing is defined as the process of sending a part to a vendor so the vendor can perform work on

it. After the work is completed, the item is received back into inventory, potentially under the same or a different

part number. An example provided is a bike company outsourcing a frame to a painting company, which then ships the

painted frame back. The context mentions there are specific instructions to follow to outsource an item using the

Purchase Order module, but it does not detail those specific steps. It also notes that purchase orders with Outsource

type items may have specific statuses.

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Asking (Row 53): What is the difference between 'Voiding' and 'Deleting' a purchase order?

response for row 53

Query: What is the difference between 'Voiding' and 'Deleting' a purchase order?

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REFERENCE #0

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderFishbowl Advanced -

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new vendor.\n\nThe date will default to the date the PO is created. However, the date can be changed by typing in the

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advanced/s/article/ Purchase-OrderInformation []

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\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

REFERENCE #1

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Response: Based on the provided context: \* \*\*Deleting\*\* a purchase order is done using the `Delete` button. This action is only

possible if the purchase order is in a "Bid Request" status. If an order has been issued, it must first be unissued to

return it to the "Bid Request" status before it can be deleted. Deleted purchase orders do not maintain a history and

cannot be seen in the search pane or reports. \* \*\*Voiding\*\* a purchase order is done using the `Void` button. This

button replaces the `Delete` button when a purchase order has an "Issued" status. Voiding marks the order as voided but

does not delete it from the system. Voided purchase orders maintain a history and can still be seen in the search pane

and some reports.

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Asking (Row 54): When would you use the 'Close Short' button on a purchase order?

response for row 54

Query: When would you use the 'Close Short' button on a purchase order?

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REFERENCE #0

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderFishbowl Advanced -

Purchase Order[] https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderDec 17, 2024Knowledge[] https://

help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderArticle DetailsThe Purchase Order module, located in the

Purchasing group , facilitates the process of creating and issuing purchase orders. This module is often referred to as

the PO module and allows for parts, miscellaneous items, outsourced items, and credit returns items to be added to a

purchase order.[] https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderContents [] https://

help.fishbowlinventory.com/ advanced/s/article/ Purchase-Order1. Create a purchase orderOpen the Purchase Order module

and click the New button on the module toolbar to create a new purchase order. Select the vendor for the purchase order

by typing in the Vendor field or by clicking the Search button for an advanced search. If the vendor does not currently

exist[]url heading content images in the system, select Add New from the bottom of the vendor dropdown list to create a

new vendor.\n\nThe date will default to the date the PO is created. However, the date can be changed by typing in the

field or by clicking the Calendar button. Fishbowl will automatically assign the next available order number, but this

can also be manually changed. Click the Save button in the module toolbar to save any changes. \nIf desired, a Customer

SO number or a Vendor SO number can be stored on the purchase order. This provides the ability to keep track of the

order number the vendor is using to process the order, and the sales order number of the customer who ordered the item.

\nIf applicable, the Location Group and Class for the order can be modified at the bottom of the order by theurl heading

content images total field. \nPurchase orders can also be created using the import . https://

help.fishbowlinventory.com/ advanced/s/article/ Purchase-Order2. Add itemsFollow the steps below to add items to a

purchase order: \nWhen a part is added to a purchase order, it will pull the vendor's last cost for the part. If the

item has not been purchased from the selected vendor and a vendor association has not been added, the cost will

initially be $0. The cost can be manually changed by typing in the cost field. When the order is issued or fulfilled,

the new cost will be saved for future use.\n[] https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-

OrderItem typesTo change the item type, click the Type field of any line item and select from the following types. \n[]

https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderEdit an itemClick OK to close the edit window,

and then click Save in the module toolbar to save any changes.[] https:// help.fishbowlinventory.com/3. Issue a purchase

orderAfter all items have been added to the purchase[]url heading content images advanced/s/article/ Purchase-

Orderorder, the bid request should be sent to the vendor. Once the vendor responds, it may be necessary to make price

adjustments, quantity adjustments, etc. Make any necessary edits and then issue the order.\nTo issue a purchase order,

click the Issue button. Issuing a purchase order automatically saves the order and allows the order to move to the next

step in the process: https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderOrder statusThe Status field

shows the status of the purchase order:\nThe status may also be one of the following for Credit Return and Outsource

types:[] https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-Order4. Fulfill a purchase orderThe steps

necessary to fulfill a purchase order vary based on the item type.[] https:// help.fishbowlinventory.com/

advanced/s/article/ Purchase-OrderModule buttonsNew creates a new purchase order . \nIssue toggles the Issued status of

the purchase order .\nSave saves any changes made to the purchase order. \nDelete deletes[]url heading content images

the purchase order if it is in a Bid Request status. Issued orders can be unissued to return them to the Bid Request

status.\nVoid replaces the Delete button when an order has an Issued status. The order will be voided but not

deleted.\nClose Short replaces the Delete button when an order has been partially fulfilled. This button will close

short the unfulfilled portion of the order.\nTo Receive opens the current purchase order in the Receiving module .\nAuto

PO creates purchase orders for items with low quantities . \nDuplicate creates a copy of the purchase order. The order

number will automatically be assigned, and the new SO will have a Bid Request status.\nEmail opens a window to compose

an email. If the module's default report is specified, the PDF report will be attached.url heading content images Email

can be configured on the Email tab of the Settings module . \nPrint sends the default module report to the printer.\nHow

To opens this article in a web browser.\nRefresh reloads whatever is currently open in the module. https://

help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderCredit returnAfter an item has been added , the type can

be changed by clicking the Type field in the order item table, and choosing Credit Return from the dropdown.\n\nThe type

can also be changed in the edit window by double-clicking a line item and then selecting Credit Return in the Type

field. \n\nOnce all items have been added, click the Issue button in the module toolbar. Because credit return items are

being returned to the vendor, they must be picked and shipped to fulfill the order. Open the order in the Picking module

to complete the pick, and then ship the order in[]url heading content images the Shipping module .\nFollow the steps

below to create a miscellaneous credit return: https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-

OrderOutsourceOutsourcing is the process of sending a part to a vendor so that the vendor can work on the part. Then the

item is received back into inventory, either with the same part number or with a different part number. For example, a

bike company may offer custom frame painting to customers for an additional fee. Since the company does not paint bikes

at their location, they may outsource the frame to a painting company that completes the painting and ships the frame

back to the bike company to be put together and sold to the customer. Follow the instructions below to outsource an

item.[] https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderEdit a fulfilled purchase orderUsers with

the appropriate Access Rights can modify the information included on the[]url heading content images Details , Memo ,

and Custom tabs of a purchase order even after the order has been fulfilled. This includes the ability to change the

Fulfillment Date, Shipping Terms, Payment Terms, FOB, Carrier, and Custom Fields, and to add Notes or Memos to the order

.\nThis does not include the ability to modify costs, vendors, or items on the order. If the order has already been

exported to QuickBooks, the changes must be manually entered in QuickBooks. \nTo make modifications, open a purchase

order, make the desired changes, and then click the Save button in the module toolbar. https://

help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderVoid, delete, or close short a POThe Void button replaces

the Delete button when an order has an Issued status. The order will be voided but not deleted. Voided purchase orders

maintain a history and can be seen in the search pane and some reports.[]url heading content images \nThe Delete button

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determine when the part should be ordered and how many of the part should be requested.[] https://

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advanced/s/article/ Purchase-Orderthe ability to create alternate currencies and set the conversion rate between the

home currency and the alternate currency. These currencies can then be assigned to vendors . When a vendor with an

alternate currency is used in the Purchase Order module , costs can be viewed and set in the alternate currency. Fields

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available in the Purchase Order module . https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-

OrderSearchThe Search pane on the left can be used to filter by Number , Vendor , or Status . Records can also be found

by typing in the table . Click the Advanced Search button to search the Custom Fields and the following search options.

Custom field columns can also be displayed in the purchase order line item[]url heading content images table by right-

clicking any column header. \n\nThe General tab displays important order information, including the vendor, order

number, order status, addresses, order items, and more. \nThe Details tab displays important order details, including a

link to the vendor in the Vendor module , the last user to modify the order, shipping terms, payment terms, carrier,

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memos, the date they were created, and the user who created them. Highlighting a memo will display the details of the

memo in the lower pane.\nThe Custom tab stores additional fields for the order that can be customized to fit the needs

of each company.\n\nSome aspects of the Purchase Orderurl heading content images module can be customized by opening the

module, clicking the Tools menu, and then selecting Module Options . https:// help.fishbowlinventory.com/

advanced/s/article/ Purchase-OrderInformation []

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advanced/s/article/ Purchase-OrderInformation []

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Response: Based on the provided context: The 'Close Short' button is used when a purchase order has been partially fulfilled.

This button replaces the Delete button in that specific scenario and is used to close the unfulfilled portion of the

order.

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Asking (Row 55): What is the purpose of the 'Auto PO' wizard?

response for row 55

Query: What is the purpose of the 'Auto PO' wizard?

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REFERENCE #0

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderFishbowl Advanced -

Manufacture Order[] https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderDec 17, 2024Knowledge[]

https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderArticle DetailsThe Manufacture Order module,

located in the Manufacturing group , organizes work orders and allows for items to be manufactured, disassembled, and

repaired. Manufacture orders can be created individually or generated from sales order demand and inventory levels. This

article outlines the process, functions, tabs, and module options of the Manufacture Order module .[] https://

help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderContents [] https:// help.fishbowlinventory.com/

advanced/s/article/ Manufacture-Order1. Add itemsFollow the steps below to add items to a manufacture order.[] https://

help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderReverseA Reverse work order uses an existing BOM and

swaps the finished goods and raw goods. If[]url heading content images the process is a little more complex, a new BOM

can also be created in the Bill of Materials module specifically for this purpose. Follow the steps below to add a

Reverse work order to a manufacture order. https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-

OrderDisassembleA Disassemble work order uses a finished work order and swaps the finished goods and raw goods. Follow

the steps below to add a Disassemble work order to a manufacture order.[] https:// help.fishbowlinventory.com/

advanced/s/article/ Manufacture-OrderRepairFollow the steps below to add a Repair work order to a manufacture order.[]

https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderCustomFollow the steps below to add a Custom

work order to a manufacture order.[] https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-Order2.

ConfigurationAfter adding items to a manufacture order, the parts to be used on a work order can be customized on the

Configuration tab. This is especially applicable for Repair and Custom work orders, but the parts can be[]url heading

content images customized for any type of work order.\nOnce the manufacture order has been issued, the Configuration tab

will become read-only, but changes can continue to be made on the WO Details tab in much the same way. See Configuration

and WO Details tabs for more information regarding these similar tabs. https:// help.fishbowlinventory.com/

advanced/s/article/ Manufacture-Order3. Issue a manufacture orderOnce all of the items have been added to a manufacture

order, click the Issue button on the module toolbar to issue the manufacture order. When the manufacture order is

issued, the work orders are created. Once a work order has been created, assigned users can be added, changes can be

made on the WO Details tab, and the work order can proceed through the fulfillment process. A work order can be

fulfilled in the Manufacture Order module or in the Work Order module[]url heading content images by clicking the WO

Number link. https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-Order4. Fulfill a work orderOnce the

manufacture order is issued, each work order can be fulfilled. A work order must be started, picked, and finished. Work

orders can proceed through these steps individually by using the appropriate buttons on the component toolbar to the

right. Clicking the Finish button in the component toolbar will perform the Start and Pick steps if they have not

already been completed. These steps can also be performed quickly for all work orders by using the Quick Fulfill wizard,

located on the module toolbar.[] https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderStart a work

orderStarting a work order flags the work order so that work may begin. The Started Date is stored so that the duration

of the work order can be estimated. Complete the following steps to start a work order.\nThe Start step can also be[]url

heading content images performed when finishing a work order. https:// help.fishbowlinventory.com/ advanced/s/article/

Manufacture-OrderPick a work orderPicking a work order will gather the raw goods needed to manufacture the finished

good. \nThe Pick step can also be performed when finishing a work order, eliminating the need to load the Picking

module.[] https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderFinish a work orderFinishing a work

order will consume the raw goods and place the finished goods into inventory. If the work order was created for a sales

order, the inventory needed for the sales order will become available to pick. Complete the following steps to finish a

work order.[] https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderModule buttonsNew creates a new

manufacture order .\nIssue changes the status of a manufacture order to Issued . \nUnissue changes the status of a

manufacture order to Entered . \nSave saves any changes made to the manufacture order.\nDelete deletes the[]url heading

content images manufacture order if it is in an Entered status. Issued orders can be unissued to return them to the

Entered status.\nClose Short will replace the Delete button when an order has a status of Partial . Work orders must

either be in an Entered or Fulfilled status to close short a manufacture order. To void a work order, click the Void

Work Order button located on the component toolbar.\nMO to PO generates a purchase order with the items that are short

or all of the items on the manufacture order. Options can be customized in the Manufacture Order module options .

\nQuick Fulfill quickly fulfills all work orders. This will proceed through the Finish Work Order wizard for each work

order on the manufacture order .\nAuto MO launches the Auto MO wizard to automaticallyurl heading content images create

manufacture orders . \nDuplicate creates a copy of any manufacture order. The order number will automatically be

assigned, and the new MO will have an Entered status.\nEmail opens a window to compose an email. If the module's default

report is specified, the PDF report will be attached. Email can be configured on the Email tab of the Settings module .

\nPrint sends the default module report to the printer.\nHow To opens this article in a web browser.\nRefresh reloads

whatever is currently open in the module. https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderWork

order buttonsThe work order component toolbar is located to the right of the item list and has several functions. Each

function will be performed on the highlighted work order.\nstarts the highlighted work order. \npicks the highlighted

work order.\nfinishes the highlighted work order.[]url heading content images \ndeletes the highlighted work

order.\nvoids the highlighted work order. https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderAuto

MO wizardThe Auto MO wizard is an easy way to generate manufacture orders for parts with low inventory levels. In order

to use Auto MO on a specific part, a Reorder Level/ Point should first be created for that part. The following

instructions outline the process of using the Auto MO wizard:[] https:// help.fishbowlinventory.com/ advanced/s/article/

Manufacture-OrderCreate MO from SOManufacture orders can be automatically created from sales order items that have an

auto-create BOM . The manufacture order is created once the sales order is issued. To see the manufacture order, double-

click the sales order item, select the Configuration tab, and then click the blue MO link.\nIf the item has a Build To

Order BOM , the option is given to configure a new[]url heading content images work order. The scheduled date for the

sales order item will be set to the work order scheduled date if it is later than the default date. \nThe sales order

number is also displayed on the General tab of the Manufacture Order module and can be clicked to jump directly to the

sales order. https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderUnlink manufacture order from

sales orderTo unlink a manufacture order from the sales order it was created from, click the red trashcan icon on the

right side of the Sales Order section of the manufacture order. A popup message will appear, asking if you really want

to do that. Click Yes , and then the manufacture order will no longer have any connection to the sales order. Once done,

this action cannot be undone. \nIf you issue a manufacture order, you will not be able to unissue, cancel, or void the

sales order it is linked to unless you first unissue the manufacture[]url heading content images order or unlink it.

https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderAssign users to a work orderUsers can be

assigned to a work order as soon as a manufacture order is issued, and the work order created. To add users, highlight

the work order, and add users on the Assigned Users tab at the bottom of the order.\n\nUsers can also be assigned in the

Finish work order wizard .[] https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderCalculate

costOnce a manufacture order has been saved, the button can be clicked to load the Manufacture Order Projected Cost

report. The costs of the raw goods are used to determine the cost of the finished good. For unfulfilled work orders,

finished good costs are estimated using the current costs of the raw goods when the report was generated. For fulfilled

work orders, the actual costs of the raw goods from the time the order was fulfilled will be displayed. NOTE:[]url

heading content images When an item is sold, the cost that is exported to the accounting system will not come from this

report, but will be determined by the current cost of the selected costing method . \n https://

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by Number , BOM Number , SO Number , or Status . Records can also be found by typing in the table . Click the Advanced

Search button to search the Custom Fields and the following search options. Manufacture order numbers are listed in this

pane first by length (longest first) and then alphabetically (A-Z). For example, 900 would come after 0901 because it

has one less digit, but it would come before 901 because it has the same number of digits. And Deck would come before

Cup because it has one more character, but it would come after Buck because it has the same[]url heading content images

number of characters. You can adjust the order of these numbers by clicking the Number column header to make it either

ascending or descending. \n\nThe General tab provides the core information for the manufacture order. The following

information is available on the General tab:\nThe Details tab displays details and notes for the manufacture order.\nThe

Configuration tab and the WO Details tab are very similar. Both tabs allow items to be added, removed, or rearranged.

However, there is one important difference between the two tabs:\nA work order is created when the manufacture order is

issued, meaning the WO Details tab will not be visible until the manufacture order is issued. Before the work order is

created, edits can be made on the Configurationurl heading content images tab. As soon as the manufacture order is

issued, the Configuration tab will become read-only, and edits can be made on the WO Details tab.\nThe Memo tab allows

memos to be viewed and added to a manufacture order. The top pane displays a list of memos. Highlighting a memo will

display the entire memo in the lower pane. The buttons to the right of the memo list can be used to Add , Edit , Delete

, or Print a memo. \nThe Custom tab is used to enter custom fields for a manufacture order. The fields displayed on the

Custom tab can be customized in the Custom Field module . Custom fields can be searched by clicking the Advanced Search

button in the manufacture order search pane. Some reports also have Custom Field filters.\n\nSome aspects of the

Manufacture Order module can be customized by opening the module, clickingurl heading content images the Tools menu, and

then selecting Module Options . https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderInformation []

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderFishbowl Advanced -

Manufacture Order[] https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderDec 17, 2024Knowledge[]

https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderArticle DetailsThe Manufacture Order module,

located in the Manufacturing group , organizes work orders and allows for items to be manufactured, disassembled, and

repaired. Manufacture orders can be created individually or generated from sales order demand and inventory levels. This

article outlines the process, functions, tabs, and module options of the Manufacture Order module .[] https://

help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderContents [] https:// help.fishbowlinventory.com/

advanced/s/article/ Manufacture-Order1. Add itemsFollow the steps below to add items to a manufacture order.[] https://

help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderReverseA Reverse work order uses an existing BOM and

swaps the finished goods and raw goods. If[]url heading content images the process is a little more complex, a new BOM

can also be created in the Bill of Materials module specifically for this purpose. Follow the steps below to add a

Reverse work order to a manufacture order. https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-

OrderDisassembleA Disassemble work order uses a finished work order and swaps the finished goods and raw goods. Follow

the steps below to add a Disassemble work order to a manufacture order.[] https:// help.fishbowlinventory.com/

advanced/s/article/ Manufacture-OrderRepairFollow the steps below to add a Repair work order to a manufacture order.[]

https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderCustomFollow the steps below to add a Custom

work order to a manufacture order.[] https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-Order2.

ConfigurationAfter adding items to a manufacture order, the parts to be used on a work order can be customized on the

Configuration tab. This is especially applicable for Repair and Custom work orders, but the parts can be[]url heading

content images customized for any type of work order.\nOnce the manufacture order has been issued, the Configuration tab

will become read-only, but changes can continue to be made on the WO Details tab in much the same way. See Configuration

and WO Details tabs for more information regarding these similar tabs. https:// help.fishbowlinventory.com/

advanced/s/article/ Manufacture-Order3. Issue a manufacture orderOnce all of the items have been added to a manufacture

order, click the Issue button on the module toolbar to issue the manufacture order. When the manufacture order is

issued, the work orders are created. Once a work order has been created, assigned users can be added, changes can be

made on the WO Details tab, and the work order can proceed through the fulfillment process. A work order can be

fulfilled in the Manufacture Order module or in the Work Order module[]url heading content images by clicking the WO

Number link. https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-Order4. Fulfill a work orderOnce the

manufacture order is issued, each work order can be fulfilled. A work order must be started, picked, and finished. Work

orders can proceed through these steps individually by using the appropriate buttons on the component toolbar to the

right. Clicking the Finish button in the component toolbar will perform the Start and Pick steps if they have not

already been completed. These steps can also be performed quickly for all work orders by using the Quick Fulfill wizard,

located on the module toolbar.[] https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderStart a work

orderStarting a work order flags the work order so that work may begin. The Started Date is stored so that the duration

of the work order can be estimated. Complete the following steps to start a work order.\nThe Start step can also be[]url

heading content images performed when finishing a work order. https:// help.fishbowlinventory.com/ advanced/s/article/

Manufacture-OrderPick a work orderPicking a work order will gather the raw goods needed to manufacture the finished

good. \nThe Pick step can also be performed when finishing a work order, eliminating the need to load the Picking

module.[] https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderFinish a work orderFinishing a work

order will consume the raw goods and place the finished goods into inventory. If the work order was created for a sales

order, the inventory needed for the sales order will become available to pick. Complete the following steps to finish a

work order.[] https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderModule buttonsNew creates a new

manufacture order .\nIssue changes the status of a manufacture order to Issued . \nUnissue changes the status of a

manufacture order to Entered . \nSave saves any changes made to the manufacture order.\nDelete deletes the[]url heading

content images manufacture order if it is in an Entered status. Issued orders can be unissued to return them to the

Entered status.\nClose Short will replace the Delete button when an order has a status of Partial . Work orders must

either be in an Entered or Fulfilled status to close short a manufacture order. To void a work order, click the Void

Work Order button located on the component toolbar.\nMO to PO generates a purchase order with the items that are short

or all of the items on the manufacture order. Options can be customized in the Manufacture Order module options .

\nQuick Fulfill quickly fulfills all work orders. This will proceed through the Finish Work Order wizard for each work

order on the manufacture order .\nAuto MO launches the Auto MO wizard to automaticallyurl heading content images create

manufacture orders . \nDuplicate creates a copy of any manufacture order. The order number will automatically be

assigned, and the new MO will have an Entered status.\nEmail opens a window to compose an email. If the module's default

report is specified, the PDF report will be attached. Email can be configured on the Email tab of the Settings module .

\nPrint sends the default module report to the printer.\nHow To opens this article in a web browser.\nRefresh reloads

whatever is currently open in the module. https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderWork

order buttonsThe work order component toolbar is located to the right of the item list and has several functions. Each

function will be performed on the highlighted work order.\nstarts the highlighted work order. \npicks the highlighted

work order.\nfinishes the highlighted work order.[]url heading content images \ndeletes the highlighted work

order.\nvoids the highlighted work order. https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderAuto

MO wizardThe Auto MO wizard is an easy way to generate manufacture orders for parts with low inventory levels. In order

to use Auto MO on a specific part, a Reorder Level/ Point should first be created for that part. The following

instructions outline the process of using the Auto MO wizard:[] https:// help.fishbowlinventory.com/ advanced/s/article/

Manufacture-OrderCreate MO from SOManufacture orders can be automatically created from sales order items that have an

auto-create BOM . The manufacture order is created once the sales order is issued. To see the manufacture order, double-

click the sales order item, select the Configuration tab, and then click the blue MO link.\nIf the item has a Build To

Order BOM , the option is given to configure a new[]url heading content images work order. The scheduled date for the

sales order item will be set to the work order scheduled date if it is later than the default date. \nThe sales order

number is also displayed on the General tab of the Manufacture Order module and can be clicked to jump directly to the

sales order. https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderUnlink manufacture order from

sales orderTo unlink a manufacture order from the sales order it was created from, click the red trashcan icon on the

right side of the Sales Order section of the manufacture order. A popup message will appear, asking if you really want

to do that. Click Yes , and then the manufacture order will no longer have any connection to the sales order. Once done,

this action cannot be undone. \nIf you issue a manufacture order, you will not be able to unissue, cancel, or void the

sales order it is linked to unless you first unissue the manufacture[]url heading content images order or unlink it.

https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderAssign users to a work orderUsers can be

assigned to a work order as soon as a manufacture order is issued, and the work order created. To add users, highlight

the work order, and add users on the Assigned Users tab at the bottom of the order.\n\nUsers can also be assigned in the

Finish work order wizard .[] https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderCalculate

costOnce a manufacture order has been saved, the button can be clicked to load the Manufacture Order Projected Cost

report. The costs of the raw goods are used to determine the cost of the finished good. For unfulfilled work orders,

finished good costs are estimated using the current costs of the raw goods when the report was generated. For fulfilled

work orders, the actual costs of the raw goods from the time the order was fulfilled will be displayed. NOTE:[]url

heading content images When an item is sold, the cost that is exported to the accounting system will not come from this

report, but will be determined by the current cost of the selected costing method . \n https://

help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderSearchThe Search pane on the left can be used to filter

by Number , BOM Number , SO Number , or Status . Records can also be found by typing in the table . Click the Advanced

Search button to search the Custom Fields and the following search options. Manufacture order numbers are listed in this

pane first by length (longest first) and then alphabetically (A-Z). For example, 900 would come after 0901 because it

has one less digit, but it would come before 901 because it has the same number of digits. And Deck would come before

Cup because it has one more character, but it would come after Buck because it has the same[]url heading content images

number of characters. You can adjust the order of these numbers by clicking the Number column header to make it either

ascending or descending. \n\nThe General tab provides the core information for the manufacture order. The following

information is available on the General tab:\nThe Details tab displays details and notes for the manufacture order.\nThe

Configuration tab and the WO Details tab are very similar. Both tabs allow items to be added, removed, or rearranged.

However, there is one important difference between the two tabs:\nA work order is created when the manufacture order is

issued, meaning the WO Details tab will not be visible until the manufacture order is issued. Before the work order is

created, edits can be made on the Configurationurl heading content images tab. As soon as the manufacture order is

issued, the Configuration tab will become read-only, and edits can be made on the WO Details tab.\nThe Memo tab allows

memos to be viewed and added to a manufacture order. The top pane displays a list of memos. Highlighting a memo will

display the entire memo in the lower pane. The buttons to the right of the memo list can be used to Add , Edit , Delete

, or Print a memo. \nThe Custom tab is used to enter custom fields for a manufacture order. The fields displayed on the

Custom tab can be customized in the Custom Field module . Custom fields can be searched by clicking the Advanced Search

button in the manufacture order search pane. Some reports also have Custom Field filters.\n\nSome aspects of the

Manufacture Order module can be customized by opening the module, clickingurl heading content images the Tools menu, and

then selecting Module Options . https:// help.fishbowlinventory.com/ advanced/s/article/ Manufacture-OrderInformation []

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Response: I cannot determine the answer to that.

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Asking (Row 56): How does Fishbowl handle currency conversion on purchase orders for vendors using alternate currencies?

response for row 56

Query: How does Fishbowl handle currency conversion on purchase orders for vendors using alternate currencies?

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/CurrencyFishbowl Advanced -

Currency[] https:// help.fishbowlinventory.com/ advanced/s/article/CurrencyDec 17, 2024Knowledge[] https://

help.fishbowlinventory.com/ advanced/s/article/CurrencyArticle DetailsThe Currency module, located in the Accounting

group , provides the ability to create alternate currencies and set the conversion rate between the home currency and

the alternate currency. Currency rates can be imported and updated from QuickBooks. Currency rates can also be manually

imported or imported on a schedule . Both the Sales Order module and the Purchase Order module support currency

conversion. If currency conversion is enabled in Fishbowl and multi-currency is enabled in QuickBooks, orders will

export to QuickBooks with the alternate currency set. QuickBooks automatically creates separate Accounts Receivable

and[]url heading content images Accounts Payable accounts for each currency that is in use. https://

help.fishbowlinventory.com/ advanced/s/article/CurrencyContents [] https:// help.fishbowlinventory.com/

advanced/s/article/CurrencyModule buttonsNew creates a new currency .\nSave saves any changes made to the currency that

is currently open. \nDelete deletes the currency that is currently open.\nUpdate will import updated currency rates from

the accounting integration . \nEmail opens a window to compose an email. If the module's default report is specified,

the PDF report will be attached. Email can be configured on the Email tab of the Settings module . \nPrint sends the

default module report to the printer.\nHow To opens this article in a web browser.\nRefresh reloads whatever is

currently open in the module.[] https:// help.fishbowlinventory.com/ advanced/s/article/CurrencyCreate a currencyFollow

the steps below to create a new currency.[] https:// help.fishbowlinventory.com/ advanced/s/article/CurrencyEdit,

delete, or inactivate a currency[] []url heading content images https:// help.fishbowlinventory.com/

advanced/s/article/CurrencyUpdate currency ratesCurrency rates can be updated using any of the following methods.

https:// help.fishbowlinventory.com/ advanced/s/article/CurrencyCurrency conversion for purchase ordersTo see the

currency conversion features available in the Purchase Order module, see Purchase Order Currency Conversion .[] https://

help.fishbowlinventory.com/ advanced/s/article/CurrencyCurrency conversion for sales ordersTo see the currency

conversion features available in the Sales Order module, see Sales Order Currency Conversion . \nSome aspects of the

Currency module can be customized by opening the module, clicking the Tools menu, and then selecting Module Options .[]

https:// help.fishbowlinventory.com/ advanced/s/article/CurrencyInformation []

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/CurrencyFishbowl Advanced -

Currency[] https:// help.fishbowlinventory.com/ advanced/s/article/CurrencyDec 17, 2024Knowledge[] https://

help.fishbowlinventory.com/ advanced/s/article/CurrencyArticle DetailsThe Currency module, located in the Accounting

group , provides the ability to create alternate currencies and set the conversion rate between the home currency and

the alternate currency. Currency rates can be imported and updated from QuickBooks. Currency rates can also be manually

imported or imported on a schedule . Both the Sales Order module and the Purchase Order module support currency

conversion. If currency conversion is enabled in Fishbowl and multi-currency is enabled in QuickBooks, orders will

export to QuickBooks with the alternate currency set. QuickBooks automatically creates separate Accounts Receivable

and[]url heading content images Accounts Payable accounts for each currency that is in use. https://

help.fishbowlinventory.com/ advanced/s/article/CurrencyContents [] https:// help.fishbowlinventory.com/

advanced/s/article/CurrencyModule buttonsNew creates a new currency .\nSave saves any changes made to the currency that

is currently open. \nDelete deletes the currency that is currently open.\nUpdate will import updated currency rates from

the accounting integration . \nEmail opens a window to compose an email. If the module's default report is specified,

the PDF report will be attached. Email can be configured on the Email tab of the Settings module . \nPrint sends the

default module report to the printer.\nHow To opens this article in a web browser.\nRefresh reloads whatever is

currently open in the module.[] https:// help.fishbowlinventory.com/ advanced/s/article/CurrencyCreate a currencyFollow

the steps below to create a new currency.[] https:// help.fishbowlinventory.com/ advanced/s/article/CurrencyEdit,

delete, or inactivate a currency[] []url heading content images https:// help.fishbowlinventory.com/

advanced/s/article/CurrencyUpdate currency ratesCurrency rates can be updated using any of the following methods.

https:// help.fishbowlinventory.com/ advanced/s/article/CurrencyCurrency conversion for purchase ordersTo see the

currency conversion features available in the Purchase Order module, see Purchase Order Currency Conversion .[] https://

help.fishbowlinventory.com/ advanced/s/article/CurrencyCurrency conversion for sales ordersTo see the currency

conversion features available in the Sales Order module, see Sales Order Currency Conversion . \nSome aspects of the

Currency module can be customized by opening the module, clicking the Tools menu, and then selecting Module Options .[]

https:// help.fishbowlinventory.com/ advanced/s/article/CurrencyInformation []

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Response: Based on the provided context: The Purchase Order module in Fishbowl supports currency conversion. Alternate currencies

and their conversion rates relative to the home currency are created and set within the Currency module. However, the

context does not detail the specific features or \*how\* the currency conversion functions within the Purchase Order

module itself. It directs the user to a separate resource named "Purchase Order Currency Conversion" for those details.

Therefore, I cannot determine the specific way Fishbowl handles currency conversion on purchase orders from the context

provided.

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Asking (Row 57): Can you modify details on a purchase order after it has been fulfilled? If so, what kind of details?

response for row 57

Query: Can you modify details on a purchase order after it has been fulfilled? If so, what kind of details?

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REFERENCE #0

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderFishbowl Advanced -

Purchase Order[] https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderDec 17, 2024Knowledge[] https://

help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderArticle DetailsThe Purchase Order module, located in the

Purchasing group , facilitates the process of creating and issuing purchase orders. This module is often referred to as

the PO module and allows for parts, miscellaneous items, outsourced items, and credit returns items to be added to a

purchase order.[] https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderContents [] https://

help.fishbowlinventory.com/ advanced/s/article/ Purchase-Order1. Create a purchase orderOpen the Purchase Order module

and click the New button on the module toolbar to create a new purchase order. Select the vendor for the purchase order

by typing in the Vendor field or by clicking the Search button for an advanced search. If the vendor does not currently

exist[]url heading content images in the system, select Add New from the bottom of the vendor dropdown list to create a

new vendor.\n\nThe date will default to the date the PO is created. However, the date can be changed by typing in the

field or by clicking the Calendar button. Fishbowl will automatically assign the next available order number, but this

can also be manually changed. Click the Save button in the module toolbar to save any changes. \nIf desired, a Customer

SO number or a Vendor SO number can be stored on the purchase order. This provides the ability to keep track of the

order number the vendor is using to process the order, and the sales order number of the customer who ordered the item.

\nIf applicable, the Location Group and Class for the order can be modified at the bottom of the order by theurl heading

content images total field. \nPurchase orders can also be created using the import . https://

help.fishbowlinventory.com/ advanced/s/article/ Purchase-Order2. Add itemsFollow the steps below to add items to a

purchase order: \nWhen a part is added to a purchase order, it will pull the vendor's last cost for the part. If the

item has not been purchased from the selected vendor and a vendor association has not been added, the cost will

initially be $0. The cost can be manually changed by typing in the cost field. When the order is issued or fulfilled,

the new cost will be saved for future use.\n[] https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-

OrderItem typesTo change the item type, click the Type field of any line item and select from the following types. \n[]

https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderEdit an itemClick OK to close the edit window,

and then click Save in the module toolbar to save any changes.[] https:// help.fishbowlinventory.com/3. Issue a purchase

orderAfter all items have been added to the purchase[]url heading content images advanced/s/article/ Purchase-

Orderorder, the bid request should be sent to the vendor. Once the vendor responds, it may be necessary to make price

adjustments, quantity adjustments, etc. Make any necessary edits and then issue the order.\nTo issue a purchase order,

click the Issue button. Issuing a purchase order automatically saves the order and allows the order to move to the next

step in the process: https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderOrder statusThe Status field

shows the status of the purchase order:\nThe status may also be one of the following for Credit Return and Outsource

types:[] https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-Order4. Fulfill a purchase orderThe steps

necessary to fulfill a purchase order vary based on the item type.[] https:// help.fishbowlinventory.com/

advanced/s/article/ Purchase-OrderModule buttonsNew creates a new purchase order . \nIssue toggles the Issued status of

the purchase order .\nSave saves any changes made to the purchase order. \nDelete deletes[]url heading content images

the purchase order if it is in a Bid Request status. Issued orders can be unissued to return them to the Bid Request

status.\nVoid replaces the Delete button when an order has an Issued status. The order will be voided but not

deleted.\nClose Short replaces the Delete button when an order has been partially fulfilled. This button will close

short the unfulfilled portion of the order.\nTo Receive opens the current purchase order in the Receiving module .\nAuto

PO creates purchase orders for items with low quantities . \nDuplicate creates a copy of the purchase order. The order

number will automatically be assigned, and the new SO will have a Bid Request status.\nEmail opens a window to compose

an email. If the module's default report is specified, the PDF report will be attached.url heading content images Email

can be configured on the Email tab of the Settings module . \nPrint sends the default module report to the printer.\nHow

To opens this article in a web browser.\nRefresh reloads whatever is currently open in the module. https://

help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderCredit returnAfter an item has been added , the type can

be changed by clicking the Type field in the order item table, and choosing Credit Return from the dropdown.\n\nThe type

can also be changed in the edit window by double-clicking a line item and then selecting Credit Return in the Type

field. \n\nOnce all items have been added, click the Issue button in the module toolbar. Because credit return items are

being returned to the vendor, they must be picked and shipped to fulfill the order. Open the order in the Picking module

to complete the pick, and then ship the order in[]url heading content images the Shipping module .\nFollow the steps

below to create a miscellaneous credit return: https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-

OrderOutsourceOutsourcing is the process of sending a part to a vendor so that the vendor can work on the part. Then the

item is received back into inventory, either with the same part number or with a different part number. For example, a

bike company may offer custom frame painting to customers for an additional fee. Since the company does not paint bikes

at their location, they may outsource the frame to a painting company that completes the painting and ships the frame

back to the bike company to be put together and sold to the customer. Follow the instructions below to outsource an

item.[] https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderEdit a fulfilled purchase orderUsers with

the appropriate Access Rights can modify the information included on the[]url heading content images Details , Memo ,

and Custom tabs of a purchase order even after the order has been fulfilled. This includes the ability to change the

Fulfillment Date, Shipping Terms, Payment Terms, FOB, Carrier, and Custom Fields, and to add Notes or Memos to the order

.\nThis does not include the ability to modify costs, vendors, or items on the order. If the order has already been

exported to QuickBooks, the changes must be manually entered in QuickBooks. \nTo make modifications, open a purchase

order, make the desired changes, and then click the Save button in the module toolbar. https://

help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderVoid, delete, or close short a POThe Void button replaces

the Delete button when an order has an Issued status. The order will be voided but not deleted. Voided purchase orders

maintain a history and can be seen in the search pane and some reports.[]url heading content images \nThe Delete button

deletes a purchase order if it is in a Bid Request status. Issued orders can be unissued to return them to the Bid

Request status. Deleted purchase orders do not maintain a history and cannot be seen in the search pane or reports.\nThe

Close Short button replaces the Delete button when an order has been partially fulfilled. This button will close short

the unfulfilled portion of the order. Voided purchase orders maintain a history and can be seen in the search pane and

some reports. https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderAuto POThe Auto PO wizard provides

an easy way to generate purchase orders for items with low quantities. Reorder levels can be created for each part to

determine when the part should be ordered and how many of the part should be requested.[] https://

help.fishbowlinventory.com/Currency conversionThe Currency module provides []url heading content images

advanced/s/article/ Purchase-Orderthe ability to create alternate currencies and set the conversion rate between the

home currency and the alternate currency. These currencies can then be assigned to vendors . When a vendor with an

alternate currency is used in the Purchase Order module , costs can be viewed and set in the alternate currency. Fields

used for multicurrency will not be visible until currency conversion is enabled . Below are the currency features

available in the Purchase Order module . https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-

OrderSearchThe Search pane on the left can be used to filter by Number , Vendor , or Status . Records can also be found

by typing in the table . Click the Advanced Search button to search the Custom Fields and the following search options.

Custom field columns can also be displayed in the purchase order line item[]url heading content images table by right-

clicking any column header. \n\nThe General tab displays important order information, including the vendor, order

number, order status, addresses, order items, and more. \nThe Details tab displays important order details, including a

link to the vendor in the Vendor module , the last user to modify the order, shipping terms, payment terms, carrier,

order dates, and more. \nThe Memo tab can be used to add information to each purchase order. The upper pane displays the

memos, the date they were created, and the user who created them. Highlighting a memo will display the details of the

memo in the lower pane.\nThe Custom tab stores additional fields for the order that can be customized to fit the needs

of each company.\n\nSome aspects of the Purchase Orderurl heading content images module can be customized by opening the

module, clicking the Tools menu, and then selecting Module Options . https:// help.fishbowlinventory.com/

advanced/s/article/ Purchase-OrderInformation []

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Content:

url heading content images https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderFishbowl Advanced -

Purchase Order[] https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderDec 17, 2024Knowledge[] https://

help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderArticle DetailsThe Purchase Order module, located in the

Purchasing group , facilitates the process of creating and issuing purchase orders. This module is often referred to as

the PO module and allows for parts, miscellaneous items, outsourced items, and credit returns items to be added to a

purchase order.[] https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderContents [] https://

help.fishbowlinventory.com/ advanced/s/article/ Purchase-Order1. Create a purchase orderOpen the Purchase Order module

and click the New button on the module toolbar to create a new purchase order. Select the vendor for the purchase order

by typing in the Vendor field or by clicking the Search button for an advanced search. If the vendor does not currently

exist[]url heading content images in the system, select Add New from the bottom of the vendor dropdown list to create a

new vendor.\n\nThe date will default to the date the PO is created. However, the date can be changed by typing in the

field or by clicking the Calendar button. Fishbowl will automatically assign the next available order number, but this

can also be manually changed. Click the Save button in the module toolbar to save any changes. \nIf desired, a Customer

SO number or a Vendor SO number can be stored on the purchase order. This provides the ability to keep track of the

order number the vendor is using to process the order, and the sales order number of the customer who ordered the item.

\nIf applicable, the Location Group and Class for the order can be modified at the bottom of the order by theurl heading

content images total field. \nPurchase orders can also be created using the import . https://

help.fishbowlinventory.com/ advanced/s/article/ Purchase-Order2. Add itemsFollow the steps below to add items to a

purchase order: \nWhen a part is added to a purchase order, it will pull the vendor's last cost for the part. If the

item has not been purchased from the selected vendor and a vendor association has not been added, the cost will

initially be $0. The cost can be manually changed by typing in the cost field. When the order is issued or fulfilled,

the new cost will be saved for future use.\n[] https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-

OrderItem typesTo change the item type, click the Type field of any line item and select from the following types. \n[]

https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderEdit an itemClick OK to close the edit window,

and then click Save in the module toolbar to save any changes.[] https:// help.fishbowlinventory.com/3. Issue a purchase

orderAfter all items have been added to the purchase[]url heading content images advanced/s/article/ Purchase-

Orderorder, the bid request should be sent to the vendor. Once the vendor responds, it may be necessary to make price

adjustments, quantity adjustments, etc. Make any necessary edits and then issue the order.\nTo issue a purchase order,

click the Issue button. Issuing a purchase order automatically saves the order and allows the order to move to the next

step in the process: https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderOrder statusThe Status field

shows the status of the purchase order:\nThe status may also be one of the following for Credit Return and Outsource

types:[] https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-Order4. Fulfill a purchase orderThe steps

necessary to fulfill a purchase order vary based on the item type.[] https:// help.fishbowlinventory.com/

advanced/s/article/ Purchase-OrderModule buttonsNew creates a new purchase order . \nIssue toggles the Issued status of

the purchase order .\nSave saves any changes made to the purchase order. \nDelete deletes[]url heading content images

the purchase order if it is in a Bid Request status. Issued orders can be unissued to return them to the Bid Request

status.\nVoid replaces the Delete button when an order has an Issued status. The order will be voided but not

deleted.\nClose Short replaces the Delete button when an order has been partially fulfilled. This button will close

short the unfulfilled portion of the order.\nTo Receive opens the current purchase order in the Receiving module .\nAuto

PO creates purchase orders for items with low quantities . \nDuplicate creates a copy of the purchase order. The order

number will automatically be assigned, and the new SO will have a Bid Request status.\nEmail opens a window to compose

an email. If the module's default report is specified, the PDF report will be attached.url heading content images Email

can be configured on the Email tab of the Settings module . \nPrint sends the default module report to the printer.\nHow

To opens this article in a web browser.\nRefresh reloads whatever is currently open in the module. https://

help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderCredit returnAfter an item has been added , the type can

be changed by clicking the Type field in the order item table, and choosing Credit Return from the dropdown.\n\nThe type

can also be changed in the edit window by double-clicking a line item and then selecting Credit Return in the Type

field. \n\nOnce all items have been added, click the Issue button in the module toolbar. Because credit return items are

being returned to the vendor, they must be picked and shipped to fulfill the order. Open the order in the Picking module

to complete the pick, and then ship the order in[]url heading content images the Shipping module .\nFollow the steps

below to create a miscellaneous credit return: https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-

OrderOutsourceOutsourcing is the process of sending a part to a vendor so that the vendor can work on the part. Then the

item is received back into inventory, either with the same part number or with a different part number. For example, a

bike company may offer custom frame painting to customers for an additional fee. Since the company does not paint bikes

at their location, they may outsource the frame to a painting company that completes the painting and ships the frame

back to the bike company to be put together and sold to the customer. Follow the instructions below to outsource an

item.[] https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderEdit a fulfilled purchase orderUsers with

the appropriate Access Rights can modify the information included on the[]url heading content images Details , Memo ,

and Custom tabs of a purchase order even after the order has been fulfilled. This includes the ability to change the

Fulfillment Date, Shipping Terms, Payment Terms, FOB, Carrier, and Custom Fields, and to add Notes or Memos to the order

.\nThis does not include the ability to modify costs, vendors, or items on the order. If the order has already been

exported to QuickBooks, the changes must be manually entered in QuickBooks. \nTo make modifications, open a purchase

order, make the desired changes, and then click the Save button in the module toolbar. https://

help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderVoid, delete, or close short a POThe Void button replaces

the Delete button when an order has an Issued status. The order will be voided but not deleted. Voided purchase orders

maintain a history and can be seen in the search pane and some reports.[]url heading content images \nThe Delete button

deletes a purchase order if it is in a Bid Request status. Issued orders can be unissued to return them to the Bid

Request status. Deleted purchase orders do not maintain a history and cannot be seen in the search pane or reports.\nThe

Close Short button replaces the Delete button when an order has been partially fulfilled. This button will close short

the unfulfilled portion of the order. Voided purchase orders maintain a history and can be seen in the search pane and

some reports. https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-OrderAuto POThe Auto PO wizard provides

an easy way to generate purchase orders for items with low quantities. Reorder levels can be created for each part to

determine when the part should be ordered and how many of the part should be requested.[] https://

help.fishbowlinventory.com/Currency conversionThe Currency module provides []url heading content images

advanced/s/article/ Purchase-Orderthe ability to create alternate currencies and set the conversion rate between the

home currency and the alternate currency. These currencies can then be assigned to vendors . When a vendor with an

alternate currency is used in the Purchase Order module , costs can be viewed and set in the alternate currency. Fields

used for multicurrency will not be visible until currency conversion is enabled . Below are the currency features

available in the Purchase Order module . https:// help.fishbowlinventory.com/ advanced/s/article/ Purchase-

OrderSearchThe Search pane on the left can be used to filter by Number , Vendor , or Status . Records can also be found

by typing in the table . Click the Advanced Search button to search the Custom Fields and the following search options.

Custom field columns can also be displayed in the purchase order line item[]url heading content images table by right-

clicking any column header. \n\nThe General tab displays important order information, including the vendor, order

number, order status, addresses, order items, and more. \nThe Details tab displays important order details, including a

link to the vendor in the Vendor module , the last user to modify the order, shipping terms, payment terms, carrier,

order dates, and more. \nThe Memo tab can be used to add information to each purchase order. The upper pane displays the

memos, the date they were created, and the user who created them. Highlighting a memo will display the details of the

memo in the lower pane.\nThe Custom tab stores additional fields for the order that can be customized to fit the needs

of each company.\n\nSome aspects of the Purchase Orderurl heading content images module can be customized by opening the

module, clicking the Tools menu, and then selecting Module Options . https:// help.fishbowlinventory.com/

advanced/s/article/ Purchase-OrderInformation []

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Response: Yes, users with the appropriate Access Rights can modify certain details on a purchase order after it has been

fulfilled. The kinds of details that can be modified include information on the \*\*Details\*\*, \*\*Memo\*\*, and \*\*Custom\*\*

tabs. Specifically, this includes: \* Fulfillment Date \* Shipping Terms \* Payment Terms \* FOB (Free On Board) \*

Carrier \* Custom Fields \* Adding Notes or Memos to the order However, it is explicitly stated that this \*\*does

not\*\* include the ability to modify costs, vendors, or items on the order after it has been fulfilled.

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Asking (Row 58): What is the main goal of the Purchasing Dashboard module?

response for row 58

Query: What is the main goal of the Purchasing Dashboard module?

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Content:

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Advanced - Purchasing Dashboard[] https:// help.fishbowlinventory.com/ advanced/s/article/ Purchasing-DashboardDec 17,

2024Knowledge[] https:// help.fishbowlinventory.com/ advanced/s/article/ Purchasing-DashboardArticle DetailsThe

Purchasing Dashboard module, located in the Purchasing group , provides businesses with crucial insights into their

procurement processes. By streamlining purchasing data into actionable insights, companies can improve supplier

negotiations, optimize inventory levels, and manage purchasing costs effectively.\n[] https://

help.fishbowlinventory.com/ advanced/s/article/ Purchasing-DashboardKey Features [] https:// help.fishbowlinventory.com/

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negotiations, optimize inventory levels, and manage purchasing costs effectively.\n[] https://

help.fishbowlinventory.com/ advanced/s/article/ Purchasing-DashboardKey Features [] https:// help.fishbowlinventory.com/

advanced/s/article/ Purchasing-DashboardInformation []

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Response: The main goal of the Purchasing Dashboard module is to provide businesses with crucial insights into their procurement

processes by streamlining purchasing data into actionable insights.

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Asking (Row 59): How can the Purchasing Dashboard help a company manage procurement?

response for row 59

Query: How can the Purchasing Dashboard help a company manage procurement?

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2024Knowledge[] https:// help.fishbowlinventory.com/ advanced/s/article/ Purchasing-DashboardArticle DetailsThe

Purchasing Dashboard module, located in the Purchasing group , provides businesses with crucial insights into their

procurement processes. By streamlining purchasing data into actionable insights, companies can improve supplier

negotiations, optimize inventory levels, and manage purchasing costs effectively.\n[] https://

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2024Knowledge[] https:// help.fishbowlinventory.com/ advanced/s/article/ Purchasing-DashboardArticle DetailsThe

Purchasing Dashboard module, located in the Purchasing group , provides businesses with crucial insights into their

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negotiations, optimize inventory levels, and manage purchasing costs effectively.\n[] https://

help.fishbowlinventory.com/ advanced/s/article/ Purchasing-DashboardKey Features [] https:// help.fishbowlinventory.com/

advanced/s/article/ Purchasing-DashboardInformation []

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Response: The Purchasing Dashboard provides businesses with crucial insights into their procurement processes by streamlining

purchasing data into actionable insights. This allows companies to improve supplier negotiations, optimize inventory

levels, and manage purchasing costs effectively.

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