Configure Automated Temporary-Sale Conversion

How to Configure Automated Temporary-Sale Conversion in Muhasib ERP

Overview

This guide will help you configure an approved rule for automatically converting allowed temporary sales while excluding unsafe records.

Eligible temporary sales may be converted by background logic; exact timing and effects require verification.

Who can do this

You need access to Relevant global/instance settings and temporary-sale/POS conversion permissions.

Before you start

Confirm product support, schedule, eligibility statuses, payment/credit treatment, stock rules, customer handling, tax/integration behavior, numbering, cutoff, retry, and rollback plan.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Administration/Settings → temporary-sale automation settings, when exposed.

Configure Automated Temporary-Sale Conversion

Step 1: Keep automation disabled while defining rules

Step 2: Record current settings and pending temporary-sale population

Step 3: Configure schedule and explicit eligibility criteria

Step 4: Exclude incomplete, disputed, unmapped, or already converted records

Step 5: Enable only in a cloned environment first

Step 6: Process one known eligible record

Process one known allowed record.

Step 7: Approve production activation only after reconciliation

Check your work

One source temporary sale maps to one final invoice with correct status, stock, customer, tax, payment, and ledgers.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- If no active UI/scheduler is found, classify the feature as hidden/deferred.
- Do not enable broad criteria against unreviewed historical records.

Related guides

- Verify Automated Temporary-Sale Conversion
- Convert a Temporary Sale to an Invoice
- Understand Back Office Background Operations

What to do next

> **Verify Automated Temporary-Sale Conversion**.

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