Create a Temporary Sale

How to Create a Temporary Sale in Muhasib ERP

Overview

This guide will help you save a sale as a temporary transaction for later completion.

The transaction remains available for later conversion. Treat its financial and inventory impact as unconfirmed until system testing establishes it.

Who can do this

You need access to Temporary Sale plus needed customer, item, location, batch, and serial.

Before you start

Confirm the customer, items, quantities, prices, taxes, discounts, and the business reason for postponing invoicing.

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

Where to find it

Back Office → Sales & Customers → Temporary Sale.

Create a Temporary Sale

Step 1: Open Temporary Sale and start a new transaction

Step 2: Select the customer and transaction date

Step 3: Add the required items and quantities

Step 4: Confirm price, discount, tax, location, batch, and serial details

Step 5: Add a reference or note that explains when the transaction

Add a reference or note that explains when the transaction should be completed.

Step 6: Review the totals and save once

Check your work

Reopen the saved temporary sale and confirm customer, lines, totals, status, and reference.

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

If something goes wrong

- If an item cannot be selected, check stock, location, batch/serial, and item permissions.
- Search for the saved transaction before retrying after a timeout.

Related guides

- Convert a Temporary Sale to an Invoice
- Create a POS Sale
- Return a Temporary Sale

What to do next

> **Convert a Temporary Sale to an Invoice**.

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