

Using Back Orders

Out-of-stock situations are likely to occur from time to time.

Having a system of back order processing ensures customers do not turn to the competition to buy the products they need.

In this course, you will learn how to create a back order, [pause] recall it using 'Find Documents' and how to release it once stock is available.

Create a new Sales Order and select a Product.

The 'Quantity' the customer needs exceeds the amount of 'Available stock'.

Completing the line displays a stock warning advising there is not enough stock available for the request.

The quantity 'Required' and 'Available' are shown.

Clicking the drop down shows a list of options for handling the shortfall.

The second option to 'Create a back order for this customer' is selected.

Indicate the quantity to back order.

The options include 'Just the stock shortage', 'The whole line' or 'This many'.

Selecting the last option allows you to specify a specific quantity to back order.

With a selection made, click 'OK'.

When the line is added to the order, the 'Qty' shown represents the amount that was not backordered.

'Complete' the sale.

Use 'Find Documents' to locate the sales order.

When the sales order was completed another document was created for products with a back order quantity.

The sales order for the quantity that is available is shown with the standard 'SO' icon and a status of 'Picking'.

The back order document has a 'BO' icon and a status of 'Waiting for Stock'.

Sales orders are numbered in 5 digit increments.

The number assigned to back orders is the next sequential number after the sales order number.

You can also set the 'Look for' to 'Back Orders'.

The results contain back order documents noted by the 'BO' icon and sales order numbers ending in 6 and 1.

Back orders are 'Related Documents' to the original sales order.

Selecting a back order, [pause] right-clicking [pause] and choosing the 'Related Documents' option shows the sales order number that the back order originates from.

Back orders remain at a 'Waiting for Stock' status until released.

The 'Back Order Release' process checks the current available stock quantities to fill the order.

Select 'Order Monitor' from the 'Home' tab.

Set the 'Filter' to 'Back Orders For Release'.

Set any other filters to narrow your search.

Click 'Go'.

You can use the right-click option [pause] and select 'Release Back Order'.

However, it is important to note that using this method does not take into consideration Stock Receipts, the order's Date Required or Date Created.

Best Practice is to click the toolbar button 'Back Order Release'.

At the 'Release Back Orders/Transfers' window set the 'Branch to check' if different from the current branch.

The system displays the date 'Last checked up to'.

Set the date to 'Check stock receipts since'.

Select to 'Allocate stock based on' either 'Order/Transfer Date Required' or 'Order/Transfer Date Created'.

Click the 'Check Now' button.

Alongside the 'View Results' button you can see the number of 'back order/transfer lines outstanding'.

Click 'View Results'.

A new window opens showing products on back order where stock is now available. These can be released.

From the buttons displayed, you can select to 'Release All' at one time, 'Release Selected' by selecting individual or multiple product lines for release' or 'Remove From List'. This removes the line from being available for release on this list. It does not delete the back order line.

Choosing either 'Release All' or 'Release Selected' asks you to confirm the action.

You can elect to print the documentation.

From 'Order Monitor' change the 'Filter' to 'Orders for Picking'.

The released back orders are listed with a status of 'Picking'.

Having a store procedure to address unavailable stock situations ensures that your customers get the products they need in a timely manner.

By creating a back order, locating it when merchandise becomes available and releasing the order you can keep your customers' happy and maintain accurate inventory data.

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