Stock Warnings Overview

Stock Warnings Workflow Process

Sales Clerk: OK sir, you'd like to order a case of hammers. I'll get right on it!

Sales Clerk: Uh oh….. we don't have any hammers! How am I going to fill the customer's order?

Narrator: BisTrack gives you several options for managing out-of-stock issues. Let's examine them.

One option is to create a system-generated back order.

You'll need to choose the quantity and complete the sales order.

BisTrack takes care of the rest based on system settings generating the required sales order and back order documents.

Another option is to order stock from the supplier. This creates a Back-to-Back order.

Again, you'd complete the sales order with BisTrack taking care of the rest based on system settings.

This time, it generates a Purchase Order document in addition to the Sales Order.

If you have multiple stores, you could Transfer stock from another branch.

The system automatically creates a transfer document when you complete the sales order.

Lastly, if you know that the item is part of an existing purchase or transfer, you can select the document number to allocate the stock.

Because there's already Purchase Order or Transfer documents, this method only creates a new Sales Order document.

Choose a method that works best to meet your customer's needs.

Stock Warning Options

If you complete an order where there is not enough stock on hand to fill the order, BisTrack shows a Stock Warning window.

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Choose one of the options to create a back order, assuring your customer will receive the desire product.

When you create an order for an item that's out-of-stock, BisTrack opens the Order Line Stock Warning window.

Along with the warning, BisTrack gives you the option to proceed with the order.

Select No.

BisTrack opens the Order Line Stock Warning window with the item information and a dropdown menu with several options.

Note that the first option is Proceed with order.

This is not a Best Practice since this option doesn't ensure that you'll procure the out-of-stock item.

Your product details and system settings determine the remaining options.

Selecting one such as Create a back order asks you to define how you want to handle the back order.

Select an option, then choose OK.

BisTrack adds the line to the order and creates a backorder document in the background.

Complete the order as you normally would.

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