Using Stock Warnings

Andrew

…Looks like we're out of stock for that right now, I can put it on Back Order or Transfer it form another location. Do you have a preference?

Robert

When your inventory is low, BisTrack gives you several options to help make sure your customer gets their order efficiently.

Select a topic and we'll go through the options!

Topics

- Back Order

- Back to Back Order

- Transfer

- Allocate Stock

Back Order

When asked to continue on the Stock Warning window, press No to see your options.

Select Create a back order for this customer, and choose how many to include.

The line appears on your Sales Order.

BisTrack creates the Back Order when you complete the order.

To create a back order from the Stock Warning window, choose No.

Open the dropdown and select Create a back order for this customer. Then select OK.

Choose an option for how much you want to order.

Select Just the stock shortage if you want to allocate any current stock and backorder the rest.

If you want to Back Order the full quantity, select The whole line, or choose This many… to manually enter the amount.

Press OK to add the item to the order.

Only the amount that you added to the order displays.

Add other items to the order as needed.

When you complete the order, BisTrack automatically creates the Back Order for you.

Back to Back Order

A Back to Back Order creates a purchase order, and assigns a Special Order tag to the line being added.

When you complete the order, BisTrack prompts to confirm the correct supplier.

To create a back-to-back order from the Stock Warning window, choose No.

This creates a Purchase Order and sets the order status to Waiting for Stock.

Select Order stock from the supplier (back-to-back), and then select the quantity to backorder.

Select OK.

When you add the product to the order, BisTrack displays a Special Order icon.

Complete the order.

BisTrack selects the default supplier.

If others are available, you can choose one by selecting the ellipsis icon in the alternatives column.

Press Continue. BisTrack processes the Sales Order and creates the back-to-back purchase order.

Transfer

If you have multiple locations, you can create a transfer to fulfill the customer's order.

The cost to transfer and available stock displays in the Transfer Costs window.

When you have multiple branches, and not enough stock at your branch to meet an order, you can create a transfer to get the items from another branch.

From the Order Line Stock Warning window, select Transfer Stock from another branch, and then choose how many of the product you would like to transfer.

Select the Transfer Costs button to see which branches have stock available and the expense to carry out the transfer.

Choose a branch to make the transfer, and select the date required.

Press OK.

BisTrack adds a Transfer icon to the line and creates the transfer document when you complete the order.

Allocate Stock

You can allocate stock for your order from an existing transfer or Purchase Order.

When you have a stock deficit for a product on an order, you can assign the product from an existing Purchase Order or Transfer.

On the Order Line Stock Quantity screen, select Allocate stock from an existing purchase order or Allocate stock from an existing transfer.

The button name changes to Purchase Order if you choose Allocate stock from an existing purchase order.

Select the Stock Transfer button.

BisTrack displays a list of only those documents that contain the product you need.

Select a line and Choose OK.

BisTrack puts a Transfer or Special Order Icon on the line depending on how you chose to allocate the items.

Complete the order as usual, and BisTrack will reserve the stock for this Sales Order.

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