Using Back Orders in Order Monitor

BisTrack gives you back order handling functions within Order Monitor.

In this course, we show you how to create a back order during the Picking Confirmation phase and how to use the Back Order Release option.

BisTrack can generate back orders caused by a stock shortage or to allow a split delivery from a Picking Confirmation.

To begin, open the Order Monitor window.

Select an order to enter the picking confirmation.

When the Quantity entered matches the Requested amount, the system changes the line Status to Picked and the cursor proceeds to the next product.

When there is insufficient stock for a line or you're splitting a delivery, you can enter a Quantity that is less than the Requested amount.

The status for the line is Under, Back Order.

The system puts the difference between the Requested and Picked Quantity on a back order document.

If you don't want to back order the line, use the F11 Action button which opens a window that identifies that the line is set to back order and allows you to change the action to NOT back order the line.

You can also enter a picking amount that is higher than Requested.

The system shows the Status Over, Check in red.

Verify the Quantity before confirming. Once confirmed, the sales order changes to the new amount entered.

When you complete all the lines and have verified that they are correct, click the Pick Confirmed button.

The system updates the original sales order's status to Delivery for the item's picked.

Continue to prepare the delivery documents.

BisTrack automatically creates a Back Order for the products not fully picked.

When you enter the picking confirmation for the Back Order, it will have a separate set of delivery documents from the original order.

An important Order Monitor function is releasing back orders when products become available to fill an order.

In Order Monitor, set the Filter to Back Orders For Release.

Set any other filters to narrow your search, and then click Go.

Back orders for Delivered and Will Call sales remain at a Waiting for Stock status until released.

The Back Order Release option appears on the toolbar.

Use it to check the current available stock quantities for filling these orders.

There is also a right-click option for Release Back Order to allow manually releasing individual Back Orders.

However, it’s important to note that using this method does not consider Stock Receipts, the order’s Date Required, or Date Created.

A Best Practice is to click the toolbar button.

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 in the Check stock receipts since field.

In the Allocate stock based on drop down selector, choose either Order/Transfer Date Required or Order/Transfer Date Created.

Then click the Check Now button.

Adjacent to the View Results button, the system displays the number of back order/transfer lines outstanding.

Click the View Results button.

A new window opens showing products and quantities on back order where stock is now available. These are ready for release.

BisTrack gives you three button options to manage the release.

You can Release All at one time.

You can Release Selected by choosing a single or multiple product lines for release.

Or you can select Remove From List. This removes the line from being available for release on this list. It does not delete the back order line.

When you choose either Release All or Release Selected, the system asks you to confirm the action.

Click Yes to release the back order lines.

You may print the documentation if desired.

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

The system lists the released back orders with a status of Picking.

You can now print the Picking documents and prepare the orders for delivery or pick up.

Back orders are an everyday occurrence for a busy sales processing environment.

You should now have the tools needed to create a back order from a Picking Confirmation along with finding and releasing back orders for goods received into stock.

You can enter the customer’s Loyalty Number, phone number, or email address.

On software release 26.1 and higher you can set Option ID 1723 to Yes.

This will give your loyalty customers the ability to link the transaction to their loyalty account by entering their phone number on the PIN Pad.

To view the Loyalty Summary on Eagle Software Release 26 and higher, enter the customer Loyalty number.

Press the Summary button.

The left side of the screen displays the customers address, phone number, and email.

It also shows current Loyalty points and the future dollar value.

Reward and Redemption History is located on the right.

Click OK to close the window.

After loyalty points are converted into a dollar value they can be applied to a reusable gift card.

To redeem a loyalty gift card, finalize the transaction.

If the customer has a balance on their Card, a pop-up screen displays the current balance.

Select ‘Yes’ to apply the balance.

Accept additional tender if needed and then complete the sale.

Sometimes a customer may receive a coupon as a reward for their purchases.

Begin the transaction by entering the loyalty number.

Now scan or enter he customer’s purchases.

When complete, scan or enter the Dynamic Coupon barcode.

Press Total.

The Total Screen will reflect the reduced price of the merchandise.

Finalize the transaction just as you normally would.

In this course you have learned how to look up Loyalty customers within Point of Sale and view their Loyalty history summary

We have reviewed the steps needed to redeem Eagle Loyalty Gift Card dollars and Loyalty Dynamic Coupons.

You should now be ready to offer valuable rewards to your loyal customers and keep them coming back your store.

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