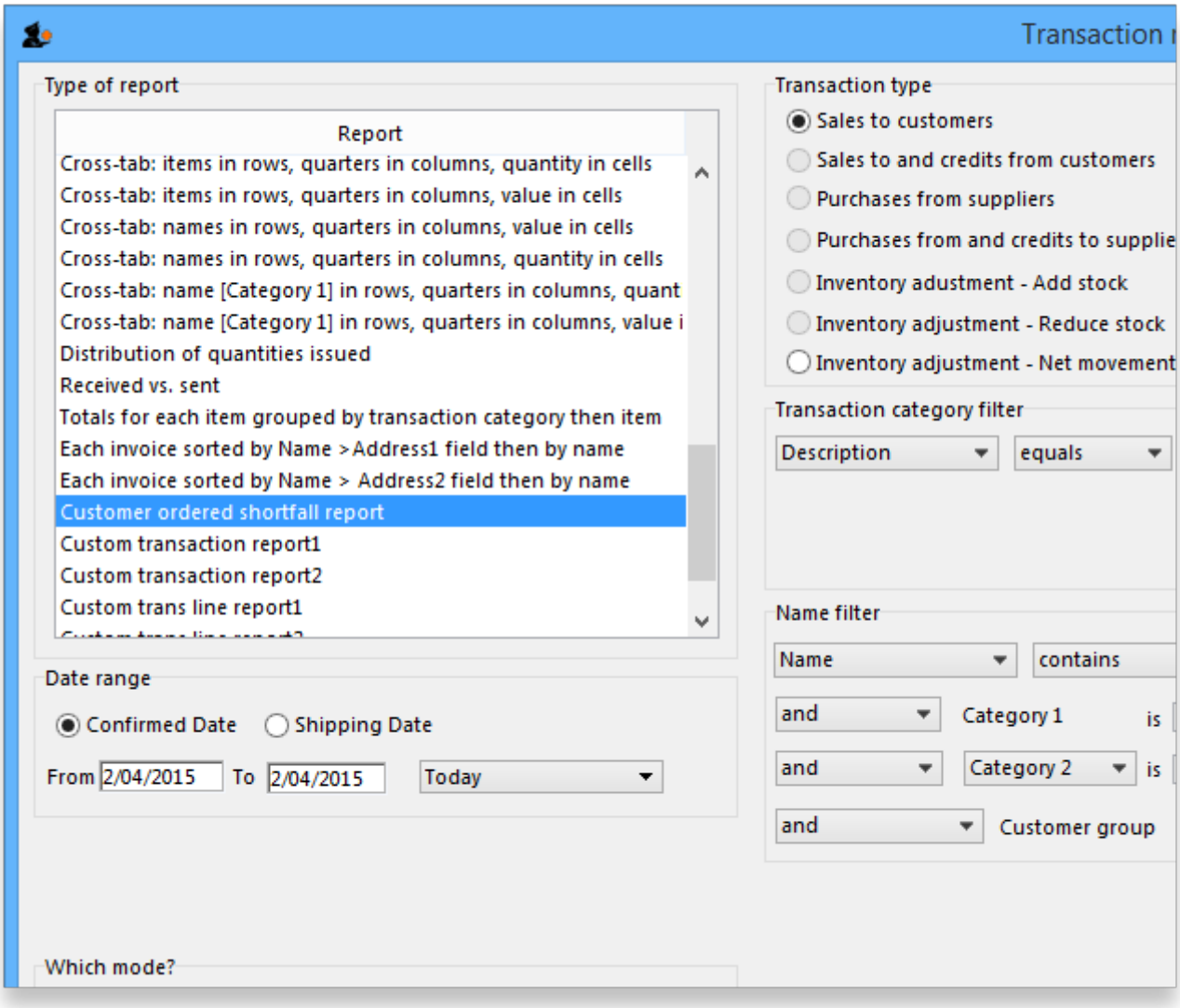
# Customer ordered shortfall report

When you choose // Report> transactions // and then select // Customer ordered short fall report// , the transaction report like the one below will be produced. This report is used only for sales to customers.

For this report to make sense, make sure that:

- The // Allow placeholder lines on customer invoices// preference is **checked**
- The // Delete placeholder lines when confirming invoices// preference is **un-checked**




From the report window, select the desired parameters and click // OK// . An example report is shown below.

**Customer ordered short fall report**
**National Medical Store**

Date range :01/01/2007 to 17/01/2007, Item name contains @ma@Item category includes PHARMACEUTICALS

Transaction Type equals customer, Name code contains @2@, Mode: Both

| Item Code | Item Description | Units of Demand | Units of supply | Shortfall | % shortfall |
|---|---|---|---|---|---|
| | Item category : MEDICAL SUPPLIES | | | | |
| 4455 | MASK,RESUSCITATION,ADULT | 586.02 | 43.02 | 543 | 92.66 |
| 4460 | MASK,OXYGEN,ADULT,W/O TUBING | 2838 | 1984 | 854 | 30.09 |
| | Totals for item category:MEDICAL SUPPLIES | 3424.02 | 2027.02 | 1397 | 40.8 |
| | item category : PHARMACEUTICALS | | | | |
| 502 | MAGNESIUM TRISIL CO. TAB PKT/20 | 5628 | 3895 | 1733 | 30.79 |
| 10 | ACETAZOLAMIDE TAB S 250 MG BOT/100 | 1889 | 1639 | 250 | 13.23 |
| | Totals for item category: PHARMACEUTICALS | 7517 | 5534 | 1983 | 26.38 |
| | Grand total : | 10941.02 | 7561.02 | 3380 | 30.89 |

// Previous: ATC based reports Next: Purchasing//

## Setting up mSupply to use the Customer Ordered Shortfall report

For this report to be used, you need to do the following

- Choose *File* > *Preferences* > *Invoices2* and ensure “Delete placeholder lines when confirming invoices” is **not** checked.
- Staff must enter requested amounts on invoices as placeholder lines.
    - For example, a customer orders 1000 x Paracetamol syrup 60ml. You have 800 in stock, so you add 800 to the invoice, and you also add a placeholder line for 200 bottles.
- You need to decide whether to (and if yes, how) to use the backorder system. If customers can rely on you to record shortfalls as backorders, then they will no need to re-order the shortfall in subsequent ordering cycles, as they know you will deliver it when available.

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