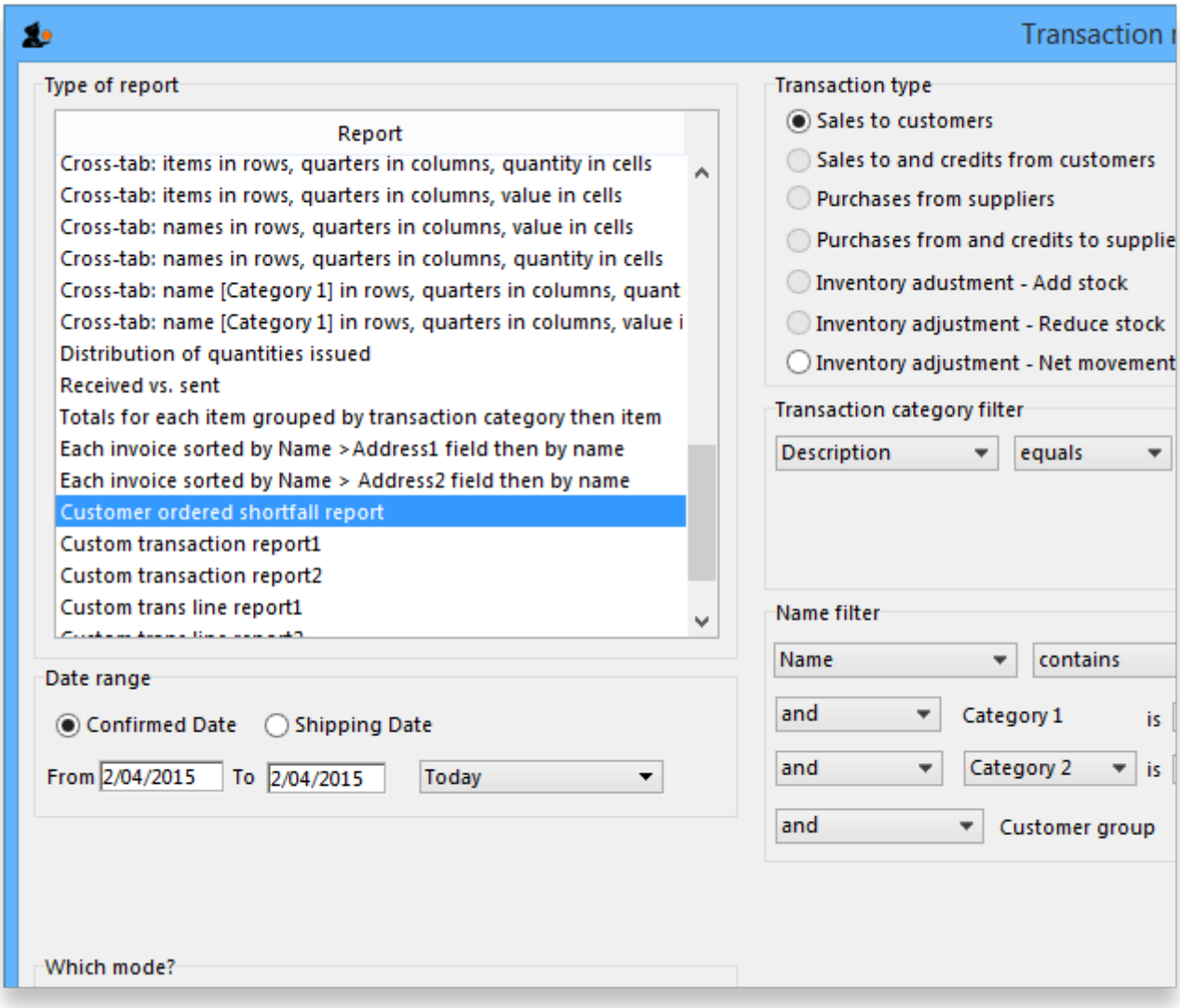
16.05. Customer ordered shortfall report

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	586.00	43.00	543	92.66
4460	MASK,OXYGEN,ADULT,W/O TUBING	2838	1984	854	30.09
	Totals for item category:MEDICAL SUPPLIES	3424.00	2027.00	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 :	10941.00	7561.00	3380	30.89

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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.

In our experience, general custom and practice in places that use mSupply is for facilities to simply re-order stock that wasn't delivered 'last' time. In this context, it would not be useful to turn the backorder system on.

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