Backorders

Overview

mSupply's backorder system allows you to record items you were unable to supply to clients, and (hopefully) supply them at a later date when you have enough stock.

When you do not have enough stock of an item that a customer orders, it is normal to add a placeholder line to the invoice you are creating. If you have local suppliers, it is possible you will be able to receive stock in time to fill the order, and the placeholder line can be edited and replaced with a normal stock line.

Once it is time to ship the order, placeholder lines will be converted to backorder lines, and you will be invited to enter a comment for each item (e.g. "We're very sorry- it's coming next week.)

Backorder preferences

The behaviour of mSupply in handling backorders is controlled by several preference settings:

• To do anything at all with backorders, you need to choose *File > Preferences* and go to the *Invoices 2 tab*. There, check *We run a backorder system*

C	Customer Invoices
	V We run a backorder system

• If you wish to have customer invoices automatically created when goods on backorders are received, the appropriate box should be checked.

Auto-issue customer backorders when stock

• On the same tab, check Allow placeholder lines on customer invoices . This allows you to use placeholder lines to record stock ordered by a customer but not able to be issued.

Allow placeholder lines on customer invoices

• On the right side of the same tab is the option to *Delete placeholder lines when confirming invoices.* If this option is not checked, placeholder lines will be left on an invoice when it is confirmed. Otherwise they will be deleted. In either case, as long as the *We run a backorder system* option is checked, confirming an invoice will result in placeholder lines being transferred to backorders. Delete placeholder lines when confirming

How much is on backorder?

There are four ways in which you can view backorders

- When creating a customer invoice, there is a *backorders* button. This is described in detail below.
- Use the backorders report to view some or all backorders.
- When viewing details for a particular item, see all the backorders for that item on the backorders tab.
- When viewing details for a particular customer, see all the backorders for that customer on the backorders tab.

Backorder management from the Customer invoice window

Clicking the **Backorders** button when viewing a customer invoice will show all lines for the entered customer that are on backorder.

The **Backorders** button will be hidden if "*We run a backorder system* " is not checked in Preferences > Invoices2.

If you are entering a new invoice, you need to have entered a customer name on the invoice before clicking the button.

The window also shows current stock, so you can easily see which backordered lines can be added to the current invoice

EL New backorder	Delete backorder	Modifyline Ad	d lines to invoice	
	Iten	Date	Stock on Hand	Quantity on back order
HLORHENDINE (BSTETRIC CREAM BOT	/1 19/05/08	967	0
ATROPINE EYEDR	OPS 1% BOT/5ML	19/05/08	141	5
EXAMETHASONE	INJ 4MG IN 1ML	19/05/08	1179	10
YRIDOXINE TABS	3 50mg (VIT 86)	19/05/08	D	2
0-TRIMOKAZOLE	TABS 480MG	19/05/08	2374000	20
				1

Buttons in the backorder window

New backorder: Placeholder lines are automatically changed to backorders when an invoice is confirmed, but there may be occasions when the manual entry of a new backorder is necessary: click this button to create one.

3/8

Delete backorder: You can delete an item line or multiple item lines by selecting the line(s) and clicking on *Delete backorder* button.

Modify line: This button is used to edit the item line. Select the desired line and click on *Modify line* button to display the following window.

Item	DAPSONE TABS 100MG	145
order date	28/03/07	
quantity	14	
comment	b	
comment	lp	

Add lines to invoice

Highlighting lines and then clicking the *Add lines to invoice* button will (surprise) add the highlighted lines to the invoice. The backorder quantity will be set to zero, and may then be deleted.

Note that as you issue lines on an invoice, the quantity on backorder is automatically reduced. However, once a line reaches zero, it is not automatically deleted. This is because it is possible the user will delete or edit the line on invoice, and hence the reduction in backorder quantity may have to be reversed.

The Backorders report

Choose Reports > Backorder report.

You can enter settings to reduce the scope of items or customers for which the report is produced.

Backorders report
Report on items whose
Item code 🔹 equals 💌
(Leave blank for all items- warning: may take a few minutes to produce the report for all items)
and Category is Don't Care 💌
and epartment is Don't care
Name filter
Name code 🔹 equais 💌
Grouped by
Grouped by item then name
Or: Complex Find
Cancel OK

The first drop down list allows the report to be filtered by many options, but note that if *Item name* is chosen, then the full name must be entered and not just partial details.

Item code 🔷 👻	1
Item code	1
Item name	a
ABC category	
Shelf location	Ш
Flag	Ш
user_field_1	Ш
user_field_2	Ш
user_field_3	Ш
user_field_4	Н
Essential Drug List	Н
Critical stock	
Normal stock	
	2

Two options are available: for display:

- each customer and the items on backorder for that customer
- each item and the customers having backorders for that item.

Backorder Report (General)							
ltem Code	Item Name	Stock	Cust Name	B/ord Quanti			
4204	ARTEMETHER SUPPOSITORY 50MG	D	GOOD SAMARITAN HOSPITAL				
			Total				
2035	ATROPINE EYEDROPS 1% BOT/5ML	141	SASAMUNGA MINI HOSPITAL				
			Total				
4065	BAG, AUTOCLAVE 100MM X 520MM	0	KIRA KIRA HOSPITAL				
			Total				
4076	BAG, URINE DRAINAGE WITH TAP, 2L DISPOSABLE	1	SEGHE AHC	1			
			Total	1			
3013	BANDAGE, CREPE 15CM	132	TULAGI MINI HOSPITAL				
			Total				
3020	BANDAGE, P.O.P. 10CM	1387	GOOD SAMARITAN HOSPITAL	1			
			TULAGI MINI HOSPITAL				
			Total	1			
51	BENZHEXOL TABS 5MG	53800	MALU'U AHC				
			Total				

Note that this report does have limitations, as if a customer orders the same item more than once, it is likely that demand will be overstated.

Viewing backorders for a customer or an item.

Clicking the backorders tab when viewing a customer or item details shows a window where you can view or edit items on backorder. The example shows backorders for an item, ibuprofen 200mg tablets.

🏚 Item details						
General Misc Usage Stock Ledger	item name Ibu	profen 200mg ta te backorder	ь	Store: General	v	
Quotes Backorders						
Notes	Name	Code C	Order Date	Quant	comment	^
Reconcile	Pharmacy	pharam 0	8/02/2011	500		
Bill of materials	Rural clinic Medical Care	Fund 0	8/02/2011	300		
Purchase Orders	medical care	med 0	0/02/2011	200		
Dispensing						
Reporting						
Log						
CST						
						-
						- F
	Stock on Backorder from o	ustomers	1000			
Delete				0	K & Previous OK & Next Cancel	ОК

Notes

• If you have set the preference to leave placeholder lines on confirmed invoices, then you can use the *Item ordered shortfall* report to display the difference between customer demand and what was actually supplied.

Automatic creation of customer invoices for backorders

With the required boxes checked under *Files > Preferences > Invoices*, mSupply will automatically create invoices for those customers having items on backorder when the items are received from suppliers.

This description is illustrated by the situation in which two customers, Urban Clinic and Rural Clinic both have Promethazine 25mg tablets on backorder - Urban Clinic awaiting 5×100 , and Rural clinic awaiting 2×100 . The supplier is Arbuckle.. This may be confirmed by previewing a backorder report:

		Backorder Report (Gene	ral)	
Item Code	Item Name	Cust Name	Stock	
pro25t	Promethazine 25mg tab	Rural dinic	0	200
		Urban clinic	0	500
		Total		700
		i otal		10

On receiving the goods from the supplier, a new goods received record is created in the usual way, and finalised. When you click on *OK* to create the supplier invoice, you are required to confirm your intention to finalise the order, which you would normally do. The supplier invoice is displayed, and in the bottom left corner of the supplier invoice, you will see that the *Hold* box is checked. You should click on it to remove the check mark.

¢) 🗷	Other charges Item(s): Amount:
Hold	Export batch: 0 Margin: 0.00

and this alert message is displayed:



Review the invoices as alerted, and for this example the invoice generated for the Urban Clinic is shown:

Custo	merinv	oice				00.00.00					
Name	e Urba	n clinic		Con	firm date	00/00/00				Colour:	Black
Their re	1		urbcl							Invoice : 60	
ommen	t Back	order fulfilme	ent (automatic); Good	•	Category	None			En	try date : 08/02/2	2011
									Goods re-	ceive ID: 19	
<u>.</u>		61.			R	1	<u>[8]</u>			Status: sg	
New I	line	Delete line(s)		Backo	orders H	listory		Ent	ered by: user1	(pass= user)
General	Summ	ary by Item	Summary by Batch Tra	nsport details						Store: Genera	il .
L	Locati	on	Item Name		Quan	Pack Size	Batch	Exp date	Sell Price	Price exter	n *
1		Prometh	azine 25mg tab		5	100	SJ 803	31/07/201	135.00		675.00
											-
			Other charges	Item:						Amount:	0.00
-										Subtotak	675.00
										0 % tax:	0.00
										Totak	675.00
Hold		Fxmort batch	0				OK & Next		Delete	ОК	

The invoice generated has all the relevant details, e.g. batch no., expiry, etc., copied across from the supplier invoice, and the comment has been added to the effect that the invoice has been generated automatically, and also identifies the Goods Received ID:

Customer invoice Name Urban clinic	Confirm date	00/00/00
Their ref urbcl Comment Backorder fulfilment (automatic): Good	Category	None
1 Transaction comment		
Backorder fulfilment (automatic); Goods receive ID : 18		^

Previous: Customer credits Next: Electronic Invoices

Last

update: 2017/07/17 issuing_goods:managing_customer_backorders https://docs.msupply.org.nz/issuing_goods:managing_customer_backorders?rev=1500325932 21:12

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