Sales Management

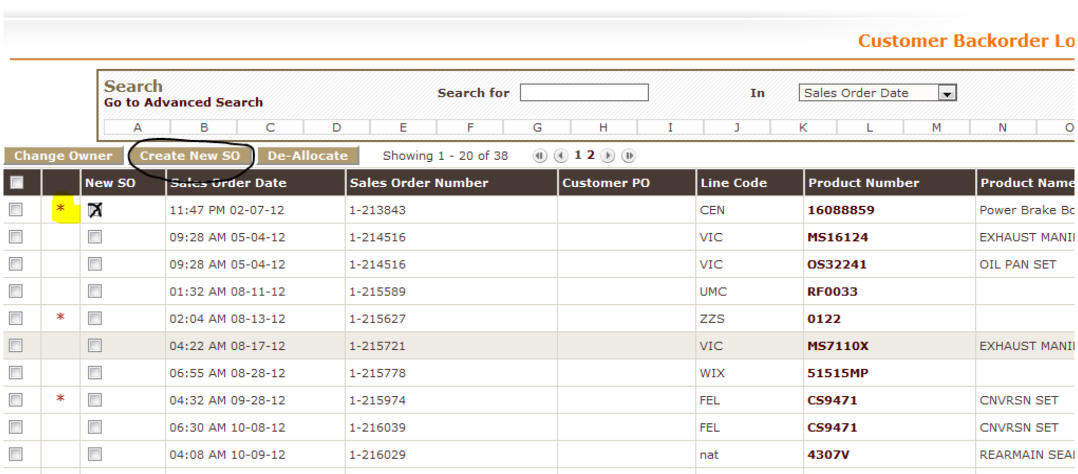
Customer Backorder Log

The Customer Backorder Log allows you to look at sales orders that had out of stock products ordered as a backorder. This is primarily used for ordering products that are part of your normal stocking orders or that your customer is not in such a hurry that they want to pay additional freight. You can see all of the sales orders listed on the Customer Backorder Log located by going to SALES MANAGEMENT > CUSTOMER BACKORDER LOG.

When you create a sales order and backorder a part for the customer, the part will show up on the original sales order with a order qty of 1 (or however many they ordered) and a ship qty of 0 (zero). You will NOT be charging the customer for the part at the time (although you could take a deposit to cover all or part of the cost).

Once you have finalized the original sales order, the parts that were backordered will show up on the Customer Backorder Log so that once the part arrives designated employees will be able to fulfill the sales order from this interface.

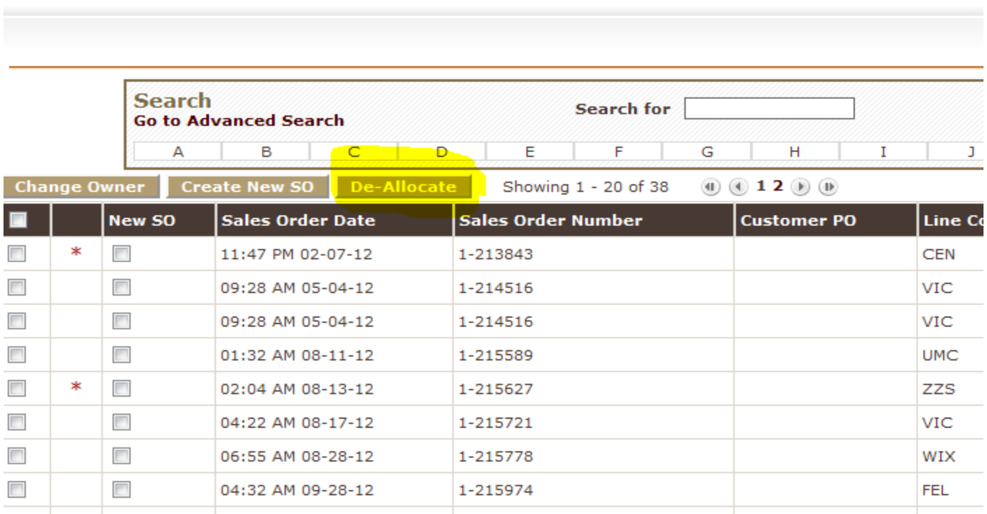
In the second column (to the left of NEW SO, but with no title) you will see a red asterisk next to sales orders for which the product has been received or is now in inventory.



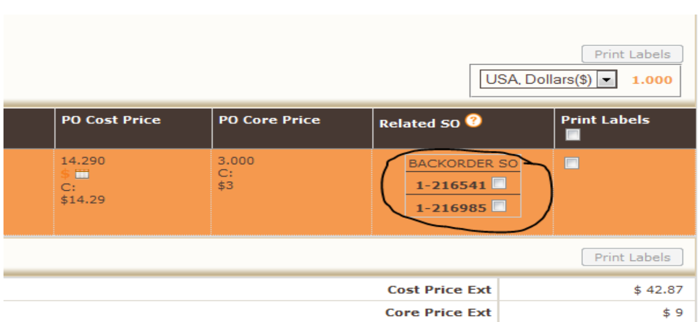
If you have a SO that has products received, you can check the box in the NEW SO column, then check the CREATE NEW SO button. This allows the user to finalize the Sales Order.

At that point a new sales order will be created to sell out the part that was originally on backorder.

The Customer Backorder Log now has a button called 'De-Allocate'. When a product on the CBL is received and allocated you will see a red asterisk next to the New SO box on the line. You have the ability to decide to remove that allocation and sell the product(s) to another account. Just check the box to the left of the red asterisk and then click the 'De-Allocate' button.



In addition, you also have the option of not allocating products to the CBL when you receive them (this is part of the receiving module, but related to backorders). When receiving Purchase Orders by Product or PO#, if the product you are receiving is already on the CBL, then you will see the related SO in the new column at receiving called 'Related SO'. There will be a check box next to the SO #, un-checking the box next to a Related SO will allow you to receive this product a WITHOUT allocating to the CBL. This is intended to allow you to sell newly received products to another customer first without making any changes to the CBL.



Pushing Buy Outs to the Backorder Log

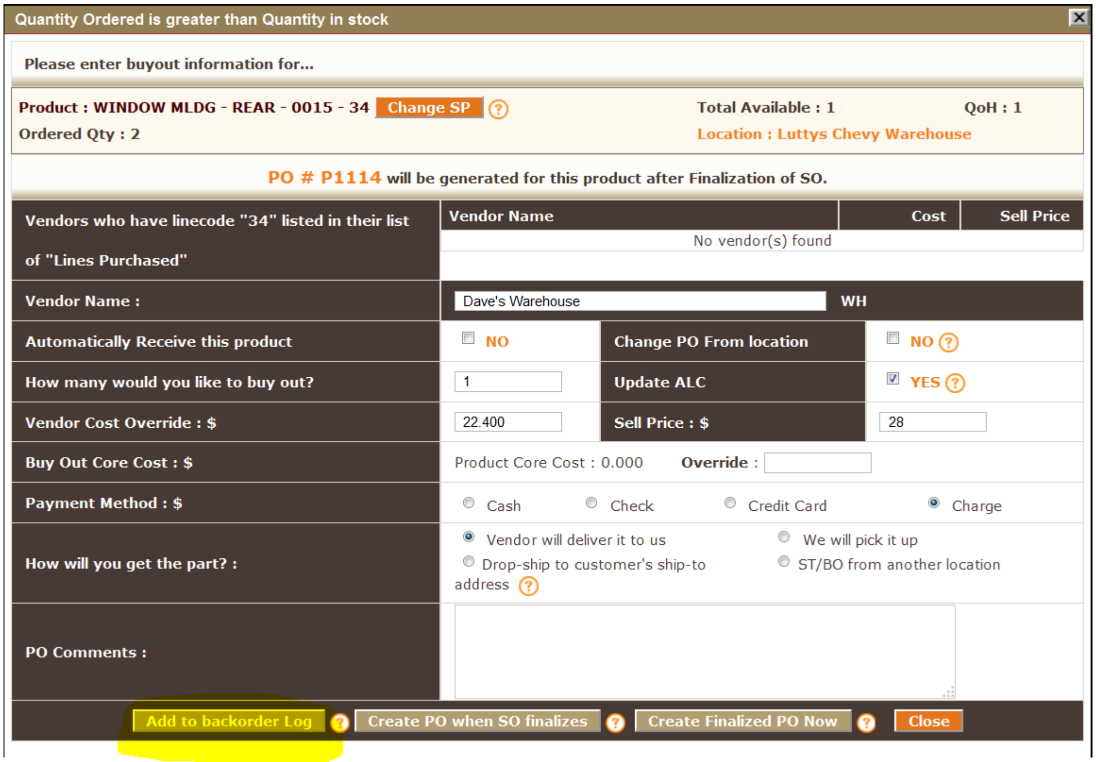
In general when using Fuse5, when you backorder parts, it is NOT expected that you will charge the customer for the part at the original point of sale. There are some businesses that want to backorder, and therefore not generate a Buy Out purchase order, but still charge the customer for the part real time and then deliver the part at a later time.

This can be done using the customer setting called ALLOW BUY OUTS TO BACKORDER LOG.

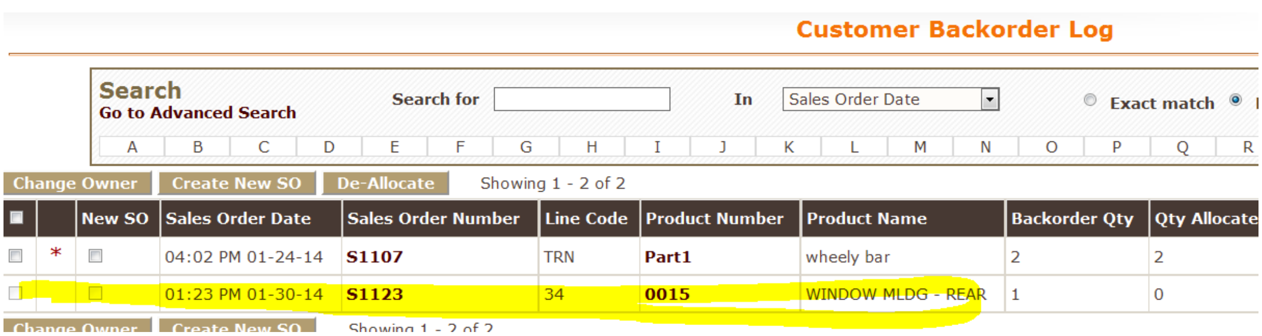
When this setting is turned ON, you will get an additional button on the Buy Out creation screen during the sales order. The button is labeled 'Add to backorder Log'. This button will allow you not NOT create a PO at the time of sale, but still charge for the part like a regular buy out at the point of sale. Now you still need to take the added step of ordering the part, since you did not do that during the sales order. These parts will automatically be included on the next 'Order to X' PO you do for that line code, just like a back order does. For ordering purposes, it works just like a back order. In fact if you buy out qty=1 of product A and back order qty=1 of product A on during the day. Then next PO you do for the product A will show qty=2 to purchase.

Here is an example where you may use this. Say you have a vendor that you only want to place one large order per day, instead of a bunch of small orders all day long. If you use the 'Add to backorder log' button on your buyouts during the day. Then you can place a single order for all of the buyouts at a later time you choose, which could save you a lot of money on shipping. The only major difference between this and a back order, is that you pay for the buy out up front on the current SO. A back order requires a new SO and payment when the part arrives.

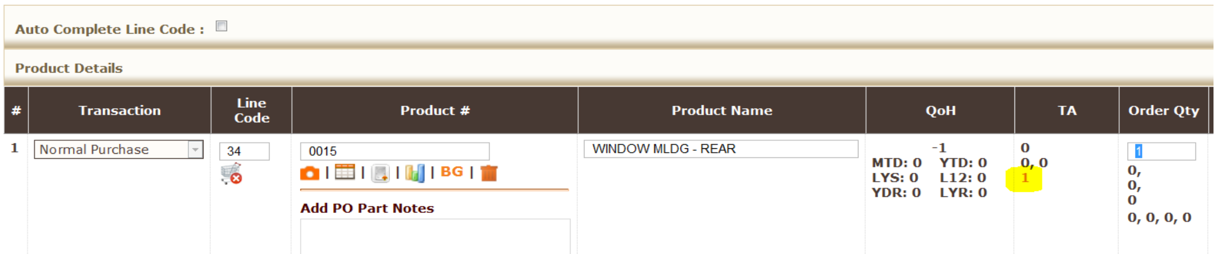
This is what it looks like in the buy out screen



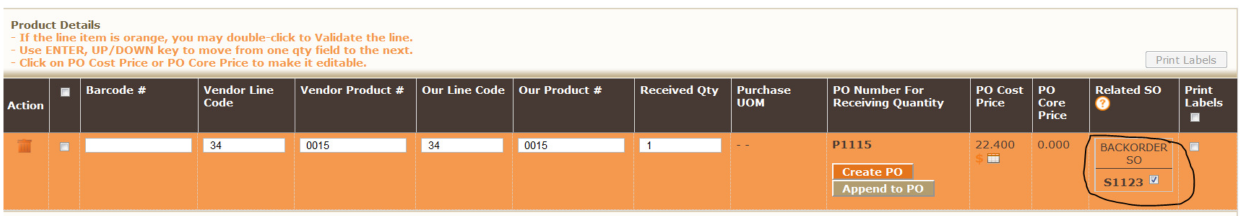
If you select this option, you do have the ability to have the customer pay for the part even though you haven't ordered it yet. This part will now show up on the Customer Backorder Log.



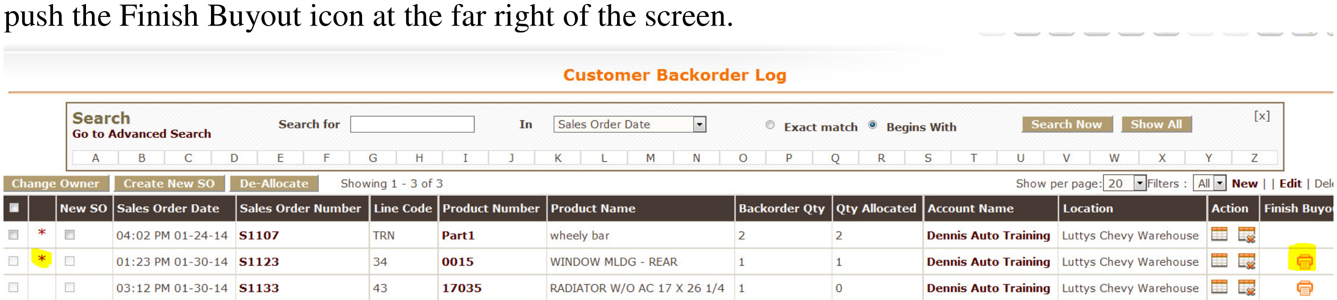
When the Purchase Order is created that you order the line of parts that this part is included in, the customer backorder will be visible to the person generating the PO.



When the part is received through the receiving module, the user will see that it is related to a previously created sales order. The person doing the receiving should notify whomever manages the Customer Backorder log.



Now that the part has been received you will see a red asterisk next to the part in the Customer Backorder Log. Unlike normal backorders, with which you would create a new sales order, with buy outs that have been pushed to the backorder log you will be unable to click the New SO button. Instead push the Finish Buyout icon at the far right of the screen.



When you click the Finish Buyout button you will be prompted to reprint the sales order and remove the entry from the backorder log. This will complete the process if you have previously billed the customer for the parts.