

Warehouse Back Order Process

A back order is created when a campus or department submits a requisition for a quantity greater than what is in stock at the warehouse. This can be seen on the requisition report with a status of “B – Partial ship, back order” as shown on the report below.

Date Run:09-01-2015 2:53 PM

Approve Warehouse Requisition Report - Current Year

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Cnty Dist:161-616

TXEIS ISD

Warehouse ID: 1

Originator Name	Requestor Name	Requisition Nbr	Date Request	Date Required	Reason	
Campus/Dept	Shipping Addr	Reference Nbr	Hold	Accounting Per	Requisition Total	
Services Business (BUS)	000550 - Services	500018	09-01-2015	09-01-2015	restock paper	
101 - 101 School	ELEMENTARY SCHOOL		<input type="checkbox"/>	09	.00	
Comments:						

Seq	Item Number	Description	Quantity	Unit Price	Total	Unit of Issue	Status
Approval Status			Long Description				
001	000001	PAPER	5	24.97	124.85	RM - Ream	B - Partial ship, back order
Y - Approved		PAPER LONG DESCRIPTION					
Note:							

Account Code	Description	Balance Amt	Pct	Amount
199-11-6399.03-001-522000	SUPPLIES HM EC	-1,049.10	100.000%	124.85
Total:				124.85

End of Report

The receiving status can also be seen in the details for the warehouse requisition in **Inquiry > Warehouse Requisition Status**.

500017	Business, Services	09-01-2015	Approved	09	R	test quantity	BUS	
500018	Business, Services	09-01-2015	Approved	09	R	restock paper	BUS	
500019	500006 Business, Services	09-01-2015	00171	QUILL CORPORATION	Received all/Closed	09	R	BUS
500020	Business, Services	09-01-2015	Approved	09	R	TEST	BUS	

Req Nbr: 500020

Note	Accounts	Item	Apprvl Stat	Recv Stat	Catalog Nbr	Item Number	Description	Unit of Issue	Unit Price	Quantity	Sub Total	Disc %	Disc Amt	Freight Elig	Freight %	Freight Amt	Total
	Accounts	001	Approved	Partial ship, back order		000005	Highlighter - Yellow	EA	1.95	5.00	9.75	0.00%	0.00	Y	0.00%	0.00	9.75

When printing the Shipping Order report the software applies all available quantity to the order. Back ordered items are notated with an asterisk (*) next to the item number. A difference can be noted in the units ordered and the units shipped as shown below.

Purchasing Department Warehouse Shipping Order

Shipping Order: 000005

Ship Date: 09-01-2015

Organization: 101 - 101 School

Filled By: _____

Shipping Description: ELEMENTARY SCHOOL

Requested Date: 09-01-2015

Shipping Department: ELEMENTARY

Reference Nbr:

Requestor: Services Business

Requisition Nbr: 500018

Item Nbr	Description	Units Order	Units Ship	Units Iss	Units Price	Dollar Amt Ship
000001*	PAPER LONG DESCRIPTION	5.0	3.00000	RM	24.97000	74.91

* Item Placed On Back Order

Budget To Be Charged

Account Code	Amount
199-11-6399.03-001-5-22000	74.91
Total Amount	74.91

All back orders are listed on the BWH1250 - Back Order Report at **Reports > Warehouse Reports > Back Order Report**.

Date Run: 09-01-2015 2:55 PM
Cnty Dist: 161-616

Items On Back Order
TXEIS ISD

Program: BWH1250
Page: 1 of 1
Warehouse ID: 1

Item Number	Description	Req Nbr	Req Item	Quantity	Date	Organization	Shipping Description
000001	PAPER PAPER LONG DESCRIPTION	500018	001	2	09-01-2015	101 - 101 School	ELEMENTARY SCHOOL

End of Report

Back orders can either be filled when restocked or cancelled.

Before a back order can be filled, the item must first be restocked (Maintenance > Create/Modify Inventory Restock Requisition) and received (Maintenance > Receive Inventory Items) into inventory. See Warehouse Restock Requisition document for details.

To fill a back order go to **Maintenance > Fill Back Orders**.

1. Click **Retrieve** to view the list of orders that need to be filled. A page with all back-ordered items will display in a list.

Warehouse Version : 2.0.0004 Build: 0087

Tables Maintenance Inquiry Utilities Reports

Maintenance > Fill Back Orders SessionTimer: 58 min and 17 sec

Fill Back Orders

Date Equal Percent Fill Retrieve

Detail	Item Number	Item Description	Shipping Address	Date	Quantity On Hand	Original Order	Units Filled	Back Ordered	Units To Ship
	000005	Highlighter - Yellow	ELEMENTARY SCHOOL - ELEMENTARY	09-01-2015	25	5	0	5	0

2. Select one of the following options:

Click **Date** to fill back orders in date order (e.g., oldest date fills first).

Click **Equal** to fill the back orders in equal quantities for each order. If there is not enough quantity on hand, the order will not be filled. For example, if there are only three items on hand, and there are four orders, the order cannot be filled using the **Equal** button.

Click **Percent** to fill back orders using a calculated percentage.

Click **Fill** to fill back orders manually. With this method, the order quantities are entered by the user based on quantity on hand, and the system will not look at dates or calculations.

3. A Fill Back Order Preview Report is displayed. Select **Process** to fill back orders. Select **Cancel** to return to the Fill Back Orders page.

Process Cancel

Date Run: 09-01-2015 4:59 PM
Cnty Dist: 161-616

Fill Back Orders Preview
TXEIS ISD

Page: 1 of 1
Warehouse ID: 1

Item Number	Item Description	Shipping Address	Date	Original Order	Units Filled	Back Ordered	Units To Ship
000005	Highlighter - Yellow	ELEMENTARY SCHOOL - ELEMENTA	09-01-2015	5	0	5	5

End of Report

To cancel a back order go to **Maintenance > Cancel Back Orders**.

1. In the **Requisition Nbr** field, type the six-digit requisition number for the requisition containing the back-ordered items you wish to cancel, and then click **Retrieve**.

If the requisition number is unknown, click **Directory**.

- To search for a specific item, type data in the desired search fields.
- To search through all available data, leave all fields blank.
- Click **Search**.
- A list of requisitions that matches the search criteria is displayed.
- Select a requisition from the list. Otherwise, click **Cancel**.

Warehouse Version: 2.0.0004 Build: 0067

Tables Maintenance Inquiry Utilities Reports

SessionTimer: 59 min and 50 sec

Maintenance > Cancel Back Orders

Cancel Back Orders

Requisition Nbr: Retrieve Directory

Back Order Information

Date Requested: Reference Nbr:

Requestor Name: Shipping Address:

Requisitions

Req Number: Requestor: Vendor Number:

From Date: To Date: Vendor Sort Key:

Vendor Name: Search Cancel

Req Nbr	Date Requested	Requestor	Vendor Nbr	Vendor Name	Vendor Sort Key	Priority	Reason	Status
500022	09-01-2015	000550 - Services Business				R	TEST	A

2. Select **Cancel** for one or more of the back ordered items listed for the requisition as needed.

Warehouse Version : 2.0.0004 Build: 0087

Maintenance > Cancel Back Orders SessionTimer: 59 min

Save

Cancel Back Orders

Requisition Nbr: 500022 Retrieve Directory

Back Order Information

Date Requested: 09-01-2015 Reference Nbr:

Requestor Name: 000550 - Services Business Shipping Address: ELEMENTARY SCHOOL - ELEMENTARY

Cancel	Fund	Func	Obj	Sobj	Org	Program	Item #	Quantity	Unit Price	Ext Amt	Description	Unit of Issue	Status
<input checked="" type="checkbox"/>	199	11	6399	30	001	511000	000004	3	13.12	39.36	FOLDERS - GREEN	BX	B

Note: When a back ordered item is cancelled, the status of that item is changed from B – Partial Shipment/Back Order to F – Fully Shipped on the Order table because the order of additional items is no longer pending.

3. Select **Save** when you are finished making changes to save the changes to the selected requisition.