Backordered Items Report

Cavallo Support - 2024-11-22 - Purchasing

Overview

The Backordered Items module displays a searchable list of items throughout SalesPad that are currently on backorder on a sales document. Report columns are customizable, and users can allocate multiple backordered items from this screen, applying newly available quantities to existing backordered documents.

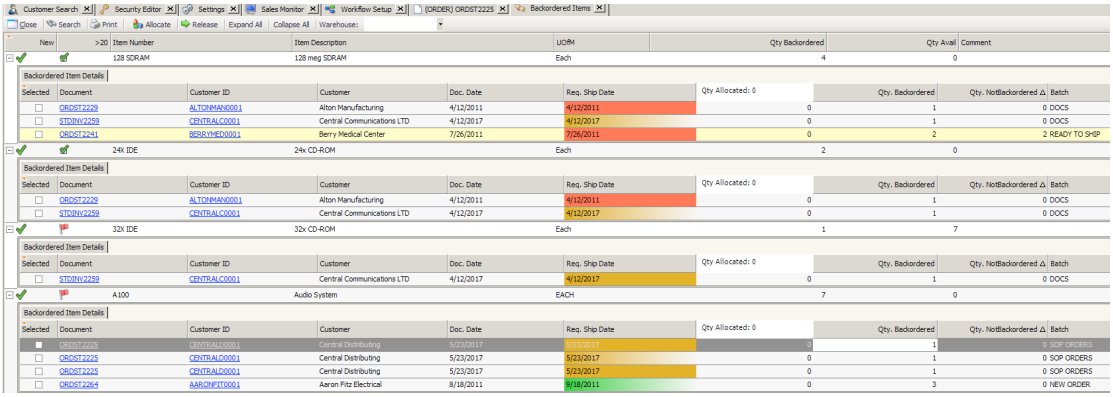
Security and Settings

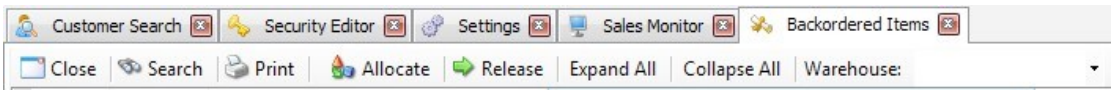
The *Backordered Items Report* security must be enabled in the Security Editor.

The *Process From Queue* setting must be enabled in the Settings module.

Use

Backordered Items module:





Print - Allows the user to view and print a displayed report.

Allocate - Reserves inventory for the selected sales document(s) (checked box in the Selected column). If lines are checked, everything backordered on the selected document will be allocated. Users can also manually allocate lines for more precise control of allocation by changing the number in the Qty Allocated column.

Release **-** Allows the user to release the sales document to the next batch.

Expand All **-** Expands every backordered item, displaying the backordered item details.

Collapse All **-** Collapses every expanded item on the report.

Warehouse **-** Selecting a warehouse from the drop--down allows users to filter through the backordered items by warehouse location.

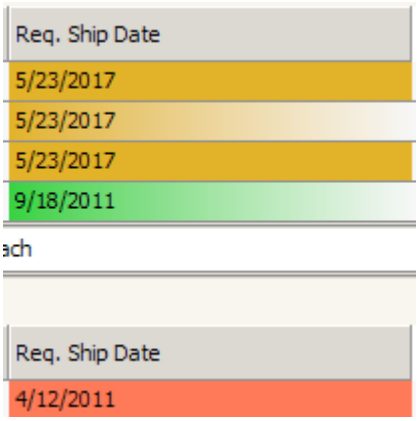
The New column indicates with a green check (true) or red flag (false) whether a line is 2 days old or newer. The >20 column indicates with a green check box (true) or red flag (false) whether a line is over 20 days old.

The Req Ship Date field (when expanded) will be highlighted in different colors based on how old the backorder is:

Red: Now

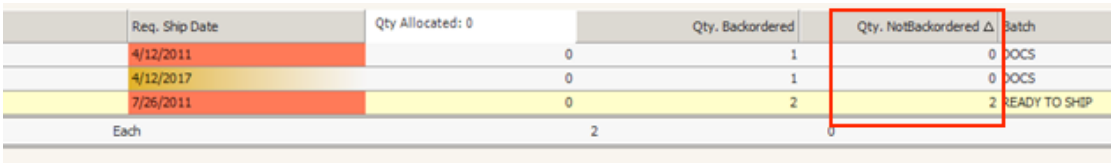
Yellow: over 30 days

Green: All others



Multiple lines in a row of the same color will alternate between solid and gradient to make them easier to distinguish.

A highlighted yellow line means the Qty Not Backordered does not equal zero:



The Qty Not Backordered column displays the total quantity on the document, minus the quantity backordered.

Note: At this time, documents that become fully allocated in this module will not be automatically forwarded to the next workflow queue.