Anthology, Inc.

Customer Back Orders in V6

Customer Back Orders (CBO's) is a generic term to refer to any item requested by a customer, either as a quick Special Order (SPO) through the cash register or a more complex Customer Order (CO). In V6 we have made a few changes to the way CBO's are handled and implemented an optional new system for those stores that wish to have CBO's handled a little more explicitly. We will refer to these as the "Old CBO" and "New CBO" systems. The New system is turned on by going to Tools | Options | CR tab | "Use new system for CBO statuses".

In addition, a new field has been added to the inventory called "OnHold". This field replaces the older "Commit" field. It will be displayed on various screens such as Inventory, CBO Manager, the Inventory info panel on PO/RM's, etc. This field is a sum of all copies that might otherwise be spoken for. This includes Open Bookfairs, Open CO's, Open Overstock Returns.   This value also includes outstanding CBO qtys. When a SPO Wrapper is printed from Receiving for an item the OnHold qty will be incremented to indicate that at least one copy has been reserved on the special orders shelf for the customer to come pick up. You can Clear or Put On Hold the CBO qty by going to the Actions menu. Clear removes that CBO Qty requested from the OnHold field, and changes the Item Status value to OnHold. When an item shows in the CBO Manager with a status of IN it means there are enough copies OnHand to cover the request. When an item shows in the CBO Manager with a status of ONHOLD it means that a copy of the title has been specifically reserved for at least one of the requests for it.

Old CBO System

A few changes have been made to the existing CBO system. A change was made to how we display the CBO flags on PO/RM's. Previously if an item had been on a CBO, but had been ordered, received and waiting for pickup, and then put onto a new PO or RM the CBO flag would be displayed again and a SPO Wrapper would also be printed during the printing of wrappers for the other CBO items. Now when looking at a Draft PO, the CBO icon will be shown only if the item has a status of "Needs Order" when looking at the CBO Manager screen. If looking at an Open RM the CBO icon will only be shown for those items that have a status of "Needs Order" or "OnOrder".

Otherwise an item will be marked in the CBO Manager with a status of "NeedsOrder" if there is not enough OO or OH to cover the requests.   When a CBO item is on a draft PO only we will display the status of "Draft" as long as there are enough copies to cover all requests. If the item is on an Open RM and there are enough copies to cover the requests the status will be "OnOrder".

When a SPO Wrapper is printed from Receiving (the item must have had a qty in Rec) the status on the CBO Manager will show "OnHold" and the qty requested will be added to the new OnHold field to indicate that some of the received copies are not available for general sale.

New CBO System

This "New CBO System" is meant to help stores hard link specific CBO's to a specific PO to be linked on through the receiving cycle.

As an item is CBO'd it will begin to show up on the CBO Manager with a status of "New". This is to indicate that this particular CBO request has likely not been ordered yet and needs to be added to a PO. By choosing the F12 Send to PO option the PO used will begin to appear in the PO # field in CBO Manager. That PO will have the CBO flag icon displayed for that item and the Status will change to "Draft". As that PO is electronically ordered or posted to an Open RM that CBO item will begin to display a status of "OnOrder".

Manually adding an item to a PO that has an outstanding CBO with a status of NEW will result in a prompt about linking the PO to that CBO item. User will be further prompted if the qty is not large enough. Auto generating PO's will automatically link picked up titles in the CBO Manager to the PO generated. Various other actions on the title such as Move to another DRAFT PO from another DRAFT PO module (not backwards from an OPEN RM), EO Cascading, and Merging will also change the linkage in the CBO manager to the new PO selected. If "Copy to PO" is chosen the user will be prompted if not enough qty are being Copied to that other PO. If a CBO item that has already been Linked to a PO is deleted from the PO or the PO itself is voided the linkage is cleared from the CBO Manager screen.

The CBO flag icon will only be displayed on the PO/RM that the CBO item is specifically linked to. You can still view all the other outstanding CBO requests for that title by looking at the CBO info panel from a PO/RM. If a CBO item is on multiple PO/RM's that are displayed on the PO's info panel, we will show the PO/RM that it is Linked to in red.

When a SPO Wrapper is printed from Receiving (the item must have had a qty in Rec) the status on the CBO Manager will show "OnHold" and the qty requested will be added to the new OnHold field to indicate that some of the received copies are not available for general sale. If there are more qty being received than requested for that linked CBO request and there are other CBO's out there linked to other PO's we will change the linkage to the one being printed from. If there are not enough qty being received to cover all of the outstanding CBO requests for that particular title we will prioritize by age.

With the New system the CBO Manager also has a new checkbox called "New CBO's Only". This will hide all but the new CBO's that do not yet have a link to a PO so staff can work at the end of each day making direct assignments to the PO's to be ordered the next day.

When first switching to this New CBO System you will be prompted if you want to fix the existing SPO's. By choosing yes the program will look for the oldest open RM's first and begin linking CBO's to them. Any item that needs to be ordered yet will get a status of "New" so staffers can make their own decision as to what PO to link to.