

Table Of Contents

Introduction – Fill Customer Backorders.....	1
Accessing The Program	1
Creating A Fill Customer Backorder From Stock Report	2
Fill Customer Backorders From Stock Report (Report Only).....	4
Creating Workspaces For Filled Customer Backorders.....	4
Fill Customer Backorders From Stock (Workspaces Created).....	7
Workspace Screen Example	8
Creating Estimate Workspaces For Filled Customer Backorders.....	8
Fill Customer Backorders From Stock (Estimates Created)	10
Reprinting The Last Fill Customer Backorders From Stock Report	11

Introduction – Fill Customer Backorders

The Fill Customer Backorders From Stock program is designed to allow the user to generate a report that shows what customer backordered items can be filled based upon the item's current quantity on hand and the backorder date. The report can be generated using any of the following options when wanting to fill customer backorders from stock:

- ◆ Optionally only generate a report that shows what customer backordered items can be filled based upon the item's current quantity on hand and the backorder date.
- ◆ Optionally create workspaces or estimate workspaces for a range of customers and/or product lines.
- ◆ Optionally fill only backordered items that can be 100% filled.
- ◆ Optionally fill backordered items in multiples of unit pack quantities.
- ◆ Optionally use the original price at the time of the backorder or use the current price based upon the customer's pricing matrix.
- ◆ Optionally create estimates/workspaces using a specific counterman code or using the original counterman code at the time of the backorder.
- ◆ Optionally list the original PO number and backorder date below each item as an **<F12>** (*Text Write In*) description line.
- ◆ Optionally automatically print interim invoices for newly created workspaces.
- ◆ Optionally reprint the last printed Fill Customer Backorder From Stock report.

When estimates/workspaces are created, the customer backorder records will be automatically updated if partially filled or deleted if completely filled. A report is also automatically generated to show the counterman code and workspace number for the newly created estimates/workspaces.

 **Note:** Customer backorder records are filled accordingly from the oldest to newest backorder dates!

Accessing The Program

To access the fill backorder's program, follow the steps below:

- From the *Autologue Main Menu*, enter **21** and press **<Return>**.
- When the *Utility Menu 1* is displayed, enter **1** (*Select Utility Menu 2*).
- When the *Utility Menu 2* is displayed, enter **1** (*Select Utility Menu 3*).
- When the *Utility Menu 3* is displayed, enter **1** (*Select Utility Menu 4*).
- When the *Utility Menu 4* is displayed, enter **1** (*Select Utility Menu 5*).
- When the *Utility Menu 5* is displayed, enter **1** (*Select Utility Menu 6*).
- When the *Utility Menu 6* is displayed, enter **2** (*Fill Customer Back Orders From Stock*).

The *Fill Customer Backorders From Stock* screen will then be displayed as shown:

FILL CUSTOMER BACKORDERS FROM STOCK

Printer : 1 Create Estimate / Workspace / Report (E/W/R) : R

Beginning Customer : 1 Ending Customer : 499

Beginning Product Line : 1 Ending Product Line : 255

100% Only (Y/N) : N By Unit Pack (Y/N) : N

Use Prices At The Time Of Backorder (Y/N) : N

F1 - Reset F4 - Reprint F10 - Run F11 - Exit

Creating A Fill Customer Backorder From Stock Report

The user has the ability to generate a “what if” report to show what items can be filled for what customer without actually creating estimates or workspaces.

To create a fill customer backorder from stock report, follow the steps below:

- From the *Fill Customer Backorders From Stock* screen and with the cursor positioned at the **Printer** : prompt, enter a printer number in which the report will be printed and press <Return> or just press <Return> to use the default system printer number.
- With the cursor positioned at the **Create Estimate / Workspace / Report (E/W/R)** : prompt, enter **R** (*Report*) and press <Return>.

If **R** is entered, a report will be created based upon the entered prompts. If **E** is entered, a report and estimate workspaces will be created based upon the entered prompts. If **W** is entered, a report and normal workspaces will be created based upon the entered prompts.

- With the cursor positioned at the **Beginning Customer** : prompt, enter the beginning customer number and press <Return> or just press <Return> to use the default value of **1**.
- With the cursor positioned at the **Ending Customer** : prompt, enter the ending customer number and press <Return> or just press <Return> to use the default value of the last customer number.

- With the cursor positioned at the **Beginning Product Line** : prompt, enter the beginning product line number and press <Return> or just press <Return> to use the default value of 1.
- With the cursor positioned at the **Ending Product Line** : prompt, enter the ending product line number and press <Return> or just press <Return> to use the default value of 255.
- With the cursor positioned at the **100% Only (Y/N)** : prompt, enter **Y** and press <Return> or press <Return> to use the default value of **N**.

If **Y** is entered, only backordered items that can be 100% filled will be selected. If the default value of **N** is used, backordered items that can be partially or 100% filled will be selected.

- With the cursor positioned at the **By Unit Pack (Y/N)** : prompt, enter **Y** and press <Return> or press <Return> to use the default value of **N**.

If **Y** is entered, the selected backordered items will be filled using multiples of unit pack quantities. If the default value of **N** is used, the selected backordered items will be filled by individual unit quantities.

- With the cursor positioned at the **Use Prices At The Time Of Backorder** : prompt, enter **Y** and press <Return> or press <Return> to use the default value of **N**.

If **Y** is entered, the original price of the selected backordered items at the time of the backorder will be used when creating estimates or workspaces. If the default value of **N** is used, the price of the selected backordered items will be based upon each customer's current pricing matrix and the original price will not be printed on the report.

- With the cursor positioned at the **Create Workspace Using Counterman** : prompt, enter a specific counterman code to be used and press <Return> or just press <Return> to use the original counterman codes the customer backorders were originally created under.

The screen will display **ORIGINAL** as the default value.

- With the cursor positioned at the **List Original PO / Backorder Date Below Part (Y/N)** : prompt, enter **N** and press <Return> or press <Return> to use the default value of **Y**.

If the default value of **Y** is used, the original PO number and backorder date will be listed below each item as an <F12> (*Text Write In*) description line in the workspace/estimate created. If **N** is entered, the original PO number and backorder date will *not* be listed below each item.

- With the cursor positioned at the **Print Interim's When Creating Workspaces (Y/N)** : prompt, enter **N** and press <Return> or press <Return> to use the default value of **Y**.

If the default value of **Y** is used, interim invoices will automatically be printed for created workspaces only! Estimate workspaces do *not* print! If **N** is entered, workspaces are created and interim invoices will *not* be printed.

- Press the <F10> (Run) key to create and print the Fill Customer Backorder From Stock report.

Fill Customer Backorders From Stock Report (Report Only)

Shown below is an example of the report:

FILL CUSTOMER BACKORDERS FROM STOCK										
Demonstration Software										Page 1
										Tue Dec 16 11:01:07 YYYY
CUSTOMER	PRODUCT LINES	FILL	FILL BY	ORIG. B/O	FILL	CREATE	SHOW	PRINT		
START	END	100% ONLY	UNIT PACK	PRICE	COUNTERMAN	E/W/R	PO	INTERIM		
1	5000	1	255	N	N	N	R	Y	Y	

Demonstration Software										Tue Dec 16 11:01:07 YYYY
CTRMN	CUST #	PURCHASE ORDER #		PART NUMBER		PL #	ORDER	FILL	DATE	
A	250	23432		BCA-A2		58	12	12	MM/DD/YYYY	
A	250	23432		BCA-A4		58	5	5	MM/DD/YYYY	
A	250	23641		JTT-817		4	16	16	MM/DD/YYYY	
A	251	1233		BCA-A4		58	2	2	MM/DD/YYYY	
A	251	1233		BCA-A7		58	2	2	MM/DD/YYYY	
A	251	1233		FRM-PH30		50	12	12	MM/DD/YYYY	
A	251	1233		REB-3250		201	4	4	MM/DD/YYYY	
A	260	NONE		ACD-R45TS		3	8	8	MM/DD/YYYY	
A	260	NONE		BCA-A6		58	2	2	MM/DD/YYYY	
A	260	NONE		BCA-A7RK		58	2	2	MM/DD/YYYY	
A	260	NONE		FRM-PH30		50	2	2	MM/DD/YYYY	
A	270	NONE		FRM-CA326		50	1	1	MM/DD/YYYY	
A	270	NONE		FRM-PH11		50	2	2	MM/DD/YYYY	
A	270	NONE		REB-3525		201	2	2	MM/DD/YYYY	
A	278	6651		BCA-A12		58	2	2	MM/DD/YYYY	
A	278	6651		FRM-PH43		50	4	4	MM/DD/YYYY	
B	260	NONE		REB-3131		201	2	2	MM/DD/YYYY	
C	251	1235		FRM-CG11		50	6	6	MM/DD/YYYY	

Fill Customer Backorders From Stock Report (Report Only)

Creating Workspaces For Filled Customer Backorders

To automatically create workspaces for filled customer backorders, follow the steps below:

- From the *Fill Customer Backorders From Stock* screen and with the cursor positioned at the **Printer** : prompt, enter a printer number in which the report will be printed and press <Return> or just press <Return> to use the default system printer number.
- With the cursor positioned at the **Create Estimate / Workspace / Report (E/W/R)** : prompt, enter **W** (Workspace) and press <Return>.

If **R** is entered, a report will be created based upon the entered prompts. If **E** is entered, a report and estimate workspaces will be created based upon the entered prompts. If **W** is entered, a report and normal workspaces will be created based upon the entered prompts.

Note: If the **HOLD_IS_EST** uservar is enabled, an *ONLY ESTIMATES ARE ALLOWED* message will be displayed if **W** is entered at the **Create Estimate / Workspace / Report (E/W/R)** : prompt. The screen will then redisplay the previous value entered.

- With the cursor positioned at the **Beginning Customer** : prompt, enter the beginning customer number and press **<Return>** or just press **<Return>** to use the default value of **1**.
- With the cursor positioned at the **Ending Customer** : prompt, enter the ending customer number and press **<Return>** or just press **<Return>** to use the default value of the last customer number.
- With the cursor positioned at the **Beginning Product Line** : prompt, enter the beginning product line number and press **<Return>** or just press **<Return>** to use the default value of **1**.
- With the cursor positioned at the **Ending Product Line** : prompt, enter the ending product line number and press **<Return>** or just press **<Return>** to use the default value of **255**.
- With the cursor positioned at the **100% Only (Y/N)** : prompt, enter **Y** and press **<Return>** or press **<Return>** to use the default value of **N**.

If **Y** is entered, only backordered items that can be 100% filled will be selected. If the default value of **N** is used, backordered items that can be partially or 100% filled will be selected.

- With the cursor positioned at the **By Unit Pack (Y/N)** : prompt, enter **Y** and press **<Return>** or press **<Return>** to use the default value of **N**.

If **Y** is entered, the selected backordered items will be filled using multiples of unit pack quantities. If the default value of **N** is used, the selected backordered items will be filled by individual unit quantities.

- With the cursor positioned at the **Use Prices At The Time Of Backorder** : prompt, enter **Y** and press **<Return>** or press **<Return>** to use the default value of **N**.

If **Y** is entered, the original price of the selected backordered items at the time of the backorder will be used when creating estimates or workspaces. If the default value of **N** is used, the price of the selected backordered items will be based upon each customer's current pricing matrix and the original price will not be printed on the report.

- With the cursor positioned at the **Create Workspace Using Counterman** : prompt, enter a specific counterman code to be used and press **<Return>** or just press **<Return>** to use the original counterman codes the customer backorders were originally created under.

The screen will display **ORIGINAL** as the default value.

- With the cursor positioned at the **List Original PO / Backorder Date Below Part (Y/N)** : prompt, enter **N** and press <Return> or press <Return> to use the default value of **Y**.

If the default value of **Y** is used, the original PO number and backorder date will be listed below each item as an <F12> (*Text Write In*) description line in the workspace/estimate created. If **N** is entered, the original PO number and backorder date will *not* be listed below each item.

- With the cursor positioned at the **Print Interim's When Creating Workspaces (Y/N)** : prompt, enter **N** and press <Return> or press <Return> to use the default value of **Y**.

If the default value of **Y** is used, interim invoices will automatically be printed for created workspaces only! Estimate workspaces do *not* print! If **N** is entered, workspaces are created and interim invoices will *not* be printed.

- Press the <F10> (*Run*) key to start creating workspaces and the Fill Customer Backorder From Stock report.

Once the workspaces have been created, the customer backorder records are automatically updated if partially filled or deleted if completely filled. A report is also automatically generated to show the counterman code and workspace number for the newly created estimates/workspaces.

- ☞ **Note:** Customer backorder records are filled accordingly from the oldest to newest backorder dates!

Fill Customer Backorders From Stock (Workspaces Created)

Shown below is an example of the report:

FILL CUSTOMER BACKORDERS FROM STOCK											Page	1
Demonstration Software											Tue Dec 16 11:01:07 19YY	

CUSTOMER		PRODUCT LINES		FILL	FILL BY	ORIG. B/O	FILL	CREATE	SHOW	PRINT		
START	END	START	END	100% ONLY	UNIT PACK	PRICE	COUNTERMAN	E/W/R	PO	INTERIM		

1	5000	1	255	N	N		N	W	Y	Y		

Demonstration Software											Tue Dec 16 11:01:07 19YY	
CTRMN	CUST #	PURCHASE ORDER #				PART NUMBER		PL #	ORDER	FILL	DATE	

A	250	23432				BCA-A2		58	12	12	MM/DD/YYYY	
A	250	23432				BCA-A4		58	5	5	MM/DD/YYYY	
A	250	23641				JTT-817		4	16	16	MM/DD/YYYY	
A	251	1233				BCA-A4		58	2	2	MM/DD/YYYY	
A	251	1233				BCA-A7		58	2	2	MM/DD/YYYY	
A	251	1233				FRM-PH30		50	12	12	MM/DD/YYYY	
A	251	1233				REB-3250		201	4	4	MM/DD/YYYY	
A	260	NONE				ACD-R45TS		3	8	8	MM/DD/YYYY	
A	260	NONE				BCA-A6		58	2	2	MM/DD/YYYY	
A	260	NONE				BCA-A7RK		58	2	2	MM/DD/YYYY	
A	260	NONE				FRM-PH30		50	2	2	MM/DD/YYYY	
A	270	NONE				FRM-CA326		50	1	1	MM/DD/YYYY	
A	270	NONE				FRM-PH11		50	2	2	MM/DD/YYYY	
A	270	NONE				REB-3525		201	2	2	MM/DD/YYYY	
A	278	6651				BCA-A12		58	2	2	MM/DD/YYYY	
A	278	6651				FRM-PH43		50	4	4	MM/DD/YYYY	
B	260	NONE				REB-3131		201	2	2	MM/DD/YYYY	
C	251	1235				FRM-CG11		50	6	6	MM/DD/YYYY	
Demonstration Software											Tue Dec 16 11:01:07 19YY	
WORKSPACES CREATED												
CTRMN	WORKSPACE			NEW/APPEND								

A	250			NEW								
A	251			NEW								
A	260			NEW								
A	270			NEW								
A	278			NEW								
B	260			NEW								
C	251			NEW								

Fill Customer Backorders From Stock Report (Workspaces Created)

Workspace Screen Example

CNTRM S CERTIFIED APPLIANCE			(714)587-7485		CUST 251		-CHARGE-	
DESCRIPTION		MFR-PART NO	LIST	CORE	UNIT	COD	QTY	EXTENDED
1	LIFTERS	JTT-817	6.95	0.00	2.74	N	16	43.84
2	* BACKORDER PO:6123				DATE:2/25/2000			
3	BEARING	BCA-A2	11.77	0.00	8.53	N	2	17.06
4	* BACKORDER PO:6123				DATE:2/25/2000			
5	BEARING	BCA-A4	13.92	0.00	10.09	N	2	20.18
6	* BACKORDER PO:6123				DATE:2/25/2000			

Original PO and Backorder Date

Creation: 02/25/00 Doc #		GPM%	40.28	SUB-TOTAL	81.08
				TAX	0.00
OPEN BALANCE	1436.91	CREDIT LIMIT	30000.00	TOTAL	81.08
** PO REQUIRED ** ** OVERDUE **					

The workspace screen shows an example of filled items and the original P.O. and backorder date information list below each part.

Creating Estimate Workspaces For Filled Customer Backorders

To create estimate workspaces for filled backorders, follow the steps below:

- From the *Fill Customer Backorders From Stock* screen and with the cursor positioned at the **Printer** : prompt, enter a printer number in which the report will be printed and press <Return> or just press <Return> to use the default system printer number.
- With the cursor positioned at the **Create Estimate / Workspace / Report (E/W/R)** : prompt, enter **E** (*Estimate*) and press <Return>.

If **R** is entered, a report will be created based upon the entered prompts. If **E** is entered, a report and estimate workspaces will be created based upon the entered prompts. If **W** is entered, a report and normal workspaces will be created based upon the entered prompts.

- With the cursor positioned at the **Beginning Customer** : prompt, enter the beginning customer number and press <Return> or just press <Return> to use the default value of 1.
- With the cursor positioned at the **Ending Customer** : prompt, enter the ending customer number and press <Return> or just press <Return> to use the default value of the last customer number.

- With the cursor positioned at the **Beginning Product Line** : prompt, enter the beginning product line number and press <Return> or just press <Return> to use the default value of 1.
- With the cursor positioned at the **Ending Product Line** : prompt, enter the ending product line number and press <Return> or just press <Return> to use the default value of 255.
- With the cursor positioned at the **100% Only (Y/N)** : prompt, enter Y and press <Return> or press <Return> to use the default value of N.

If Y is entered, only backordered items that can be 100% filled will be selected. If the default value of N is used, backordered items that can be partially or 100% filled will be selected.

- With the cursor positioned at the **By Unit Pack (Y/N)** : prompt, enter Y and press <Return> or press <Return> to use the default value of N.

If Y is entered, the selected backordered items will be filled using multiples of unit pack quantities. If the default value of N is used, the selected backordered items will be filled by individual unit quantities.

- With the cursor positioned at the **Use Prices At The Time Of Backorder** : prompt, enter Y and press <Return> or press <Return> to use the default value of N.

If Y is entered, the original price of the selected backordered items at the time of the backorder will be used when creating estimates or workspaces. If the default value of N is used, the price of the selected backordered items will be based upon each customer's current pricing matrix and the original price will not be printed on the report.

- With the cursor positioned at the **Create Workspace Using Counterman** : prompt, enter a specific counterman code to be used and press <Return> or just press <Return> to use the original counterman codes the customer backorders were originally created under.

The screen will display **ORIGINAL** as the default value.

- With the cursor positioned at the **List Original PO / Backorder Date Below Part (Y/N)** : prompt, enter N and press <Return> or press <Return> to use the default value of Y.

If the default value of Y is used, the original PO number and backorder date will be listed below each item as an <F12> (*Text Write In*) description line in the workspace/estimate created. If N is entered, the original PO number and backorder date will *not* be listed below each item.

- With the cursor positioned at the **Print Interim's When Creating Workspaces (Y/N)** : prompt, enter N and press <Return> or press <Return> to use the default value of Y.

If the default value of **Y** is used, interim invoices will automatically be printed for created workspaces only! Estimate workspaces do **not** print! If **N** is entered, workspaces are created and interim invoices will **not** be printed.

- Press the <F10> (Run) key to start creating estimate workspaces and the Fill Customer Backorder From Stock report.

Once the estimate workspaces have been created, the customer backorder records are automatically updated if partially filled or deleted if completely filled. A report is also automatically generated to show the counterman code and workspace number for the newly created estimate workspaces.

Note: Customer backorder records are filled accordingly from the oldest to newest backorder dates!

Fill Customer Backorders From Stock (Estimates Created)

Shown below is an example of the report:

FILL CUSTOMER BACKORDERS FROM STOCK												Page	1
Demonstration Software												Tue Dec 16 11:01:07 YYYY	

CUSTOMER	PRODUCT LINES		FILL	FILL BY	ORIG. B/O	FILL	CREATE	SHOW	PRINT				
START	END	START	END	100% ONLY	UNIT PACK	PRICE	COUNTERMAN	E/W/R	PO	INTERIM			

1	5000	1	255	N	N		N	E	Y	Y			

Demonstration Software												Tue Dec 16 11:01:07 19YY	
CTRMN	CUST #	PURCHASE ORDER #				PART NUMBER		PL #	ORDER	FILL	DATE		

A	250	23432				BCA-A2		58	12	12	MM/DD/YYYY		
A	250	23432				BCA-A4		58	5	5	MM/DD/YYYY		
A	250	23641				JTT-817		4	16	16	MM/DD/YYYY		
A	251	1233				BCA-A4		58	2	2	MM/DD/YYYY		
A	251	1233				BCA-A7		58	2	2	MM/DD/YYYY		
A	251	1233				FRM-PH30		50	12	12	MM/DD/YYYY		
A	251	1233				REB-3250		201	4	4	MM/DD/YYYY		
A	260	NONE				ACD-R45TS		3	8	8	MM/DD/YYYY		
A	260	NONE				BCA-A6		58	2	2	MM/DD/YYYY		
A	260	NONE				BCA-A7RK		58	2	2	MM/DD/YYYY		
A	260	NONE				FRM-PH30		50	2	2	MM/DD/YYYY		
A	270	NONE				FRM-CA326		50	1	1	MM/DD/YYYY		
A	270	NONE				FRM-PH11		50	2	2	MM/DD/YYYY		
A	270	NONE				REB-3525		201	2	2	MM/DD/YYYY		
A	278	6651				BCA-A12		58	2	2	MM/DD/YYYY		
A	278	6651				FRM-PH43		50	4	4	MM/DD/YYYY		
B	260	NONE				REB-3131		201	2	2	MM/DD/YYYY		
C	251	1235				FRM-CG11		50	6	6	MM/DD/YYYY		
Demonstration Software												Tue Dec 16 11:01:07 19YY	
ESTIMATES CREATED													
CTRMN	ESTIMATE		NEW/APPEND										

A	250		NEW										
A	251		NEW										
A	260		NEW										
A	270		NEW										
A	278		NEW										
B	260		NEW										
C	251		NEW										

Fill Customer Backorders From Stock Report (Estimates Created)

Reprinting The Last Fill Customer Backorders From Stock Report

To reprint the last Fill Customer Backorders From Stock report, follow the steps below:

- From the *Fill Customer Backorders From Stock* screen and with the cursor positioned at the **Printer** : prompt, enter a printer number in which the report will be reprinted and press **<Return>** or just press **<Return>** to use the default system printer number.
- Press the **<F4>** (*Reprint*) key to reprint the last Fill Customer Backorder From Stock report.