Backorders

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Overview

Sellercloud can mark orders with a **Backorder** status when a customer orders an out-of-stock item. This allows you to fulfill the order at a later time once you replenish the inventory for that product.

There are several ways to handle backorders:

- Reallocate inventory
- Dropship from a vendor
- Delay the shipping or cancel the order
- Configure automated emails to notify your customers

The backorder feature is only available if the **BackOrderReCalculateService** is running on your server. Contact Sellercloud Support to confirm that this service is installed. In addition, you must enable the Client Setting **Enable BackOrder Workflow**.

If your workflow includes Shipping Containers and you wish to send backorder information to the channel, you can enable the **Enable Shipping Containers for PO** Client Setting. When this setting is enabled, Sellercloud sends the **Qty On Order** and **Estimated Arrival Date** fields of a container as backorder information instead of the **Qty On Order** and **Estimated Delivery Date** fields of Purchase Orders. This option applies to channels such as Wayfair and Overstock.

Backorders

The **Backorder** quantity appears on the Order Details page's **Items** panel. The backorder quantity equals the number of insufficient product units that are required to fulfill the order. When inventory becomes available, this quantity gets adjusted, and the order status gets updated accordingly.

Search Backorders

To search for backordered products:

1. Go to **Catalog > Manage Catalog** or **Inventory > Manage Inventory.**

2. Click **Add filter** and select **Back Order**.

3. Click the **Back Order** filter and select the **From / To** backorder quantities to search for.

4. Click **Search**.

To search your orders by backorder status:

1. Go to **Orders > Manage Orders**.

2. Click **Add filter** and select **Back Order**.

3. Click the **Back Order** filter and select a backorder type.

4. Click **Search**.
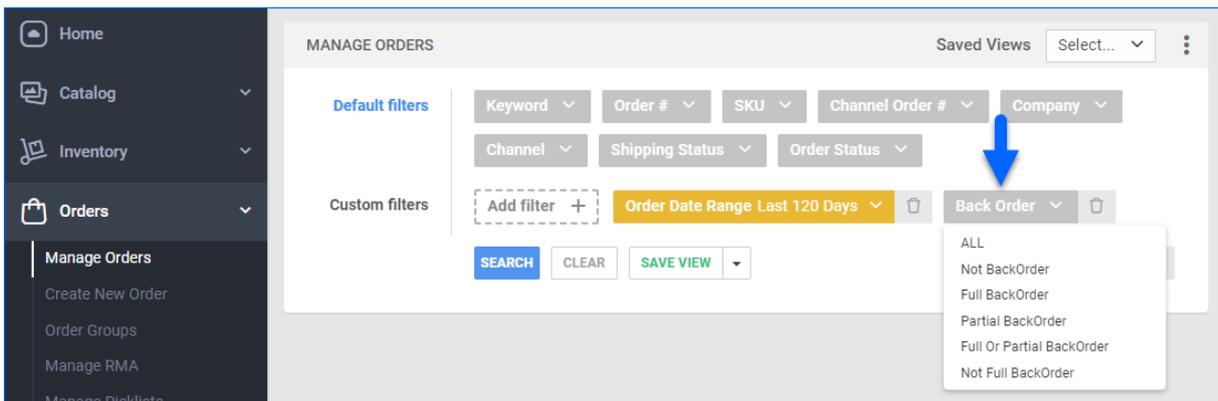
Manage Backorders

The following order-related actions affect your orders' backorder status. When they occur, the backorder status and quantity are immediately updated:

- An order gets Split
- Items get added or Replaced
- Inventory becomes available through a PO Receive

When inventory becomes available, older orders get updated first. If you Manually Adjust or Set the Physical inventory of an item, you can force the recalculation of one or more backorders instead of reallocating inventory or waiting for the **BackOrderReCalculateService** to rerun.

Update Backorders

To update one or more orders:

1. Go to **Orders > Manage Orders**

2. Select orders by checking the boxes on the left.

3. Click the blue **Actions** icon in the bottom right corner.

4. Search for **Backorder** and select from these actions:

a. **BackOrder Reallocation** – Edit the backorder quantity. This is useful when you want to reallocate an order's backordered item to fill the backorder quantity on another order and ship it immediately. Note that your changes will be overwritten when the **BackOrderReCalculateService** re-runs based on the quantity available and the backorder-related Client Settings.

b. **Mark BackOrder** – Mark orders as backorders.

c. **Mark Not BackOrder** – Unmark orders as backorders.

d. **Recalculate Backorders** – Recalculate the selected backorders immediately based on the currently available product quantities.

You can also manage backorder reallocation action for a specific order:

1. Go to the Order Details Page.

2. Click **Toolbox** and select **Manage Backorder**.

3. On this page, you can see the quantity on order, the currently available inventory, and the backorder quantity. Click **Edit**, then update the **Backorder Qty** field and click **Save**.

Workflow Automation

Sellercloud also allows you to automate parts of your backorder workflow:

1. Create a Saved Search with the **Back Order** filter.

2. Create a new rule with the Order Rule Engine with a condition where the **Condition Type** is **Order Saved View**, then select the saved search created in Step 1.

3. Add **Actions** to apply to your backorders automatically.

If necessary, you can contact Sellercloud Support to request additional customizations via plugins. Building any type of new customization is billable. Learn more about Sellercloud Pricing.

Email Customers

You can automate the backorder workflow further by notifying customers about cancellations or shipping delays. You do this by creating an email template and configuring it to be sent automatically whenever a backorder occurs.

1. Go to Company Settings.

2. Click **Toolbox** and select **Email Settings > Email Templates**.

3. Click **Add New Template**.

4. Create a customized template to be used when an item is out of stock. You can personalize your template with Placeholders.

5. Click **Save Template**.

6. Click **Toolbox** and select **Email Settings > Email Template Assignment**. Here, you can select email templates to send automatically in specific scenarios.

7. Click **Edit**.

8. Scroll down to **EmailCustomerForBackOrder** and choose your email template.
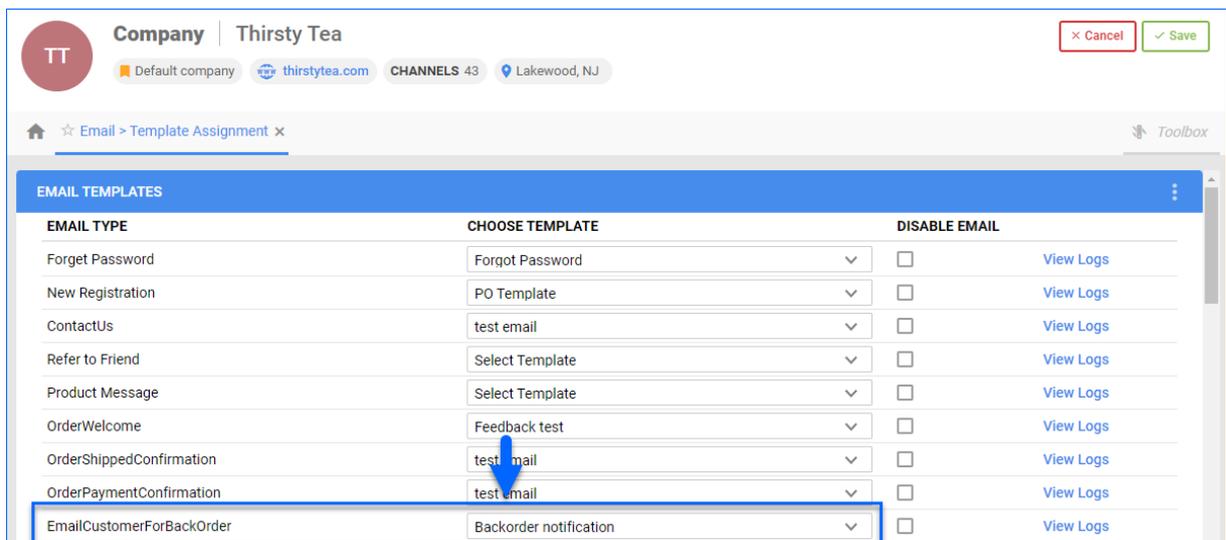
9. Click **Save**. This email will be sent whenever an order is marked as a Backorder.

You must select a working SMTP Profile on the email template for this automation to work.

Configure Shipbridge

Shipbridge also has settings related to backorders.

You can move all backorders to Shipbridge's Requires Attention tab instead of the **Unshipped** tab. To enable this option:

1. Go to **Menu > Customize Interface**.

2. Select **GUI**.

3. Check **Auto move orders with backorder items to the attention tab**.
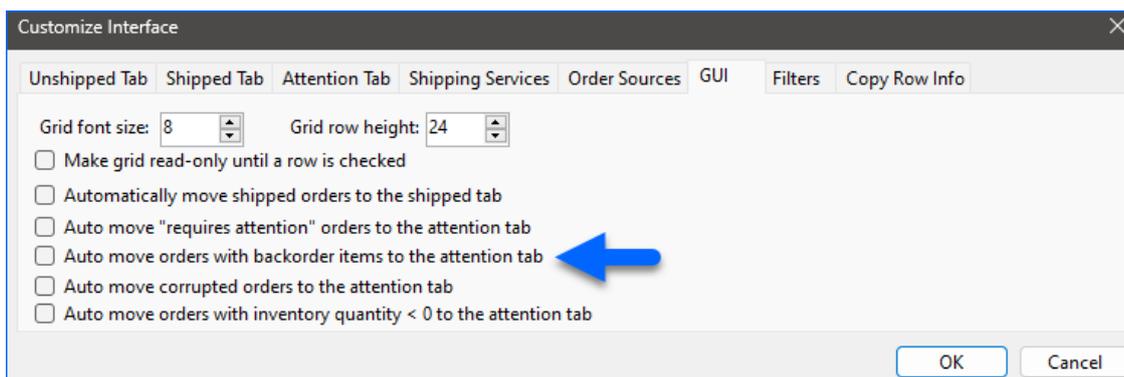
You can hide all backorders from Shipbridge's Scan and Ship tab when entering or scanning those orders, so you will not try to ship a backorder when you have no item(s) available in the warehouse. To enable this option:

1. Go to **Menu > Options**.

2. Select the **Scan and Ship** tab.

3. Click **Ignore backorder/requires attention orders**.
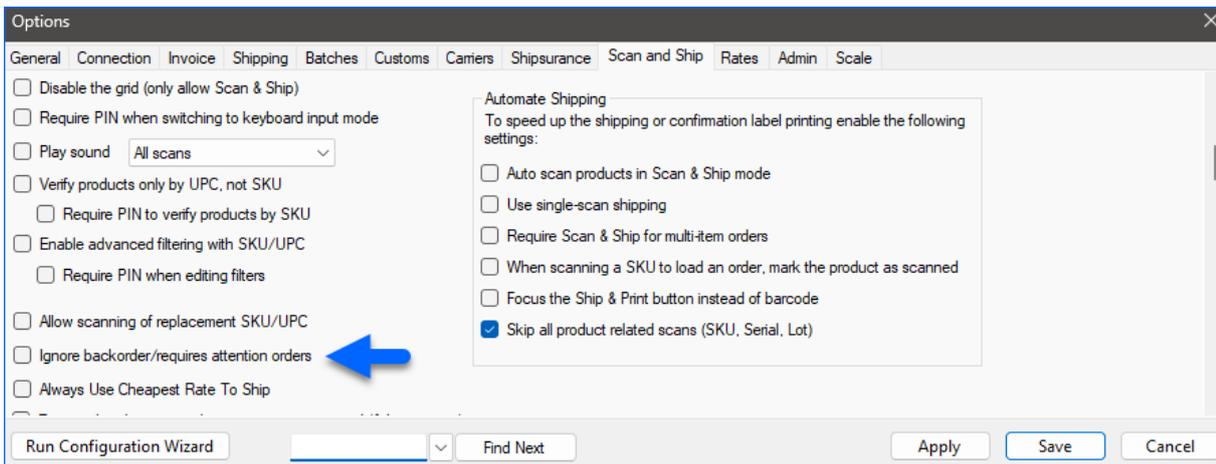
Shipbridge also has a filter for backorders called **Back Order Status**.
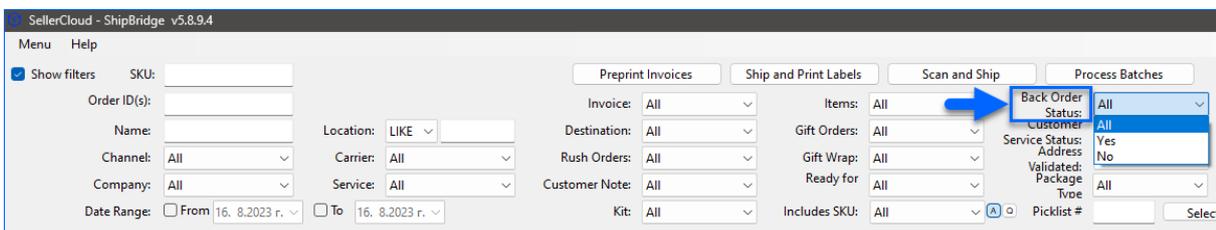
Client Settings

Below are the Client Settings that affect Sellercloud's backorder calculation and general functionality.

General Settings
- **Enable BackOrder Workflow** – Enables all backorder functionality.
- **BackOrder: Max Days to bo Back** – Enable to set a specific past number of days to include in the backorder calculation. If an order is older, it will not have its backorder status changed.
- **Update BackOrder status on Order Status Change** – Disabled by default. Enable to automatically recalculate the backorder status based on the currently available inventory anytime an order's status is changed from any status to **On Hold** or **Quote** or vice versa.
- **Hide BackOrder Column In Manage Orders** – Enable to hide the **Backorder Qty** column on the Manage Orders Page.
- **Enable per OrderItem based BackOrder in PickList** – Controls how the **Mark Backorder** action on the Picklist Details page works. If this setting is enabled, it will mark the items as backorder even if they have enough inventory. This setting is available only in Alpha.
- **Stop Marking Orders as BackOrder while Creating Orders** – Enable to prevent orders' backorder status from being set upon creation. The backorder status will still be updated once the **BackOrderReCalculateService** runs.
- **Do Not Send BackOrder Tags To Magento** – Enable to prevent Sellercloud from sending the <backorders> and <use_config_backorders> tags to Magento.

Calculation Settings
- **Use Payment Date Instead of Order Creation in Backorder Calculation** – Enable to use the **Payment Date** instead of the **Order Date** when allocating product inventory for backorders during calculation.
- **Use Warehouse-Based BackOrder Calculation** – Enable to calculate backorder per product, based on the **Ship From** warehouse set on the order. This will not do the calculation for FBA, Interim, or Untested Warehouses.
- **Don't consider Dropship WH Qty as Available Qty for BackOrder calculation** – Enabled by default. Excludes product quantities in Dropship Warehouses from the backorder calculation. You can use this when importing inventory from a vendor into a dropship-type warehouse, and you don't want this inventory to be considered

available.

- **Don't consider Unsellable WH Qty as Available Qty in Backorder Calculation** – Enabled by default. Excludes product quantities in Unsellable Warehouses from the backorder calculation.
- **Consider ReplacementSKU Qty in BackOrder Calculation** – Disabled by default. If an item is out of stock, but its Replacement SKU has stock, the order will not be marked as a backorder.
- **Include Authorized Orders In BackOrder Calculation** – Enable to include orders with their Payment Status set to **Authorized** in the backorder calculation.
- **Include OnHold Orders In BackOrder Calculation** – Enable to include orders with their Order Status set to **On Hold** in the backorder calculation.
- **Include Unpaid and Partially Paid Orders In BackOrder Calculation** – Enabled by default. Orders with a Payment Status of **Unpaid** and **Partially Paid** will be included in the backorder calculation.
- **Prioritize Fully-Shippable Orders in BackOrder Calculation** – Enable to prioritize the allocation of available quantity to the order with the minimum required quantity that can be fulfilled when recalculating backorder quantities. This setting is useful when dealing with multiple backorders with different quantities. For example, if an order for 40 items with 10 on hand, and a second order for 10 comes in later, this setting will allocate quantity to the second order instead of reserving it for the first. As usual, it will try to do this for the oldest orders first.
- **Prioritize Rush Orders in Backorder Calculation** – Enable to prioritize the allocation of available quantities to Rush Orders when recalculating backorder quantities.
- **Prioritize Picked Orders in Backorder Calculation** – Enable to allocate available quantities to picked orders when recalculating backorder quantities.

Understanding backorders

The Backorder feature is only available if the BackOrderReCalculateService is running on your server; please contact Sellercloud Support to confirm that this service is installed. In addition, **Enable BackOrder Workflow** must be selected in **Client Settings** to use this feature. Read how to configure Backorder-related later in this topic. Sellercloud can mark an order with a BackOrder status when a customer orders an item for which you have no availability. When this happens, the backordered quantity will appear in the Order Details' BackOrderQty column and the order is marked as BackOrder in the Order Status bar. When inventory does become available, the BackOrder Qty is adjusted and the Order Status is updated accordingly. Note that inventory is applied chronologically to orders, with quantity first becoming available to older orders. If you manually change the inventory of an item, you can easily force the recalculation of one or more Backorders instead of reallocating inventory or waiting for the BackOrderReCalculateService to rerun: On the Manage Orders page > Select orders > Action Menu > **Recalculate Backorders** > **Go**. This topic explains several ways to help you effectively manage your Backorders, including:

- Order-related functions affecting backorders
- Reallocating backorder quantity
- Configuring ShipBridge for backorders
- Related options for managing backorders

Finding backorders

1. Open Manage Orders > **Advanced Search** > **BackOrder** dropdown field > choose **Full BackOrder**, **Partial BackOrder**, or **Full or Partial BackOrder** > **Search**.

2. Open a Backorder from the Manage Orders page of results:


Order-related functions affecting backorders

The following order-related actions will have an impact on an order's Backorder status. When any of these occur, the Backorder status and quantity is immediately determined on related orders, and other quantity adjustments will update the Backorder status periodically, throughout the day:

- An order is split
- An order has items added to it
- Inventory becomes available though a PO Receive

Reallocating backorder quantities

To be able to ship an order immediately, there may be times when you want to reallocate an order's backordered item to fill the backorder quantity on another order. If so, you can edit the orders' Backorder quantities and change their Backorder statuses. Here's how:

1. On the Manage Orders page— select the **Backorder** > Action Menu > **Mark BackOrder** or **Mark Not BackOrder** > **Go**.

2. There are 2 places to edit an order's Backorder quantity:

   a. On the Order Details page— click Action Menu > **Manage Backorder Reallocation** > **Go**; or

   b. On the Manage Orders page > select the Backorder > Action Menu > **Manage Backorder Reallocation** > **Go**.

3. On the **BackOrder Reallocation** page > revise the **Backorder Qty** field > **Update**.
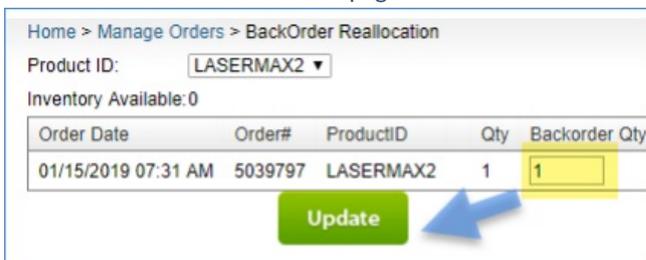
Your changes will be overwritten when the BackOrderReCalculateService re-runs, based on quantity available and Backorder-related **Client Settings**.

Configuring ShipBridge for backorders

ShipBridge has 2 convenient settings that help control Backorders:
- **Menu** > **Customize Interface** > **GUI** > **Auto move orders with backorder items to the attention tab**— This moves all Backorders to ShipBridge's **Requires Attention** tab instead of the **Unshipped** tab, so they are easily discernible as orders that are not ready to ship.
- **Menu** > **Options** > **Scan and Ship** > **Ignore backorder/requires attention orders**— This hides all Backorders from ShipBridge's Scan and Ship tab when entering or scanning those orders, so you will not try to ship a Backorder when you have no item(s) available in the warehouse.

Configuring Client Settings for backorders

There are a number of Client Settings that affect Sellercloud's calculation and appearance of Backorders:

CLIENT SETTINGS	DESCRIPTION

Enable BackOrder Workflow (required)	• Must be selected for the Backorder feature to work • Shows BackOrder Qty and Avail Qty on the expanded Manage Orders grid *Enabling this will deselect the setting Hide BackOrder Column in Manage Orders. It is assumed you want to see the BackOrder icon on the Manage Orders page; however, you can override this behavior by selecting it.
Hide BackOrder Column in Manage Orders	Hides the BackOrder icon on the expanded Manage Orders grid and the BackOrderQty column on the Order Details page. *Selecting Enable BackOrder Workflow automatically deselects this setting
Stop Marking Orders as BackOrder while Creating Orders (enabled by default)	• Orders will not be marked with a BackOrder status when created • Hides the BackOrder icon on the Manage Orders grid and the BackOrderQty column on the Order Detail page
Consider ReplacementSKU Qty in BackOrder Calculation	If an item is out of stock, but its replacement SKU has stock, the order will not be marked as a backorder
Don't consider Dropship WH Qty as Available Qty for BackOrder calculation (enabled by default)	• Excludes the quantity in a Dropship type warehouse from the Backorder calculation • You can use this when importing inventory from a vendor into a dropship type warehouse and you don't want this inventory to be considered as available. Instead, items are actually ordered on a PO, received, and shipped to the customer.
Include Authorized Orders In BackOrder Calculation (enabled by default)	Orders with a Payment Status of **Authorized** are considered for calculating Backorders
Include Unpaid and Partially Paid Orders In BackOrder Calculation (enabled by default)	Orders with a Payment Status of **Unpaid** and **Partially Paid** are considered for calculating Backorders
Use WarehouseBased Backorder Calculation	Calculates Backorder per product, based on the Ship To warehouse set on the order. Note:This will not do the calculation for FBA, Interim, or Untested warehouse types.
Update BackOrder status on Order Status Change (enabled by default)	Whenever the **Order Status** is changed to any value, the Backorder quantity is automatically recalculated
Use Payment Date Instead of Order Creation in Backorder Calculation	**Payment Date**, not **Order Date**, will be used in Backorder calculations; meaning, paid Backorders will have priority over Backorders without payment

Prioritize FullyShippable Orders in Backorder Calculation	• This setting is useful when dealing with multiple Backorders with different quantities:
	  ○ It will allocate available quantities to the order with the minimum required quantity that can be fulfilled, when possible
	  ○ For example, an order for 40 items with 10 on hand and a second order for 10 comes in later. This setting will allocate quantity to the second order instead of reserving it for the first. It will try to do this for the oldest orders first.

Include OnHold Orders In BackOrder Calculation	Orders with an Order Status of **OnHold** will be included in Backorder calculations
Enable per OrderItem Based BackOrder in PickList	

Related options for managing backorders

When an order comes in for an out-of-stock item, Sellercloud offers several other options for dealing with Backorders:
- Delaying shipping
- Dropshipping from vendor
- Cancelling order
- Emailing customers— This feature lets you email a customer about a cancellation or shipping delay. You create an email template and configure emails to be automatically sent whenever a Backorder occurs:

1. **Settings** > choose **Email Templates**. (You can also go to **Company Settings** > **Toolbox** > **Email Settings** > **Email Templates**.)

2. Click **Add New Template** and create a customized template to be used when an item is out of stock > **Save Template**.

3. **Company Settings** > **Toolbox** > **Email Settings** > click **Email Template Assignment**. Here, you assign a specific email to send when encountering a given property.

4. Scroll down to EmailCustomerForBackOrder and choose your email template > **Update Grid**. This email will be sent whenever an order is marked as a BackOrder.