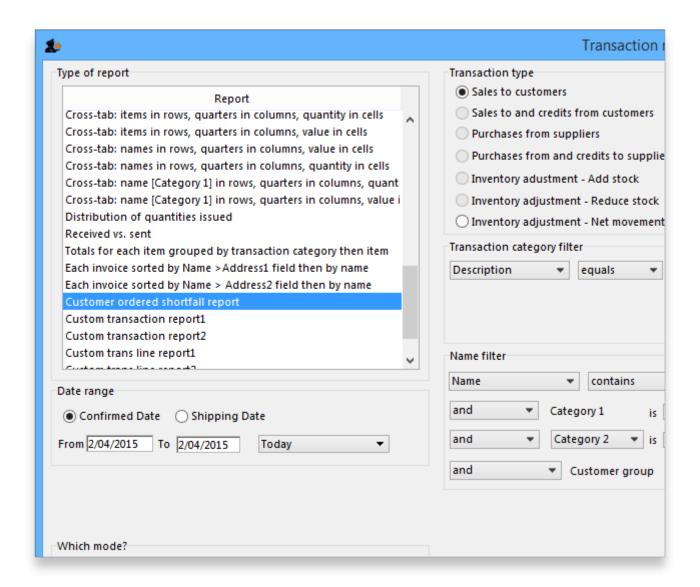
11.06. Customer ordered shortfall report

When you choose *Report> transactions* and then select *Customer ordered short fall report*, the transaction report like the one below will be produced. This report is used only for sales to customers.

For this report to make sense, make sure that:



- The Allow placeholder lines on customer invoices preference is **checked**
- The Delete placeholder lines when confirming invoices preference is un-checked



From the report window, select the desired parameters and click OK. An example report is shown below.

Customer ordered short fall report National Medical Store

Date range :01/01/2007 to 17/01/2007, Item name contains @ma@ttem category includes PHARMACEUTICALS

Transaction Type equals customer, Name code contains @2@, Mode: Both

ltern	tem	Units of	Units of		%
Code	Description	Demand	supply	Shortfall	shortfall
Item category : MEDICAL SUPPLIES					
4455	MASK,RESUSCITATION,ADULT	586 D2	43 02	543	92.66
4450	MASK,OXYGEN,ADULT,W/OTUBING	2838	1984	854	3009
	Totals for item category: MEDICAL SUPPLIES	342402	2027 02	1397	40.8
item category : PHARMACEUTICALS					
502	MAGNESIUM TRISIL CO. TAB PKT/20	5628	3895	1733	30.79
10	ACETAZOLAMIDE TABIS 250 MG BOT/100	1889	1639	250	13.23
	Totals for item category: PHARMACEUTICALS	7517	5534	1983	26.38
	Grand total :	10941.02	7561 D2	3380	30.89

Previous: ATC based reports Next: Purchasing

Setting up mSupply to use the customer ordered shortfall report

For this report to be used, you need to do the following

- Choose File > Preferences > Invoices2 and ensure "Delete placeholder lines when confirming invoices" is **not** checked.
- Staff must enter requested amounts on invoices as placeholder lines.
 - For example, a customer orders 1000 x Paracetamol syrup 60ml. You have 800 in stock, so you add 800 to the invoice, and you also add a placeholder line for 200 bottles.



You need to decide whether to (and if yes, how to) use the backorder system. If customers can rely on you to record shortfalls as backorders, then they will no need to re-order the shortfall in subsequent ordering cycles, as they know you will deliver it when available.

In our experience, general custom and practice in places that use mSupply is for facilities to simply re-order stock that wasn't delivered 'last' time. In this context, it would not be useful to turn the backorder system on.

Previous: 11.05. Requisition reports | Next: 11.07. ATC and DDD code based reports

From:

https://docs.msupply.org.nz/ - mSupply documentation wiki

Permanent link:

https://docs.msupply.org.nz/reports:customer_ordered_shortfall?rev=1572033625

Last update: 2019/10/25 20:00

