



INDITION COMMERCE

Special Orders Frequently Asked Questions

Answers to common selling, payment, inventory, and restriction questions

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Prepared by Indition product documentation for store staff, administrators, and support. This document describes the supported workflow in Special Orders 1.1 with review corrections. Use the sections below to find the policy, procedure, or implementation detail relevant to your task.

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What makes an item a Special Order

It is merchandise ordered for future delivery. Current stock is not an eligibility condition. An item in stock today can still be a Special Order; an item with no available units can also be one if its category and staff policy allow it.

Guest checkout, gift-card products, and payment-only lines are not eligible merchandise for creating a Special Order.

Can a cart contain regular goods and several future items

Yes. Desktop POS, touch POS, and customer administration support mixed carts. Each Special Order line keeps its own deposit and delivery details. A regular and a Special Order copy of the same SKU are kept separate so only the regular quantity follows immediate-sale stock rules.

Is a delivery date or Purchase Order required

The expected delivery date and free-text Purchase Order reference are optional. A reference is informational; entering it does not create a native Inventory PO link. To generate a linked draft, select the requirements in the Special Orders report and use Create Purchase Order Draft.

How is the minimum deposit calculated

When required, the minimum is the larger of the percentage amount and floor, limited to that line's merchandise total. It is calculated per line after discounts, before tax and shipping. For a \$100 line, 25% and a \$50 floor require \$50. A \$40 line under that policy requires \$40.

Staff can take a higher deposit up to the line total. With the requirement OFF, zero is permitted. The regular goods, deposits, tax, and other current charges remain due today; layaway and Payment Terms cannot fund that current amount.

Who can create Special Orders

The selected creation roles control ordinary staff access to new Special Orders. Customer Ordering and POS use separate selections. The register roles are initially selected and can be removed. Full platform access is implicit and is not shown as a selectable role.

Settings, reports, purchasing, stock operations, and customer-block management also follow their backend route permissions and the owning module's authorization. Being in a creation role does not automatically grant every administration route.

What changes when orders are paused or the module is off

Accept new special orders at NO pauses new bookings while recorded orders can still be managed. A held or unplaced cart is not yet a recorded Special Order sale. Special Orders Enabled at NO also stops the module's operational services. Use Settings to turn it back on.

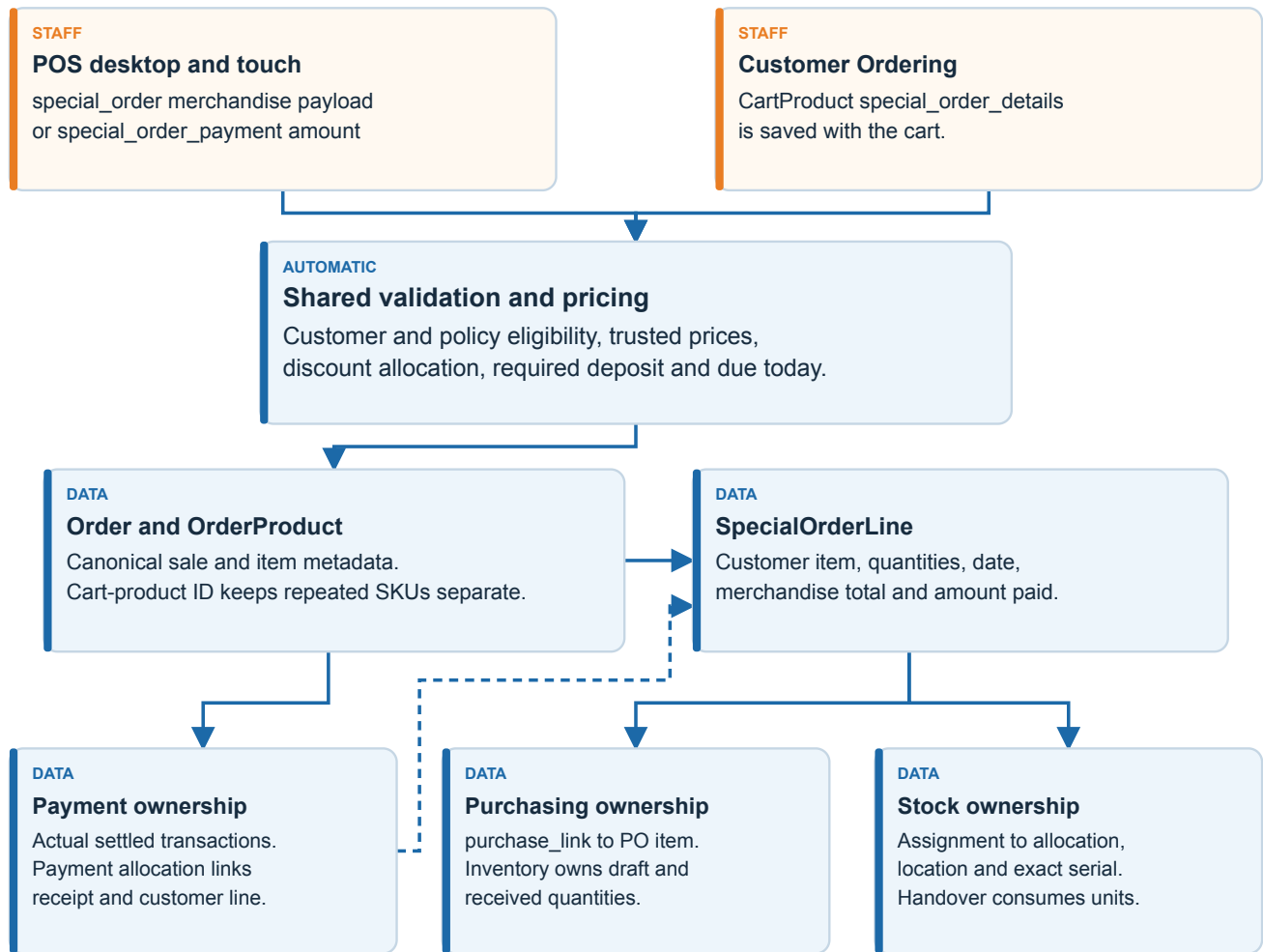
Do not uninstall to pause the feature. The uninstall process refuses to remove a module containing Special Order history.

When are stock and serials committed

Creating the future-delivery sale takes neither stock nor a serial. Later assignment reserves specific stock without reducing on hand. Handover removes the assigned quantity from on hand and releases the matching reservation. Serialized units are selected individually at assignment and become sold at handover.

Where Special Order data moves

Order and Payment keep the sale and tenders. SpecialOrders links the future commitment to Inventory.



Payment allocations update SpecialOrderLine.amount_paid and its remaining balance.

Workflow events retain actor and operation history. Deferred balance is not a PaymentTransaction.

Data ownership and movement from POS or Customer Ordering into the sale, Special Order line, payments and Inventory.

Available stock is shown across active warehouses and locations. Receiving a linked PO does not automatically assign the received units to a customer.

Why can an item be Ready but not available for handover

Ready describes stock assignment coverage. The item's full merchandise balance must also be paid before any quantity on that line can be handed over. For a tracked item, sufficient assigned stock is required as well. A partial handover does not permit leaving part of that line's price unpaid.

How are later payments and retries handled

Select the customer in POS, open Special Orders, and choose Take Balance Payment for the item. The amount cannot exceed the current balance, is not taxed again, and is allocated from actual settled tenders. Split tenders can cover one payment.

Sale replay protection returns the existing sale when the same successful sale request is repeated. Stock assignment and handover forms also protect against a duplicate submission performing the action twice. If the customer was charged but the sale is missing, ask for reconciliation rather than making another charge.

What does the blacklist show to cashiers and customers

The block requires an internal note. With Show internal note to cashier at YES, POS receives that note. With NO, a separate Cashier note is required and the private internal note is excluded. POS shows the permitted message, creator, creation time, and optional end date.

Customer note is stored separately and is not sent on save or included in the cashier projection. The block stops new Special Orders only. It ends at the start of the selected removal date, or continues until manually removed when no date is set. History is retained.

What can an import change

CSV and XLSX imports update an existing Special Order Item ID, with optional mappings for expected delivery date, PO reference, and staff note. A mapped blank clears a value. An unmapped field is preserved. The import does not create orders, change quantities, reserve inventory, or record payments.

The limit is 10 MB and 10,000 data rows. Dates use YYYY-MM-DD. A failed row rolls back the item changes in that import. Exports are Excel workbooks and both import and export files are logged.

Are cancellations returns notifications and offline recovery included

There is no dedicated Special Order cancellation or refund workflow in this release. Ordinary POS refunds, exchanges, and voids refuse Special Order lines or their payment lines. Escalate these adjustments to an authorized manager or support team.

Quotes cannot carry Special Orders, and generated Purchase Orders are drafts. Customer notifications are not automatic. Payment recovery metadata records the Special Order context but requires staff review; it is not a promise of unattended offline completion.