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INDITION COMMERCE

Special Orders Frequently Asked Questions

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

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Find practical answers about staff responsibilities, deposits, purchasing, customer balances and fulfillment in Special Orders.

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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. Gift cards also cannot be used as payment at Customer Ordering checkout for a cart that contains Special Order items.

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. A deposit above the line total is capped at the total, which means paying the line in full. With the requirement OFF, zero is permitted. The regular goods and their tax, the deposits, and other current charges are due today; layaway and Payment Terms cannot fund that current amount. A Special Order item's own tax is added to its balance due later, so an item taken with no deposit is saved with nothing to pay today. Paying an item in full today includes its tax.

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When the cashier chooses Pay, the register checks each saved deposit again and raises it to the minimum if a quantity or discount change raised the minimum. The tenders must equal Due Today: the register asks for the rest if they fall short and refuses the sale, before any card is charged, if they come to more. To collect more, raise the Special Order deposit first.

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. Administrators retain full access; the selectable creation roles organize staff access to new orders.

Settings, reports, purchasing, stock operations and customer restrictions follow the staff access assigned for those responsibilities. Your administrator can align these permissions with each person’s work.

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.

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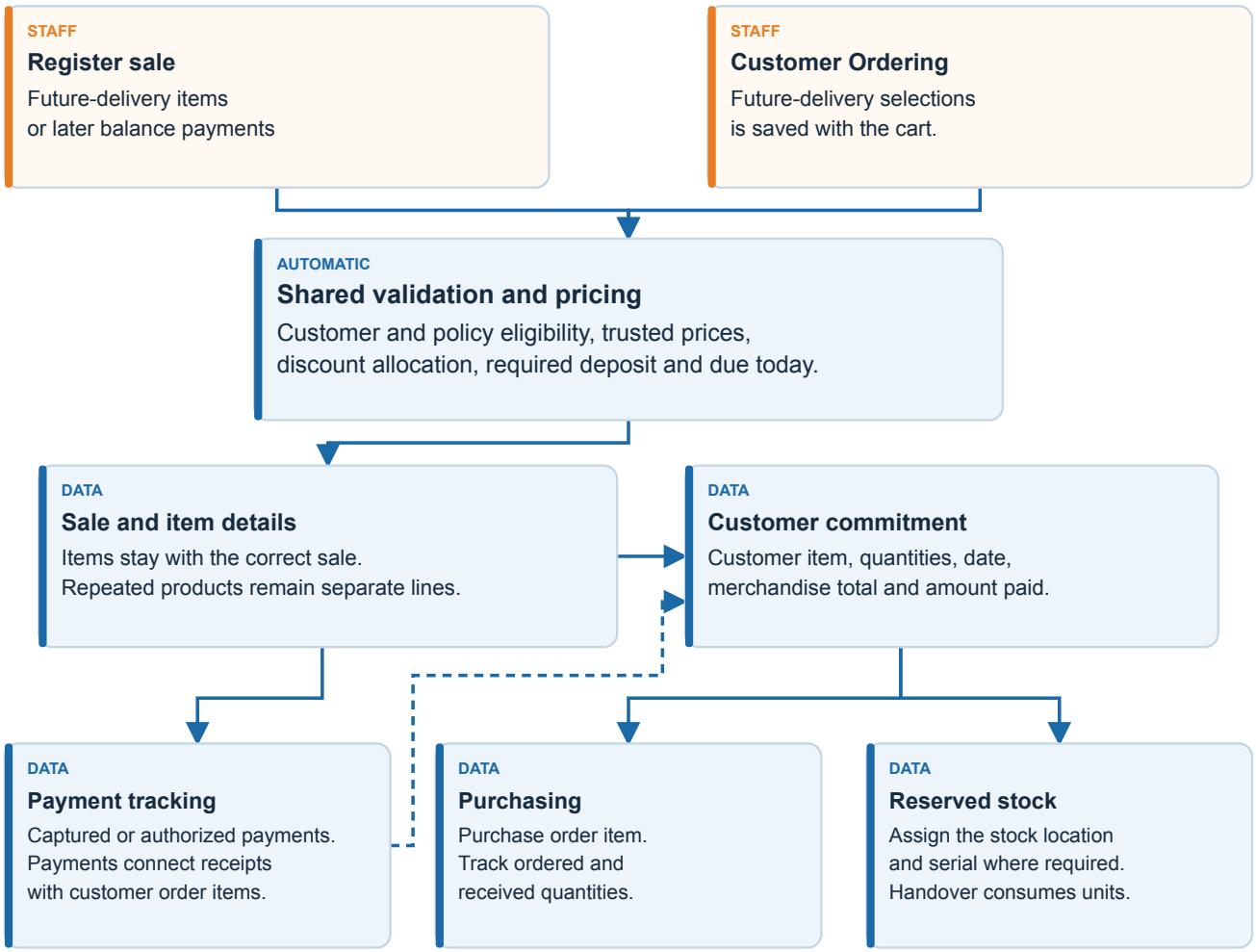
Special Order fulfilment and payments

Keep the sale, customer commitment, payments and stock together through fulfilment.



Each payment updates the amount paid and remaining customer balance.

History records staff actions, payments and stock movement through fulfilment.

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.

What do the statuses mean

The report, the item page, the export, and the customer's list in POS share one vocabulary. Open: no units handed over and no stock assigned yet. Partially Ready: some waiting units have stock assigned. Ready: assigned stock covers every waiting unit. Partially Fulfilled: some units handed over, others still waiting. Fulfilled: nothing left to hand over, with at least one unit handed over. Cancelled: every unit cancelled.

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Where the waiting units will come from is shown separately on the item page as a Sourcing line: Not yet sourced, On order with the vendor, Received: assign the stock, Stock assigned, or Not stock-tracked: hand over when it arrives.

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 the receipt's captured tenders, oldest first. Split tenders can cover one payment. In Customer Ordering, an authorized card payment counts toward the deposits just as a captured one does.

Sale replay protection returns the existing sale when the same successful sale request is repeated. Stock assignment, release, handover, cancellation, and detail 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.

Upload up to 10 MB and 10,000 data rows, with dates in YYYY-MM-DD format. Review any row message before applying an import. Export Excel workbooks and use the import and export logs to retrieve files and results.

How do I cancel an item or refund its deposit

Open the item and use Cancel Item with a quantity and a reason. Cancelling releases the stock assigned to those units, frees their quantity on linked Purchase Orders, and lowers the item total to the units the customer still receives. Money already paid beyond that total becomes the item's Refund Due.

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Refund that amount from the order's Refund screen as a fixed amount; card payments go back through the payment gateway and Special Orders records the refund on the item automatically. Each order refunds only the money it took for an item: a balance taken later as a POS payment is refunded from that payment's order, and the item page shows a Refund up to button for every order that holds part of the Refund Due. The order accepts the refund once every Special Order item on the sale is handed over or cancelled.

Can the rest of the sale ship or be refunded

Yes. Ordinary items on a mixed sale can ship and can be refunded or returned as items while the Special Order items are on the way. Only the Special Order items themselves are handled in Special Orders. Refunding money for the whole sale and setting it to Cancelled, Refunded, Denied, or Failed wait until every Special Order item is handed over or cancelled. Cancelling the sale as a whole, which would refund every line as an item, is refused in Orders and In-Store Pickup, and the automatic cancellation of unaccepted orders skips such a sale: return its other items individually and refund any Refund Due by amount. Completed waits until each is also fully paid. A sale with Special Order history cannot be deleted.

Which workflow should I use

POS refunds, exchanges, and voids still refuse Special Order lines and their payment lines, and a sale with Special Orders cannot be voided at the register. Use Cancel Item and the order's Refund screen instead.

Use a sales order to record Special Orders. Review generated draft purchase orders and send customer updates as part of your fulfilment workflow. Staff review any recovered payment before completing the order.

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