



INDITION COMMERCE

Special Orders Feature List

What the release supports across Customer Ordering, POS, and
Inventory

Special Orders Edition 1.1 · October 17, 2026



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Prepared by Indition product documentation for product owners and store operations. 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.

Future delivery in an ordinary sale

A Special Order is a merchandise item sold for future delivery. Its current inventory balance does not determine whether it can be special ordered. This module uses future-delivery item metadata and its own commitment records; it is separate from the legacy Bernina preorder-request SKU and repair-part sourcing labels. Staff can combine several Special Order lines with merchandise the customer takes immediately, including separate regular and future-delivery lines for the same SKU.

Both the desktop and touch POS support the workflow. Customer Ordering also preserves Special Order details when a cart becomes an order. Each future-delivery line can carry an optional expected delivery date, a deposit, a Purchase Order reference, and a staff note.

Controls shared across selling channels

The Special Orders settings screen controls module availability, whether new orders are accepted, permitted staff roles, category restrictions, and minimum deposits. New installations start with the module OFF. One policy is stored on the site's initial workflow and read by every ordering workflow, including a separate POS host; stale install defaults on another workflow do not override it.

Customer Ordering and POS have separate editable creation-role selections. The register roles are selected initially when that channel is available. Full platform access remains implicit and is never offered as a selectable role. Category selection is searchable and supports checkbox choices, Select All, Clear All, and a visible list of selected categories. Selecting a parent category includes its descendants.

When deposits are required, the minimum is the greater of the configured percentage and floor, capped at the merchandise total for that line. The calculation uses the price after discounts and excludes tax and shipping. Staff can collect more than the minimum, up to the line total.

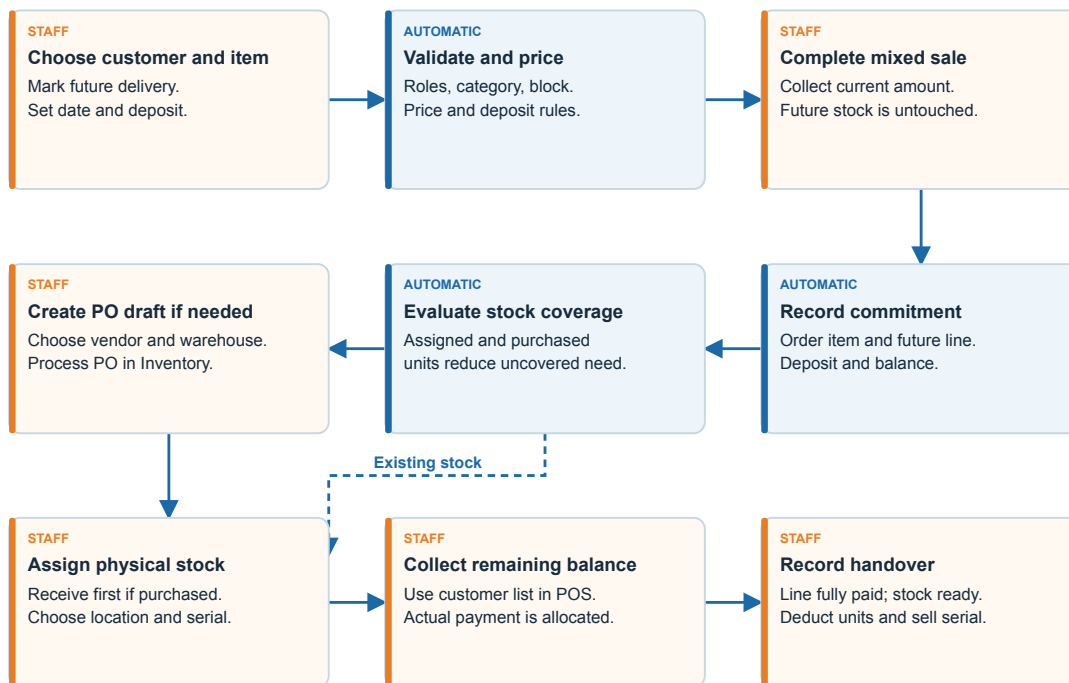
Payment and inventory have separate lifecycles

Checkout collects regular merchandise, Special Order deposits, applicable tax, and other current charges. The remaining Special Order merchandise balance is deferred. The deferred amount is not a payment transaction. Later POS payments are allocated to the selected customer item and cannot exceed its outstanding balance.

No stock or serial is claimed when the future-delivery sale is created. Authorized staff later assign available inventory from active warehouses and locations. Assignment reserves units; handover deducts on-hand stock. A serialized SKU requires an exact physical serial during assignment. A line must be fully paid before any quantity on that line is handed over.

Special Order lifecycle

Blue steps run on the server. Orange steps require a staff action.



Assignment reserves stock. Handover reduces on hand. Untracked goods skip physical assignment.

Expected dates are optional. A PO draft is not automatically approved, sent, received, or handed over.

Order lifecycle showing staff actions and automatic validation, payment and inventory steps.

Purchasing, reporting, and customer restrictions

The management report shows customer commitments, quantities, payments, status, delivery dates and PO references. It supports filtering, sorting, persistent selection, dialog-based inline edits, Excel exports and mapped CSV or Excel imports. The empty state hides the grid. Page sizes are 50, 100, 250 and 500, defaulting to 50.

Selected items can generate an Inventory Purchase Order draft. The system links the draft to the originating customer items and excludes quantities already covered by assignments or linked purchasing. Receiving follows Inventory's existing workflow; received stock must then be assigned to the customer item.

A separate Special Order Blacklist blocks new Special Orders for a customer without blocking ordinary purchases or management of existing orders. The record captures required internal reasoning, optional customer wording, a controlled cashier message, an optional removal date, and the staff member and time. Private notes are excluded from the POS projection.

Release boundaries

Purchase Orders remain drafts until staff approve and process them. Saving customer notes does not send notifications. Quotes, layaway and Payment Terms cannot carry Special Orders. Ordinary order, stock and refund actions cannot bypass future-delivery balances or handover. A dedicated cancellation and refund workflow remains future work. Use the User Manual for procedures and Technical Documentation for deployment details.