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INDITION COMMERCE

Special Orders User Manual

Create, collect, source, assign, and hand over future-delivery items

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Follow a Special Order from its initial sale and deposit through purchasing, stock assignment, balance payment and customer handover.

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Understand the order lifecycle

A Special Order records future delivery for a merchandise line. Stock can be available now, unavailable, or not tracked. The sale does not reserve stock or take a serial. Purchasing and assignment happen later, and handover is the step that removes assigned stock from on-hand inventory.

Use a real customer account for the order. Anonymous guest checkout is not accepted for Special Orders. Each line has its own deposit, deferred balance, delivery expectation, purchasing context, and fulfillment quantity.

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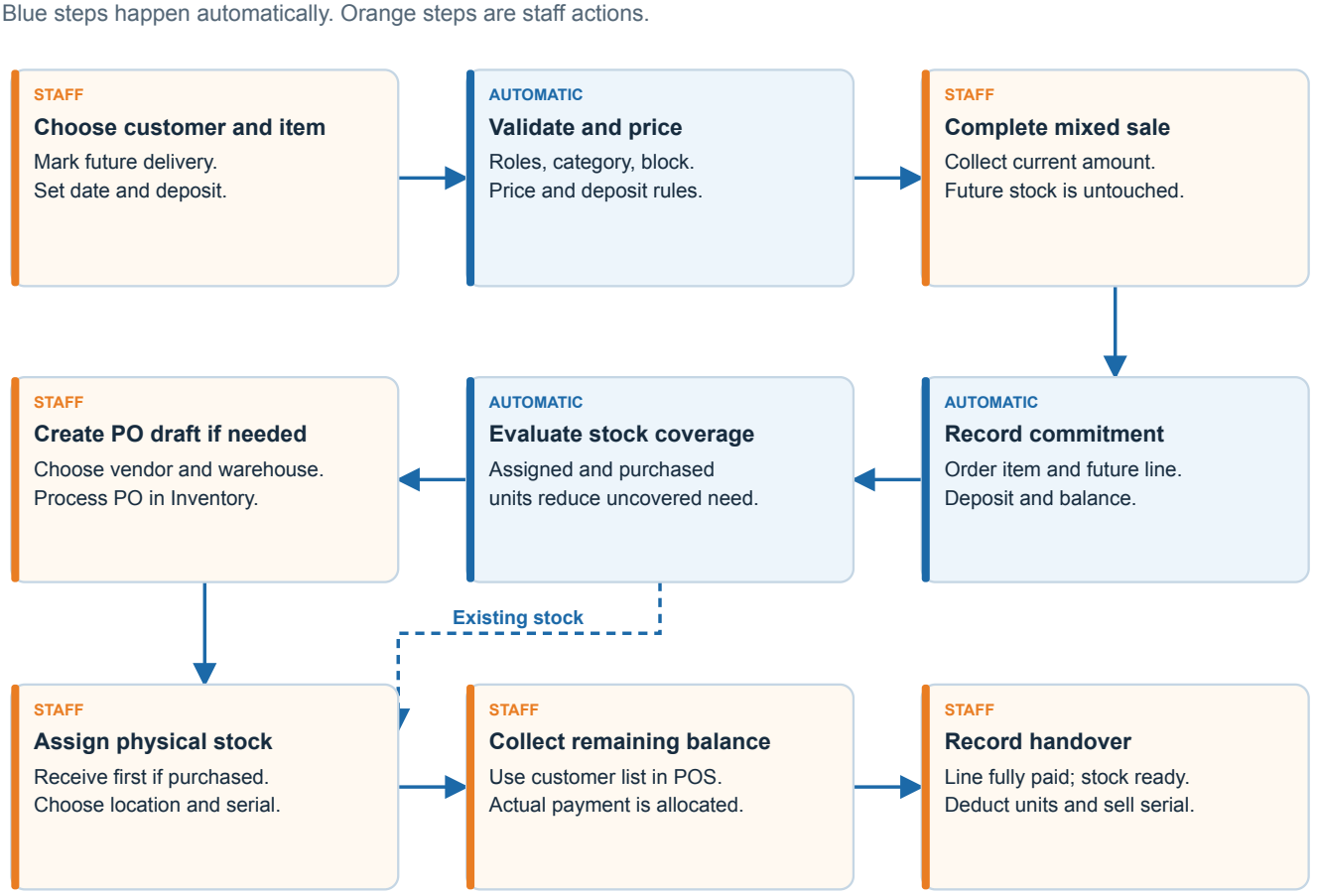

Order lifecycle showing staff actions and automatic validation, payment and inventory steps.

Create a Special Order in POS

1. Select the customer before marking an item as a Special Order.
2. Add merchandise to the cart. Choose Special Order on the item; in touch POS, open the cart line editor first.
3. Enter Expected delivery if known. Leaving it blank is allowed.
4. Enter the deposit for that line, or leave the field blank to use the required minimum. A deposit above the line total is treated as paying the line in full. Enter an optional Purchase Order reference and Staff note.
5. Choose Save Special Order and confirm the line's deposit and deferred balance.
6. Add other future-delivery items and ordinary merchandise as needed. Review Due Today and the balance due later before taking payment. The receipt shows the Special Order balance due later, and a sale that still owes a balance is not marked PAID.

For serialized merchandise, the serial prompt offers Special Order so the exact physical unit can be assigned later. Do not scan an unrelated serial just to get past the ordinary-sale prompt.

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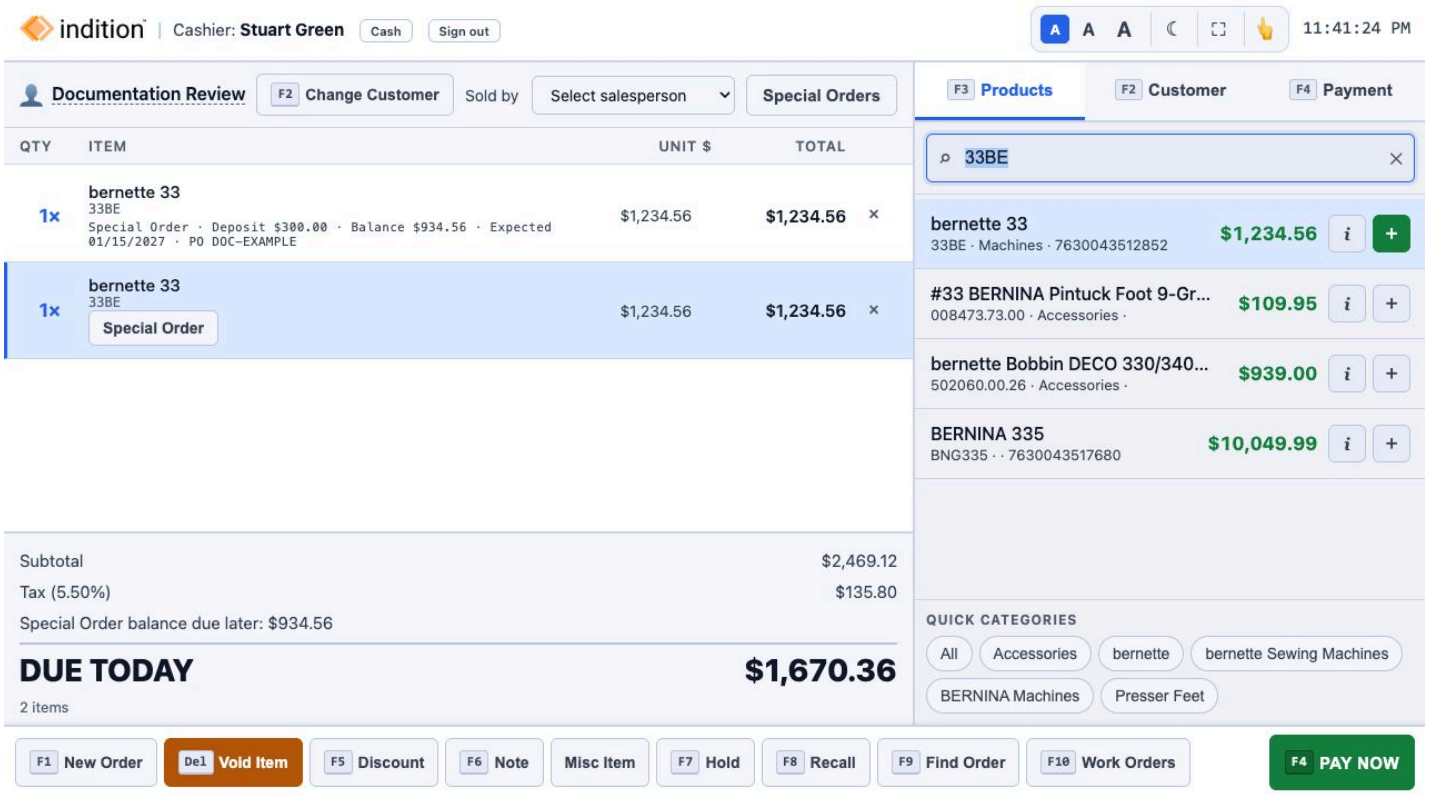

Future-delivery and regular copies of the same product remain separate at the register. Due Today excludes deferred merchandise.

Review the amount collected today

The current amount includes regular merchandise and its tax, each selected Special Order deposit, and other current charges. The rest of each Special Order item, together with its tax, is shown as the balance due later, so an item taken with no deposit has nothing due today. An item paid in full today pays its tax today. The server recalculates the prices, discounts, and permitted deposit rather than trusting a browser-entered price.

For an illustrative cart with no discounts, suppose three Special Order lines total $300, $200, and $100. At 25% with no floor, their deposits are $75, $50, and $25. Add $50 of regular goods, with 6% tax on everything: $39 in all. The full sale is $689. Each Special Order item's tax ($18, $12, and $6) joins its balance, so the balance due later is $486 ($450 of merchandise and $36 of tax) and $203 is collected today: the $150 of deposits, the $50 of regular goods, and their $3 of tax.

An order discount is allocated before deposits are checked. When you choose Pay, the register checks every Special Order line again: it keeps the deposit you saved, raises it to the minimum if a later quantity or discount change raised the minimum, and caps it at the line total. Due Today is updated before you take payment.

Collect exactly the amount due today. If the tenders come to less, the register asks for the full amount, including the Special Order deposits. If they come to more, the register refuses the sale before any card is charged; raise the Special Order deposit in the editor to take more, or collect only the amount due. Layaway and Payment Terms are not permitted ways to defer the amount currently due.

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Create an order in customer administration

Open Customers, select the account, and start or open its order cart. Add merchandise and use the line's Special Order control to enter the future-delivery details. Save the cart before proceeding to checkout.

Review the summary's deferred balance and amount due today. Regular and future-delivery copies of the same SKU remain separate. Checkout preserves the Special Order details on the resulting order item. Customer ordering uses the same creation, category, deposit, and blacklist checks as the register.

Changing a line's quantity keeps its chosen deposit, raised to the new minimum when needed and capped at the line total. Gift cards cannot pay for a cart that contains Special Order items; remove the gift card, or place the Special Order items on a separate order.

Find and update a recorded item

Open the Special Orders report from its module menu or the POS or Inventory reporting entry point. Filter by customer, SKU, product, order, status, dates, or payment values. Click an SO item link to open its detail page.

Use Delivery and Purchasing Details to change the expected date, free-text PO reference, or staff note, then select Save Details. The report's Enable Inline Editing action also permits Expected Delivery and PO Reference edits by double-clicking a cell or pressing Enter in a focused cell.

Typing a PO reference does not create or attach a native Inventory PO. Linked Purchase Orders are created through the report's purchasing action.

Read the item status

The Special Orders report, the item detail page, its Excel export, and the customer's Special Orders list in POS all use the same six statuses. POS adds "Balance due" after the status while money is still owed.

Status	Meaning
Open	Units are waiting for handover and none of them has stock assigned yet.
Partially Ready	Some of the units waiting for handover have stock assigned.
Ready	Assigned stock covers every unit waiting for handover. Ready does not mean paid.
Partially Fulfilled	Some units have been handed over and others are still waiting.
Fulfilled	Nothing is left to hand over: every unit was handed over or cancelled, and at least one was handed over.
Cancelled	Every unit on the item was cancelled.

While units are waiting, the item page also shows a separate Sourcing line under its summary cards. It says where those units will come from: Not yet sourced, On order with the vendor, Received: assign the stock, Stock assigned, or Not stock-tracked: hand over when it arrives. An item that is not stock-tracked stays Open until it is handed over, because it never has stock assigned.

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The item page cards are Status, Awaiting Handover, Stock Assigned, Paid, and Balance, plus Refund Due when money is owed back to the customer. The report's summary cards are Open Orders, Units Awaiting Delivery, and Unpaid Balance, plus Refunds Due when any item has one.

Generate a Purchase Order draft

1. Select the applicable items in the report. Selections persist while filtering or changing pages; use the selected-count link to show selected items only.
2. In Create Purchase Order for Selected Items, choose a Vendor and Warehouse. The create action appears when both are chosen.
3. Choose Create Purchase Order Draft. The draft opens in Inventory and is linked to the original customer items.
4. Review the vendor, warehouse, quantities, costs, and expected date using the normal Inventory PO controls before any approval or sending.

Only uncovered quantities are purchased. Assignments and linked purchasing are considered, including received units still awaiting assignment. Several selected requirements for the same SKU can be combined into one draft PO item with separate customer links.

Receive and assign available stock

Receive purchased goods through the normal Inventory workflow. Receipt updates inventory and linked purchasing progress; it does not automatically choose a customer serial, reserve a bin, or mark handover.

Open the Special Order detail page and review Available Stock - All Warehouses. The table lists active warehouse and location combinations with available units. Choose a Location and Quantity. For a serialized item, choose the exact Serial Number at that location and assign one unit per serial.

Select Assign Stock. The reserved quantity increases, while on-hand quantity is unchanged. Repeat for other locations or serials if needed. Use Release on an assignment to make its unhanded-over units available again.

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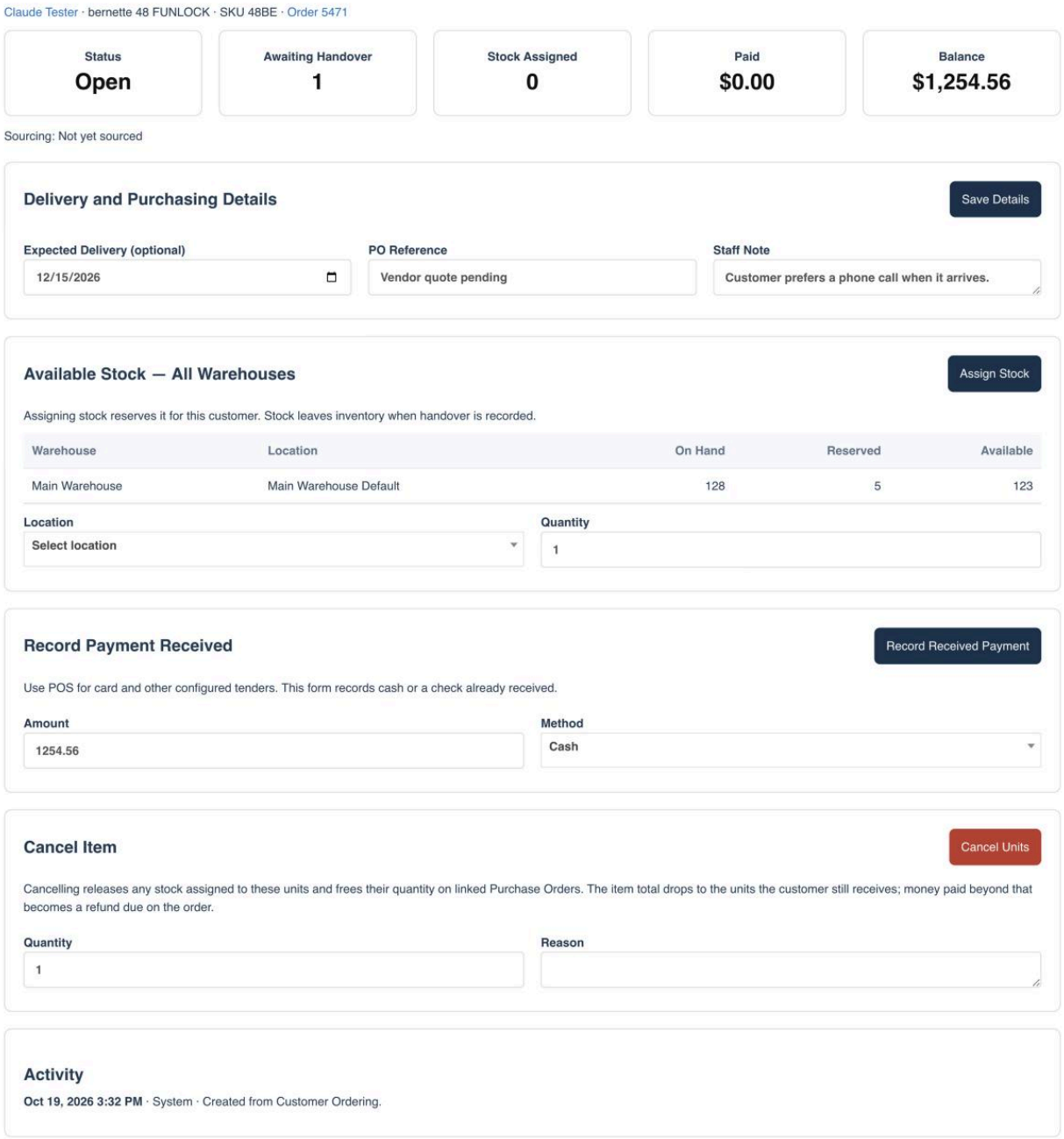

The item detail page brings together status, sourcing, delivery, purchasing, available stock, payments and cancellation. Assign Stock reserves units for the customer; handover records the stock leaving your business.

Take a later balance payment

1. In POS, select the same customer account.
2. Open Special Orders in the customer area and find the item.
3. Enter an amount greater than zero and no more than its outstanding balance, then choose Take Balance Payment.
4. Review the payment-only cart line and complete payment through the register's configured tender workflow.

The payment is allocated to that customer item. It has no merchandise quantity to reserve and is not taxed a second time. Remove and re-add the line if its payment amount needs to change. The same item cannot be added twice as a balance-payment line in one cart.

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POS-originated order balances must be collected through POS. Non-POS order detail pages also offer Record Payment Received for cash or a check already received; use POS for card collection and other configured tenders.

Record customer handover

Verify that the item's Balance is zero. For tracked merchandise, verify that enough stock is assigned; the status Ready indicates stock coverage and does not by itself mean the item is paid.

Choose the quantity under Handover to Customer and select Record Handover. Whole-unit SKUs require whole units; eligible fractional SKUs keep their supported quantity precision. Partial handover is supported, but the whole line must first be fully paid.

Handover reduces on-hand stock and the corresponding reserved quantity. A selected serialized unit becomes sold. Items without inventory tracking do not require a physical stock assignment before recording handover.

Cancel an item and refund the difference

Use Cancel Item on the item detail page when the customer no longer wants some or all of the units that have not been handed over.

1. Open the item from the Special Orders report.
2. In Cancel Item, enter the quantity to cancel. It can be up to the units awaiting handover; whole-unit SKUs need whole units.
3. Enter the reason. It is required and can be up to 2,000 characters.
4. Choose Cancel Units.

Cancelling releases any stock assigned to the cancelled units, so it is available again. Quantity on linked Purchase Orders that the remaining units no longer need is released from this customer and shown under Released by Cancellation. The Purchase Order itself is not changed in Inventory, so those units arrive later as ordinary stock. The item total drops to the value of the units the customer still receives, and the required deposit drops in the same proportion. The Activity list records the quantity, the reason, and the resulting refund due.

Cancelling does not move money. Money already paid beyond the new item total becomes the item's Refund Due, shown on the item page, on the order page, and in the report's Refunds Due card. To pay it back, choose a Refund up to button on the Refund Due panel; there is one for each order that holds part of the money. Refund that amount from the order's Refund screen as a fixed amount. Card payments go back to the card through the payment gateway. Special Orders records the refund automatically, shows "Refund recorded on order" in the item's Activity, and clears the Refund Due. If part of the money was taken later as a POS balance payment, that payment's order has its own button: each order refunds only what it took, and the refund is applied to the item in the same way.

The order accepts a refund by amount only after every Special Order item on that sale is handed over or cancelled. If you cancel part of an item, or one item on a sale that has others still on the way, refund the difference once the rest are handed over or cancelled. When the last open item on a POS sale, or on a Customer Ordering sale with no ordinary items, is cancelled or handed over and at least one unit was handed over, the sale is marked Completed automatically.

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Adjust a sale that includes Special Orders

The order page in Orders shows a Special Orders panel that lists each item with its SO link, balance, the refund due that can be paid from this order, links to any other order holding the rest, and expected date. A balance-payment order lists the items it paid toward. In In-Store Pickup, the order summary shows Balance Due and Refund Due on separate rows. On a mixed sale, the ordinary items keep working as usual: they can ship and they can be refunded or returned as items while the Special Order items are still on the way.

Special Order items are not shipped, refunded, or replaced as order items. Record their handover in Special Orders, or cancel them there and refund the difference by amount. Refunding money by amount or for the whole sale, charging a replacement order, and changing the status to Cancelled, Refunded, Denied, or Failed all wait until every Special Order item on the sale 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. A balance-payment receipt waits in the same way for the items it paid toward. Completed waits until every Special Order item is fully paid and handed over, or cancelled. Other status changes and order comments work as usual. A sale with Special Order history cannot be deleted.

In POS, refunds, exchanges, and voids still refuse Special Order items and their balance-payment lines; ordinary items on a POS sale can be refunded at the register. A sale that contains Special Orders or their payments cannot be voided. If Special Orders is switched off, refunds, cancellation, and completion of these sales are unavailable until it is switched back on.

Manage a customer Special Order block

From the customer account's Actions menu, select Special Order Blacklist. Enter the required Internal note. Choose whether to show it to the cashier. With NO, enter the separate required Cashier note. Customer note is optional and is not sent when the block is saved.

Choose an optional future automatic removal date and select Block Special Orders. Existing blocks can be updated or removed by authorized staff. The page retains who created the block and when, its notes and visibility choice, and removal history.

When staff try to create a new Special Order for that customer in POS, a modal explains that Special Orders are not allowed and displays the permitted cashier note, creator, creation time, and end date if set. Ordinary purchases and management of existing Special Orders remain available.

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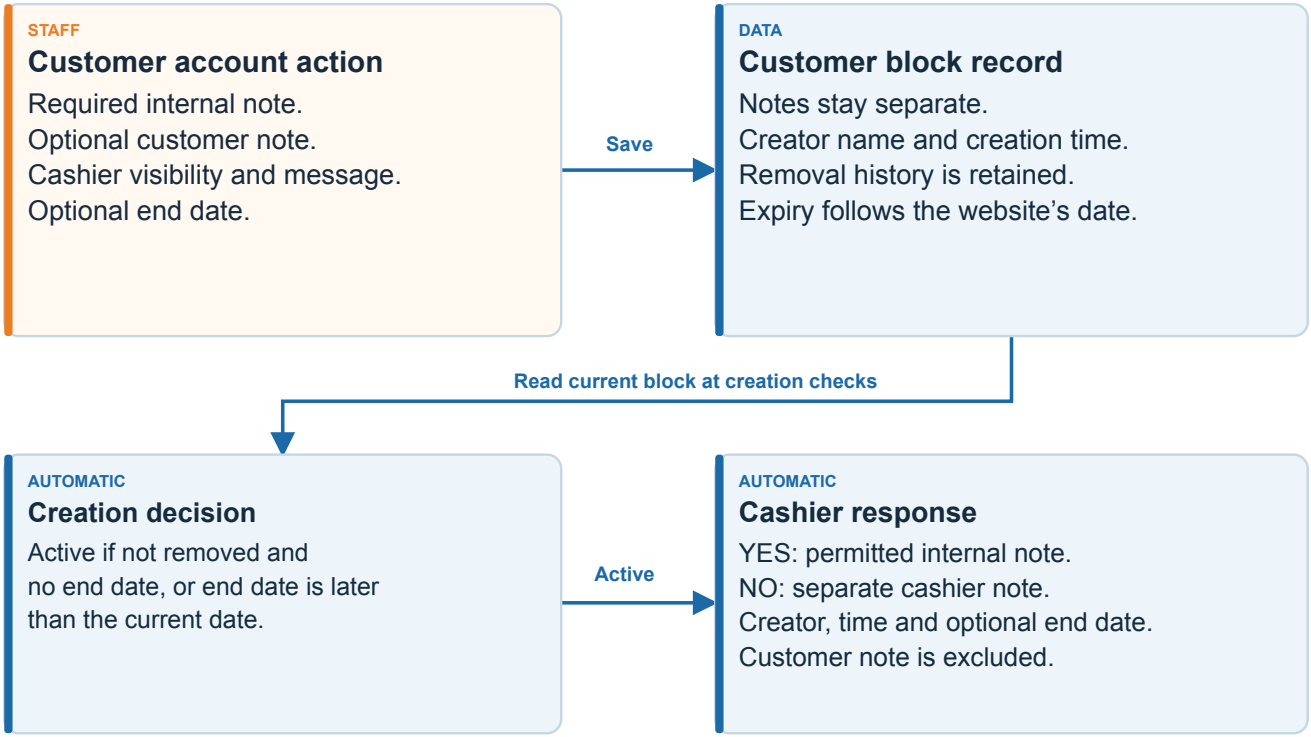
Customer block data and cashier visibility

Keep private account notes separate from the information cashiers need.



Inactive or expired blocks allow normal policy checks. Private internal wording never goes to POS.

Customer restriction data flow and note-visibility boundary. A saved customer note is not a sent communication.

Export and import item details

Use Actions and Export to create an Excel workbook. The grid offers selected and filtered export scopes. Import and Export Logs identify the staff member, file, record count, and date; imported-record counts link to the affected items.

Import updates existing Special Order items. Upload a CSV or XLSX file up to 10 MB with headers and at most 10,000 data rows. Choose Upload and Map Fields, map Special Order Item ID, then optionally map Expected Delivery, PO Reference and Staff Note. Use YYYY-MM-DD for import dates and choose Apply Import. Import and export logs provide access to the original files and results.

Leave a field at Do not update to preserve it. A blank value in a mapped field clears it. A failed row causes the item updates from that import to roll back. Import does not create sales, alter quantities, or collect payments.

Respond to common refusals

If creation is refused, review the customer block message first, then ask an administrator to check feature availability, acceptance of new orders, the staff creation role, and product category policy. Raise the chosen deposit if it is below the minimum; a deposit above the line total is capped at the total.

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If the register says the payments are more than is due today, collect only the amount due or raise a Special Order deposit first. If Customer Ordering checkout refuses a gift card, remove it or place the Special Order items on a separate order. If Orders refuses a refund, cancellation, or completion, check the order's Special Orders panel: an item is still open, a balance is unpaid, or Special Orders is switched off. Cancelling the whole sale is always refused when it has Special Order items.

If stock assignment is refused, review available units, active locations, and the exact serial. An available unit may already be reserved by another order. Do not force stock negative or substitute an unrelated serial.

If payment was captured but no receipt was recorded, preserve the payment reference and escalate for reconciliation. Do not charge again simply because the receipt is missing. Special Order recovery cases are marked for staff review.

Work within the current release

Cancel Special Order units with Cancel Item and pay back any refund due from the order's Refund screen, as described above. Ordinary POS refund, exchange, and void paths still refuse Special Order merchandise and their payment lines. Never edit balances or inventory tables directly; escalate anything these steps cannot handle to an authorized manager or support team.

Special Orders do not go on quotes. Purchase Orders remain drafts until staff process them through Inventory. Expected dates are staff-entered expectations, and saving customer wording or changing a delivery date does not send an automatic notification.

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