



INDITION COMMERCE

Special Orders User Manual

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

Special Orders Edition 1.1 · October 17, 2026



© 2026 Indition Corp. All rights reserved. Indition™ and the Indition logo are trademarks of Indition Corp. All other product names, logos, and brands are the property of their respective owners.

Prepared by Indition product documentation for cashiers, customer service, purchasing, and inventory staff. 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.

Contents

[Understand the order lifecycle](#)

[Create a Special Order in POS](#)

[Review the amount collected today](#)

[Create an order in customer administration](#)

[Find and update a recorded item](#)

[Generate a Purchase Order draft](#)

[Receive and assign available stock](#)

[Take a later balance payment](#)

[Record customer handover](#)

[Manage a customer Special Order block](#)

[Export and import item details](#)

[Respond to common refusals](#)

[Work within the current release](#)

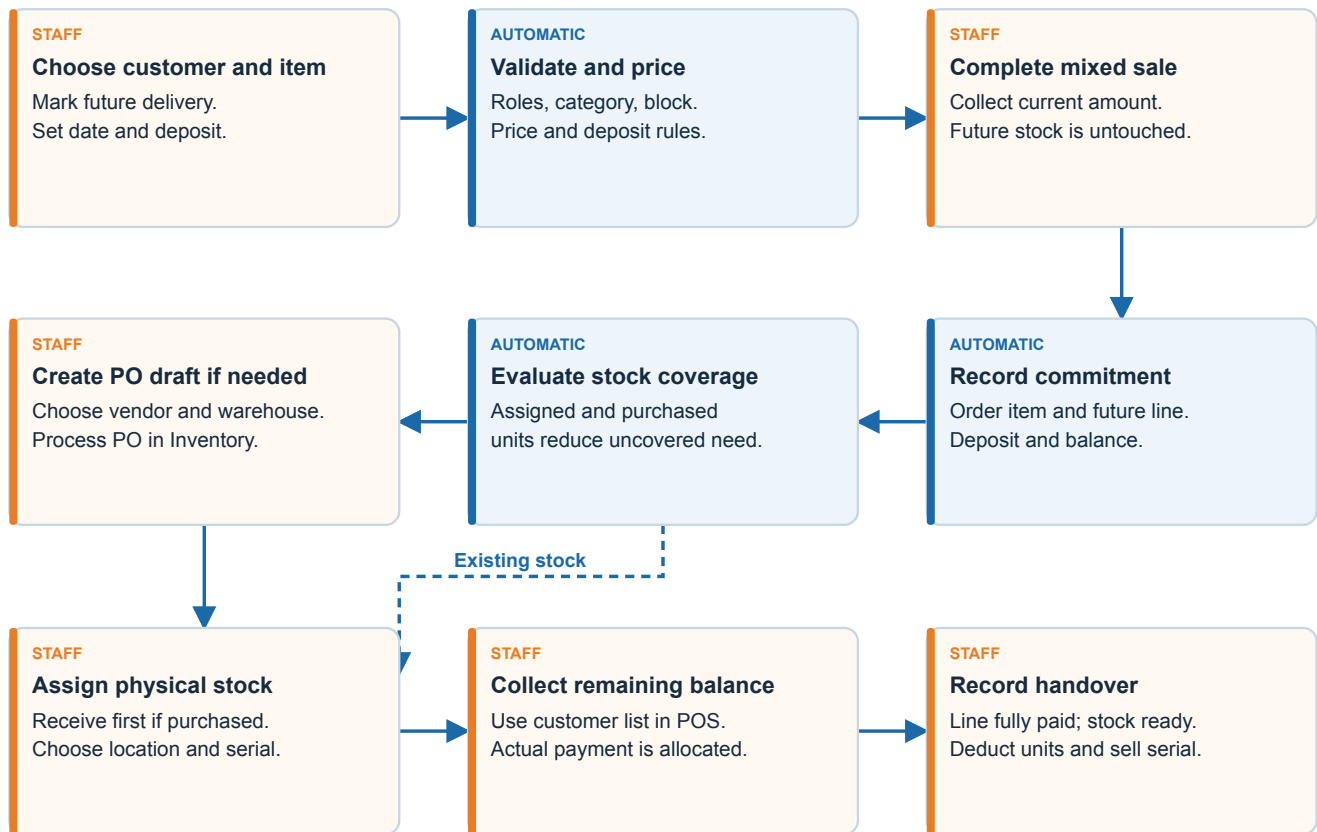
Understand the order lifecycle

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.

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.

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. 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.

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.

indition

Cashier: **Stuart Green**

Cash
Sign out

A
A
A
C

11:41:24 PM

Documentation Review
F2 Change Customer
Sold by
Select salesperson
Special Orders

F3 Products
F2 Customer
F4 Payment

QTY	ITEM	UNIT \$	TOTAL
1x	bernette 33 33BE Special Order · Deposit \$300.00 · Balance \$934.56 · Expected 01/15/2027 · PO DOC-EXAMPLE	\$1,234.56	\$1,234.56 ×
1x	bernette 33 33BE Special Order	\$1,234.56	\$1,234.56 ×

Subtotal
Tax (5.50%)
Special Order balance due later: \$934.56

\$2,469.12
\$135.80

DUE TODAY
2 items

\$1,670.36

F1 New Order
Del Void Item
F5 Discount
F6 Note
Misc Item
F7 Hold
F8 Recall
F9 Find Order
F10 Work Orders

F4 PAY NOW

33BE

bernette 33
33BE · Machines · 7630043512852
\$1,234.56
i
+

#33 BERNINA Pintuck Foot 9-Gr...
008473.73.00 · Accessories ·
\$109.95
i
+

bernette Bobbin DECO 330/340...
502060.00.26 · Accessories ·
\$939.00
i
+

BERNINA 335
BNG335 · 7630043517680
\$10,049.99
i
+

QUICK CATEGORIES

All
Accessories
bernette
bernette Sewing Machines

BERNINA Machines
Presser Feet

Documentation example in dev POS. Future-delivery and regular copies of the same SKU remain separate; Due Today excludes the deferred merchandise.

Review the amount collected today

The current amount includes regular merchandise, each selected Special Order deposit, and applicable current tax and charges. The unpaid future merchandise is shown as the balance due later. 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 and \$39 of tax. The full sale is \$689, the deferred merchandise balance is \$450, and \$239 is collected today.

An order discount is allocated before deposits are checked. If a changed price, quantity, or discount makes the chosen deposit invalid, reopen the Special Order editor and correct it. Layaway and Payment Terms are not permitted ways to defer the amount currently due.

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.

© 2026 Indition Corp · Indition™ is a trademark of Indition Corp. All rights reserved.

4 / 8

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.

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.

indition

System

Phone | Offline

Search orders, customers, products...

7

2

99+

Special Orders » SO-85

Documentation Review · bernette 33 · SKU 33BE

Status

Awaiting Sourcing

Awaiting Handover

1

Stock Assigned

0

Paid

\$0.00

Balance

\$1,234.56

Delivery and Purchasing Details

Save Details

Expected Delivery (optional)

01/15/2027

PO Reference

DOC-REVIEW

Staff Note

Available Stock — All Warehouses

Assign Stock

Assigning stock reserves it for this customer. Stock leaves inventory when handover is recorded.

Warehouse	Location	On Hand	Reserved	Available
Main Warehouse	Main Warehouse Default	461	45	416

Location

Quantity

Validation example showing the current commitment, stock availability and formatted balance. Handover remains unavailable until payment and stock coverage permit it. The QA record was removed after validation.

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.

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.

Manage a customer Special Order block

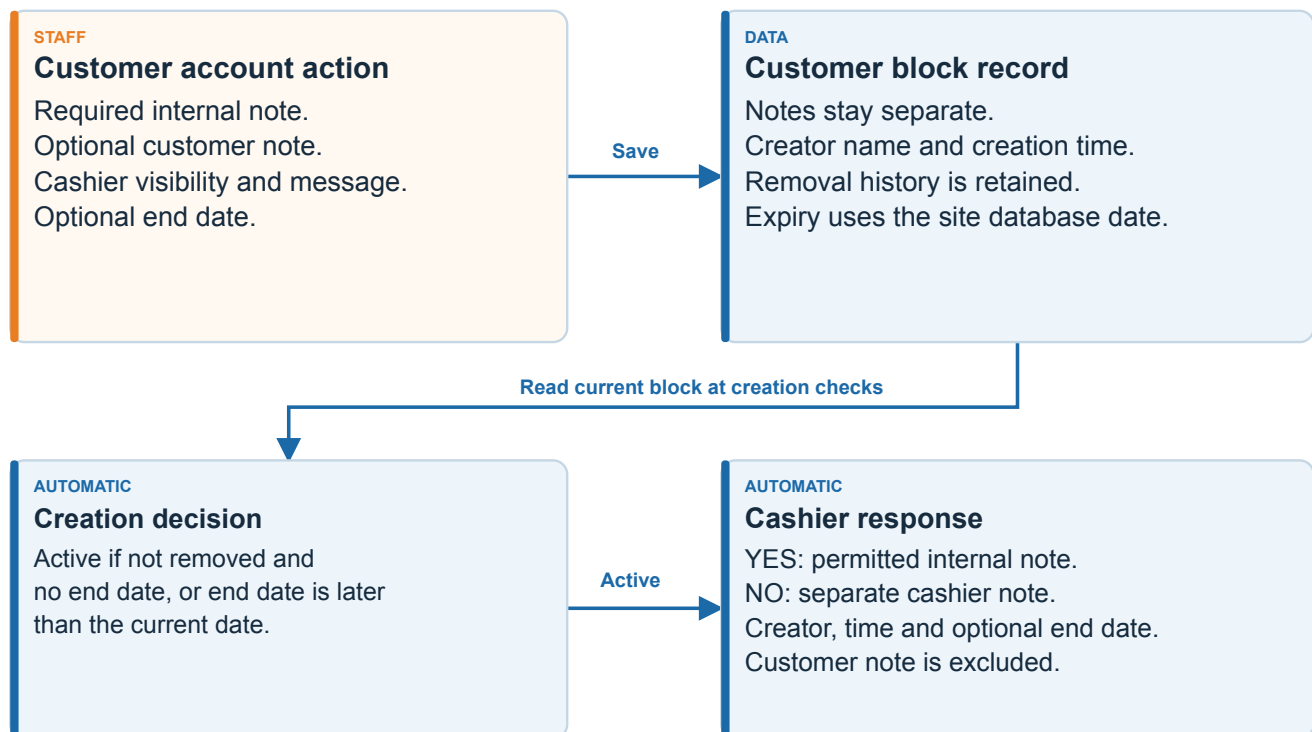
From the customer account's Actions menu, select Special Order Blacklist. Enter the required Internal note. Choose whether to show it to the cashier. With NO, enter the separate required Cashier note. Customer note is optional and is not sent when the block is saved.

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.

Customer block data and cashier visibility

The block record retains separate notes. POS receives only an explicit cashier-safe projection.



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 only. 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, and optionally map Expected Delivery, PO Reference, and Staff Note. Import dates use YYYY-MM-DD; staff-facing delivery summaries use MM/DD/YYYY. Choose Apply Import. Import staging and original downloads are stored in the shared database with an owner-bound, expiring token, so the mapping and apply requests may run on different servers. Repeating Apply Import replays the result without another update or log.

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 module availability, acceptance of new orders, the staff creation role, and product category policy. Correct the chosen deposit if it is outside the permitted range.

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

A dedicated Special Order cancellation and refund workflow is not provided. Ordinary POS refund, exchange, and void paths refuse Special Order merchandise and their payment lines. Escalate an adjustment to an authorized manager or support team rather than editing balances or inventory tables.

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.