

Customer Ordered Shortfall Report

When you choose *Report > transactions* and then select *Customer ordered short fall report* , the transaction report like the one below will be produced. This report is used only for sales to customers.

Note that for this report to make sense the preference *Allow placeholder lines on customer invoices* must be checked, and the preference *Delete placeholder lines when confirming invoices* must be unchecked.

The screenshot shows the 'Transaction Report' configuration window. It is divided into several sections:

- Type of report:** A list of report types with 'Customer ordered shortfall report' highlighted in blue. Other options include 'Cross-tab: items in rows, quarters in columns, quantity in cells', 'Received vs. sent', and 'Totals for each item grouped by transaction category then item'.
- Transaction type:** Radio buttons for 'Sales to customers' (selected), 'Sales to and credits from customers', 'Purchases from suppliers', 'Purchases from and credits to suppliers', 'Inventory adjustment - Add stock', 'Inventory adjustment - Reduce stock', and 'Inventory adjustment - Net movement'.
- Transaction category filter:** A dropdown menu set to 'Description' and a comparison operator set to 'equals'.
- Date range:** Radio buttons for 'Confirmed Date' (selected) and 'Shipping Date'. Below are input fields for 'From' (2/04/2015), 'To' (2/04/2015), and a 'Today' button.
- Name filter:** A dropdown menu set to 'Name' and a comparison operator set to 'contains'. Below are additional filter rules: 'and' followed by 'Category 1 is', 'and' followed by 'Category 2 is', and 'and' followed by 'Customer group'.
- Which mode?:** A section at the bottom left with a label 'Which mode?'.

From the report window, select the desired parameters and click *OK* . An example report is shown below.

Customer ordered short fall report National Medical Store

Date range :01/01/2007 to 17/01/2007, Item name contains @ma@item category includes PHARMACEUTICALS

Transaction Type equals customer, Name code contains @@@, Mode: Both

Item Code	Item Description	Units of Demand	Units of supply	Shortfall	% shortfall
item category : MEDICAL SUPPLIES					
4455	MASK,RESUSCITATION,ADULT	586.02	43.02	543	92.66
4450	MASK,OXYGEN,ADULT,W/O TUBING	2838	1984	854	30.09
Totals for item category: MEDICAL SUPPLIES		3424.02	2027.02	1397	40.8
item category : PHARMACEUTICALS					
502	MAGNESIUM TRISIL CO. TAB PKT.20	5628	3895	1733	30.79
10	ACETAZOLAMIDE TAB \$ 250MG BOT/100	1889	1639	250	13.23
Totals for item category: PHARMACEUTICALS		7517	5534	1983	26.38
Grand total :		10941.02	7561.02	3380	30.89

Previous: [ATC based reports](#) Next: [Purchasing](#)

Setting up mSupply to use the Customer Ordered Shortfall report

For this report to be used, you need to do the following

- Choose *File > Preferences > Invoices2* and ensure “Delete placeholder lines when confirming invoices” is **not** checked.
- Staff must enter requested amounts on invoices as placeholder lines.
 - For example, a customer orders 1000 x Paracetamol syrup 60ml. You have 800 in stock, so you add 800 to the invoice, and you also add a placeholder line for 200 bottles.
- You need to decide whether to (and if yes, how) to use the backorder system. If customers can rely on you to record shortfalls as backorders, then they will no need to re-order the shortfall in subsequent ordering cycles, as they know you will deliver it when available.

From:
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Last update: **2017/07/17 21:57**

