



Part Deliveries & Back Orders on Sales Orders

*What happens when a Sales Order can't be fully picked, and how the
balance is handled*

outstanding

Introduction

Sometimes there isn't enough stock on hand to fully pick a Sales Order. Data Fusion lets you invoice for what you can deliver right now, and automatically raises a new Sales Order in Sage for whatever's left — so you're never stuck trying to keep one order open for multiple partial invoices, or manually recreating an order for a missed balance.

⚠ Important: Every short-picked balance becomes a brand-new Sales Order, not a reopened version of the original. This keeps every invoice matched to one clean, completed pick.

Before You Begin — Prerequisites

- The Sales Order must already exist in Sage and be synced through as normal — Sales Orders are always created in Sage.
- A picking slip has been generated for the order in the usual way.



Key Terms — Glossary

Term	What It Means
Short-Picked	A line where less was picked than was originally ordered.
Back Order	The unpicked balance of a short-picked order, automatically raised as a brand-new Sales Order in Sage, linked back to the original.
Cancel Balance	Choosing to abandon the unpicked balance entirely instead of keeping it on back order — no new order is created.
Partially Invoiced	The status shown on the original Sales Order while a back-order balance is still being transferred to its new order.
Qty_Left	A column on the picking slip showing what's still outstanding on each line.

Where This Happens

Task	Data Fusion	Sage
Create the Sales Order		✓
Generate and fulfil the Picking Slip	✓	
Decide what happens to a short-picked balance	✓	
Raise the new back-order Sales Order	✓ (posts automatically)	✓ (new order created)
Invoice / verify		✓



The Full Workflow

1. Pick the picking slip as normal, picking whatever is available. Leave short lines as they are — nothing special needs to be done while picking.
2. Close off the picking slip. What happens next depends on what you picked:
 - **Everything fully picked:** confirm to close it off — a normal invoice, nothing owing.
 - **Something short-picked:** you're asked whether picking is actually complete. If not, you choose either:
 - **Put the balance on back order** — invoices what was picked now, and creates a new Sales Order automatically for the unpicked balance.
 - **Cancel the balance** — invoices what was picked now, and abandons the rest. No back order is created.
2. If a back order was created, the original Sales Order shows “Partially Invoiced” until the balance has fully transferred to the new order. The new order appears automatically in your outstanding Sales Orders, referencing the original order number, and follows the normal Sales Order → Picking Slip → Invoice process from there.
3. If that new order is short-picked again, the same process repeats — a further back order can be raised from it, and so on, until everything has been delivered.

Understanding the Back Order

- **One order, one pick, one invoice.** Rather than reopening the same Sales Order for multiple partial invoices over time, Data Fusion always closes off what's in front of you and raises a brand-new Sales Order for anything still owing. Every invoice stays matched to a single, complete pick.
- **The new order is linked back to the original.** Its reference shows the original order number, so it's always easy to trace a back order back to where it came from.
- **Stock only ever moves for what's actually picked.** Nothing is deducted for the back-ordered balance until it's picked on its own, separate order.

Common Mistakes to Avoid

- **Expecting one Sales Order to handle repeated partial invoices over time.** It doesn't — every short-picked balance becomes a new, separate Sales Order.
- **Not checking for a “Partially Invoiced” status.** This means a balance is still being transferred to a new order — if it stays like this longer than expected, check that the new back-order Sales Order was created successfully in Sage.
- **Choosing “Cancel Balance” by mistake.** This permanently abandons the unpicked quantity — no back order is created, and it can't be recovered from this picking slip afterwards.