Auto Close Back Orders
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Auto Close Back Orders

If a line item on a sales order is partially fulfilled, the remaining quantity is saved as back order. However, in many organizations, such back order quantities are not fulfilled, and the sales order is closed. The Auto Close Back Orders SuiteApp enables you to close such partially fulfilled back orders automatically, post billing. The SuiteApp also enables you to maintain a list of items to exclude from automatic closure of back orders.

This SuiteApp works with the following item types:

- Assembly items
- Lot numbered assembly items
- Serialized assembly items
- Inventory Items
- Lot numbered inventory items
- Serialized inventory items
- Item groups
- Kit/Package items

Installing Auto Close Back Orders

Only users with Administrator role or with SuiteBundler permission can install the SuiteApp. Following are the bundle details:

- Bundle Name: Auto Close Back Orders
- Bundle ID: 300047

For more information on installing a bundle, see the help topic Installing a Bundle.

Auto Close Back Orders is a managed SuiteApp that is automatically updated whenever enhancements or new features are added.

Prerequisites

The Auto Close Back Orders SuiteApp is developed and tested for use primarily with NetSuite OneWorld. The following features are required to use this SuiteApp.

To enable the features:

1. Go to Setup > Company > Setup Tasks > Enable Features.
2. Check the boxes next to all the features listed in the following table:

<table>
<thead>
<tr>
<th>Subtab</th>
<th>Feature Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>SuiteCloud</td>
<td>Custom Records</td>
</tr>
<tr>
<td></td>
<td>Client SuiteScript</td>
</tr>
<tr>
<td></td>
<td>Server SuiteScript</td>
</tr>
</tbody>
</table>
3. Click Save.

Creating or Customizing Roles to Use Auto Close Back Orders

If you are an administrator, you can create new roles or customize roles to add permissions for using Auto Close Back Orders. For more information, see the help topics Assigning Roles to an Employee and Customizing or Creating NetSuite Roles.

Refer to the following table for minimum access levels for different record types required to use Auto Close Back Orders:

<table>
<thead>
<tr>
<th>Record</th>
<th>Minimum Access Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction &gt; Find Transaction</td>
<td>View</td>
</tr>
<tr>
<td>Lists &gt; Custom Record Entries</td>
<td>View</td>
</tr>
<tr>
<td>Lists &gt; Customers</td>
<td>View</td>
</tr>
<tr>
<td>Lists &gt; Documents and Files</td>
<td>View</td>
</tr>
<tr>
<td>Lists &gt; Subsidiaries</td>
<td>View</td>
</tr>
<tr>
<td>Custom Record &gt; Fill Kill Item Exception</td>
<td>View</td>
</tr>
<tr>
<td>Custom Record &gt; Item Exception</td>
<td>Full</td>
</tr>
</tbody>
</table>

Setting Automatic Closing of Back Orders

To enable automatic closing of partially fulfilled back orders, check the Auto Close Back Orders box in the Custom Preferences subtab of General Preferences (Setup > Company > General Preferences).

Criteria for Automatic Closing of Back Orders

A line item on a sales order is automatically closed only when all of the following conditions are met:

- The Auto Close Back Orders preference is set.
- The status of the Sales Order is Partially Fulfilled or Pending Billing/Partially Fulfilled.
- The item is of one of the following types:
  - Inventory items (except drop ship and special order items)
  - Assembly items
  - Item groups
  - Kit/package items
- The item is not included directly or through an item group in the Fill Kill Item Exception list of the customer for the selected subsidiary. For more details, see the section Creating Fill Kill Item Exceptions.
- Fulfilled Quantity and Invoiced Quantity for the item is equal as well as greater than zero.
- **Ordered Quantity** is greater than the **Fulfilled Quantity** for the item.

Using Auto Close Back Orders

The auto kill script is triggered when you save an invoice. When a line item is identified for automatic closing, the script takes the following actions:

- The line item on the sales order is automatically closed.
- The **Back order** quantity is set to zero.

Creating Fill Kill Item Exceptions

For some customers, you may want to exclude some or all items from automatically closing back orders. To do so, add them to the Fill Kill Item Exception list. You can create the list per subsidiary of each customer.

**To create a fill kill item exception list:**

1. Go to Lists > Accounting > Fill Kill Item Exception > New.
   For existing customers, you can also access the page by clicking the **Fill Kill Item Exception** button on the Customer record.
2. In the Fill Kill Item Exception page, add exceptions to the list.
   a. Select the customer.
   b. Select the subsidiary.

   **Note:** If you do not want to automatically close any item for the selected customer and subsidiary, check the **Exempt All Items** box and go to step f.

   c. In the Item Exception sublist, select the item.
   d. Click **Add**.
   e. Repeat steps c and d above to include more items to the exceptions list.
   f. Click **Save**.