



ORACLE  
NETSUITE

# 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 or include in automatic closure of back orders.

## Overview of Auto Close Back Orders

The Auto Close Back Orders 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

## Auto Close Back Orders Preference

Select appropriate option in the **Items to Auto Close** preference in the **Custom Preferences** subtab of the General Preferences page (Setup > Company > General Preferences). The preference has the following options:

- **None (or Blank)** – The **Auto Close Back Orders** script does not run on any items.
- **Items in Auto Close Items List** – The Auto Close Back Orders script runs on items selected in the Auto Close Items page.
- **Items not in Auto Close Items List** – The Auto Close Back Orders script runs on all items except the ones selected in the Auto Close Items page.



**Note:** In version 1.02.0 of the Auto Close Back Orders SuiteApp, the following options in the **Auto Close Back Orders** preference are renamed:


- **Items in Fill Kill Items List** renamed to **Items in Auto Close Items List**
- **Items not in Fill Kill Items List** renamed to **Items not in Auto Close Items List**

If you had previously installed a version older than 1.02.0 of the SuiteApp, you would see the old options even after upgrading to the latest version. Also, translation will not work on the old options.

## 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 item is included in the auto close items list.
- 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 sales order line item is not in outbound processing, that is, the line item is not in picked or packed state.
- If either of the following conditions is true:
  - **Fulfilled Quantity** and **Invoiced Quantity** for the item is equal as well as greater than zero.
  - **Fulfilled Quantity** for the item is zero and at least one of the line items is closed.
- **Ordered Quantity** is greater than the **Fulfilled Quantity** for the item.

 **Note:** Completely fulfilled sales order lines are not automatically closed.

## Setting Up Auto Close Back Orders

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

## 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 about installing a bundle, see the help topic [Installing a Bundle](#).

## 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:

Subtab	Feature Name
SuiteCloud	■ Custom Records
	■ Client SuiteScript
	■ Server SuiteScript



3. Click **Save**.

## Supported Browsers for Auto Close Back Orders

The Auto Close Back Orders SuiteApp supports the following browsers and operating systems:

Browser	Platform
Google Chrome 71 or newer	<ul style="list-style-type: none"> <li>Windows 10</li> <li>Windows 8.x</li> <li>Windows 7</li> </ul>
Microsoft Edge (Anniversary Update and later)	Windows 10 (Anniversary Update)
Mozilla Firefox 60 or newer	<ul style="list-style-type: none"> <li>Windows 10</li> <li>Windows 8.x</li> <li>Windows 7</li> <li>Windows Vista</li> </ul>

## 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:

Record	Minimum Access Level
Transaction > Find Transaction	View
Lists > Custom Record Entries	View
Lists > Customers	View
Lists > Documents and Files	View
Lists > Subsidiaries	View
Custom Record > Auto Close Items	View
Custom Record > Item Exceptions	View

## Using Auto Close Back Orders

The Auto Close Back Orders script is used to automatically close back orders. The script triggers 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.

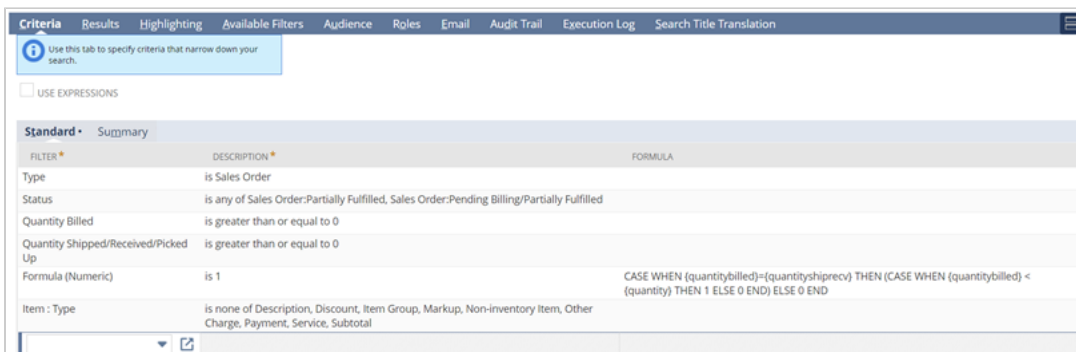
## Creating Auto Close Items List

For each customer, create an auto close items list. The selection in the **Items to Auto Close** preference decides whether the Auto Close Back Orders script runs on the auto close items or excludes the auto close items.

### To create an auto close items list:

1. Go to Lists > Accounting > Auto Close Items > New.  
For existing customers, you can also access the page by clicking the **Auto Close Items** button on the Customer record.
2. In the Auto Close Items page, add items to the list.
  - a. Select the customer.
  - b. Select the subsidiary.
  - c. (Optional) To select all items, check the **Select All Items** box.
  - d. In the sublist, select the item.
  - e. Click **Add**.
  - f. Repeat steps d and e above to include more items to the exceptions list.
3. Click **Save**.

The **AFK Fill Kill Transaction Search** saved search is editable. Use the saved search to define your own criteria to search for sales order line items that you want to auto close. Below is a screenshot of the default saved search criteria.



Filter	Description	Formula
Type	is Sales Order	
Status	is any of Sales Order:Partially Fulfilled, Sales Order:Pending Billing/Partially Fulfilled	
Quantity Billed	is greater than or equal to 0	
Quantity Shipped/Received/Picked Up	is greater than or equal to 0	
Formula (Numeric)	is 1	CASE WHEN (quantitybilled)=(quantityshiprecv) THEN (CASE WHEN (quantitybilled) < (quantity) THEN 1 ELSE 0 END) ELSE 0 END
Item : Type	is none of Description, Discount, Item Group, Markup, Non-inventory Item, Other Charge, Payment, Service, Subtotal	

## Importing Auto Close Items

You can also import the auto close items using the CSV Imports feature. For importing auto close items, you must have **Edit** permission for the following records:

- Custom Record > Auto Close Items
- Custom Record > Item Exceptions

For more information, read the help topic [Importing CSV Files with the Import Assistant](#).