

User Manual

Aptean Food and Beverage ERP

Backorder Management

Product Documentation



Contents

- [Release notes](#)
 - [2602.0.0.0](#)
 - [2601.4.0.0](#)
 - [2601.3.0.0](#)
 - [2601.2.0.0](#)
 - [2601.1.0.0](#)
 - [2601.0.0.0](#)
 - [2501.1.0.0](#)
 - [2501.0.0.0](#)
 - [2301.11.0.0](#)
 - [2301.10.0.0](#)
 - [2301.9.0.0](#)
 - [2301.8.0.0](#)
 - [2301.7.0.0](#)
 - [2301.6.0.0](#)
 - [2301.5.0.0](#)
 - [2301.4.0.0](#)
 - [2301.3.0.0](#)
 - [2301.2.0.0](#)
 - [2301.1.0.0](#)
 - [1.4.112748.0](#)
 - [1.3.102545.0](#)
 - [1.2.100174.0](#)
 - [1.1.89000.0](#)
 - [1.0.65168.0](#)
- [Introduction](#)
- [General setup](#)
 - [Manage permission sets](#)
 - [Setup](#)
- [Manage backorders](#)
 - [Create backorder lines](#)
 - [Move backorder lines to an existing sales order](#)



[Move backorder lines to a new sales order](#)

[Backorder fields on posted documents](#)

[Integrations](#)

[Aptean Over Under Delivery](#)

[Aptean Advanced Pricing](#)

[Aptean Advanced Attributes](#)

[Aptean Contract Management](#)

[Aptean Drop Shipment](#)

[Aptean Transport](#)



Release notes

Article • 7/22/2026 • 1 min read

To view what's new or changed in each release of the Aptean Backorder Management extension, select the specific release version.

Date	Release version	Description
July 2026	2602.0.0.0	Major release
June 2026	2601.4.0.0	Minor release
May 2026	2601.3.0.0	Minor release
March 2026	2601.2.0.0	Platform release
January 2026	2601.1.0.0	Stability release
January 2026	2601.0.0.0	Feature release
October 2025	2501.1.0.0	Stability release
September 2025	2501.0.0.0	Feature release
June 2025	2301.11.0.0	Stability release
April 2025	2301.10.0.0	Stability release
March 2025	2301.9.0.0	Stability release
September 2024	2301.8.0.0	Stability release
May 2024	2301.7.0.0	Stability release
April 2024	2301.6.0.0	Stability release
March 2024	2301.5.0.0	Stability release
December 2023	2301.4.0.0	Stability release
November 2023	2301.3.0.0	Stability release
November 2023	2301.2.0.0	Stability release
October 2023	2301.1.0.0	Stability release
August 2023	1.4.112748.0	Feature release



June 2023	1.3.102545.0	Stability release
May 2023	1.2.100174.0	Stability release
March 2023	1.1.89000.0	Stability release
November 2022	1.0.65168.0	Initial release



2602.0.0.0

Release Note • 7/22/2026 • 2 min read

Enhancements/Modifications

With this release of the Aptean Backorder Management extension, you can:

Use the **Backorder Management Setup** page to configure the default state of the **Retain Current Prices**, **Archive Before Move**, and **Delete Lines with Zero Qty. Shipped** toggles on the **Move to a New Order** and **Move to an Existing Order** dialogs. Additionally, you can set the **Default Retain Current Price**, **Default Archive Before Move**, and **Default Delete Lines** field values to *Yes* or *No* to control whether the corresponding toggles are turned on or off by default when the dialogs open.

Open the **Backorder Management** list page directly from the Sales Order page when the order contains one or more lines with the **Purchasing Code** field value set to *Special Order*. When you execute the **Move to a New Order** or **Move to an Existing Order** action and the **Quantity to Move** field value is greater than zero, the system checks whether the linked special order purchase order line has an outstanding quantity. If it does, the system displays an error message and requires you to complete the special order process before you can move the sales order line.

UI/UX Changes

The following UI/UX changes have been made in this release:

- The **Backorder Management Setup** page has been added.



2601.4.0.0

Release Note • 6/24/2026 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
375819	An error occurs on the Sales Order page when moving the remaining quantity to a back order after a partial shipment has been posted for a sales line with a 100% line discount.
373153	An error occurs when moving sales order lines through the Backorder Management page if the Lot Attribute of Type field value is set to <i>Option</i> on the sales line and contains special characters.
371621	The system fails to load all selected sales order lines on the Backorder Management List page when the Backorder Management action is executed from the Lines FastTab on the Sales Order page.



2601.3.0.0

Release Note • 5/27/2026 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
362136	The system incorrectly updates the Shipment Date field value during backorder processing when both the Shipment Date and Req. Delivery Date field values are defined on the backorder. This issue occurs only when the Move Type field value is set to <i>Quantity</i> or <i>Underdelivery</i> .



2601.2.0.0

Release Note • 3/25/2026 • 1 min read

Enhancements/Modifications

With this release of the Aptean Backorder Management extension, the variables on the *MoveToExistingOrder73FDW* page are made accessible for customization.



2601.1.0.0

Release Note • 1/28/2026 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
340186	When the language is set to Dutch, the system incorrectly translates the notification message when quantities are moved to the Sales Order page from the Backorder Management List page.



2601.0.0.0

Release Note • 1/28/2026 • 2 min read

Features

With the features added in this release of the Aptean Backorder Management extension, the system:

- Transfers lot attribute requirements automatically when quantities are moved between sales orders. Lot attribute requirements from the source sales order line are copied to the target sales order line without manual entry. For more information, see [Integration with Aptean Advanced Attributes](#).
- Ensures that contract logic is consistently applied, even when quantities are moved between sales orders, when the Aptean Backorder Management is integrated with the Aptean [Contract Management](#) extension. As a result, sales order lines created or updated through backorder management automatically inherit the correct contract information. For more information, see [Integration with Aptean Contract Management](#).
- Validates and determines whether backorder management can be accessed, based on the drop shipment and special order status of sales order lines. For more information, see [Integration with Aptean Drop Shipment](#).
- Validates transport planning status before allowing quantity movements. Sales order lines that are linked to a transport request planned into a transport order can no longer be moved using backorder management. For more information, see [Integration with Aptean Transport](#).

Integrations

The Aptean Backorder Management extension has been integrated with the following extensions:

- Aptean [Advanced Attributes](#)
- Aptean [Contract Management](#)
- Aptean [Drop Shipment](#)
- Aptean [Transport](#)

For more information, see [Integrations](#).



2501.1.0.0

Release Note • 10/22/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Backorder Management extension, the translation file for the Swedish (sv-SE) language has been updated with standard texts for better readability.



2501.0.0.0

Release Note • 9/24/2025 • 3 min read

Features

With the features added in this release of the Aptean Backorder Management extension,

- You can create backorder lines for specific sales order lines by selecting the required sales order lines and then executing the **Backorder Management** action on the **Lines** FastTab on the **Sales Order** page. For more information, see [Create backorder lines](#).
- The system supports partial movement of quantity from a sales order line to an existing or new sales order, improving inventory allocation. You can enter the specific quantity you want to move in the **Quantity To Move** field on the **Backorder Management List** page. For more information, see [Create backorder lines](#).
- You can move sales order line quantity to an existing or new sales order due to underdelivery and specify the reason for underdelivery on the **Backorder Management List** page. After movement, the sales order line quantity remains the same and the system automatically updates the **Over & Underdelivery Reason Code** field value on the original **Sales Order** page. For more information, see [Move backorder lines to an existing sales order](#) and [Move backorder lines to a new sales order](#).
- The system updates the details of the existing or new sales orders to which the sales order line quantity is moved in the **Backorder Moved To Sales Order No.** field value on the **Sales Order** page, improving visibility on the original sales order.
- The system updates the details of the sales order from which the sales order line is moved in the **Backorder Moved From Sales Order No.** field on the **Sales Order** page, improving visibility on the existing or new sales order.

Enhancements/Modifications

With this release of the Aptean Backorder Management extension,

- The system automatically moves all backorder lines to a new or existing sales order when executing the **Move to an Existing Order** or **Move to a New Order** action on the **Backorder Management List** page, preventing the manual selection of specific backorder lines.
- Various code level modifications have been made as a part of a code cleanup activity.
- The system retains manual discounts and prices when executing the **Move To New Order** or **Move to Existing Order** action on the **Backorder Management List** page. This enhancement is applicable only when the **Retain Current Prices** toggle is turned on.



Integrations

The Aptean Backorder Management extension have been integrated with the following extensions:

- Aptean [Over Under Delivery](#).
- Aptean [Advanced Pricing](#).

For more information, see [Integrations](#).

UI/UX changes

The following UI/UX changes have been made in this release.

- The **Backorder Management** action has been added to the **Lines** FastTab of the **Sales Order** page.
- The following fields have been added to the **Backorder Management List** page.
 - Quantity to Move
 - Move Type
 - Underdelivery Reason Code
 - Variance
- The **Backorder Moved To Sales Order No.** and **Backorder Moved From Sales Order No.** fields, and the **Backorder** checkbox have been added to the **Lines** FastTab of the **Sales Order** page.



2301.11.0.0

Release Note • 6/4/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
284495	The system incorrectly moves all lines from the Backorder Management List page, instead of only the selected lines, when attempting to move them to an existing sales order.



2301.10.0.0

Release Note • 4/25/2025 • 1 min read

Enhancements/Modifications

The translation files for the Swedish (sv-SE) language have been updated with standard texts for better readability.



2301.9.0.0

Release Note • 3/12/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
270959	The system incorrectly updates the Unit of Measure Code field value on the Sales Order page when a new sales order is created from an existing sales order using the Move To New Order action on the Backorder Management List page.



2301.8.0.0

Release Note • 9/2/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Backorder Management extension, modifications have been made to accommodate the following changes:

- Enhanced application interaction: Procedures have been added to enhance the application interaction, improve upgrade tag management, streamline upgrade and installation processes, and provide additional flexibility by managing upgrades on a per-company and per-database basis.
- Application area refresh: Updates have been implemented to improve the application area refresh process by integrating a new procedure into the *Enable* codeunit.
- Improved management of install and upgrade code: The *Install* and *Upgrade* codeunits have been updated to streamline the handling of installation, reinstallation, and upgrade processes, ensuring smoother transitions and minimizing disruptions during these operations.
- Centralized license management procedures: The existing license management codeunit has been modified to use centralized license management procedures, further reducing the need for application-specific adjustments.
- Enhancements have been made to update the process within the application to handle the *User Group* and *User Group Permission Set* tables. This change ensures compatibility with current and future versions of Business Central, even when the *User Group* and *User Group Permission Set* tables are deprecated.

! Note

The *User Group* and *User Group Permission Set* tables are deprecated in Business Central, version 25.



2301.7.0.0

Release Note • 5/14/2024 • 1 min read

Enhancements/Modifications

The Swedish translation files have been updated with standard texts for better readability.



2301.6.0.0

Release Note • 4/30/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
198149	Curated certain tooltips on the sales documents for better readability.



2301.5.0.0

Release Note • 3/6/2024 • 1 min read

Enhancements/Modifications

The Backorder Management functionality now works seamlessly with items having reservation entries of type *Tracking* in the Aptean Backorder Management extension. The Backorder Management function encountered issues when dealing with items configured with reservation entry types *Item Tracking* or *Action* (reference Ticket No. 02784360). The problem arose due to the creation of two reservation entries, leading to errors during the process. This has been resolved by adjusting the filter to check only the relevant reservation entry, ensuring smooth functionality.

Resolved issues

The following issue has been resolved in this release.

ID	Description
177302	The External Document No. field is erroneously marked as mandatory on the Move to New Order page during backorder creation.



2301.4.0.0

Release Note • 12/21/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
163573	An incorrect shipment date is displayed in the notification when when performing the Move To New Sales Order action to move a sales order line associated with a transport route to a new sales order. Additionally, the notification appears even if the location on the sales order line and the customer card are the same.



2301.3.0.0

Release Note • 11/23/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
159752	While executing the Move to Existing Order action on the Backorder Management List page, the values in the Shipment Variance and Completely Shipped fields on the selected Sales Order page are not updated correctly. Additionally, the Qty. to Ship field value is editable, even when the Underdelivery checkbox is selected.



2301.2.0.0

Release Note • 11/1/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
154476	An error occurs on the Backorder Management List page while executing the Move To New Order action during the creation of sales order with standard sales lines.



2301.1.0.0

Release Note • 10/4/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean Trade Management extension. To know more, see [What's new in version 2301.1.0.0](#).



1.4.112748.0

Release Note • 8/16/2023 • 1 min read

Features

The following features were added in this release of the Aptean Backorder Management extension:

- When moving backordered items from the **Move To New Order** and **Move To Existing Order** dialogs you can now choose to:
- Archive sales orders using the **Archive Before Move** toggle.
- Delete unshipped items using the **Delete Lines with Zero Qty. Shipped** toggle.
- From the **Move To New Order** dialog, you can set a new location code for all backordered items you want to move.
- The **Qty. to Ship** field for all moved lines in the source Sales Order will be cleared after lines are moved.
- Any sales line items that have item tracking or reservation entries against them, will be prevented from being moved when using the **Move To New Order** and **Move To Existing Order** function.

UI/UX changes

In this release, the following UI/UX changes have been made to improve usability:

- The tooltip for the **Gross Requirements** field on the **Backorder Management List** page
- The names of **Move To New Order** and **Move To Existing Order** dialogs
- The **Retain Current Prices** field on the **Move To New Order** and **Move To Existing Order** dialogs



1.3.102545.0

Release Note • 6/9/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
119574	After moving a backorder line to a new sales order, the values of the selected line on the source sales order lines are not updated accurately in the Underdelivery , Shipment Variance , and Outstanding Quantity fields.



1.2.100174.0

Release Note • 5/29/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
119573	The Location Filter field on the Item Availability by Event page does not display the updated location code for the selected item on the Sales Order lines.



1.1.89000.0

Release Note • 4/3/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
105519	The Completely Shipped field value on the Sales Order page is not changed to <i>Yes</i> when the items are completely shipped.



1.0.65168.0

Release Note • 4/3/2023 • 1 min read

Features

The Aptean Backorder Management extension efficiently handles temporarily out-of-stock products/items and provides you insight into inventory management. With this extension, you can now

- Move a sales order line to a new sales order or an existing sales order.
- View the sales document number to/from which the sales line is moved on the sales order page.
- Display the item/product availability information quickly on the FactBox of the Backorder Management page.
- Find the Backorder fields on the Posted Sales documents along with the associated information.



Introduction

Article • 9/24/2025 • 1 min read

The Aptean Backorder Management (BOR) extension helps you to manage the sales process and enhance the retention of customers. It helps you to understand and forecast the demand for the product(s). This also plays a crucial role in inventory management and retains the estimated revenue level.

The Aptean Backorder Management extension enables you to manage the turnaround time of products to the customer leading to increased business performance. It ensures low expenses, enhanced product value, elimination of waste, customization of orders, and excellent customer service.

Important

To use the Aptean Backorder Management extension, the Aptean [Over Under Delivery](#) extension must be installed.



General setup

Article • 11/5/2024 • 1 min read

The following setups are required.

- [Manage permission sets](#)
- [Setup](#)



Manage permission sets

Article • 11/5/2024 • 3 min read

Permission sets in Business Central define a user's access level to various features and data within this extension.

We provide the following system permission sets:

- Direct
- Indirect

Direct permission sets

Users with this permission set can perform specific actions directly without requiring additional approvals or workflows. These sets include permissions to read, modify, delete, and create data.

The direct permission set ID for this extension is *BORMGT73FDW*.

Indirect permission sets

Users with this permission set can perform specific actions. This is used in conjunction with other permission sets to allow you to perform certain actions. These permissions typically involve additional conditions or approvals before the action can be completed.

The indirect permission set ID for this extension is *BORMGTBASIC73FDW*.

User-defined permission sets

In addition to the system permission sets we provide, you can create new permission sets or copy system permission sets and modify or delete access to specific entities according to your requirements. For more information, see [Assign permissions to users and groups](#).

Assign a permission set

1. Select the Search icon , enter **Users**, and then choose the related link.
The **Users** list page opens.
2. Navigate to the username for which you want to assign the permission set and select it.
The **User Card** page opens.
3. On the **User Permission Sets** FastTab, in the **Permission Set** field, enter the valid permission set for this extension.



The associated fields are automatically updated based on the entered value. The user has the necessary permissions to use the features of the Aptean Backorder Management extension, ensuring secure and role-based access.



Setup

Article • 7/22/2026 • 2 min read

To use the Backorder functionality, make sure the Aptean Over and Under Delivery extension is installed.

You can configure the default state of the **Retain Current Prices**, **Archive Before Move**, and **Delete Lines with Zero Qty. Shipped** toggles on the **Move to a New Order** and **Move to an Existing Order** dialogs.

To set up backorder management, follow these steps:

- 1. Select the **Search** icon  , enter **Backorder Management Setup**, and then choose the related link.
The **Backorder Management Setup** page opens.
- 2. Enter the required information in the following fields:

Field	Description
Default Retain Current Price	Select whether the Retain Current Prices toggle is turned on or off by default when the Move to a New Order or Move to an Existing Order dialog opens.
Default Archive Before Move	Select whether the Archive Before Move toggle is turned on or off by default when the Move to a New Order or Move to an Existing Order dialog opens.
Default Delete Lines	Select whether the Delete Lines with Zero Qty. Shipped toggle is turned on or off by default when the Move to a New Order or Move to an Existing Order dialog opens.



Manage backorders

Article • 9/24/2025 • 1 min read

You can create backorder lines from a sales order and then move specific quantity of items to an existing or new sales order via the **Backorder Management List** page. For more information, see:

- [Create backorder lines](#)
- [Move backorder lines to an existing sales order](#)
- [Move backorder lines to a new sales order](#)



Create backorder lines

Article • 9/24/2025 • 1 min read

To create backorder lines from a sales order, follow these steps:

- 1. Navigate to the relevant **Sales Order** page.
- 2. On the action bar, select **Actions > Functions > Backorder Management** if you want to move the quantity of all sales order lines.
Alternatively, you can select specific sales order lines and then select the **Backorder Management** action on the **Lines** FastTab to move the quantity of the selected sales order lines.

ⓘ Note

Ensure that the **Status** field value on the sales order is set to *Open*, the sales order lines do not have item tracking lines or reservation entries, and the **Blocked** toggle on the associated **Item Card** page is turned off.

The system displays the relevant sales order lines on the **Backorder Management List** page.

3. Enter the required information in the following fields:

Field	Description
Item No.	Specifies the item number associated with the sales order line.
Description	Specifies the description of the item associated with the sales order line.
Variant Code	Specifies the variant of the item associated with the sales order line.
Quantity	Specifies the total quantity of the item on the sales order line.
Quantity to Move	Enter the quantity of the item you want to move to an existing or new sales order. The system displays the total quantity by default.
Move Type	Select whether the movement is due to underdelivery or for movement of quantity. The available options are: <i>Underdelivery</i>: You can specify a reason for underdelivery in the Underdelivery Reason Code field. In this case, the sales order line quantity remains the same. <i>Quantity</i>: The system moves the quantity specified in the Quantity to Move field to the existing or new sales order. After movement, the quantity on the original sales order line is updated.



	The default value is <i>Underdelivery</i> .
Underdelivery Reason Code	Select the reason for underdelivery of the shipment. This field value is editable only when the Move Type field value is set to <i>Underdelivery</i> .
Location Code	Specifies the location from where the item on the sales order line is to be shipped to the customer.
Quantity Shipped	Specifies the quantity of the item that has been shipped.
Variance	Specifies the variance between the quantity moved to existing or new sales orders and the quantity on the original sales order line. You must ensure that the Quantity to Move field value does not exceed the difference between the Quantity and Variance field values.
Outstanding Quantity	Specifies the quantity of the item that has not been shipped yet.
Available Inventory	Specifies the quantity of the item that is currently available in the inventory and not reserved for other demand.
Inventory	Specifies the total quantity of the item that is currently in the inventory at all locations.
Gross Requirement	Specifies the sum of the dependent demand and the independent demand for the item on the sales line. Dependent demand includes production order components of all statuses, assembly order components, and planning lines. Independent demand includes sales orders, transfer orders, service orders, job tasks, and demand forecasts.
Scheduled Receipt	Specifies how many units of the assembly component are inbound on purchase, transfer, assembly, firm planned production, and released production orders.
Substitutes Exist	Specifies whether there is a substitute for this item.
Unit of Measure	Specifies the unit of measure associated with the sales order line.

The backorder lines are created.

You can move the quantity of the items specified in the **Quantity to Move** field value for all backorder lines to an existing or new sales order. For more information, see [Move backorder lines to an existing sales order](#) and [Move backorder lines to a new sales order](#).



Move backorder lines to an existing sales order

Article • 9/24/2025 • 1 min read

To move the quantity from backorder lines on the **Backorder Management List** page to an existing sales order, follow these steps:

1. On the action bar, select **Move to an Existing Order**.

The **Move to an Existing Order** dialog opens.

2. Enter the required information in the following fields:

Field	Description
Destination Document No.	Select an existing sales order number to which you want to move the quantity of the items.
Retain Current Prices	Turn on the toggle to retain the current unit price of the items.
Archive Before Move	Turn on the toggle if you want the system to create an archive of the source sales order before moving the sales order lines.
Delete Lines with Zero Qty. Shipped	Turn on the toggle if you want to delete moved lines with no posted shipments.

3. Select **OK**.

The system performs the following updates based on the **Move Type** field value of the backorder line.

- *Underdelivery*:
 - On the **Backorder Management List** page, the system updates the **Variance** field value.
 - On the original sales order line, the system updates the **Underdelivery** checkbox, and the **Backorder Moved To Sales Order No.** and **Over & Underdelivery Reason Code** field values.
- *Quantity*:
 - On the **Backorder Management List** page, the system updates the **Quantity** and **Quantity to Move** field values.
 - On the original sales order line, the system updates the **Quantity** and **Backorder Moved To Sales Order No.** field values.
- On the existing sales order, to which the quantity of the item is moved to, the system updates the **Backorder Moved From Sales Order No.** field value with the original sales order number from which the sales order line is moved from and selects the **Backorder** checkbox.



 Note

- Sales order lines with the **Purchasing Code** field value set to *Special Order* are supported in the backorder management workflow. When executing the **Move to an Existing Order** action on such a line, the system validates whether the linked special order **Purchase Order** line has an outstanding quantity. If the outstanding quantity is not zero, an error message is displayed and the quantity cannot be moved until the special order process is completed.

 Note

- The system supports partial quantity movement, so you can move the quantity of an item to multiple sales orders (existing and new).
- When you move the quantity to multiple sales orders,
- The system updates the **Backorder Moved To Sales Order No.** field value on the **Sales Order** page to *Multiple*. You can select the field value to view the details of the sales orders on the **Sales Lines** page.
- The system updates the **Over & Underdelivery Reason Code** field value with the most recent underdelivery reason selected.



Move backorder lines to a new sales order

Article • 9/24/2025 • 1 min read

To move the quantity from backorder lines on the **Backorder Management List** page to a new sales order, follow these steps:

1. On the action bar, select **Move to a New Order**.
The **Move to a New Order** dialog opens.
2. Enter the required information in the following fields:

Field	Description
Shipment Date	Select or enter the date when the items on the backorder lines must be shipped.
Req. Delivery Date	Select or enter the date that the customer has requested for the order to be delivered.
Shipping Time	Enter the time when the items on the backorder lines are shipped.
External Document No.	Enter a document number that refers to the customer’s or vendor’s numbering system.
Location Code	Select the location code to be used in the new sales order.
Retain Current Prices	Turn on the toggle to retain the current unit price of the items in the new sales order.
Archive Before Move	Turn on the toggle if you want the system to create an archive of the source sales order before moving the sales order lines.
Delete Lines with Zero Qty. Shipped	Turn on the toggle if you want to delete moved lines with no posted shipments.

3. Select **OK**.
The system performs the following updates based on the **Move Type** field value of the backorder line.

- *Underdelivery:*
 - On the **Backorder Management List** page, the system updates the **Variance** field value.
 - On the original sales order line, the system updates the **Underdelivery** checkbox, and the **Backorder Moved To Sales Order No.** and **Over & Underdelivery Reason Code** field values.
- *Quantity:*



- On the **Backorder Management List** page, the system updates the **Quantity** and **Quantity to Move** field values.
- On the original sales order line, the system updates the **Quantity** and **Backorder Moved To Sales Order No.** field values.
- On the new sales order, to which the quantity of the item is moved to, the system updates the **Backorder Moved From Sales Order No.** field value with the original sales order number from which the sales order line is moved from and selects the **Backorder** checkbox.

Note

- Sales order lines with the **Purchasing Code** field value set to *Special Order* are supported in the backorder management workflow. When executing the **Move to a New Order** action on such a line, the system validates whether the linked special order **Purchase Order** line has an outstanding quantity. If the outstanding quantity is not zero, an error message is displayed and the quantity cannot be moved until the special order process is completed.

Note

- The system supports partial quantity movement, so you can move the quantity of an item to multiple sales orders (existing and new).
- When you move the quantity to multiple sales orders,
- The system updates the **Backorder Moved To Sales Order No.** field value on the **Sales Order** page to *Multiple*. You can select the field value to view the details of the sales orders on the **Sales Lines** page.
- The system updates the **Over & Underdelivery Reason Code** field value with the most recent underdelivery reason selected.



Backorder fields on posted documents

Article • 4/3/2023 • 1 min read

You can find the **Backorder** and **Backorder Moved To Sales Order No.** fields on the respective **Posted Sales Shipment Lines** and **Posted Sales Invoice** pages with the updates as on the respective **Sales Order** page.



Integrations

Article • 1/28/2026 • 1 min read

The Aptean Backorder Management extension has been integrated with the following extensions:

- [Aptean Over Under Delivery](#)
- [Aptean Advanced Pricing](#)
- [Aptean Advanced Attributes](#)
- [Aptean Contract Management](#)
- [Aptean Drop Shipment](#)
- [Aptean Transport](#)



Aptean Over Under Delivery

Article • 9/24/2025 • 1 min read

The Aptean [Over Under Delivery](#) extension must be installed to use the Aptean Backorder Management extension.



Aptean Advanced Pricing

Article • 9/24/2025 • 1 min read

When the Aptean Backorder Management extension is used in conjunction with the Aptean [Advanced Pricing](#) extension, the system ensures that backorders are processed with accurate pricing and discount rules, maintaining consistent sales order calculations and reducing manual adjustments.



Aptean Advanced Attributes

Article • 1/28/2026 • 1 min read

When the Aptean Backorder Management extension is used in conjunction with the Aptean [Advanced Attributes](#) extension, when quantities are moved from one sales order to another using backorder management, the associated lot attribute requirements are automatically transferred to the new sales order.

The system creates or updates the target sales order and sales line with the moved quantity.

- Lot attribute requirements from the source sales order line are copied to the target sales order line.
- Global lot attributes with values are validated and synchronized with the new sales order line.

This eliminates the need for manual re-entry and prevents accidental loss or duplication of lot data.

For more information on backorders, see [Manage backorders](#).



Aptean Contract Management

Article • 1/28/2026 • 1 min read

When the Aptean Backorder Management extension is used in conjunction with the Aptean [Contract Management](#) extension, when a quantity is moved using backorder management, the system treats the newly created or updated sales line in the same way as a manually created sales line. During this process, the Aptean Contract Management extension is triggered to evaluate whether a matching sales contract exists.

If the **Enable Contract On Sales** and **Auto Fill Sales Contract Details** toggles on the **Contract Management Setup** are turned on, the integration performs the following actions:

- Checks for an active sales contract that matches the customer, item, and document date of the target sales order.
- Validates that the contract date range applies based on the configured date type.
- Automatically assigns the sales contract number and contract line number to the moved sales line.
- Marks the sales line as contract-related and updates the contract quantity information accordingly.

This ensures that the contract is consistently applied even when quantities are split across multiple sales orders using backorder management.



Aptean Drop Shipment

Article • 7/22/2026 • 2 min read

When the Aptean Backorder Management extension is used in conjunction with the Aptean [Drop Shipment](#) extension, the system evaluates the drop shipment status of the sales order and its lines using logic provided by the Aptean Drop Shipment extension.

- If the **Backorder Management** page is opened from the **Sales order** header page, the system automatically excludes **Sales lines** page that are marked as drop shipment (with the **Drop Shipment** checkbox selected on the **Sales Order** line). Sales lines with the **Purchasing Code** field value set to *Special Order* are included and can be processed through the backorder management workflow.
- If one or more lines are excluded, the system generates a notification informing that the order contains drop shipment or special order lines that cannot be processed.
- If the **Backorder Management** page is opened from a sales order line, the system validates the selected line before opening the page.
- If the selected line is marked as **Drop Shipment** and the **Backorder Management** checkbox is not selected, the system displays an error message indicating that the line cannot be moved. If the **Purchasing Code** field value on the selected line is set to *Special Order*, the line is shown in the **Backorder Management** list page. When executing the **Move to a New Order** or **Move to an Existing Order** action, the system validates whether the linked special order **Purchase Order** line has an outstanding quantity. If the outstanding quantity is not zero, an error message is displayed and the quantity cannot be moved until the *Special Order* process is completed..



Aptean Transport

Article • 1/28/2026 • 1 min read

When the Aptean Backorder Management extension is used in conjunction with the Aptean [Transport](#) extension, the system validates the transport status of the relevant sales order lines.

- The system checks whether a transport request exists for the sales order header or the selected sales order line.
- If a transport request exists, the system verifies whether a transport order number is registered on that transport request.
- When the transport request is not yet linked to a transport order, backorder management remains available, and quantity movements are allowed.
- When the transport request is linked to a transport order, the sales order line is considered planned for transport and cannot be moved. In this case, backorder management is blocked, and an error message is displayed stating that the line cannot be moved due to transport planning.

This ensures that only sales lines that are not actively planned for transport can be moved.

