



Sales Order Date Changes

SOP 109

Revision A, 05/10/2018

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PURPOSE: Operations may need to change the shipping date on a sales order.

PROCESS STEPS:

Customer Service/Sales

1. Enter a sales order. Please see the Sales Order Entry SOP *103_Sales Order Entry*

Operations

1. Orders on their Orders to Ship preview
2. Navigate to Sales > Sales Calendars
3. Change the Report type to **Sales Inventory**
4. Review the calendar for any orders that cannot ship on time.
 - a. These orders are typically orders that will show red or yellow on the calendar
5. Double click on the order that require a due to ship date change
6. Highlight the order
7. Click Modify
8. Change the Order Type to **Order on Hold**
9. Navigate to the Dates Tab
10. Change the **Expected Ship** date to the new due to ship date
11. Navigate to the Misc2 tab
 - a. Click on the **Remarks** line and enter the reason why the due to ship date needs to be changed.
12. Click Save

Customer Service/Sales

1. Contacts the customer to let them know of the date change.
2. If the customer agrees to the date change:
 - a. Enter the revised **Due to ship date**
 - b. Change the order type to **Sales Order**
 - c. Navigate to the Misc2 tab and enter the confirmation information
 - d. Click Save
3. If the customer does not agree to the date change:
 - a. Navigate to the Misc2 tab and enter the reason why the customer is not accepting the new date
 - b. Click Save
 - c. Review with Management how to proceed with this order

REVISIONS

Rev	Date	Change
I/R	11/16/17	New
A	5/10/18	Correct referenced SOP#