



# Sales Calendars

SOP 179

Revision A, 11/02/2018

Approved by: Don Stanton

## PURPOSE:

The Sales Calendar may be used to check inventory availability, Reserve and Un-reserve materials to Sales Orders, schedule Sales Orders for shipment, ship Sales Orders, and print the associated Documents, such as Packing Lists, Bills of Lading, and Invoices. The Sales Calendar shows a single box per Sales Order and is displayed based on a selected Sales Order date (typically organizations use the "Due to Ship" date of the Sales Order).

The Calendar section of the form shows a single box per Sales Order and displays the Sales Orders based on either the Sales User 1-5 dates or the Expires date, depending on the selection made in the "Date Based On" field on the pre-filter.

The Sales Inventory Calendar, Sales Orders will be displayed in different colors based on the Inventory Status.

- Green - inventory is on hand based on the Sales Order scheduled date.
- Yellow - inventory is not on hand but a valid plan, such as a Job, exists to have the inventory on hand by the Sales Order scheduled date.
- Red - inventory is not on hand and no plan exists for creating the necessary inventory.

## PROCESS STEPS:

1. Navigate to Sales > Sales Calendar
2. Change Report Type to "Sales Inventory"

**Note:** "Morning Meeting" settings: Sales Inventory, total volume, chose Division:

Settings	View	Clear	Layout
Report Type	Sales Inventory	Entered By	
Order Type	Sales Order	Bill-To Company	
Capacity Calc.	total volume	Ship-To Company	
Date Based On	Due to ship	Ship From Company	
Start Date	/ /	Billing Group	
End Date	/ /	Sales Rep	
Save Date	Due to ship	Sales Group	
Units Per Day	5,000	Ship Via	
Pixels Per Hour	20	IC-Disc	
Snap Minutes	15	Division	Tulsa
Schedule Type	Week View	Territory	
Shop Area		Customer Type	
Work Center Type		Industry Type	
Work Center		Progress Billing	
Job Category		Manufacturer	
Facility		Mfg/Rebrand	
Facility Group		Class & Size	

3. Complete the pre-filter as needed
4. Click view
5. Move Sales as needed. This can be done by drag and dropping
6. Click Save

Note: If you double click on the order, you can reserve and ship from that screen.



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### REVISIONS

Rev	Date	Change
I/R	10/23/17	New
A	11/2/18	Change menu names, note "Morning Meeting"