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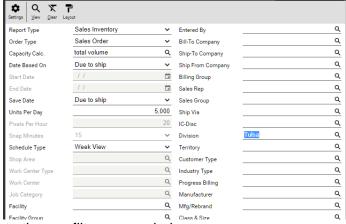
The Sales Inventory Calendar, Sales Orders will be displayed in different colors based on the Inventory Status.

- 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:

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.

REVISIONS

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