SALES ORDER GUIDELINES

Best practices for keeping sales orders clean, customer dates accurate, and shipping priorities under control.

THE 7 GUIDELINES

1 One Order = One Sales Order

Do not maintain standing sales orders. Enter each customer order on its own sales order and close it when fully shipped and invoiced.

2 Split by Ship-To Address

If an order has multiple shipping destinations, create a separate sales order for each address to support correct shipping, invoicing, sales tax, and reversals.

3 Keep Required Dates Fixed

Do not change calculated line-item Required Dates except for blanket orders with scheduled future shipments. Required Date drives MRP, job priority, and picking priority.

4 Use Late Supply for Expected Ship Dates

Use the Late Supply screen to update Expected Ship Dates when late jobs, late POs, or low stock will delay shipment. Expected Ship Date is for customer communication and does not affect priority.

5 Use Picking Manager for Order Picking

Use Picking Manager as the front-end to Order Picking. It allocates stock on hand to sales orders in earliest Required Date order and shows which orders can be fully or partially picked.

6 Never Reverse Invoices to Adjust Costs

INVOICE

Do not reverse and repost a customer invoice just to change line-item costs. Once an invoice is sent, any correction should follow proper customer-facing accounting procedures.

7 Do Not Use Sales Orders as Pseudo-Jobs

Sales orders are not a substitute for jobs. They do not provide the planning, costing, priority, or tracking capabilities of an actual job. Do not use sales kits in place of Bills of Manufacturing.

Best practice: Use Sales Orders for order entry, Late Supply for customer-date communication, and Picking Manager for priority-based picking and shipment control.