



SALES ORDERS



How to manage sales orders, customer dates, late supply, and picking priorities while protecting MRP, workflow, and accounting integrity.

1. SALES ORDER RULES

1



Use DBA Sales Orders Only

Do not use outside sales orders. Sales orders are fully integrated with BOMs, inventory, MRP, shop control, and the two-accounting-system design.

2



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.

3



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, and tax handling.

4



Keep Required Dates Fixed

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

5



Use Expected Ship Date for Customer Communication

Expected Ship Date is the date you communicate to the customer. Use it when you need cushion or when supply will be late.

6



Do Not Use Sales Orders as Pseudo-Jobs

Sales orders are not a substitute for jobs. Do not use sales kits or sales orders in place of actual manufacturing jobs.

Required Date

Drives MRP & Priority

Expected Ship Date

Communicate to Customer

2. SALES > LATE SUPPLY

Late Supply is an exception screen for sales order lines dependent on late jobs, late POs, or insufficient stock.

A

Production Feedback



Released jobs with Finish Dates later than the sales line Required Date appear on the Jobs tab.

B

Purchasing Feedback



PO lines with Expected Receipt Dates later than the sales line Required Date appear on the POs tab.

C

MRP Feedback for Stocking Items



After MRP, New status jobs supplying stocking order policy lines can be filtered to identify sales lines that will ship late.

D

Update Expected Ship Dates Directly



Use Late Supply to update Expected Ship Dates for customer communication. Unlike Required Date, Expected Ship Date can be changed freely.



If a sales order line is not listed in Late Supply, it is supplied on time.

3. SALES > PICKING MANAGER

What Picking Manager Does



- Allocates stock on hand each time the screen is opened or refreshed.



- Uses color-coded icons to show whether sales orders can be fully or partially picked.



- Links directly to Order Picking for one-by-one picking.

Stock Allocation Hierarchy

1



Released Job Components First

Stock is allocated first to released job components in planned Job Start date order.

2



Then Sales Orders by Required Date

Remaining stock is allocated to sales order lines in ascending Required Date order.

3



Tie Breaker: SO Number

When Required Dates are the same, remaining stock is allocated in ascending SO No. order.



SO Stock Allocation Inquiry provides a full allocation profile and shows which lines are fully or partially allocated for picking.



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