

MANAGING SALES ORDER DATES

How required dates, expected ship dates, late supply, and stock allocation work together.

1 Keep Required Dates Fixed



Required Date is the internal target date that drives MRP, job priority, and picking priority. Change it only for blanket orders with scheduled future shipments.

i Blanket orders: enter a separate line for each shipment and use the requested ship date.

2 Use Expected Ship for Customers



Expected Ship Date is the customer communication date. Update it when you need cushion or when supply feedback shows a likely delay.

3 Use the Late Supply Screen



Late Supply lists sales order lines that depend on late jobs, purchase orders, or stocking supply from MRP. It helps you monitor risk and update Expected Ship Dates directly.

-  **Production feedback:** Job Finish Date
-  **Purchasing feedback:** Expected Receipt Date
-  **MRP feedback:** stocking items not fully covered

4 Lines Not Listed Are On Time



Late Supply is an exception screen. If a sales order line is not listed, it is supplied on time and its Expected Ship Date can usually remain as is.

5 Picking Manager Allocates Stock



Picking Manager allocates stock on hand to sales order lines and shows which orders are ready to pick. Use color-coded status icons for fully ready, partially ready, and not ready.

-  Green = Fully Ready
-  Yellow = Partially Ready
-  Red = Not Ready

6 Stock Allocation Order

When Picking Manager allocates stock, it follows this hierarchy:

- 1** Released job components by planned Job Start date
- 2** Sales order lines by Required Date
- 3** Same-date sales orders by SO number

i SO Stock Allocation Inquiry shows the complete allocation profile for a selected sales order.



Best practice: Keep Required Dates fixed, use Expected Ship Dates for customer communication, and rely on Late Supply and Picking Manager for timely decisions.