

Dashboard Management









Home

Viewing: Portlet date settings ▼ Personalize ▼ Layout ▼

Reminders

3

Sales | My Stores Sales Orders Not Approved

3

Sales | Special Orders on Hold

0 Sales | My Stores Opportunities

0 Sales | Open Quotes (Mine)

6 Sales | Open Quotes (My Store)

0 Sales | Deposits to be Made

0 Sales | Incoming Transfers to My Store

0 Sales | Outgoing Transfers to DC

Calendar: My Calendar

< > Today 09/22 - 28/2019

My Calendar ▼ Week ▼

Sun Sep 22

Mon Sep 23

Tue Sep 24

Wed Sep 25

Thu Sep 26

Navigation Shortcut Group

Sales

Guests



Guest Lookup
Create New Guest
Create New Customer

Sales Transactions



New Opportunity
New Quote
New Sales Order

Products



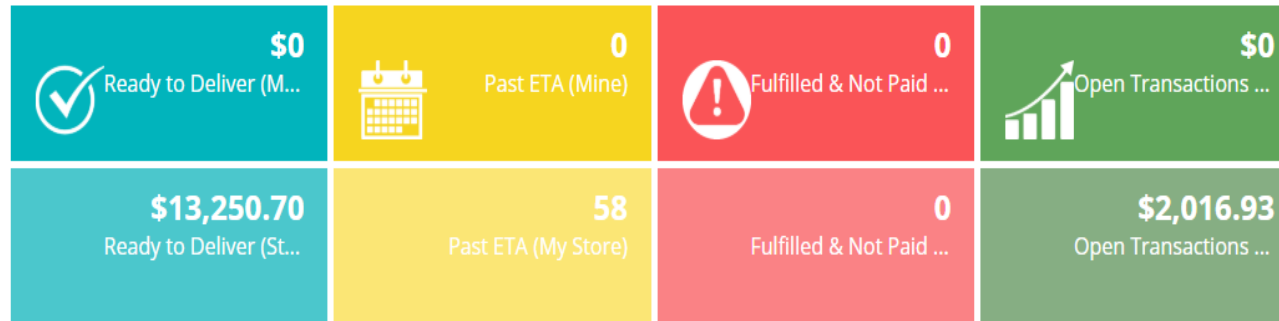
Item Look Up
Product Configurator
Average Vendor Lead Ti...
Preferred Stock

Operations



Transfer Orders
Delayed Special Orders
Make Bank Deposit
My Commissions
Manager Override

Tiles



Today's Sales & Quotes

TOTAL: 4

Edit View	Sales Location	Sales Rep	Total	Date Created ▼	Type
			267.50	09/25/2018 0:51	51-0-1

Dashboard Tiles

Home Viewing: Portlet date settings ▾ Personalize ▾ Layout ▾

Reminders

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Navigation Shortcut Group

Sales

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Transfer Orders
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Make Bank Deposit
My Commissions
Manager Override

Tiles

Ready to Deliver (M... \$0	Past ETA (Mine) 0	Fulfilled & Not Paid ... 0	Open Transactions ... \$0
Ready to Deliver (St... \$13,250.70	Past ETA (My Store) 58	Fulfilled & Not Paid ... 0	Open Transactions ... \$2,016.93

Calendar: My Calendar

< > Today 09/22 - 28/2019

My Calendar ▾ Week ▾

Sun Sep 22	
Mon Sep 23	
Tue Sep 24	
Wed Sep 25	
Thu Sep 26	

Today's Sales & Quotes

TOTAL: 4

Edit View	Sales Location	Sales Rep	Total	Date Created ▾	Type
			257.50	09/25/2016 08:51	SL - Q1

Ready To Deliver



\$0

Ready to Deliver (Mine)

\$14,652.37

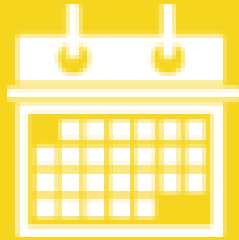
Ready to Deliver (Store)

Ready To Deliver

	EDIT VIEW	SALES LOCATION	SALES REP	SALES ORDER DATE	AMOUNT	SALES ORDER NO.	CUSTOMER NAME	BALANCE DUE	ESTIMATED READY DATE	EARLIEST ESTIMATED DATE AVAILABLE	AVERAGE DAYS OPEN	SHIP VIA	ORDER READY TO DELIVER	SHIP COMPLETE
		Center					Bohnenkamp					Delivery Truck		
✓	Edit View	-Distribution Center	Denise Desmarais	09/20/2019	374.49	SOWHS710	61492 Dave Wilholt	374.49	10/04/2019		5	Customer Pick Up at Store	Yes	Yes
✓	Edit View	-Distribution Center	Vennisa Velez	09/20/2019	0.00	SOWHS713	60795 Elizabeth Luguette	0.00	10/04/2019		5	Leaders Delivery Truck	Yes	Yes
	Edit View	-Distribution Center	Vennisa Velez	09/20/2019	609.89	SOWHS714	54804 Gene & Kristen Fiamma	609.89	10/04/2019		5	Leaders Delivery Truck	Yes	Yes
✓	Edit View	-Distribution Center	Vennisa Velez	09/20/2019	374.49	SOWHS715	61502 Jean & Stoney Malanson	374.49	10/04/2019		5	Customer Pick Up at Store	Yes	Yes
🚩	Edit View	-Distribution Center	Denise Desmarais	09/23/2019	101.18	SOWHS716	61045 Chris Smith	101.18	09/30/2019		2	Leaders Delivery Truck	Yes	Yes
NEW	Edit View	-Distribution Center	Vennisa Velez	09/23/2019	0.00	SOWHS717	42225 Clayton Smith	0.00	09/30/2019		2	Leaders Delivery Truck	Yes	Yes
✓	Edit View	-Distribution Center	Stephanie Martin	09/23/2019	0.00	SOWHS719	48097 Lee Williams	0.00	10/08/2019		2	Leaders Delivery Truck	Yes	Yes

✓ Delivery Date Set •
 NEW Became Ready to Deliver in the Last 24 Hours •
 🚩 Became Ready to Deliver in the Last 72 Hours •
 Money Owed

Past ETA



0

Past ETA (Mine)

59

Past ETA (My Store)

Set realistic ETA's when completing a Sales Order

☒ SHIP COMPLETE

ESTIMATED READY DATE
10/09/2019

ESTIMATED DATE PRODUCT AVAILABLE

IF NO STOCK IN DISTRIBUTION CENTER / RESERVE STORE STOCK

Click on "If No Stock In DC / Reserve Store Stock" directly above this for instruct

IF NO STOCK IN DC / PO FORECAST

Click on "If No Stock In DC / PO Forecast" directly above this for instructions. [Click](#)





Items 410.00 •

CE EL	EACH	AMOUNT	ESTIMATED AVAILABILITY DATE
Our	70.00	280.00	10/11/2019
Our	65.00	130.00	10/11/2019

Past ETA report can help you identify Sales Orders that may be past customer expectations.

Sales | Past Expected ETA: Palm Harbor Showroom Results

[Return To Summary](#)[+ FILTERS](#)

    EDIT <input type="checkbox"/>							
EDIT VIEW	SALES LOCATION	DAYS PAST ESTIMATED READY	SALES REP	ESTIMATED DATE READY	EARLIEST ESTIMATED DATE PRODUCT AVAILABLE	CUSTOMER NAME	# OF ORDERS
Edit View	Palm Harbor Showroom	1	Donna Napier	09/25/2019		59808 Karen Redmond	1
Edit View	Palm Harbor Showroom	2	Todd Kelly	09/24/2019		61375 Annette Silva	1
Edit View	Palm Harbor Showroom	6	Pamela J Vandenberg	09/20/2019		61714 Thomas Devlin	1
Total		9					3.0

You can re-calculate ETA from the Sales Order

 Sales Order 🔍

SOPMH551 61714 Thomas Devlin

PENDING FULFILLMENT

Edit

Back

Fulfill

Cancel Order

Take Payment

Recalculate Date Available

Email Sales Order

1. Primary Information

DATE

09/25/2019

LOCATION

Palm Harbor Showroom

You can re-calculate ETA from the Sales Order

EDIT <input type="checkbox"/>							
EDIT VIEW	SALES LOCATION	DAYS PAST ESTIMATED READY	SALES REP	ESTIMATED DATE READY	EARLIEST ESTIMATED DATE PRODUCT AVAILABLE	CUSTOMER NAME	# OF ORDERS
Edit View	Palm Harbor Showroom	1	Donna Napier	09/25/2019		59808 Karen Redmond	1
Edit View	Palm Harbor Showroom	2	Todd Kelly	09/24/2019		61375 Annette Silva	1
Edit View	Palm Harbor Showroom	6	Pamela J Vandenberg	09/20/2019	10/31/2019	61714 Thomas Devlin	1
Total		9					3.0

Fulfilled & Not Paid For



0

Fulfilled & Not Paid For (Mi...

0

Fulfilled & Not Paid For (M...

Fulfilled & Not Paid For

Sales | Fulfilled & Not Paid For (All): -Distribution Center Results

List Search Audit Trail

[Return To Summary](#)

 FILTERS

    EDIT ☐

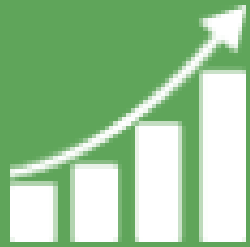
TOTAL: 14

EDIT VIEW	SALES LOCATION	# OF INVOICES	AVERAGE DAYS OVERDUE	DATE	TERMS	SUM OF INVOICES	TOTAL BALANCE OWED	NAME	DOCUMENT NUMBER	ORIGINAL SALES ORDER	SALES REP
Edit View	-Distribution Center	1	54	08/01/2019	Pay in Full Before Delivery	1,816.12	1,816.12	57890 Kemberly Thompson	INVWHS340		
Edit View	-Distribution Center	1	51	08/04/2019	Pay in Full Before Delivery	406.59	406.59	55602 Warren Beiderman	INVWHS355	Sales Order #SOWHS319	Vennisa Velez
Edit View	-Distribution Center	1	32	08/23/2019	Pay in Full Before Delivery	449.37	449.37	47655 Nicholas Coppola	INVWHS471	Sales Order #SOWHS489	Vennisa Velez
Edit View	-Distribution Center	1	20	09/04/2019	Pay in Full Before Delivery	147.87	147.87	56419 Donald & Deborah Mcknight	INVWHS521	Sales Order #SOWHS265	Vennisa Velez
Edit View	-Distribution Center	1	18	09/06/2019	Pay in Full Before Delivery	42.78	42.78	60030 Mark Arney	INVWHS546	Sales Order #SOWHS495	Vennisa Velez
Edit View	-Distribution Center	1	5	09/19/2019	Pay in Full Before Delivery	2,238.96	2,139.96	60458 jeff & Cindy Kiger	INVWHS579	Sales Order #SOWHS614	Vennisa Velez
Edit View	-Distribution Center	1	4	09/20/2019	Pay in Full Before Delivery	21.29	21.29	60066 Chuck Piper	INVWHS586	Sales Order #SOWHS505	Denise Desmarais
Edit View	-Distribution Center	1	3	09/21/2019	Pay in Full Before Delivery	320.99	320.99	47714 Robert Girard	INVWHS589	Sales Order #SOWHS473	Vennisa Velez
Edit View	-Distribution Center	1	2	09/22/2019	Pay in Full Before Delivery	631.30	631.30	28555 Rick Dimaio	INVWHS595	Sales Order #SOWHS646	Vennisa Velez

Fulfilled & Not Paid For

- ▶ RA's not received on exchanges
- ▶ Wells Fargo not posted to Sales Order
- ▶ Balance not collected

Open Transactions



\$0

Open Transactions (Mine)

\$2,658.90

Open Transactions (My Sto...

Open Transactions

Sales | Open Transactions : -Distribution Center Results

List Search Audit Trail

[Return To Summary](#)

+ FILTERS

														TOTAL: 186
EDIT VIEW	SALES LOCATION	SALES REP	SALES ORDER DATE	CUSTOMER NAME	AMOUNT	AMOUNT PAID	BALANCE DUE	ESTIMATED READY DATE	EARLIEST ESTIMATED DATE AVAILABLE	DAYS OPEN	ORDER READY TO DELIVER	SALES ORDER NUMBER	TYPE	SHIP COMPLETE
Edit View	-Distribution Center	Ashley Newton	07/07/2019	47743 Sue Harp	49.87	49.87	0.00	10/01/2019		80	No	SOWHS192	Sales Order	No
Edit View	-Distribution Center	Jessie Hooper	07/07/2019	47891 Mason Rupert	0.00		0.00	10/01/2019		80	No	SOWHS195	Sales Order	No
Edit View	-Distribution Center	Stephanie Martin	07/07/2019	47854 Susie Goodridge	39.38	39.38	0.00	09/30/2019		80	Yes	SOWHS226	Sales Order	No
Edit View	-Distribution Center	Morgan J Burke	07/08/2019	57326 Phil Filippelli	0.00	0.00	0.00	09/26/2019		79	Yes	SOWHS235	Sales Order	Yes
Edit View	-Distribution Center	Samantha Randolph	07/08/2019	32546 Robert Holder	0.00	0.00	0.00	10/02/2019		79	No	SOWHS236	Sales Order	Yes
Edit View	-Distribution Center	Morgan J Burke	07/08/2019	41729 Thomas Shaw	0.00	0.00	0.00	11/01/2019		79	No	SOWHS242	Sales Order	Yes
Edit View	-Distribution Center	Stephanie Martin	07/08/2019	53990 Marcia Butler	273.16	273.16	0.00	09/25/2019		79	Yes	SOWHS249	Sales Order	Yes
Edit View	-Distribution Center	Jessie Hooper	07/08/2019	57322 Lisa Klatt	0.00	0.00	0.00	09/25/2019		79	Yes	SOWHS250	Sales Order	Yes

Ready to Deliver & Paid

Ready to Deliver Balance Owed

Late ETA and Ready to Deliver

Reminders

3
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3
Sales | Special Orders on Hold

- 0 Sales | My Stores Opportunities
- 0 Sales | Open Quotes (Mine)
- 6 Sales | Open Quotes (My Store)
- 0 Sales | Deposits to be Made
- 0 Sales | Incoming Transfers to My Store
- 0 Sales | Outgoing Transfers to DC

Calendar: My Calendar

Today 09/22 - 28/2019
My Calendar Week

Sun Sep 22	
Mon Sep 23	
Tue Sep 24	
Wed Sep 25	
Thu Sep 26	

Navigation Shortcut Group

Sales

Guests

Guest Lookup
Create New Guest
Create New Customer

Sales Transactions

New Opportunity
New Quote
New Sales Order

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Average Vendor Lead Ti...
Preferred Stock

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Transfer Orders
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Manager Override

Tiles

Ready to Deliver (M... \$0	Past ETA (Mine) 0	Fulfilled & Not Paid ... 0	Open Transactions ... \$0
\$13,250.70 Ready to Deliver (St...	58 Past ETA (My Store)	0 Fulfilled & Not Paid ...	\$2,016.93 Open Transactions ...

Today's Sales & Quotes

TOTAL: 4

Edit View	Sales Location	Sales Rep	Total	Date Created	Type



Reminders

Reminders



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Sales Orders Not Approved

- Sales Orders with No Deposits or pending RA exchange

 **Sales | My Stores Sales Orders Not Approved: Results**


[Return To Criteria](#)

FILTERS

SALES REP
- All -

CUSTOMER NAME
- All -

STYLE
Grid

 **EDIT** ☐

EDIT VIEW	DAYS OPEN	SALES ORDER DATE ▲	ESTIMATED READY DATE	DOCUMENT NUMBER	CUSTOMER NAME	SALES REP
Edit View	40	08/16/2019	08/17/2019	SOWHS487	59902 Dianne Connolly	Vennisa Velez
Edit View	34	08/22/2019	08/01/2019	SOWHS534	59856 TimTest Transfers	Tim Newton
Edit View	5	09/20/2019	09/23/2019	SOWHS704	47854 Susie Goodridge	Stephanie Martin
	79	Total				

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Special Orders on Hold



Sales | Special Orders on Hold: Results

[Return To Criteria](#)

FILTERS

SALES LOCATION

- All -

STYLE

Normal



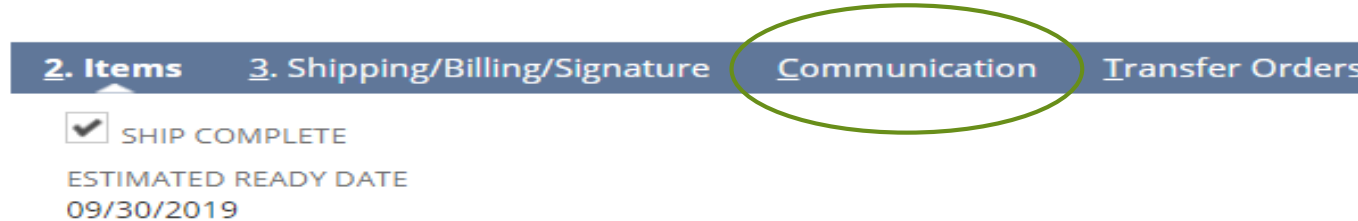
EDIT



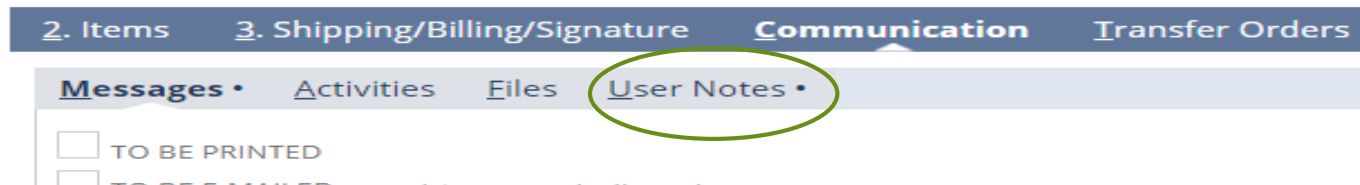
EDIT VIEW	SALES REP	DAYS OPEN	SALES ORDER DATE	SALES ORDER NUMBER	CUSTOMER NAME	AMOUNT	ESTIMATED READY DATE ▲	EARL
Edit View	Mary Hodge	4	09/21/2019	SOCAS233	61512 Karin Thomas	51.36	09/28/2019	
Edit View	Aviva Mucha	17	09/08/2019	SOEOR277	27551 Cynthia & David Cowan	181.05	09/30/2019	
Edit View	Mary Hodge	4	09/21/2019	SOCAS234	61533 Andrew Chipchak	231.20	10/12/2019	

Special Orders on Hold

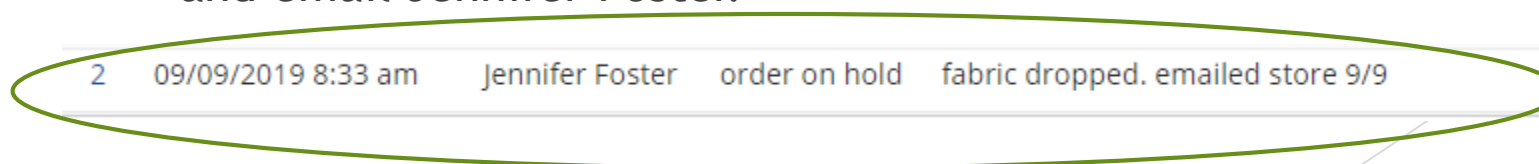
- ▶ See the reason the Special Order is on Hold by going to the Sales Order and open up Communication tab



- ▶ Open User Notes



- ▶ Read the notes detailing why the Special Order is on Hold. Take appropriate action, update user notes and email Jennifer Foster.



Reminders

Reminders

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Top Sales & Quotes

Top 10 Sales reps By Sales Orders (Date Range: Today)

