

Dispatch Planner

To enable your business to manage all of your incoming and outgoing orders, SQLWorks includes a Dispatch Planner giving you the ability to view all of your orders, track your stock movements and plan your shipments.

The Dispatch Planner lists all of your outgoing and incoming orders line by line. The coloured indicator and status description on the far right give you the information on the whereabouts of the order if incoming and inform you of the current status of that order if outgoing, giving the Dispatch Manager full visibility and control of stock at all times.

1. The Dispatch Planner is accessible to all users and can be found under the 'Products' module in the main Navigation bar.
2. In this section at the top there are a number of status options, a warehouse filter and also a time horizon. The status options can be ticked and unticked to change the results visible in the table below, similarly the warehouse and time horizon filters can be adjusted.

The status options are explained below;

- Ready To Ship - You have enough stock to ship this now (Green)
- Ready To Ship (Overdue) - You have enough stock to ship this now, and it is beyond its dispatch due date (Amber)
- Due In Time - Stock is on its way and should be with us in time (Green)
- Due In Time (Supplier Delay) - Stock is on its way and should be with us in time, though it is later than expected (Amber)

- Due Late - Stock is on its way but will not be with us in time to meet the dispatch date of the order (Red)
 - Due Late (Supplier Delay) - Stock should have been here by now, because of its delay we have missed the dispatch date of the order (Red)
 - Not Ordered - The required qty has not yet been ordered
 - Partially Ordered - Only some of the required qty has been ordered
3. To view all outstanding orders - click the Rebuild button to load order lines applying the filters selected.
 4. There are 2 tabs to view '**Stock Outgoing**' - any orders due out to customers and '**Stock Incoming**' - any Purchase orders placed that you are awaiting delivery on or any outstanding stock items being made/built on a Works Order. Selecting the stock incoming tab allows you to take a closer look and investigate further to see how your stock is coming into your warehouse and when it is due.
 5. You can select to see all 'Orders' as shown above, which is a list of order headers. Each line gives all of the information about that order, and each order header selected, gives a further line by line breakdown below.
 6. The colour coded status on the right shows whether the order is:
 - **good = green** - for example everything is in stock and ready to be sent out and the order is on time,
 - **okay = amber** - stock is ready to be sent, but the order is overdue,
 - **bad = red** - no stock and late.

The colour coded status and reason is visible on each order header as well as each ordered line item.

7. The other option is to view all orders line by line by selecting 'All Lines'. This may be useful if you would like to filter by part number or see all of the order lines you need to ship out to a specific customer, within that time horizon set at the top.
8. Via the right click option, you have the standard options across the SQLWorks system, to copy all of the data to a clipboard which can be pasted into any document type such as word, notepad etc., or export the list to an excel spreadsheet.
9. Via a double click on an individual line item on the 'All Lines' tab it allows you to view the original SO and gives the option to view the source of that item i.e., the Works Order or Purchase Order.