Sales Monitor

Cavallo Support - 2026-01-07 - [Sales](#)

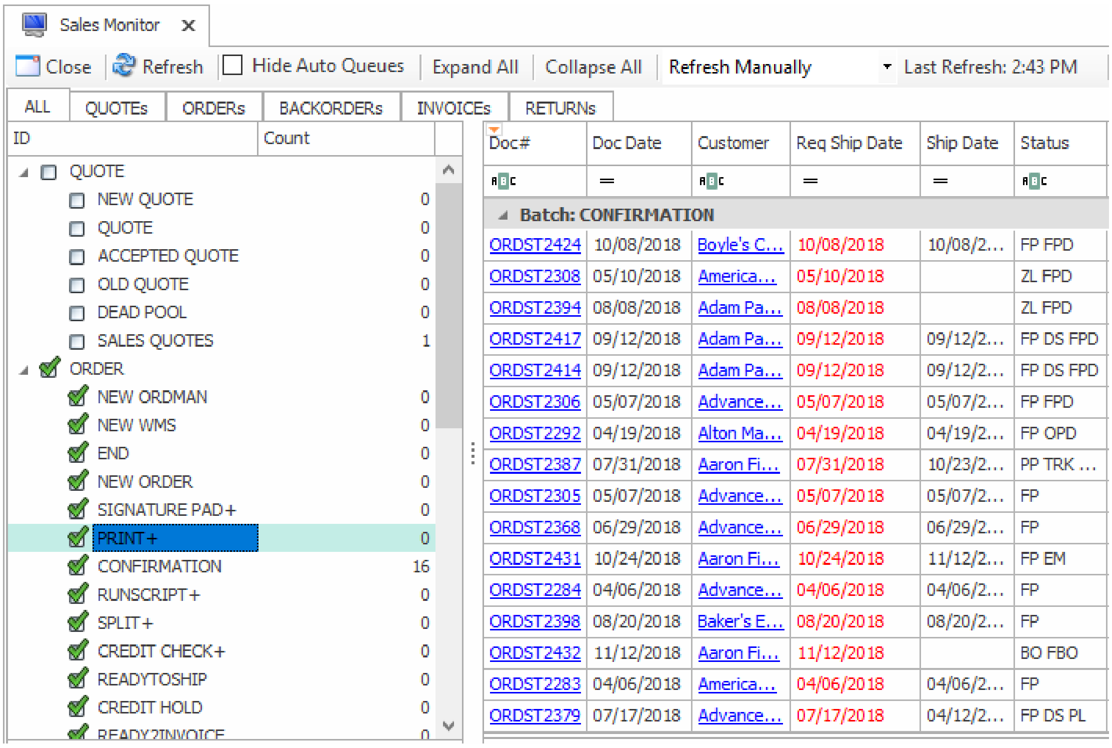
Overview

Sales Monitor provides a complete view of all open sales documents in your system and each document’s status. Individual users can configure their Sales Monitor to show only open documents that are most important to them, and, if allowed, can move documents between batches from this module.

Additional functionality is possible through the use of a SalesPad Custom Procedure.

Usage

Navigate to the Sales Monitor via Modules > Sales Monitor.

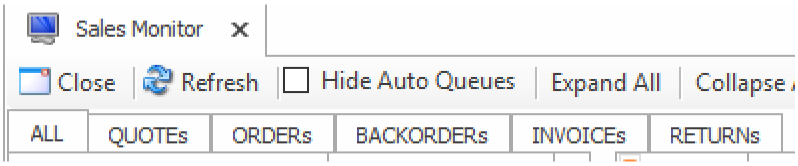


Display

On the Sales Monitor, current sales documents are organized by type and workflow batch. To display expandable/collapsible batches, you may need to add the Batch column to the grid by using the column chooser and selecting **Group By This Column**. Displayed documents can be sorted by any of the grid columns by clicking on the column header.

Note: New Batch Days and Entered Batch columns show users the number of days a document has been in a batch and the date the document was moved to the current batch. Both of these options require modifications to the spcpSalesMonitor in order to use them.

Tabs on the top of the Sales Monitor appear based on the batches created in the [Desktop: Workflow](#) module:



Note: Use the **+/-** boxes to expand or collapse IDs, or you can use the **Expand All** and **Collapse All** buttons on the header.

Clicking on the different tabs will narrow by document type, and document types can be selected or deselected from the right-hand grid to further narrow the view. You can also narrow documents by Sales Rep by selecting a Rep from the Sales Rep header dropdown (click **Refresh** to update view by selected Sales Rep).

Click on a document number (or double-click elsewhere on the line) to open an individual sales document, or click on a customer to open the Customer card.

Use the Search field in the header to search for a specific document or documents containing specific text.

REFRESH

In the Sales Monitor header, click on the **Refresh** button to instantly update the Sales Monitor view to include any new sales documents in the system (or any change in narrowing by Sales Rep). Automatic refresh can be set from the refresh dropdown by selecting Refresh Manually, Refresh Every 30 seconds, Refresh Every 1 minute, or Refresh Every 5 minutes.

STATUS COLUMN

The following codes may appear in the Status column of the Sales Monitor:

BO (Back Ordered): One or more lines has back-ordered quantities

FBO (Fully Back Ordered): Quantity back-ordered is equal to the document quantity

PBO (Partially Back Ordered): Quantity back-ordered is less than the document quantity

PP (Partially Picked): One or more lines have quantities that are partially fulfilled

FP (Fully Picked): One or more lines have been fully fulfilled

PL (Purchased Lines): One or more purchase orders are attached to this sales order

DS (Drop Ship): One or more lines are marked as dropship line items

TRK (Tracking Numbers): One or more tracking numbers exist on the document

ZL (Zero Lines): There are no line items on the order

EM (Email): Document has been emailed

FPD (Fully Paid): Sales document originating account amount is 0

OPD (Overpaid): Sales document originating account amount is less than 0

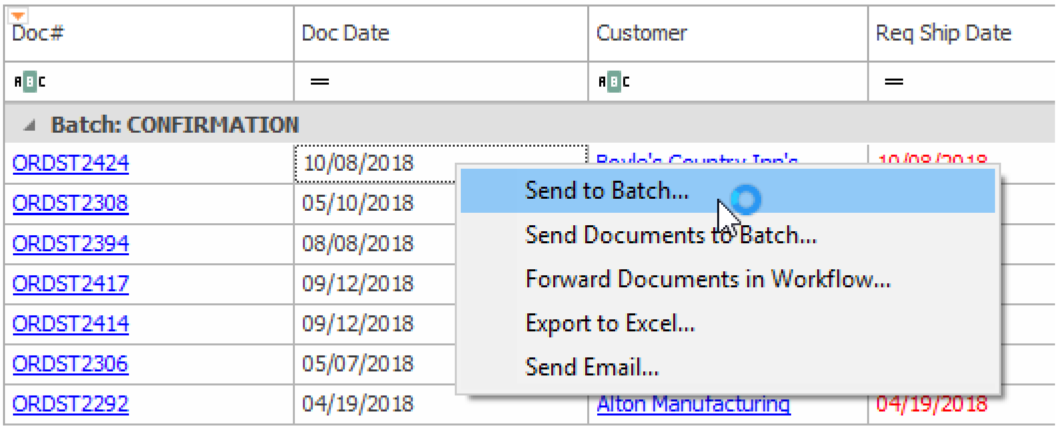
Note: If more than one code applies to a document, multiple codes will appear, separated by a space.

Doc#	Doc Date	Customer	Req Ship Date	Ship Date	Status
Batch: CONFIRMATION					
ORDST2424	10/08/2018	Boyle's Country Inn's	10/08/2018	10/08/2018	FP FPD
ORDST2308	05/10/2018	American Science Museum	05/10/2018		ZL FPD
ORDST2394	08/08/2018	Adam Park Resort	08/08/2018		ZL FPD
ORDST2417	09/12/2018	Adam Park Resort	09/12/2018	09/12/2018	FP DS FPD
ORDST2414	09/12/2018	Adam Park Resort	09/12/2018	09/12/2018	FP DS FPD

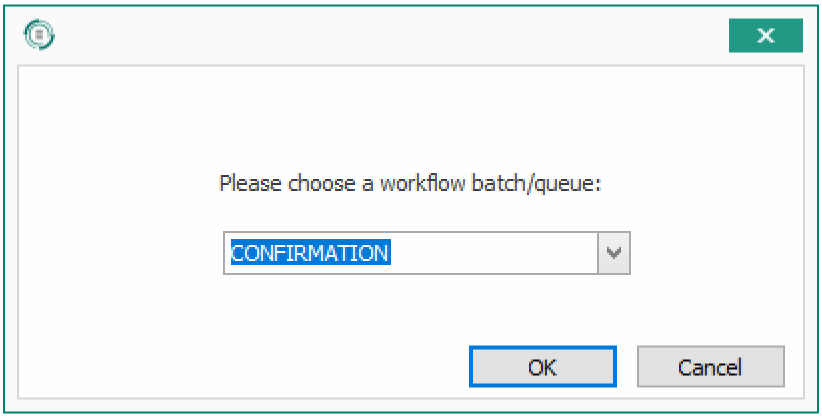
MOVING DOCUMENTS TO A NEW BATCH/QUEUE

If the *Allow Document Batch Moves* security setting is enabled, users can move documents to a different batch from within the Sales Monitor.

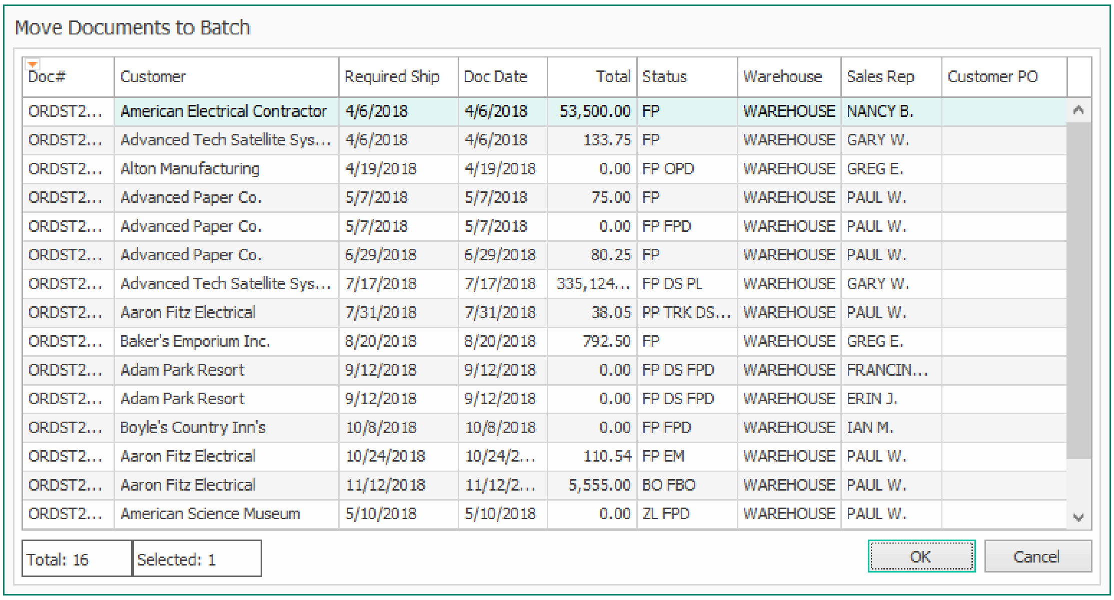
To move a single document, right-click on the document (not on a hyperlink) and select Send to Batch from the dropdown that appears.



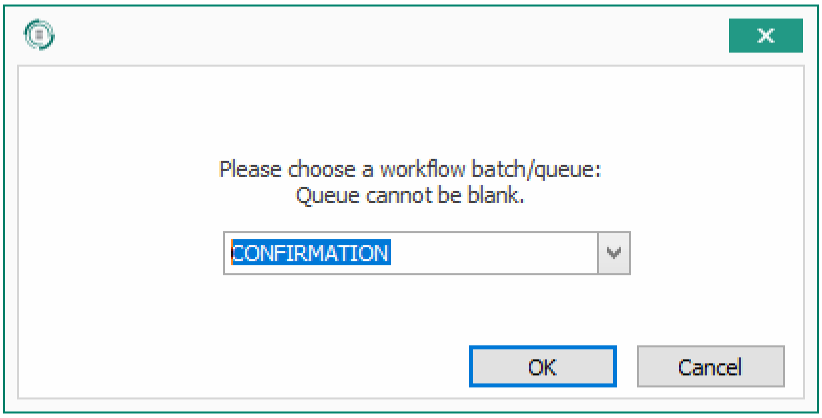
Select a destination batch and click **OK.**



The document will move to the new batch. To move multiple documents from the same batch, right-click on a document in the batch you would like to move and select **Send Documents to Batch** from the dropdown that appears. Using Shift and Ctrl, select the documents to move and click **OK.**



Select a destination batch and click **OK.**



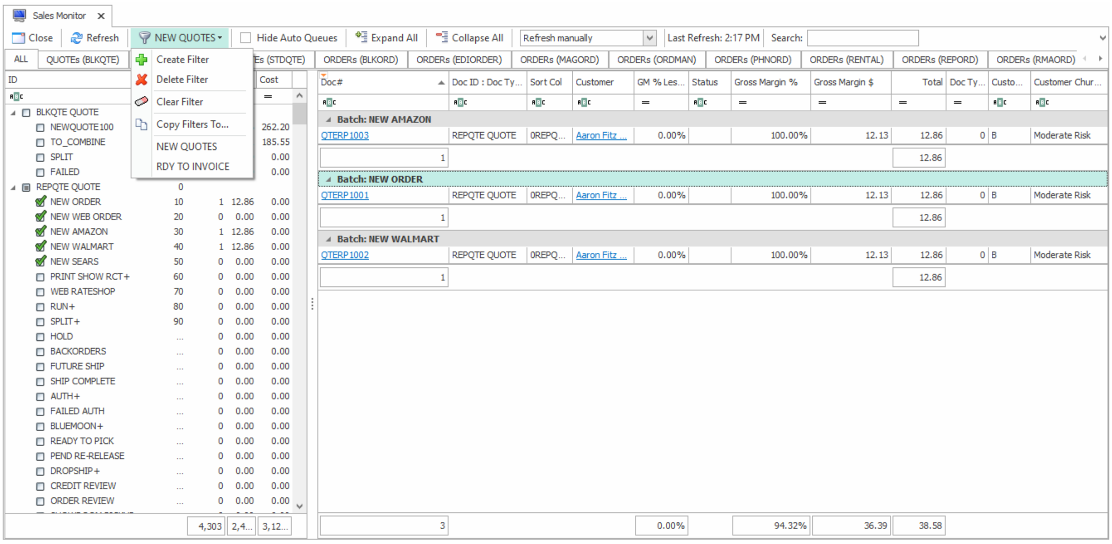
The documents will move to the new batch.

Note: When moving documents in this way, the documents hop over any workflow rules that may exist in between without being evaluated by them. After the move, Sales Monitor will still display the moved documents in the grid, but the New Batch/Queue the documents now reside in will be highlighted in the leftmost section of the Sales Monitor view.

Saved Filters

Saved filters allow you to save queue filters within the Sales Monitor screen. This allows you to quickly switch between viewing sets of sales document queues, simplifying the process of checking on the status of orders in your system. Filters are saved per user, and they can be shared with other users.

Saved Filter Configuration



The filter dropdown appears on the left end of the toolstrip at the top of Sales Monitor, next to the Refresh button. This dropdown provides options related to saved filters, and at the bottom it lists all of the saved filters for the current user.

To create a new filter, first select only the queues that need to be part of the filter, then choose Create Filter from the filter dropdown. Enter a name for the filter in the popup and click OK. The filter will then appear in the list.

To delete a filter, choose Delete Filter from the dropdown, then choose the filter to delete in the popup and click OK.

Clear Filter will unselect all currently selected queues in the Sales Doc ID grid.

Lastly, Copy Filters To is only available if security is enabled. This option will display a popup with a dropdown list of the current user's filters. The user can choose one, then click OK. A second popup will then appear with a list of all active users in the system. Choosing one and selecting OK will copy the filter to the user. The selected user can then reload Sales Monitor to see the copied filter in their dropdown list.

Using Saved Filters

Using saved filters is as simple as choosing the filter from the filter dropdown. Doing so will unselect all currently selected queues and then select only the filter's queues. The sales document grid will automatically refresh to show the documents in those queues.

Using a Sales Monitor Custom Procedure for Increased Functionality

To create the Sales Monitor custom stored procedure (spcpSalesMonitor), open SQL Server Management Studio (SSMS). Find sppSalesMonitor_Modified under Company Database > Programmability > Stored Procedures, then right-click on sppSalesMonitor_Modified and select Script Stored Procedure as > Create to > New Query Window. Make the changes as desired.

In line 11 (CREATE procedure [dbo].[sppSalesMonitor_Modified]...) change sppSalesMonitor_Modified to spcpSalesMonitor. The standard procedure sppSalesMonitor is designed to check for this procedure as its initial step, and will run it first.

For an in depth guide on creating custom procedures, refer to the documentation for [Creating a SalesPad Custom Procedure (SPCP)].

Disclaimer: SalesPad is not responsible for the code in the SPCP or any issues that are a result of modified logic used in the SPCP. Testing any changes to stored procedures in a non-production database is highly recommended. If a support issue is found to be related to a customer or partner written SPCP, any time spent by SalesPad may be billable.

Adding Sales Document User Fields to Sales Monitor

After creating the spcpSalesMonitor following the steps above, sales document user fields can be added to the Sales Monitor results grid by modifying the spcp.

In SSMS, script the stored procedure as an "Alter" command to open the procedure in a new query window. Un-comment (remove the two hyphens from) the lines shown below and execute the changes for user field values to appear in Sales Monitor.

```
,udfs.*
FROM SOP10100 AS sh(NOLOCK)
JOIN #Batches AS b ON sh.BCHSOURC = 'Sales Entry'
    AND sh.BACHNUMB = b.Sales_Batch
    AND sh.VOIDSTTS = 0
JOIN spvSalesDocumentStatus AS st ON st.SOPNUMBE = sh.SOPNUMBE
    AND st.SOPTYPE = sh.SOPTYPE
LEFT JOIN (
    SELECT SOPTYPE
        ,SOPNUMBE
        ,QTYTBAOR = SUM(CASE
                WHEN SOPTYPE = 5
                    THEN QUANTITY
                ELSE QTYTBAOR
                END)
        ,QTYREMAI = SUM(QTYREMAI)
        ,QTYFULFI = SUM(CASE
                WHEN sd.NONINVEN = 1
                    OR i.ITEMTYPE IN (
                        4
                        ,5
                        ,6
                        )
                    THEN sd.QUANTITY
                ELSE sd.QTYFULFI
                END)
        ,DSCOUNT = SUM(DROPSHIP)
        ,ORIGINATING_EXTENDED_COST = ISNULL(SUM(sd.ORUNTCST * (sd.QTYREMAI -sd.QTYCANCE)), 0)
    FROM SOP10200 AS sd(NOLOCK)
    LEFT JOIN IV00101 AS i(NOLOCK) ON i.ITEMNMBR = sd.ITEMNMBR
    WHERE sd.CMPNTSEQ = 0
    GROUP BY SOPTYPE
        ,SOPNUMBE
    ) AS d ON d.SOPTYPE = sh.SOPTYPE
    AND d.SOPNUMBE = sh.SOPNUMBE
LEFT JOIN RM00301 AS rep(NOLOCK) ON rep.SLPRSNID = sh.SLPRSNID
LEFT JOIN SOP10104 AS hld(NOLOCK) ON hld.SOPNUMBE = sh.SOPNUMBE
    AND hld.SOPTYPE = sh.SOPTYPE
    AND hld.DELETE1 = 0
--spvSalesDocType needed for UDFs and spSalesDocument fields.
LEFT JOIN spvSalesDocType AS sdt ON sdt.SOPTYPE = sh.SOPTYPE
--udfs-->
LEFT JOIN spxSalesDocument AS udfs(NOLOCK) ON udfs.Sales_Doc_Type = sdt.Sales_Doc_Type and udfs.Sales_Doc_Num = sh.SOPNUMBE
```

Alerts, Batch Hours, and Batch Days

Critical and warning hours are configured in SalesPad's workflow, and can be reviewed in Sales Monitor by adding the Alerts column. When configured, the Batch Days and Batch Hours columns display how many days or hours the document has been in the specified batch.

Doc#	Doc Date	Customer	Req Ship Date	Ship Date	Total	Alert	Batch Hours	Batch Days
Batch: CONFIRMATION								
ORDST2424	10/08/2018	Boyle's Countr...	10/08/2018	10/08/2018	0.00	Critical	6.72	0.25
ORDST2308	05/10/2018	American Scie...	05/10/2018		0.00	Critical	6.72	0.25
ORDST2394	08/08/2018	Adam Park Re...	08/08/2018		0.00	Critical	269.68	11.21
ORDST2417	09/12/2018	Adam Park Re...	09/12/2018	09/12/2018	0.00	Critical	269.68	11.21
ORDST2414	09/12/2018	Adam Park Re...	09/12/2018	09/12/2018	0.00	Critical	6.72	0.25
ORDST2306	05/07/2018	Advanced Pap...	05/07/2018	05/07/2018	0.00	Critical	6.72	0.25
ORDST2292	04/19/2018	Alton Manufac...	04/19/2018	04/19/2018	0.00	Critical	6.72	0.25
ORDST2387	07/31/2018	Aaron Fitz Ele...	07/31/2018	10/23/2018	38.05	Critical	269.68	11.21
ORDST2305	05/07/2018	Advanced Pap...	05/07/2018	05/07/2018	75.00	Critical	6.72	0.25
ORDST2368	06/29/2018	Advanced Pap...	06/29/2018	06/29/2018	80.25	None		
ORDST2431	10/24/2018	Aaron Fitz Ele...	10/24/2018	11/12/2018	110.54	Critical	575.02	23.96
ORDST2284	04/06/2018	Advanced Tec...	04/06/2018	04/06/2018	133.75	Critical	6.72	0.25
ORDST2398	08/20/2018	Baker's Empori...	08/20/2018	08/20/2018	792.50	Critical	269.68	11.21
26					517,618.77			

To add Alerts, Batch Hours, and Batch Days values to the columns in Sales Monitor, the following SQL must be un-commented from the spcpSalesMonitor created above:

```
,[EnteredBatch] = spsd.[EnteredBatch]
,[BatchHours] = cast(cast(datediff(mi, spsd.EnteredBatch, getdate()) AS NUMERIC(19, 2)) / 60 AS NUMERIC(19, 2))
,[BatchDays] = cast(cast(datediff(hh, spsd.EnteredBatch, getdate()) AS NUMERIC(19, 2)) / 24 AS NUMERIC(19, 2))
,[Alert] = CASE
    WHEN ISNULL(spsd.EnteredBatch, '') = ''
        OR (
            Warning_Hours = 0
            AND Critical_Hours = 0
            )
        THEN 'None' /*-*/
    WHEN CAST(CAST(DATEDIFF(mi, spsd.EnteredBatch, GETDATE()) AS NUMERIC(19, 2)) / 60 AS NUMERIC(19, 2)) < Warning_Hours
        THEN 'None' /*-*/
    WHEN CAST(CAST(DATEDIFF(mi, spsd.EnteredBatch, GETDATE()) AS NUMERIC(19, 2)) / 60 AS NUMERIC(19, 2)) < Critical_Hours
        OR Critical_Hours = 0
        THEN 'Warning' /*-*/
    ELSE 'Critical' /*-*/
    END
```

Additionally, the highlighted lines must also be un-commented:

```
--udfs-->
LEFT JOIN spxSalesDocument AS udfs(NOLOCK) ON udfs.Sales_Doc_Type = sdt.Sales_Doc_Type and udfs.Sales_Doc_Num = sh.SOPNUMBE
--spsd--
LEFT JOIN spSalesDocument AS spsd (NOLOCK) ON sh.SOPTYPE = sdt.SOPTYPE
AND sh.SOPNUMBE = spsd.Sales_Doc_Num
--Needed for Alert to Work
LEFT JOIN spWorkflow AS wf(NOLOCK) ON wf.Sales_Doc_Type = sdt.Sales_Doc_Type
AND wf.Sales_Doc_ID = sh.DOCID
AND wf.QUEUE = sh.BACHNUMB
```

Execute the changes in SQL, and refresh the results in Sales Monitor to observe the changes.

Security

Sales Monitor - Grants access to the Sales Monitor module.

Sales Monitor sub-securities:

Allow Document Batch Moves - If True, users can move documents between batches.

Can Change Sales Rep Filter - If True, users can change the sales rep filter (4.1+ only; security does not control who can change the sales rep filter in previous versions)

Sales Doc IDs Visible - Sets which sales documents are visible for a user or group. If blank, all documents will be visible.

Show Batch Totals - If True, displays totals for groups, documents, etc.

Show Cost - If True, displays the cost of each order.

Show Document Totals - If True, displays the totals for each order.

Show Gross Margin - If True, displays the gross margin.

Show Sales Document Type ID Groups - If True, displays groups in the Sales Monitor.

Warehouse Access List - Sets which warehouses are visible in the Sales Monitor. If blank, all warehouses will be visible.

Show GP Batches - If True, displays batches from GP.

Can Copy Queue Filters To Users - Allows a user to move batches of documents to new queues. (Default: False)

Batch days, Batch Hours, and Entered Batch are calculated values that are not active by default when installing SalesPad Desktop, as they could potentially reduce Sales Monitor performance for those not even interested in using them. They can be activated within the spcpSalesMonitor procedure. The *Entered Batch – Update Entered Batch Enabled* setting in the Security module, when set to True, updates the Entered Batch with today's date when forwarding a document through workflow, and it forces a document save while doing so.

Settings

Sales Monitor Date Format - The date format used in the Sales Monitor screen. Defaults to {0:MM/dd/yyyy}

Note: MM must be capitalized, dd and yyyy must be lower-case. If they are not, errors will occur.