Sales Monitor

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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 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.

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.

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].

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.

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.

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:

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

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.

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.