

Small Orders

We are working on combatting the amount of small orders that get moved each day. We live in a busy world and work at a busy job where it can be hard to keep track of small orders all the time. Do the steps below in you NAV and you will have a much better grip on your small orders that are out there each day so you can either adjust them, or remember to follow up with that guy who ordered one catfish for two weeks out and then never called you back.

Step 1:

Under the sales orders tab, click on “Sales Orders” that is in blue at the top of your page. When you click on it, a drop down will appear and you will select “Advanced Filter”

The screenshot shows the NAV Sales Orders interface. On the left is a navigation menu with 'Sales Orders' highlighted. The main area displays a table of sales orders with columns for No., Sell-to Customer Name, Ship-to Code, Shipment Date, Total Outstanding, Ship-to Address, Ship-to City, Ship-to State, Status, Location, Created By, Logistics, Order Date, and CSR. A filter is applied to the 'Total Outstanding' column, showing only orders with a value less than 5. The filter criteria are: 'Where' No. is Enter a value. The filter is set to 'Advanced Filter'.

No.	Sell-to Customer Name	Ship-to Code	Shipment Date	Total Outstanding	Ship-to Address	Ship-to City	Ship-to State	Status	Location	Created By	Logistics	Order Date	CSR
SO0795374	50555 Kazmaier's #1	A	8/15/2018	10	127 E Second St	Perrysburg	OH	Open	TN	024	TOW	8/10/2018	024
SO0795375	05792 Old Time Country Market	A	8/13/2018	7	56 South Flynn Rd	Westville	IN	Released	TN	014	MC	8/10/2018	029
SO0795376	12530 Butcher Block	A	8/11/2018	1	115 State Road 46 Bypass #E	Bloomington	IN	Released	TC	302	BC3	8/10/2018	129
SO07953...	65294 Naughtly Dog	A	8/10/2018	0	3860 W 3rd St	Bloomington	IN	Released	TC	129	WCB	8/10/2018	300
SO0795378	76514 Rockets Grub & Pub	A	8/13/2018	15.14333	128 N Michigan Ave	Edgerton	OH	Released	TN	010	DEF	8/10/2018	024
SO0795379	83210 St James Restaurant	A	8/13/2018	6	204 E Albion	Avilla	IN	Released	TN	018	ANG	8/10/2018	032
SO0795380	28308 Downtown Discount	A	8/11/2018	15	155 S Main St	Lakeview	OH	Released	TN	072	LIS	8/10/2018	024
SO0795381	82108 Save-A-Lot #48 Kenton	A	8/11/2018	23	307 E Decatur St	Kenton	OH	Released	TN	024	LIS	8/10/2018	024
SO0795382	61800 Martin's #17	MT	8/13/2018	3	3900 E Bristol St	Elkhart	IN	Released	TN	802	M24	8/10/2018	802
SO0795383	61800 Martin's #17	MT	8/18/2018	4	3900 E Bristol St	Elkhart	IN	Released	TN	802	M24	8/10/2018	802
SO0795384	61800 Martin's #17	MT	8/20/2018	254	3900 E Bristol St	Elkhart	IN	Released	TN	802	M24	8/10/2018	802
SO0795385	61800 Martin's #17	MT	8/23/2018	172	3900 E Bristol St	Elkhart	IN	Released	TN	802	M24	8/10/2018	802
SO0795386	61800 Martin's #17	MT	8/25/2018	41	3900 E Bristol St	Elkhart	IN	Released	TN	802	M24	8/10/2018	802
SO0795387	61740 Martin's #06	MT	8/20/2018	156	3900 E Mishawaka Rd	Elkhart	IN	Released	TN	802	M25	8/10/2018	802
SO0795388	61740 Martin's #06	MT	8/23/2018	28	3900 E Mishawaka Rd	Elkhart	IN	Released	TN	802	M25	8/10/2018	802
SO0795389	61740 Martin's #06	MT	8/25/2018	43	3900 E Mishawaka Rd	Elkhart	IN	Released	TN	802	M25	8/10/2018	802
SO0795390	61780 Martin's #10	SF	8/11/2018	6	2081 South Bend Ave	South Bend	IN	Released	TN	802	M31	8/10/2018	802
SO0795391	61813 Martin's #25	MT	8/18/2018	332	7355 Heritage Square	Granger	IN	Released	TN	802	M32	8/10/2018	802
SO0795392	61813 Martin's #25	MT	8/20/2018	21	7355 Heritage Square	Granger	IN	Released	TN	802	M32	8/10/2018	802
SO0795393	61813 Martin's #25	MT	8/23/2018	104	7355 Heritage Square	Granger	IN	Released	TN	802	M32	8/10/2018	802
SO0795394	61813 Martin's #25	MT	8/25/2018	62	7355 Heritage Square	Granger	IN	Released	TN	802	M32	8/10/2018	802
SO07953...	87002 Troyer Foods Country Ou...	A	8/10/2018	0	17141 State Road 4	Goshen	IN	Released	TN	092	TCO	8/10/2018	092
SO0795396	86396 Topeka Save-A-Lot	A	8/13/2018	55	126 N Main St	Topeka	IN	Released	TN	008	ANG	8/10/2018	034
SO0795400	61740 Martin's #06	MT	8/11/2018	54	3900 E Mishawaka Rd	Elkhart	IN	Released	TN	802	M25	8/10/2018	802
SO0795401	45060 Horrock's Farm Market Inc	DE	8/11/2018	7	7420 W Saginaw Highway	Lansing	MI	Released	TN	031	LAW	8/10/2018	024
SO07954...	87002 Troyer Foods Country Ou...	A	8/10/2018	0	17141 State Road 4	Goshen	IN	Released	TN	092	TCO	8/10/2018	092
SO0795403	80120 Sailors	A	8/13/2018	27	625 W High St	Hicksville	OH	Released	TN	010	DEF	8/10/2018	024
SO0795404	12227 New Hope Dragstrip	A	8/10/2018	3	2005 S Rogers St	Bloomington	IN	Released	TC	129	WCB	8/10/2018	300
SO0795405	45884 Integrity Meats	A	8/11/2018	0	3660 US 33	Churubusco	IN	Open	TN	024	NRL-TN	8/10/2018	001

Step 2:

Set up your filter as shown below. The 1st box is always a drop down so you can select what filter you want. Change the very 1st box to show “Total Outstanding Qty. (base)” and for the next box after “is” put a <5. This is telling the system to only look for orders that are less than 5 cases.

For the filter, choose “Shipment Date” and then for the corresponding input box put the following exactly as I have it here: w+1d . This is telling the system to only look for orders that are schedule to ship the next day.

For the third and final filter, choose “Salesperson Code”. In the corresponding box, put your salesperson code in.

Your filter should look just like the below example:

Sales Orders, Small orders ▾

Type to filter (F3) | Sell-to Customer No. ▾ | Limit totals: ".:10/11/16

Show results:

- Where Total Outstanding Qty. (base) is <5
- And Shipment Date is 08/11/18
- And Salesperson Code is

+ Add Filter

No.	Sell-to...	Ship-to C...	Ship-to Name	Ship-to City	Ship-to State	Order Date	Stop No.	Ship...	Total Outsta...	Salespers...	Created B...	CSR	Locat...	External D...	Status	Shipment...
S00788051	61804	MT	Martin's #20 Meat	Nappanee	IN	7/31/2018	103	8/11/2018	3	802	802	802	TN	MS000020 ...	Released	RETAIL
S00791696	61804	MT	Martin's #20 Meat	Nappanee	IN	8/6/2018	103	8/11/2018	4	802	802	802	TN	MS000020 ...	Released	RETAIL
S00793828	61804	SF	Martin's #20 Seafood	Nappanee	IN	8/8/2018	103	8/11/2018	2	802	802	802	TN	MS000020 ...	Released	RETAIL
S00790396	61808	SF	Martin's #19 Seafood	Niles	MI	8/2/2018	106	8/11/2018	2	802	802	802	TN	MS000019 ...	Released	RETAIL
S00791585	61808	MT	Martin's #19 Meat	Niles	MI	8/6/2018	106	8/11/2018	2	802	802	802	TN	MS000019 ...	Released	RETAIL
S00786393	61813	SF	Martin's #25 Seafood	Granger	IN	7/27/2018	102	8/11/2018	1	802	802	802	TN	MS000025 ...	Released	RETAIL
S00790909	61813	SF	Martin's #25 Seafood	Granger	IN	8/3/2018	102	8/11/2018	3	802	802	802	TN	MS000025 ...	Released	RETAIL
S00791553	61813	MT	Martin's #25 Meat	Granger	IN	8/6/2018	102	8/11/2018	3	802	802	802	TN	MS000025 ...	Released	RETAIL
S00795432	61820	SF	Martin's #14 Seafood	Elkhart	IN	8/10/2018	106	8/11/2018	2	802	802	802	TN	MS000014 ...	Released	RETAIL
S00795514	61820	MT	Martin's #14 Meat	Elkhart	IN	8/10/2018	106	8/11/2018	3	802	802	802	TN	MS000014 ...	Released	RETAIL
S00791538	61829	MT	Martin's #16 Meat	Granger	IN	8/6/2018	103	8/11/2018	2	802	802	802	TN	MS000016 ...	Released	RETAIL
S00795417	61829	SF	Martin's #16 Seafood	Granger	IN	8/10/2018	103	8/11/2018	4	802	802	802	TN	MS000016 ...	Released	RETAIL
S00790378	61876	SF	Martin's #26 Seafood	Warsaw	IN	8/2/2018	150	8/11/2018	3	802	802	802	TN	MS000026 ...	Released	RETAIL
S00791711	61876	MT	Martin's #26 Meat	Warsaw	IN	8/6/2018	150	8/11/2018	2	802	802	802	TN	MS000026 ...	Released	RETAIL
S00795316	61876	SF	Martin's #26 Seafood	Warsaw	IN	8/10/2018	150	8/11/2018	2	802	802	802	TN	MS000026 ...	Released	RETAIL
S00782254	62175	A	Meat City East	Lima	OH	7/23/2018	250	8/11/2018	2	010	024	024	TN		Open	RETAIL
S00795429	62486	A	Merindorf Meats Inc	Mason	MI	8/10/2018	270	8/11/2018	3	005	031	024	TN		Released	RETAIL
S00794022	62488	A	Merindorf Meats	Williamston	MI	8/8/2018	275	8/11/2018	1	005	097	024	TN		Released	RETAIL
S00795562	63302	DE	Miller's Deli Genoa	Genoa	OH	8/10/2018	270	8/11/2018	2.5	010	010	024	TN		Released	RETAIL
S00760290	63316	DE	Miller's Deli Lagrange	Lagrange	IN	6/18/2018	122	8/11/2018	4	010	024	024	TN		Released	RETAIL
S00795558	63440	DE	Miller's NEW LONDON Deli	New London	OH	8/10/2018	752	8/11/2018	4	010	010	024	TN		Released	RETAIL
S007950...	65210	A	Luke's Auction Barn	Kewanna	IN	8/9/2018	999	8/11/2018	0	006	072	034	TN		Released	RETAIL
S00780136	66539	A	Old Fort Country Market	Old Fort	OH	7/19/2018	520	8/11/2018	2	010	024	024	TN	S00760274...	Released	RETAIL
S00778149	67046	A	Orleans Fresh Fish & BBQ	Lansing	MI	7/16/2018	326	8/11/2018	2	005	005	024	TN		Released	L
S00787666	67046	A	Orleans Fresh Fish & BBQ	Lansing	MI	7/30/2018	326	8/11/2018	1	005	005	024	TN		Released	L
S00793116	73404	MT	#53 Portage Meat & Market...	South Bend	IN	8/7/2018	0	8/11/2018	1	008	008	802	TN		Released	RETAIL

Step 3:

Click on the blue “Sales Orders” header again and you will see an option in the drop down to save your changes. When you click on that, it will ask you to name it. I named mine Small Orders. When you save, NAV may shut down and then reopen again quickly so that your new filter can now show up.

Sales Orders ▾

Step 4:

Once you have saved your changes, you will notice that your new title header will be there. It is now under your sales order tab on the left side of the screen in NAV. This filter will now follow you until the end of time or the end of your employment here at Troyers...whichever comes first.

Sales Orders, Small orders ▾

Sales Orders

- Small orders
- Open Orders
- Unreleased Orders
- Ready to Ship

Show results:

- Where Total Outstanding Qty. (base) is <5
- And Shipment Date is 08/11/18