WEEKLY CHECKS

Stock Transfers: Check any outstanding Stock Transfers that are in transit at the end of the week.

- Go to **Stock > Transfers**.
- In the **To branch** field, select Your branch.
- Click **Advanced search** and in the **Transfer Status** field, select **In Transit.**
- Click **Search**.

Follow up on any stock transfers that have not been recorded as received.

Purchase Order Outstanding Credits: Check any outstanding credits from Purchase Orders where goods have been returned or not received.

- Go to **Payables > Reports > Create purchase order pending credits report.**
- Select the **Start date:** (Recommend 1/1/2000 to include all outstanding items).
- Select the **End date:** (Recommend 60 days ago, you can enter -60).
- In the **Invoice branch** field, select Your branch.
- **View** report.

Follow up on stock credits and check why the supplier has not issued a credit.

Purchase orders outstanding: Check for any Purchase Orders that have not yet been received.

- Go to **Payables > Reports > Purchase order outstanding report**.
- In the **Branch** field, select your branch.
- **View report.**

Follow up on any outstanding Purchase Orders and why they have not been received.

Sales Orders Outstanding / Have all Invoices been created: Check for any Sales Orders that are On Hold or do not have Packing Slips and should now be completed and invoiced.

- Go to **Sales > Approve Sales Orders**.
- **Packing slip status:** Select **Some Pending Invoice, No Packing slips, Held Packing Slips.** This will show Sales orders that need packing slips or have not been fully invoiced.
- **Show on hold:** Check this field. This will show any Sales Orders that are on hold. Sort the column **Invoice time** to show these items at the top of the list.

Follow up on why these orders are still on hold or have not yet had packing slips created.

Invoices not sent: Check any invoices that have not been sent out to your customers.

- Go to **CRM > Communications**.
- In the **Keywords** field, enter **Invoice.**
- In the **Sent toggle option,** select **NO.**
- Click **Search.**

Follow up why invoices are not being sent, e.g. an invalid email address.

On Appro Sales Orders: Check for any Sales Orders that are On Appro.

- Go to **Sales > Sales Orders.**
- Click **Advanced search** and in the **Branch** field, select your branch.
- Then in the **Sales order status** field, select **On Appro.**
- Click **Search.**

Follow up on sales orders with your customer/s.

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