DATES QUICK REFERENCE

Sales Line Fields

Sug'd Field Order	Default/ Update from Header	Field name	Notes
1	Yes	Requested Delivery Date	This field defaults from and is updated by the same field on the Order Header but can still be updated on the individual line. It represents the date the customer would like the item to be delivered. If populated this field will update the 'Planned Delivery Date' with the same date, unless the 'Promised Delivery Date field is populated; in which case it is ignored. **The system will then work backwards to work out the 'Shipment Date'.** **Note:** Other fields will be updated by the 'Planned Delivery Date' (see below).
2	Yes	Promised Delivery Date	This field defaults from and is updated by the same field on the Order Header but can still be updated on the individual line. It represents the date that you have promised item to be delivered to the customer. If populated this field will update the 'Planned Delivery Date' with the same date**. The system will then work backwards to work out the 'Shipment Date'.** If this field is populated, you cannot edit the 'Requested Delivery Date'.
Note: The fields marked * below have multiple update triggers: i.e. they will update other fields and another field will update them! As such it is recommended that you drive this fields with the Requested/Promised Delivery Date fields.			
3*	Yes	Shipment Date	This field contains the date that the items on the line **should** be in inventory and **available** to be **picked**. The program enters the Shipment Date from the Order Header in this field, but you can change the date on the line if necessary. If you change the Shipment Date on the sales header, the program will give you the option to change all the shipment dates on the lines. **Note 1:** This field will be updated automatically using the following formula if the 'Planned Shipment Date' is populated or updated: • 'Planned Shipment Date' – 'Outbound Warehouse Handling Time' **Note 2:** This the date that the (MRP) Planning Engine will attempt to satisfy. **Note 3:** This is the demand date on the Item **Availability by Event** screen that access from the 'Item Availability' field on the Sales Line Fact Box.
4	Yes	Outbound Whse. Handling Time	This field contains the time it will take to pick, pack, and despatch the item in the warehouse. The program automatically copies the contents of this field from the same field on the Order Header. It will also be updated if the 'Location Code' on the line is changed. **Note:** This filed will automatically update the 'Planned Shipment Date' with the following formula is it updated: • 'Shipment Date' + 'Outbound Whse. Handling Time'
5*	No	Planned Shipment Date	This field contains the date that the item should ship from the warehouse once it has been picked and packed. **Note:** This field will be updated automatically using the following formulas if the **either** the 'Shipment Date' or 'Planned Delivery Date' fields are updated: • 'Shipment Date' + 'Outbound Whse. Handling Time' • 'Planned Delivery Date' – 'Shipping Time'
6	Yes	Shipping Time	This field contains the time it will take to ship the item from the warehouse to the customer. The program automatically copies the contents of this field from the same field on the Order Header. It can also be updated if the 'Shipping Agent Service Code' on the line is changed. **Note:** This filed will automatically update the 'Planned Delivery Date' with the following formula is it updated: • 'Planned Shipment Date' + 'Outbound Whse. Handling Time'
7*	No	Planned Delivery Date	This field contains the planned date that the shipment will be delivered at the customer's address. **Note:** This field will be updated automatically using the following formulas if any of the 'Requested Delivery Date' , 'Promised Delivery Date', or 'Planned Shipment Date' fields are updated: • 'Requested/Promised Delivery Date' • 'Planned Shipment Date' + 'Shipping Time

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Purchase Line Fields

Sug'd Field Order	Default/ Update from Header	Field name	Notes
1	Yes	Order Date	When you create a purchase order line, the program copies the order date from the same field on the purchase header, where you either enter a date or use the work date. You can change the order date on each line, as necessary. **Note 1:** If you enter a requested receipt date on the purchase line, the program will calculate this field using the following formula: • 'Requested Receipt Date' – 'Lead Time Calculation'. **Note 2:** The order date would then indicate the latest date that you should order the item to receive it on time. Note 3: If the order is created by MRP then this will be set to the last latest date that you should order the item to receive it on time
2	See Notes	Lead Time Calculation	This field contains a date formula for the time that it takes for the Vendor to supply the item. The program uses this field to calculate the date fields on purchase order and order proposal lines as follows: • 'Order Date' + 'Lead Time Calculation' = 'Planned Receipt Date'. If a requested receipt date was entered: • 'Requested Receipt Date' – 'Lead Time Calculation' = 'Order Date'. **Note:** The program copies the contents of this field from the following: 1. Item/Vendor Record 2. Stockkeeping Unit card 3. Item Card 4. Order Header In that order….
3	Yes	Requested Receipt Date	This field defaults from and is updated by the same field on the Order Header but can still be updated on the individual line. It represents the date you have requested the vendor delivers the goods to you. If populated this field will update the 'Planned Receipt Date' with the same date, unless the 'Promised Receipt Date field is populated; in which case it is ignored. **Note:** Other fields will be updated by the 'Planned Receipt Date' (see below). This field contains the date that you want your vendor to deliver the item to you. The program copies the contents of this field from the Requested Receipt Date field on the purchase header.
4	Yes	Promised Receipt Date	This field contains the date on which the vendor has promised to deliver the item to you if it is different from the date you requested. (You could use it as a conformation if the date is the same.) The program copies the contents of this field from the Promised Receipt Date field on the order header, but you can change the date as necessary at line level.
5	No	Planned Receipt Date	This field contains the date that the Item should be received on site from the Vendor. The program calculates this field as follows: Order Date + Lead Time Calculation = Planned Receipt Date. **Note:** This field will be updated automatically using the following formulas if either the 'Expected Receipt Date' or 'Order Date' fields are updated: • 'Order Date' + 'Lead Time Calculation' • 'Expected Receipt Date' – 'Safety Lead Time' – 'Inbound Whse. Handling Time'
6	See Notes	Inbound Whse. Handling Time	This field contains the Inbound Warehouse Handling Time. It is the time it takes to process the Receipt and Put-away an Item. **Note:** The program copies the contents of this field from the following: 1. 'Order Header' 2. 'Location Code' on the Line. In that order.
7	See Notes	Safety Lead Time	This field contains a date formula, which is used as a buffer period in case of delays in the purchase replenishment lead time. When calculating order and order proposal lines, the program will add the safety lead time to the lead time. **Note 1:** The program copies the contents of this field from the following: 1. Stockkeeping Unit Card 2. Item Card 3. Manufacturing Setup Card **Note 2:** This filed is not normally present on the Purchase Line Subform, but it can be easily added by your reseller if you use it.
8	Yes	Expected Receipt Date	This field contains the date that you expect the items to be available in your warehouse. (i.e. when they have been Received and Put-away). The field affects the Item Availability on the Item Card. The program copies the expected receipt date from the purchase header, but you can change the date on the line if necessary. If you change the expected receipt date on the purchase header, the program will give you the option of changing the expected receipt dates on the lines as well. **Note 1:** If the field on the purchase header is blank, the program will calculate the field as follows: • 'Planned Receipt Date' + 'Safety Lead Time' + 'Inbound Warehouse Handling Time' The field will be updated if the 'Planned Receipt Date' is updated. **Note 2:** This the date that the (MRP) Planning Engine will work with to satisfy demand.

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