

Standard Operating Procedure

Provisions – Over Commit Report

Dole & Bailey, Inc.

Implementation Date: 11/13/23

PURPOSE: Documentation of items on sales orders with 0 stock to deliver. To be completed by Procurement Director or Category Managers as a backup.

1. Go to Inventory Exception Reports
2. In the Part Code field choose P for Parts to narrow the report down to non-WIP items.
3. From the dropdown menu, choose Items with Negative Available.
4. Check the box that says Include on Order/WIP in Available.
5. Check the box that says Show Salesman Info.
6. Enter tomorrow's date in the Orders Thru Date field. Make sure to do this step last!
7. Press Run to PDF Output.
8. Evaluate the results and black out items that will arrive in time for the order to be picked. I.e. if there's a quantity listed in the In Process column that covers the amount ordered then that order is NOT truly overwritten. The salesperson does not need to be notified.
9. Take a snapshot of the evaluated/redacted report and post it to Over Commit Report in Stock Status/Fulfillment section of Teams. For each item, tag the salesperson who wrote the order (listed in the Entered By column) and the account's outside salesperson (listed in the Outside Slsp column).

Report Interface –

The screenshot shows the 'Inventory Exception Reports' application window. The title bar includes a minimize, maximize, and close button. The interface is divided into several sections:

- Top Bar:** Contains icons for Exit, Run, and PDF settings. A dropdown menu for 'Send Output To:' is set to 'DF - PDF Output'.
- Sort By:** A section with three radio buttons: 'Item', 'Acronym' (which is selected), and 'Product Code'. To the right are 'From:' and 'To:' text boxes with search icons.
- Filtering:** A dropdown menu is set to 'Items with Negative Available'. To its right is a checkbox labeled 'Include On Order/WIP in Available' which is checked.
- Options:** A list of settings with checkboxes:
 - 'Orders Thru Date:' is set to '11/14/23'.
 - 'Include Order Info' is checked.
 - 'Part Code:' is set to 'P'.
 - 'Zero Onhand Only' is unchecked.
 - 'Use Last Received Date' is unchecked.
 - 'Show Salesman Info' is checked.
- Buttons:** A 'Select Item Attributes' button is located at the bottom left.
- Include Status:** A vertical panel on the right with five empty text boxes, each with a search icon.

Finished Report –

Date: 11/13/23
Time: 15:16:14

Dole & Bailey, Inc.
Inventory Items With Negative Available - 11/14/23

User: KSTA
Page: 001
Prog: MP3010

Item Number	Description	U/M	On Hand	Commit	Avail	In Process	Entered By	Cust Code	Order Number	Ship Date	Inside Slep	Outside Slep
441451	TURKEY BRST RAW BWS BRT 3CT PREVIOUSLY FRZ SINGLE 24# AVG	CS	0.00	3	3-		KFLA	35950	138326	11/14/23	18	18
520341	CHICKEN BRST B&S XT SGL RANDOM SAM HOLMES 2/10#	CS	0.00	3	3-		CKOL	40780	138370	11/14/23	44	44
521200	TURKEY WHL FRZ 14-16#	CS	7.00	9	2-	26	THAZ BMOR CHLI	27408 50147 53112	137924 138014 138454	11/14/23 11/14/23 11/14/23	48 31 60	48 31 60
522570	CHICKEN BRST B&S FRSH RANDOM HALAL 40#	CS	0.00	4	4-	3	KFLA KFLA KFLA	33902 26143 33902	137997 138058 138447	11/13/23 11/14/23 11/14/23	18 18 18	18 18 18
522674	CHICKEN THIGH B&S FRSH AMICK HALAL 40#	CS	0.00	4	4-		KFLA	26142	137661	11/14/23	18	18
522900	CHICKEN WING PARTY 6-8/LB 4/10#	CS	0.00	3	3-		NBIE	49420	138405	11/14/23	27	27
523495	CHICKEN THIGH B&S CASE ONLY 4/10#	CS	1.00-	4	5-	4	MHEC	56584	137455	11/14/23	22	22
523507	CHICKEN THIGH JULIENNE 20# 2/10#	CS	0.00	4	4-		DMOO	55300	138361	11/14/23	44	44
523800	CHICKEN OVEN RSTER 6.5#-8# PERDUE 855	CS	0.00	1	1-		KFLA	35550	138457	11/14/23	18	18
541008	CHEESE VEGAN FETA BLOCK VIOLIFE 8X2.65#	CS	0.00	2	2-		BCHI	32703	134617	11/13/23	23	23