Review the Sales Order Dashboard

How to Review the Sales Order Dashboard in Muhasib ERP

Overview

This guide will help you identify open, due, overdue, partially delivered, completed, or exceptional sales orders requiring action.

Open-order exceptions have identified owners and source transactions.

Who can do this

You need access to Sales Order Dashboard and authorized sales-order/customer scope.

Before you start

Confirm company, date/cutoff, order statuses, promised dates, locations, delivery/conversion policy, and expected open-order controls.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Sales & Customers → Sales Order Dashboard.

Review the Sales Order Dashboard

Step 1: Confirm company and refresh/cutoff

Step 2: Review status and due-date groups/widgets

Step 3: Filter to overdue or exceptional orders

Step 4: Open source orders

Step 5: Compare ordered, delivered/converted, and remaining quantities

Step 6: Assign fulfillment, correction, or customer follow-up

Check your work

Dashboard counts/values compare and confirm to Sales Order Inquiry under the same status/date rules.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Confirm status master definitions and promised-date basis.
- Refresh after delivery/conversion before comparing.

Related guides

- Review the Sales Order Inquiry
- Create a Sales Order
- Deliver or Convert a Sales Order

What to do next

> **Review the Sales Order Inquiry**.

Revision #0
Created 2026-09-04 09:20:59 UTC by Shah Rukh Saeed
Updated 2026-09-07 10:14:00 UTC by Shah Rukh Saeed