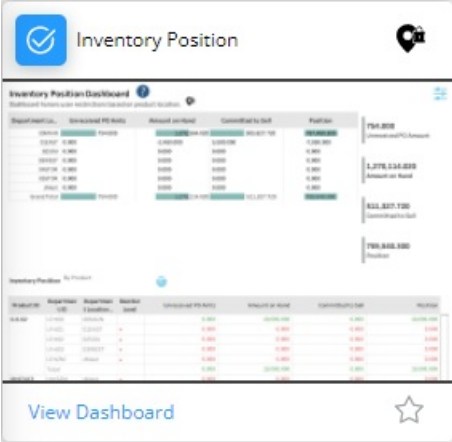# Inventory Position Dashboard

Last Modified on 03/12/2025 3:22 pm CDT

The Inventory Position dashboard honors user restrictions based on Product Location.

Purpose

This dashboard can be used to help identify inventory position of Products. The position calculation uses the unreceived amount on Purchase Orders, adds in the amount on hand, and then subtracts the amount committed to sell. The amount committed to sell optionally includes Bookings, Delivery Tickets, and Blend Tickets.

Details

Inventory Position Tab

- Look at details for a Department, Location, and relevant Products over a period of time.
- Filter based on *Department ID*, *Product ID*, *Dates*, and *Department Category*.
- Choose between desired transaction types relating Commitments to Sell like Bookings, unloaded Delivery Tickets, and unloaded Blend Tickets.
- Specify a date range for Purchase Orders and transactions included in the commitments to sell. The date range for Purchase Orders uses the Purchase Order date while the date range for commitment to sell uses the Booking, Delivery Ticket, and Blend Ticket dates.
- Quickly filter necessary information by selecting different parts of the dashboard.
- Selecting the **Print** button will redirect to a printable version of the data.
- The *Reorder* column displays a red dot if the Product's position is at or below the reorder level set up on the Product.
- Undelivered Blend and/or Delivery Tickets are tickets that are unloaded.
- Over-received Purchase Orders are excluded.

Transaction Selection

Multiple options are available for which transactions to include in the *Committed to Sell* amount.

- **Unused Booking, Undelivered Blend, Undelivered Delivery, No Commitments to Sell** – This includes Products unreceived on a Purchase Order or those with an Amount on Hand.
- **Booking, Undelivered Blend, Undelivered Delivery** – This includes Products on unused Bookings, unloaded Blend Tickets, or unloaded Delivery Tickets.
- **Booking, Undelivered Blend** – This includes Products on unused Bookings or unloaded Delivery Tickets.
- **Unused Booking** – This includes Products on unused Bookings.
- **Undelivered Blend** – Products on unloaded Blend Tickets are included.
- **Undelivered Blend, Undelivered Delivery** – Products on unloaded Blend or unloaded Delivery Tickets are included.
- **Undelivered Delivery** – Products on unloaded Delivery Tickets are included.
- **No Commitments to Sell** – This includes only Products that are not on unused Bookings, unloaded Blend Tickets, or unloaded Delivery Tickets but that do have an Amount on Hand or unreceived PO amount.

Calculating Position

When selecting any of the transaction options including a Booking, Delivery, and/or Blend Tickets, if there is a Booking, Delivery, and/or Blend Ticket with the same Product ID and Customer, the unused Booking amount will be used to avoid double-counting. In the following examples, Delivery and Blend Tickets have similar behavior.

Unused Booking, Undelivered Blend, Undelivered Delivery, No Commitments to Sell				
Transaction	Amount on Hand	PO Unreceived Amount	Committed to Sell	Position
	100	20	0	120
Customer books 30 units	100	20	30	90
Unloaded Delivery Ticket added for 10 units for same Product and Customer as the Booking	100	20	30	90
Delivery Ticket gets marked as *Loaded*	90	20	30	80
Delivery Ticket gets invoiced and Booking is used on Invoice	90	20	20	90

Unused Booking

Transaction	Amount on Hand	PO Unreceived Amount	Committed to Sell	Position
	100	20	0	120
Customer books 30 units	100	20	30	90
Unloaded Delivery Ticket added for 10 units for same Product and Customer as the Booking	100	20	30	90
Delivery Ticket gets marked as *Loaded*	90	20	30	80
Delivery Ticket gets invoiced and Booking is used on Invoice	90	20	20	90

Unloaded Delivery Ticket

Transaction	Amount on Hand	PO Unreceived Amount	Committed to Sell	Position
	100	20	0	120
Customer books 30 units	100	20	0	120
Unloaded Delivery Ticket added for 10 units for same Product and Customer as the Booking	100	20	10	110
Delivery Ticket gets marked as *Loaded*	90	20	10	100
Delivery Ticket gets invoiced and Booking is used on Invoice	90	20	20	90