OPERATIONAL CONTROL

# Sold, Paid and Delivered Are Different Records

The daily summary says sales increased. The person preparing orders describes several still waiting for confirmation and one cancelled after it appeared in the report. Both people can be reading their screens correctly while describing different stages of the same work.

## Agree What Each Status Means

Before joining tools in a dashboard, define when an opportunity becomes a confirmed order, which record supports a payment and who confirms delivery. Describe how cancellations and returns appear too. Without that agreement, adding figures from several sources can produce a total nobody recognises.

Use a common reference for each operation. If an order has one number in sales and another in the warehouse, establish an explicit relationship between them. Comparing names or amounts alone can mix up operations that happen to look similar.

## Show Differences That Need a Review

- Confirmed orders without an associated payment record.
- Operations recorded as paid that still await preparation or delivery.
- Cancellations present in one tool but absent from another.
- Records without enough reference information to match them to an operation.

Each difference needs someone who can explain it. There may be a normal waiting period, a delayed import or a mistake. The dashboard should retain that explanation without erasing the original record or turning every discrepancy into an accusation.

For someone managing from another city, a short exception list is easier to use than requesting screenshots from the whole team. You can ask about a specific order and see what remains before it can be closed.

*Operational reconciliation compares the records available. It does not replace accounting or establish, by itself, that fraud occurred or funds were finally received.*

## A Check You Can Run

Take a hypothetical order for 100 with a deposit of 30 and delivery still pending. Counting 100 as collected hides the remaining payment; counting the deposit as a completed delivery hides unfinished work. Preserve the order reference across the three records and show the difference for review. These are operational states; the accounting treatment needs its own agreed rules.

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