

# Ship Orders for Sage 300cloud

Businesses often have orders that aren't fulfilled because items are backordered. When the items arrive, the orders need to be processed – but first they must be identified, then called up individually in the Order Entry module, and then shipped. It's a very time-consuming process.

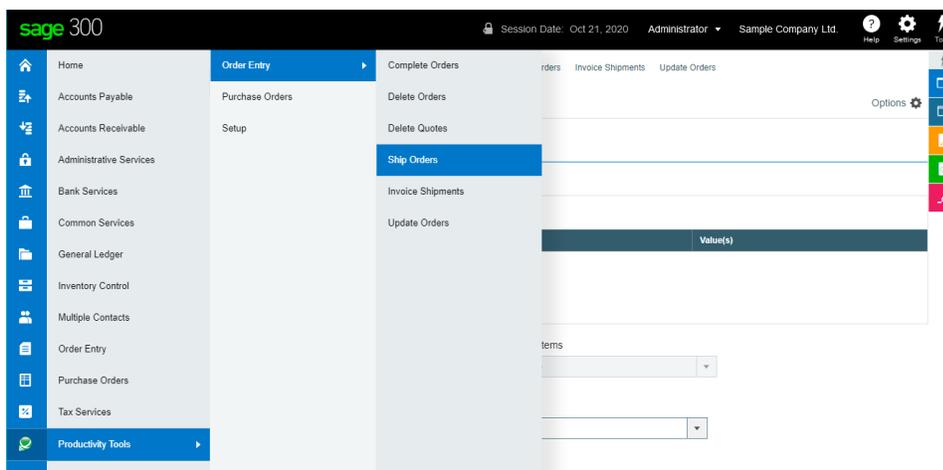
Ship Orders eliminates the time-consuming steps involved in shipping Order Entry orders from Sage 300 Order Entry. It even lets you invoice orders in the same process, so all your shipping and invoicing can be processed in one day-end task.

## Ship Orders lets you:

- Select orders for shipping by specifying various ranges of order fields, including order numbers, order dates, customer numbers, and optional fields.
- Filter orders by location.
- Select orders based on one or more specific items. If you specify items, all orders that contain one or more items from the item set will be selected.
- Ship order detail lines that meet standard shipping scenarios:
  - Only lines that can be completely shipped
  - Only backordered items in the selected orders
  - Only committed items in the selected orders
  - Any unshipped items – allowing partially shipped lines
- Choose to invoice shipped items at the same time.
- Specify different shipment and invoice dates. This is especially useful if you are processing a large number of orders, where the accounting process may lag behind order processing.
- If you do not have rights to override credit limits, enter the name and password of a user with the rights to override credit limits if shipping orders would cause a customer to go beyond their credit limit and you wish the limit to be overridden.
- After selection, review the list of orders with unshipped items and cherry-pick ones for shipment.
- Click the Process button to complete the operation in one step.

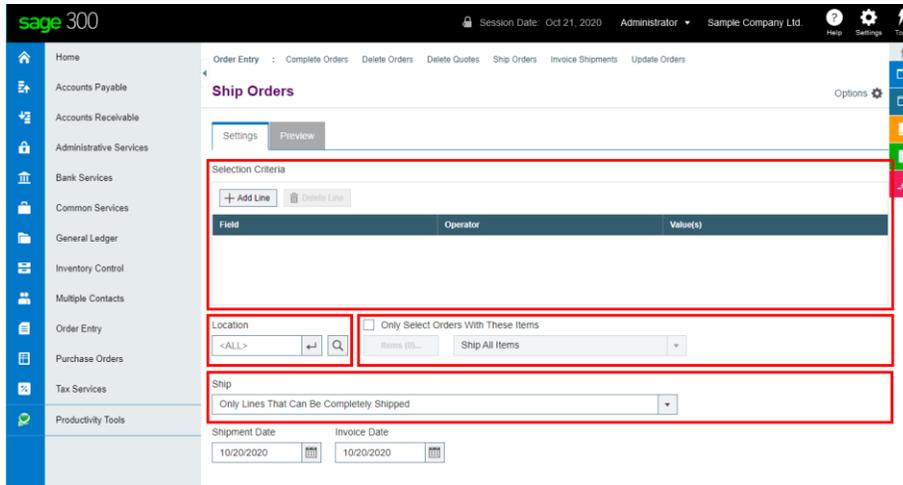
## Running Ship Orders

Ship Orders appears under **Productivity Tools > Order Entry** on the Sage 300c desktop.



The Ship Orders screen (below) lets you select orders for shipping by specifying various ranges of order fields, including order numbers, order dates, customer numbers, and optional fields.

Ship Orders also lets you specify an inventory location, select orders that have particular items, and choose whether you want to ship partial orders, only backordered quantities, or only committed quantities.



## Selecting and processing orders for shipping

### Choose the range of orders that you want to ship:

- Click the “Add Line” button to specify a new field range.

Selection Criteria



- Choose the field for selecting orders.



- Choose the Operator for the field value – for example, orders with a date that is **less than or equal to** July 2, 2021. The choices are “Equal To,” “Not Equal To,” “Contains,” “Greater Than or Equal To,” “Less Than or Equal To” (shown below), or “Is One Of.”

Operator
Select...
Select...
=
!=
>=
<=

- **The “Contains” operator appears for text fields.** The program scans the field you selected for the text in the Value field.

The following example selects orders for customers in groups that include the letters “US”.

Field	Operator	Value(s)
Customer Group Code	Contains	US

- **The “Is One Of” operator appears for fields with a specific list of values** – such as Order Type or optional fields with a list of values. It lets you specify more than one value – as below.

Field	Operator	Value(s)
UPS Zone	Is One Of	Blue Zone × White Zone ×

- Enter or choose the Value. For example, a date field provides a calendar, and other fields will provide a Finder button.

Value(s)
2/1/2021

- To specify a range of dates – for example, greater than July 2 2018 and less than July 2 2019 – you would add two lines for the Date field – as shown below:

Field	Operator	Value(s)
Order Date	>=	11/1/2020
Order Date	<=	1/31/2021

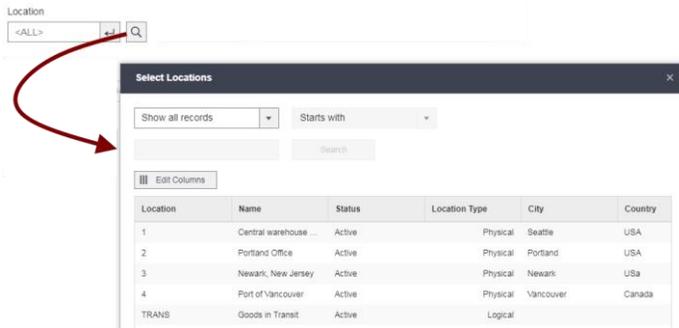
- **To remove a line**, highlight it, then click the “Delete Line” button:

<div style="display: flex; justify-content: space-between;"> <span>+ Add Line</span> <span>🗑 Delete Line</span> </div>		
Field	Operator	Value(s)
Order Date	>=	11/1/2020

**Specify one or all locations:**

- To ship orders from a single location, enter the location or click the Finder button to select from the Finder.

If you choose one location, orders will be selected if any detail lines match the specific location.



**Choose items that you want to ship:**

The program can ship orders based on the items in the orders, and you can choose to ship ONLY the items you specify or ship all items in the order.

- Select the “Only Select Orders with These Items” checkbox to restrict processing to orders that only have specific items.

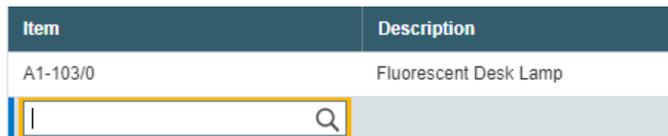
You might do this because an item you had on backorder has just been received.



- Click the “Items” button to display the Items form. (The Items button show you how many items are already in the list.)



- Click the Add Line button to add a new item to the list, and then select the Item from the Finder.



- Use the Delete key to remove item lines.

**Choose a Shipment Scenario:**

Ship Orders provides four options to control shipments for each line item.



**Notes:**

- "Only Lines That Can Be Completely Shipped" means "Ship the quantity remaining for each line only if there are sufficient quantities to complete the line. Do not partially ship a line."  
All other choices allow partial line shipments.
- The A/R Customer Invoicing option "Allow Partial Shipments" is respected only for the "Any Unshipped Items" option.
- "Any Unshipped Items" will also ship orders that comprise only miscellaneous changes.  
For the first 3 options, miscellaneous charges will be included in a shipment if, and only if, an item is shipped.
- The IC Option "Allow Negative Inventory Levels" will also affect behaviour. If selected, all quantities on a line will ship even if there are not sufficient quantities on hand.  
If this option is NOT selected and you attempt to ship more items than are on hand, the program will report an error, and the whole shipment will be cancelled.

**Choose the Shipment and Invoice dates:**

The shipment and invoice dates default to today's date. You can change them if necessary.

Shipment Date	Invoice Date
7/3/2019	7/3/2019

**If necessary, supply a credit approver to override credit limits:**

If the person shipping the orders does not have sufficient permissions to override credit limits, the program will ask you to add the ID and password of a user with full rights.

**Note:** This happens only if shipping orders would cause a customer to go beyond their credit limit and you want the limit to be overridden.

**Save or clear the selection criteria:**

You can save your selection criteria so it appears by default the next time you use the program.

The screenshot shows the 'Ship Orders' web interface. At the top, there are navigation tabs: 'Order Entry', 'Complete Orders', 'Delete Orders', 'Delete Quotes', 'Ship Orders', 'Invoice Shipments', and 'Update Orders'. Below the tabs, the 'Ship Orders' title is displayed. There are two buttons: 'Settings' and 'Preview'. A red arrow points from the 'Preview' button to the 'Options' menu. The 'Options' menu is open, showing several options: 'Text Size', 'Save Settings as Default' (highlighted with a red box), 'Clear Saved Settings', 'User Guide', 'TaiRox Home Page', and 'View Today's Log'. Below the menu, there is a 'Selection Criteria' section with '+ Add Line' and '- Delete Line' buttons. At the bottom, there is a table with columns 'Field', 'Operator', and 'Value(s)'. The table contains one row: 'Order Date', '<=', and '2/1/2021'.

- Click the Options button to display the list of options.
- Select "Save Settings as Default."

**To clear the default settings:**

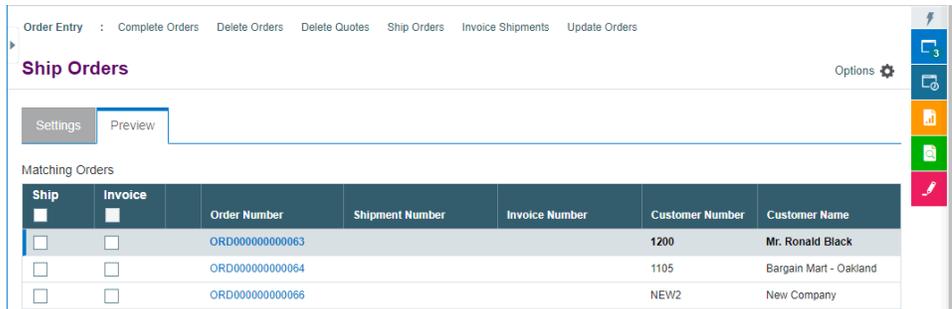
- Select "Clear Saved Settings" from the Options menu.

### View selected orders on the Preview tab and choose which ones to ship:

Click the Preview tab to view the list of orders that meet the range and item selection criteria that you specified on the Settings tab.

**Note:** If you do not specify any selection criteria – and choose “Ship All Items” (instead of specifying particular items), the program will list all orders with unshipped items when you go to the Preview tab. You can then select the orders that you want to ship.

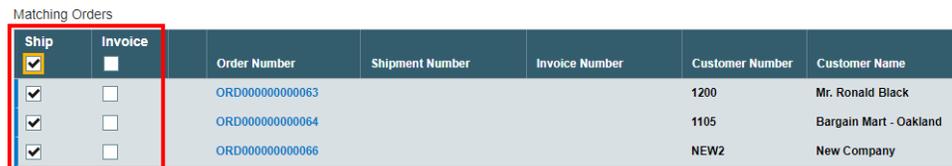
- Click the Preview tab to display the selected list of orders.



The Preview tab displays the active orders that match the selection criteria you specified, allowing you to drill down on orders to confirm your selections.

**Important Note:** Orders are selected for inclusion *when you choose the Preview tab*. Because the order may be changed before processing is completed, you should check the log when finished to see the actual processing that took place.

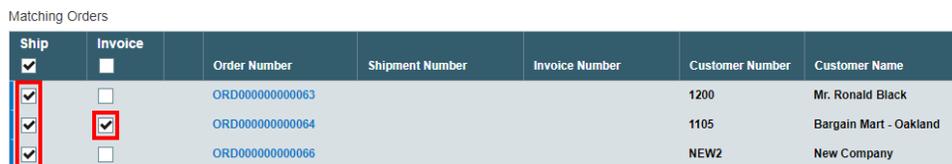
- Go back to the Settings tab to adjust the ranges and other selection criteria, then select Preview again.
- Click the checkbox in the Ship column heading to select all or select none of the orders loaded in the grid.



- Click the checkbox in the Invoice column heading to select all or select none of the orders that you are shipping.

**Note:** If the O/E option "Default Create Invoice Option to" is set to “Yes”, then invoices may get created even if you do not select the Invoice checkbox for an order.

- Click the checkboxes on each row to cherry-pick orders for shipping and invoicing.

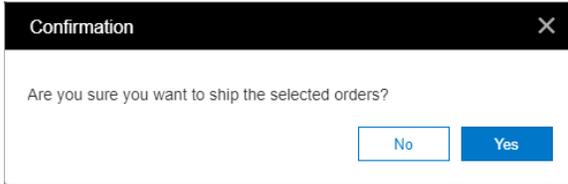


- Click the Order Number to drill down to the selected order.



**Click the Process button to ship and/or invoice the included orders:**

The program asks you to confirm your choices. Click Yes to continue.



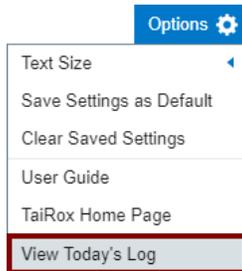
**Note:** There may be data-integrity errors that prevent some shipments, in which case an error message will appear.

If the process was successful, the following message will appear, stating the number of orders that were shipped:

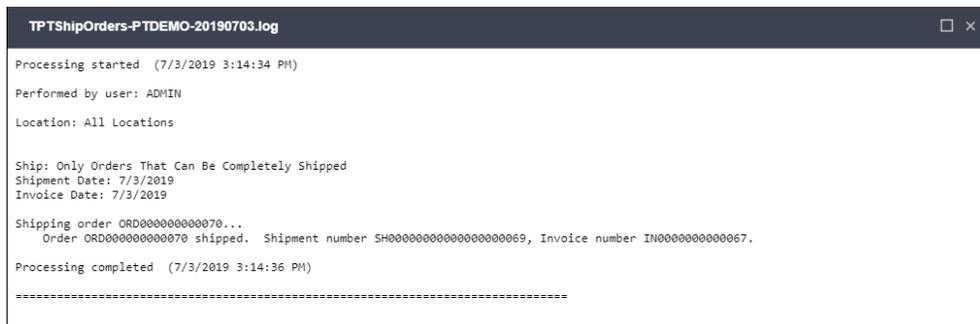


**Select “View Today’s Log” to confirm which orders were shipped and invoiced:**

- Click the Options button and select View Today’s Log to see the order selection criteria and the orders that were completed.



- The log looks like this:



The Log lists:

- The user, the settings, and the results