

Ship Orders

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.

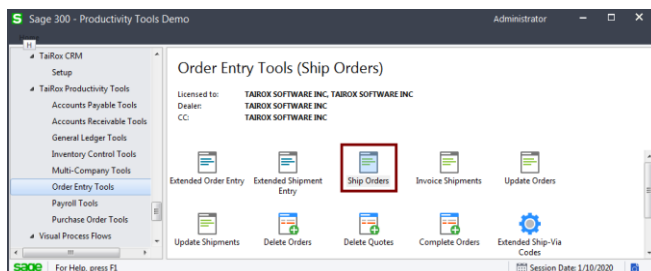
Ship Orders eliminates the time-consuming steps involved in shipping Order Entry orders from Sage 300 Order Entry. It even lets you invoice orders in the same process, so all your shipping and invoicing can be processed in one day-end task.

Ship Orders lets you:

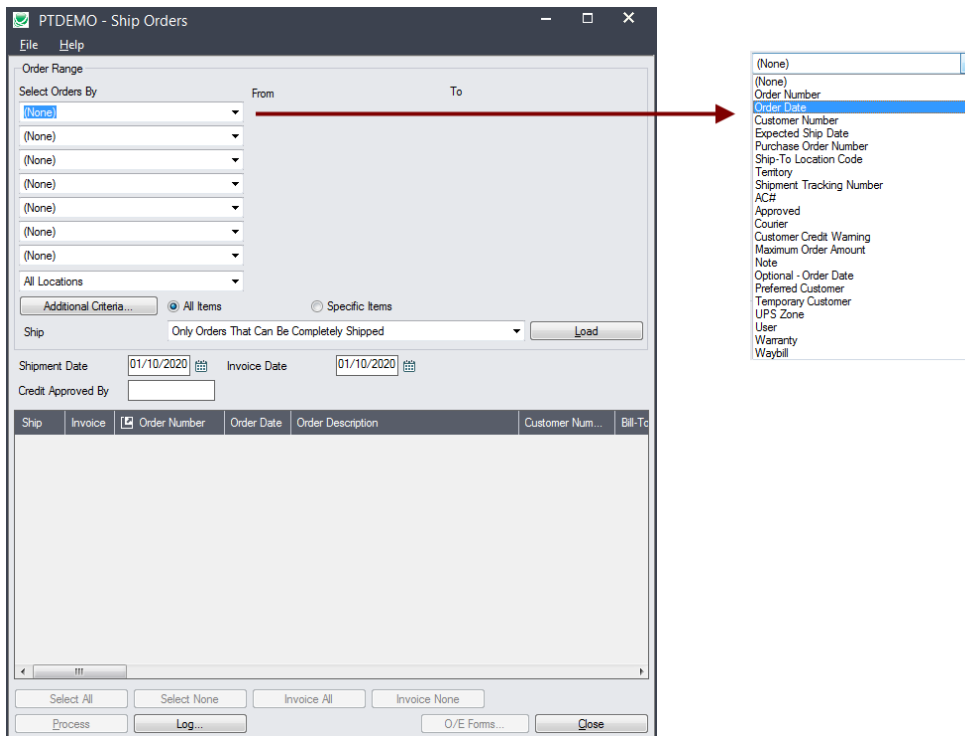
- Select orders by specifying ranges of order numbers, order dates, customer numbers, expected ship dates, PO numbers, ship-to locations, territories, tracking numbers, and optional fields.
Range selection uses the same mechanisms used by core modules when printing reports.
- Filter orders by location.
- Specify additional criteria using other order fields.
- 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 orders that meet standard shipping scenarios:
 - Only Orders That Can Be Completely Shipped
 - Only Back Ordered Quantities in Selected Orders
 - Only Committed Quantities in Selected Orders
 - All Selected Orders, Allowing Partial Shipments
- 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.
- 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 unshipped orders and cherry-pick ones for shipment.
- Click the Process button to complete the operation in one step.
- Quickly print a number of order-related forms, without navigating to another window.

Running Ship Orders

The Ship Orders icon appears under **TaiRox Productivity Tools > Order Entry Tools** on the Sage 300 desktop and can be copied to other menu locations.



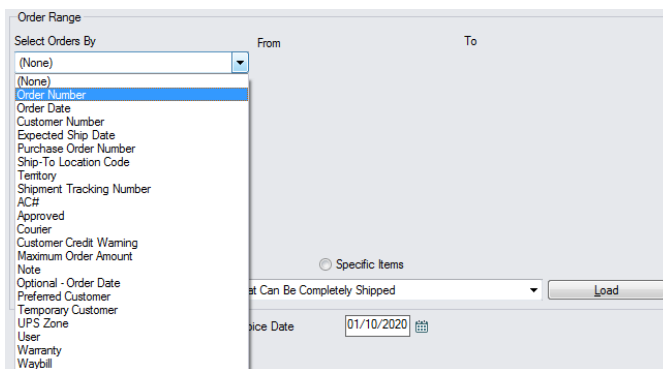
The Ship Orders screen appears below:



Selecting and Processing Orders for Shipping

Specify ranges of orders for selection:

You can specify up to seven order fields to use for primary order selection – such as the Customer number and expected order date.

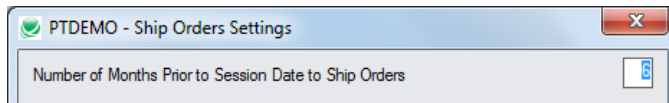


Notes:

- You can specify ranges of orders to restrict them by date, number, customer, or optional order fields (if added). The screen above provides a number of optional fields.

Note regarding order dates:

- If you choose a range of Order Dates, the default “To” date is set by a screen accessed through the **Ship Orders > File > Settings** menu choice:

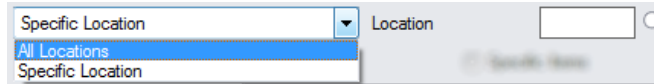


You can override the default in the Range fields.

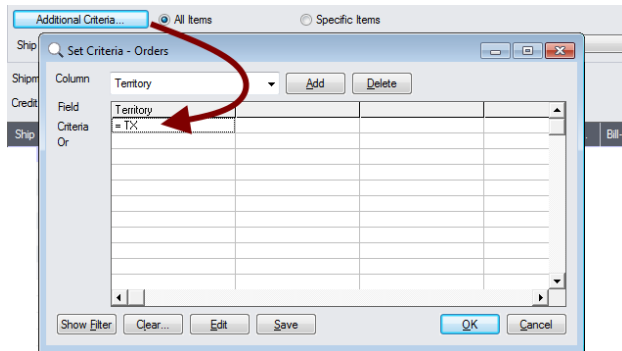
Specify one or all locations:

- The last Select Orders By drop-down lets you filter by location.

This means that orders are selected if any detail lines match the specific location.

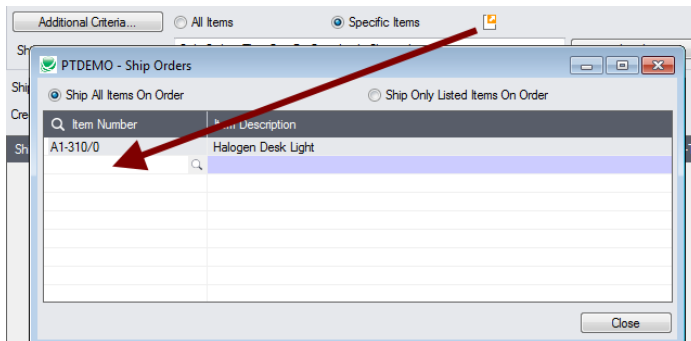


Choose additional criteria:



- Click Additional Criteria to further restrict the orders retrieved for completion. Click OK to save.

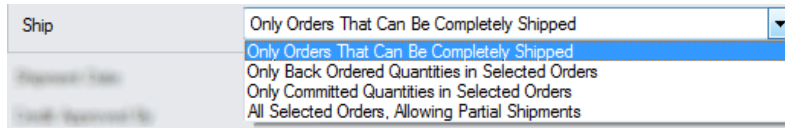
Choose all items or specific items:



- The form includes radio buttons for selecting "All Items" or "Specific Items".
If you choose Specific Items, the Drill Down button will appear next to the radio buttons. Click the button to open a window for specifying items.
- On the pop-up Item form, choose to ship all items on order or only the listed items.
 - If you choose “Ship All Items on Order”, all the items for the selected order will be shipped.
 - If you choose “Ship Only List Items on Order”, all the items that you enter in the list will be shipped on an order, and any other items that appear on the order will not be shipped.
 - Any miscellaneous charges that are entered on an order will also appear on the shipment.

Choose a Shipment Scenario:

Ship Orders provides four options to control shipments:

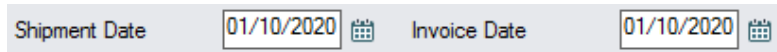


Notes:

- The A/R Customer Invoicing option "Allow Partial Shipments" is respected only for the "All Selected Orders" option.
- This option will also ship orders that are comprised only of miscellaneous changes.
For the first 3 options, miscellaneous charges will be included in a shipment if and only if some item is shipped.

Choose the Shipment and Invoice dates:

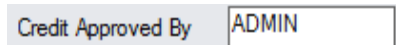
The Shipment and invoice dates default to today's date. You can change them if necessary.



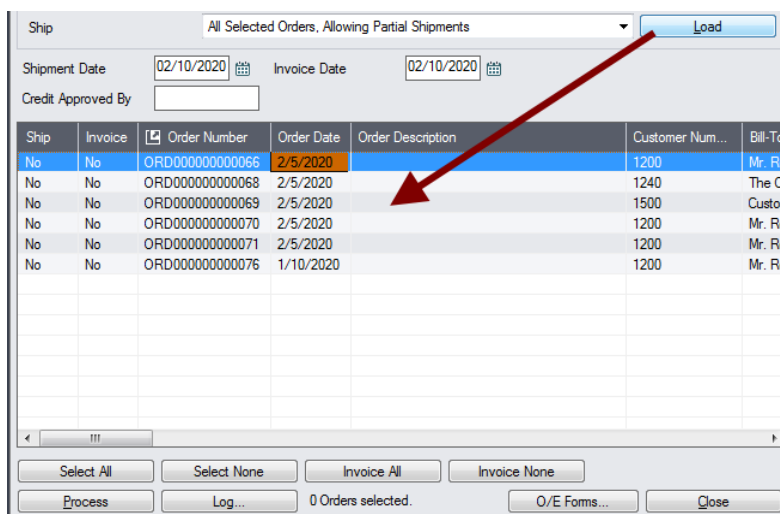
Supply a credit approver to override credit limits:

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

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



Load the list of selected orders and choose which ones to ship:



- Click the Load button to display the selected list of orders.
When the Load button is pressed, the active orders that match the selection criteria will be displayed, allowing you to drill down on orders to confirm your selections.

Ship Orders Click the Log button to confirm which orders were shipped and invoiced:

Important Note: Orders are selected for inclusion **based on the moment that the Load button is pressed**. The order may be changed before processing is completed. Make sure that you consult the log to see the actual processing that has taken place.

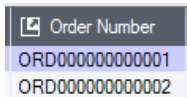
- You can adjust the ranges or additional criteria if necessary, then click Load again.
- Click the Select All and Select None buttons at the bottom of the screen to include all or none of the orders loaded in the grid.



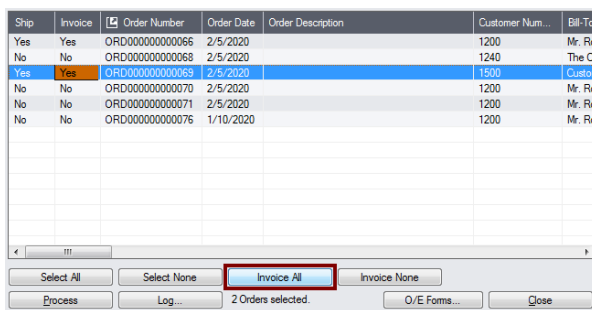
- Double-click in the Include column to “cherry-pick” orders:

Ship	Invoice	Order Number	Order Date	Order Description	Customer Num...	Bill-To
Yes	No	ORD000000000066	2/5/2020		1200	Mr. R
No	No	ORD000000000068	2/5/2020		1240	The C
Yes	No	ORD000000000069	2/5/2020		1500	Custo
No	No	ORD000000000070	2/5/2020		1200	Mr. R
No	No	ORD000000000071	2/5/2020		1200	Mr. R

- Click the Order Number column heading to drill down to the selected order:



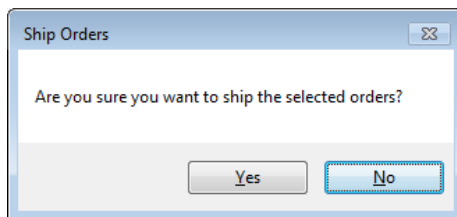
- Click the Invoice All button to create invoices for the orders that you are shipping:



- Double-click in the Invoice column to selectively invoice orders.

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.

Click the Log button to confirm which orders were shipped and invoiced:

```
7/11/2020 10:24:13 AM Ship Orders started.  
7/11/2020 10:24:13 AM
```

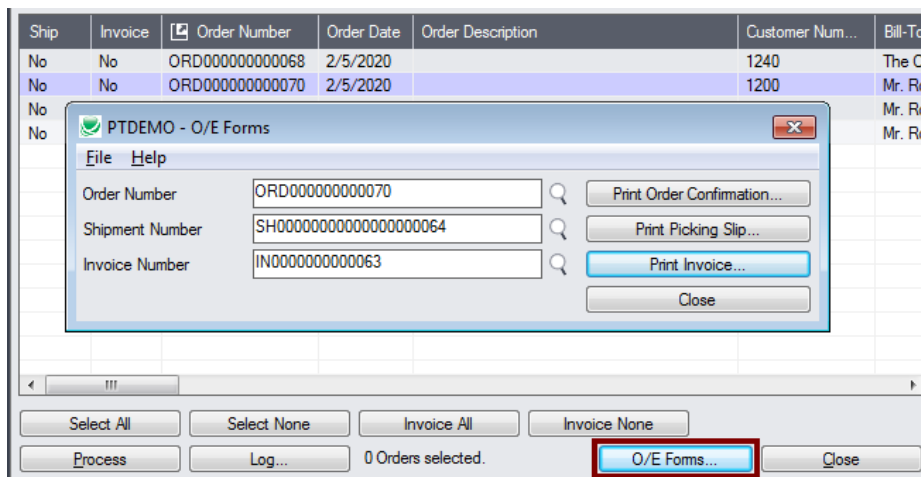
```

7/11/2020 10:24:13 AM Performed by user: ADMIN
7/11/2020 10:24:13 AM
7/11/2020 10:24:13 AM Order Range
7/11/2020 10:24:13 AM Order Date From [2/1/2019] To [5/1/2020]
7/11/2020 10:24:13 AM
7/11/2020 10:24:13 AM Shipment Date: 1/10/2020
7/11/2020 10:24:13 AM Invoice Date: 1/10/2020
7/11/2020 10:24:13 AM
7/11/2020 10:24:13 AM All Items
7/11/2020 10:24:13 AM Ship: All Selected Orders, Allowing Partial Shipments
7/11/2020 10:24:13 AM
7/11/2020 10:24:13 AM Shipping Order Number ORD000000000066...
7/11/2020 10:24:15 AM Order Number ORD000000000066 shipped. Shipment number
SH0000000000000000064, Invoice Number IN00000000000063.
7/11/2020 10:24:15 AM Shipping Order Number ORD000000000069...
7/11/2020 10:24:15 AM Order Number ORD000000000069 shipped. Shipment number
SH0000000000000000065, Invoice Number IN00000000000064.
7/11/2020 10:24:15 AM
7/11/2020 10:24:15 AM Ship Orders complete.
7/11/2020 10:24:15 AM
=====
    
```

The Log lists:

- The user, the type of orders selected, and the full range settings.
- Each order that was shipped and optionally invoiced, along with the shipment and invoice numbers.

Print Order Entry forms



- Click the O/E Forms button to pop up a print window. You can print order information, picking slips and invoices using the Sage 300 printing functions.