

# Shipment Picking Slips

Shipment Picking Slips provides greater flexibility for printing picking slips for shipments. It lets you:

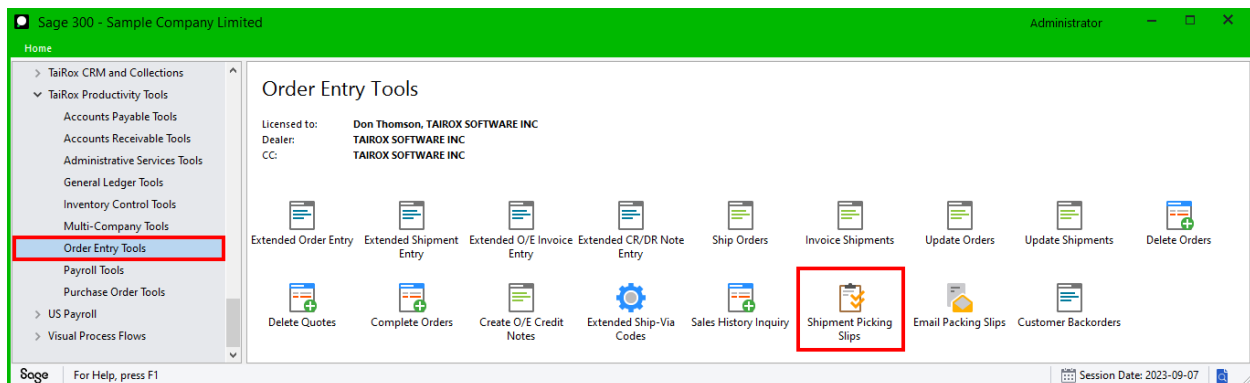
- Select shipments using ranges such as shipment numbers, shipment dates, customer numbers, customer groups, customer account sets, and optional fields used in shipments.
- Reprint picking slips.
- Include invoiced shipments.
- Filter shipments by locations in the shipment header or details.
- Load the list of shipments that meet your criteria.
- Check summary information for each qualifying shipment.
- Drill down to corresponding orders, shipments and last invoices.
- Cherry pick shipments that need picking.
- Print the picking slips you need.

Shipment Picking Slips also lets each user select the following settings:

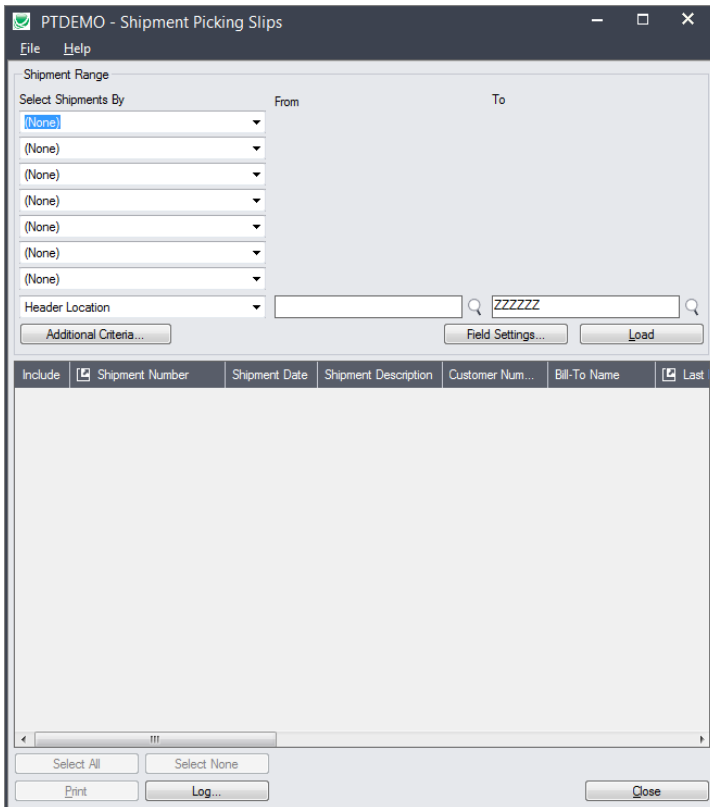
- The number of months prior to the session date to scan for active shipments.
- The Crystal Reports picking slip to use for printing.
- The order for items on picking slips – by picking sequence, item number, or line number.
- Whether to print:
  - Serial/Lot Numbers
  - Shipping Labels
  - Kit Components
  - Bills of Material Component Items

## Using Shipment Picking Slips

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



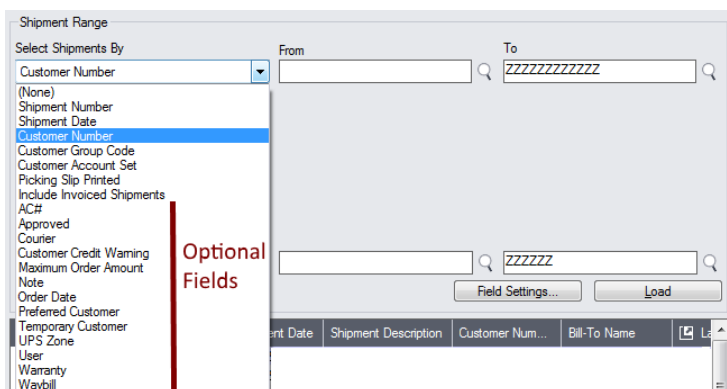
The Shipment Picking Slips screen appears below:



## Selecting shipments for printing picking slips

### Specify ranges of shipments for selection:

You can specify up to seven shipment fields and optional fields to use for primary shipment selection – such as the customer number and shipment date.

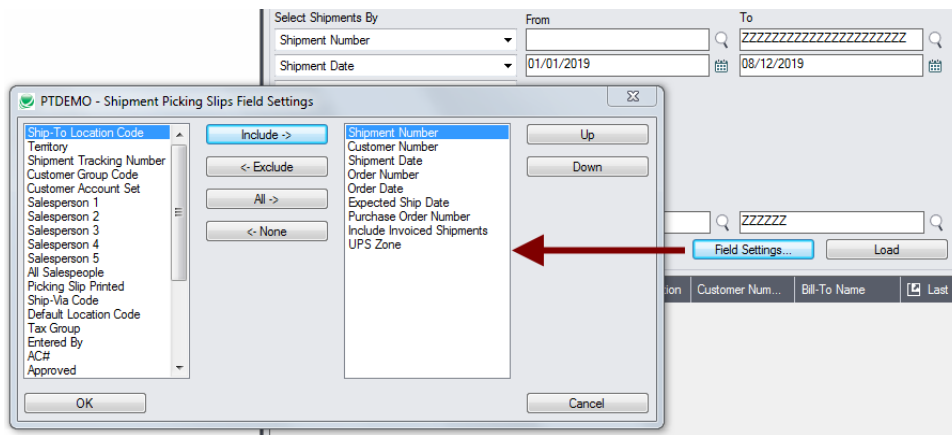


### Notes:

- The screen above shows the optional fields in sample data.
- You can add or remove fields from the dropdown list using the Field Settings button.

**Use the “Field Settings” button to customize the list of fields for selecting shipments:**

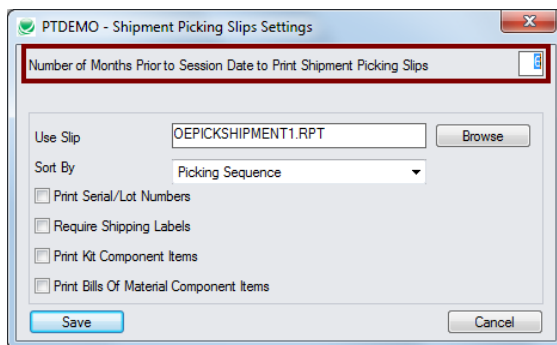
Click the **Field Settings** button to change the fields that appear in the “Select Shipments By” dropdown list.



- The list of fields on the right are the fields that will appear in the Select Shipments By dropdown.
- To add a field to the dropdown list, select it in the list on the left, and click the Include button.

**Note regarding shipment dates:**

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



You can override the default setting in the Range fields.

**Note:** All settings on this screen are saved for the current user. The same settings will be in effect the next time you use the program.

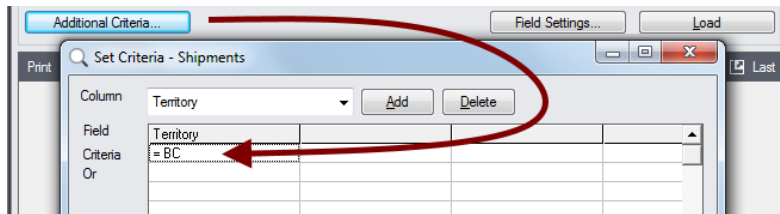
**Specify one or all locations:**

- The last Select Shipments By drop-down lets you filter by location.  
 You can choose whether shipments are selected if the shipment header matches the range of locations, or if any detail lines in the shipment match the range of locations you specify.  
 If you use the standard Sage 300 picking slip Crystal Reports (e.g. OEPICKSHIPMENT1), picking slips will be printed as follows:
  - If you select by header locations, the report will print one picking slip for each selected shipment.
  - If you select shipments by detail locations, the program will print a separate picking slip for each location listed for the shipment items.



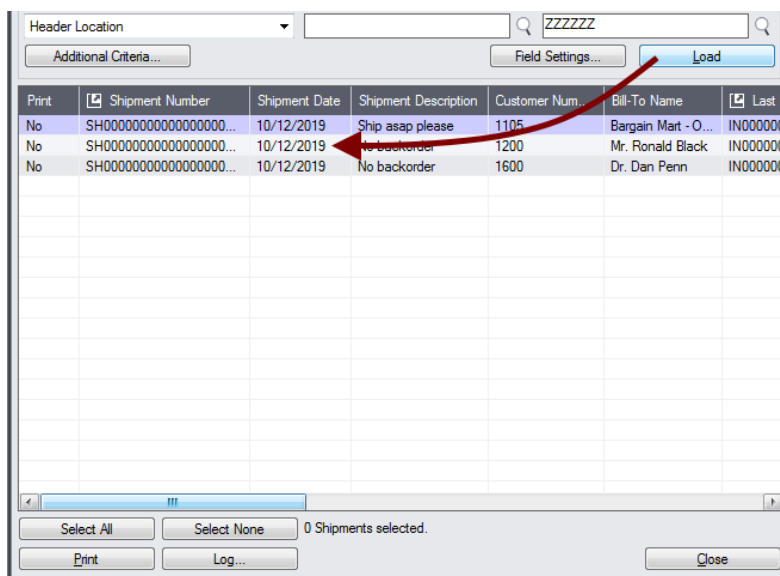
**Choose additional criteria if necessary:**

To select shipments with a field that is NOT available on the Field Settings form, use Additional Criteria.



- Click the Additional Criteria button to further restrict the shipments retrieved for printing picking slips.
- Select a field in the dropdown and click the Add button.
- Double-click the Criteria field to enter a relationship and value.
- Click OK to save.

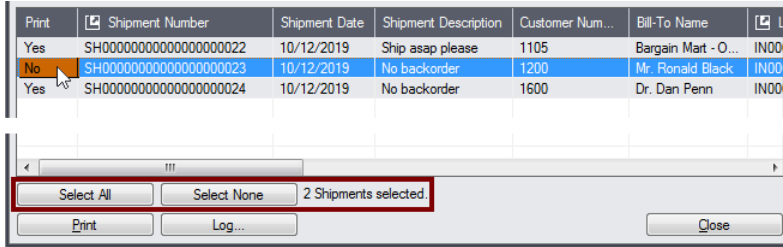
**Load the list of selected shipments and choose which picking slips to print:**



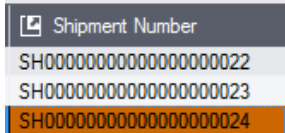
- Click the Load button to display the selected list of shipments.  
 When the Load button is pressed, the active shipments that match the selection criteria will be displayed.  
**Important Note:** Shipments are selected for inclusion **based on the moment that the Load button is pressed**. However, the shipment may be changed before printing is completed. Make sure that you consult the log to see the actual printing 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 shipments loaded in the grid for printing.



- Double-click in the Print column to “cherry-pick” shipments:



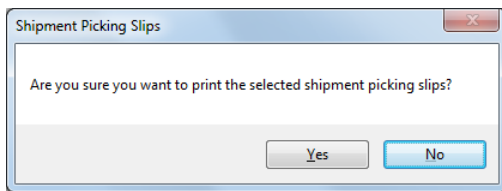
- Click the Shipment Number column heading (or double-click the shipment number) to drill down to the selected shipment:



- Click the Last Invoice Number column heading to drill down to the last invoice.
- Click the Order Number column heading to drill down to the order.

**Click the Print button to print picking slips for the selected shipments:**

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



**Click the Log button to confirm which shipment picking slips were printed:**

```

5/13/2019 10:20:36 AM
=====
5/13/2019 1:15:13 PM Shipment Picking Slips started.
5/13/2019 1:15:13 PM
5/13/2019 1:15:13 PM Performed by user: FRANK
5/13/2019 1:15:13 PM
5/13/2019 1:15:13 PM Shipment Range
5/13/2019 1:15:13 PM Customer Group Code From [WHL] To [WHL]
5/13/2019 1:15:13 PM Shipment Date From [10/1/2019] To [10/13/2019]
5/13/2019 1:15:13 PM Shipment Date From [10/1/2019] To [10/13/2019] Header Location From
[ ] To [ZZZZZZ]
5/13/2019 1:15:13 PM
5/13/2019 1:15:13 PM Printing Picking Slip for Shipment SH00000000000000000022 started.
5/13/2019 1:15:21 PM Setting Picking Slip Printed for Shipment SH00000000000000000022
started.
5/13/2019 1:15:21 PM Setting Picking Slip Printed for Shipment SH00000000000000000022
complete.
5/13/2019 1:15:21 PM Printing Picking Slip for Shipment SH00000000000000000022 complete.
5/13/2019 1:15:21 PM Printing Picking Slip for Shipment SH00000000000000000024 started.
5/13/2019 1:15:27 PM Setting Picking Slip Printed for Shipment SH00000000000000000024
started.
5/13/2019 1:15:27 PM Setting Picking Slip Printed for Shipment SH00000000000000000024
complete.
5/13/2019 1:15:27 PM Printing Picking Slip for Shipment SH00000000000000000024 complete.
5/13/2019 1:15:27 PM
5/13/2019 1:15:27 PM Shipment Picking Slips complete.
5/13/2019 1:15:27 PM
=====
    
```

The Log lists:

- The user, the full range settings and criteria for selecting shipments.
- The number of each shipment for which picking slips were printed.

## Shipment Picking Slip settings

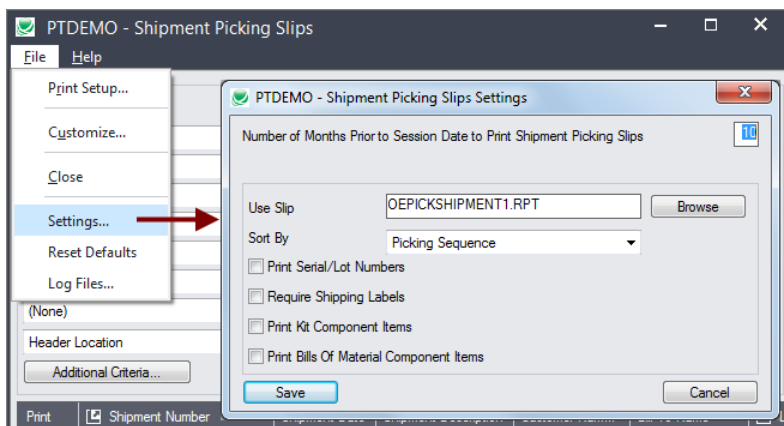
Use the Settings choice on the **Shipment Picking Slips > File > Settings** menu to select default picking slip print settings.

Default settings are for the current user

**Note:** All checkbox settings on this form are used by the standard Sage 300 Crystal Reports for printing picking slips.

If custom picking slips have been created for your company, they may not take advantage of these settings. For example, they may not be set up to print Kit component items.

The Shipment Picking List Settings form appears as follows:



- **Number of Months Prior to Session Date ...:** This number provides the default “To” date if you choose to select shipments using a range of shipment dates. You can override the default date on the screen.
- **Use Slip:** This is the Crystal Report form that you are using to print the picking slip.
- **Sort By:** The standard Sage report lets you list items on the picking slip by picking sequence, item number or line number.
- **Print Serial/Lot Numbers:** The standard Sage report lets you include serial numbers and lot numbers on the picking slip if you use Serialized Inventory and Lot Tracking.
- **Require Shipping Labels:** This option prints labels only if you entered a number of shipping labels on the Totals tab for each invoice.
- **Print Kit Component Items:** Select this option if you want the picking slips to list all components in kits.
- **Print Bills of Material Component Items:** Select this option to list the components of items built from bills of material.