

Ship Docs Overview

Last Modified on 05/09/2022 10:11 am EDT

Overview

Ship Docs are the ultimate sales transaction in Order Time. It shows the items the customers purchased. When inventory items are involved, it is the Ship Doc that deducts inventory.

Below are the different ways to create a Ship Doc:

- **From a Sales Order**

Ship Docs usually correspond to Sales Orders to show how much of the Ship Doc needs to be filled. A Ship Doc can be created directly from the **Sales Order** once its status is Approved.

- **Manually from the Side Menu**

If created from a Sales Order, all information from the Sales Order will be brought in to populate the fields. Otherwise, you have to fill them in manually.

- **Multiple Sales Orders**

A Ship Doc can also be created for a customer with multiple sales orders.

Creating a Ship Doc from a Sales Order

Once the Sales Order has been approved, a Ship Doc can be generated. A Ship Doc is the final step to completing a sales transaction; the document will display the fulfillment stage (i.e. Committed, Picked, Shipped, Voided etc.)

Once a Sales Order has been approved, it will convert into a Ship Doc order with a different number from your Sales Order. Click the **+Ship Docs** button.

The information contained on a Ship Doc is used by the system to generate an invoice in Accounting.

The screenshot shows the OrderTime software interface. The top navigation bar includes Home, Sales, Purchasing, Production, Warehouse, and Reports. The main content area displays a Sales Order - 3953 with a status of 'Approved'. The order details are organized into sections: General (No. 3953, Customer: Craig Johnson, Date: 8/6/2017, Promise Date: Multiple, Customer PO Contact), Bill Address (GENERAL DYNAMICS, 2915 NW 2, SUNRISE, FL 33322, USA), and Ship Address (GENERAL DYNAMICS, 2015 NW 2, SUNRISE, FL 33322, USA). A Summary section shows Subtotal: 857.00, Ship Amount: 0.00, Discount \$: -0.00, Taxes: 0.00, and Total Amount: 857.00. Below the details, there are tabs for Items, Details, Memo & Instructions, Custom, Ship Docs, Dependency, Attachments, Open Activities, and Activity History. The 'Ship Docs' tab is active, showing a table with columns: NO., DATE, SHIP TO, LOCATION, TRACKING NO, CUSTOMER PO, TOTAL AMOUNT, SHIPPED, STATUS, and ACTIONS. The table contains one row for item 3016, dated 8/9/2017, with a total amount of 298.20 and a status of 'Committed'. A green '+ Ship Docs' button is highlighted in the bottom right corner of the interface.

If there is a large list of Items on your Sales Order but not enough stock to fully Ship there is the option to select Items from the Sales Order to create the Ship Doc with using the **Select Items to Ship** button

Top

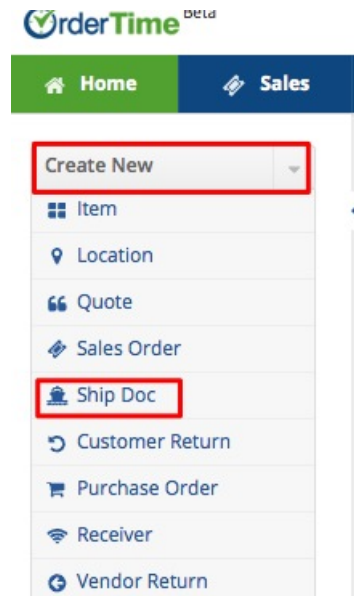
Creating Ship Doc Manually

It is important to note that Ship Docs can be created without Sales Orders.

You can create a new Ship Doc from scratch by choosing Create New Ship Doc. This can be handy for complimentary items or other situations in which no formal order was placed, yet you are still shipping something out to a Customer and wish to keep track of it.

To create a new Ship Doc:

1. Click on the side menu.
2. Select **Create New**.
3. Select **Ship Doc** from the drop down menu.



4. Enter the customer name on the **Create a new Ship Doc for** box. A drop-down menu will provide you with a list of customers that are already in your database. Select the appropriate customer.
5. Click on **Next>>** to proceed to the next screen.



6. Review the customer information, specifically the shipping address. If they are different, make changes as needed to insure the Ship Doc has the correct billing address and will be sent to the correct shipping address.
7. Select the **Date** if it is different from the day of origination. (Date is auto-filled)
8. Enter **Customer's Purchase Order** (PO) number if a PO was received from your customer; and Tracking Number, if applicable.
9. Provide more details by completing the other tabs: Default, Memo & Instructions and Custom.
10. Click **Save**.

Ship Doc - 3 Save Cancel

Customer ABCCom

No. 3 Date 03/08/2018 Customer PO Tracking No

Address Defaults Memo & Internal Notes Custom

Billing Address

Name/Company Comp1
 Street 123
 Floor/Suite 4
 Care of
 City Miami
 State/Prov./Reg. FL
 Zip/Postal code 45778
 Country US
 Contact Jack Frost
 Alt. Contact
 Phone (301) 898-6765
 Alt. Phone
 Fax (301) 898-6760
 Website
 Email abccom@email.com

Copy changes to customer

Shipping Address copy billing address

Primary

Name/Company Comp1
 Street 123
 Floor/Suite 4
 Care of
 City Miami
 State/Prov./Reg. FL
 Zip/Postal code 45778
 Country US
 Contact Jack Frost
 Alt. Contact
 Phone (301) 898-6765
 Alt. Phone
 Fax (301) 898-6760
 Website
 Email abccom@email.com

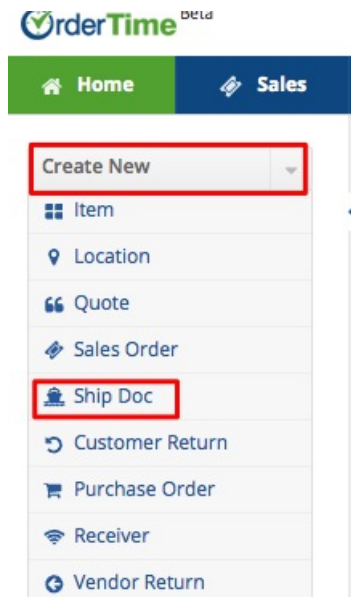
Copy changes to customer

Top

Creating a Ship Doc for Multiple Sales Orders

OrderTime provides a functionality that allows you put multiple sales orders in to a single Ship Doc. You can create a single Ship Doc for multiple Sales Orders by following these steps:

1. Click **Create New**.
2. Select **Ship Doc**.



3. Enter the **Customer Name**. Once the customer's name is entered, a list of Sales Orders (associated with the customer) will be displayed.
4. Select the **Sales Orders** that you want to include by clicking on the corresponding boxes.
5. Click **Continue**.

Sales > Ship Docs > Ship Doc

Create a new Ship Doc for:

1496316 Ontario Inc. Next >> Cancel

<input checked="" type="checkbox"/>	NO. ▲	DATE	PROMISE DATE
<input checked="" type="checkbox"/>	35	3/16/2018	3/16/2018
<input checked="" type="checkbox"/>	37	3/19/2018	3/19/2018

Continue

If you want to add multiple Sales Orders in to one Ship Doc, check the setting in [Company Preferences > Shipping](#) and make sure that the 'Add the items to an unshipped Ship Doc having the same Customer & Location' option is selected.

Top

You can also do the following in the Ship Doc page:

- Use the Edit button next to the Create PDF drop down menu to make changes.
- Send emails, add attachments, create a log, and add notes to your Ship Doc.
- Under the Memo & Instruction tab, you can include notes and Date Stamp as needed.
- Create a PDF file of the Ship Doc.
- Add and set up packages.
- Update the status of the Ship Doc.

You can directly change the field values by clicking on the line item (item row). Field boxes will appear, and you can add details or edit the information accordingly.

Adding Packages

In addition to the standard information related to Items, such as Item Number, UOM, Price, Quantity and others, the Ship Doc contains the **Packages** tab which enables you to create packages that “box up” your items. This also allows you to know the number of packages you have created for a specific Ship Doc.



Packages in Company Preferences: Make sure to set up your Company Preferences for Packages. Go Settings > Company Preferences > Shipping > Packages tab.

Package Type in Profile Lists: Go to General > Profile Lists > Shipping > Package Type to set up different package types.

Add packages by following these steps:

1. In the *Ship Doc* page, select the **Packages** tab.
2. Click the **+Add** button.

Sales > Ship Docs > Ship Doc

Ship Doc - 999897 Create PDF EDIT Status Processing

General No. 999897 Customer 1496316 Ontario Inc. Date 4/2/2018 Customer PO Contact	Bill Address TORONTO, ON	Ship Address TORONTO, ON	Summary Revision: 1 Subtotal 650.00 Ship Amount 0.00 Discount \$ 0.00 Taxes 0.00 Total Amount 650.00
--	------------------------------------	------------------------------------	--

Items Details Memo & Instructions Attachments Custom Open Activities Activity History **Packages**

PACKAGENO TRACKING NO WEIGHT ACTIONS

Add

3. The *Packages* pop-up window will appear. Select the **Package Type** from the picklist. The dimensions and weight will be populated when a package type is selected.
4. Click **Generate UCC-128** link to fill out the **Code**. Refer to [Shipping](#) article for additional information.
5. Fill out the **Tracking No.** field.
6. Under the **Unpackaged Items**, you will see your Items with their corresponding Item Number and quantity. To add the items in the package, select the line item and click **Add**.

Packages

PackageNo 1

General Custom

Package Type

Weight Length Width Height

Code 0010002267111111112 Generate UCC-128 Tracking No

Unpackaged Items		
ITEM	LOT / SERIAL NUMBER	QUANTITY
105		10
101		10

Add

Add All Remove

Packaged Items		
ITEM	LOT / SERIAL NUMBER	QUANTITY

7. The line item will move to **Packaged Items**. Under the **Packaged Items**, you can leave the quantity as is or change the quantity by clicking the number under **Quantity** and typing in the desired value. **Note:** If there are any unpackaged items, the number (quantity) left will reflect under the Unpackaged Items.
8. Click **Save**.

Packages

PackageNo 1

General Custom

Package Type

Weight 3 Length Width Height

Code 00100022671111111112 Generate UCC-128 Tracking No

Unpackaged Items		
ITEM	LOT / SERIAL NUMBER	QUANTITY
101		10
105		5

Add
Add All
Remove
Remove All

Packaged Items		
ITEM	LOT / SERIAL NUMBER	QUANTITY
105		5

Save Cancel

After saving, the Ship Doc page will updated with the details of the newly created Packages details. Repeat the steps to add more packages.

Ship Doc - 999897 Create PDF EDIT Status Processing

General	Bill Address	Ship Address	Summary Revision: 1
No. 999897 Customer 1496316 Ontario Inc. Date 4/2/2018 Customer PO Contact	-CMD I / C CALC140 SUITE 300 TORONTO, ON M4V 3T5	-CMD I / C CALC140 SUITE 300 TORONTO, ON M4V 3T5	Subtotal 650.00 Ship Amount 0.00 Discount \$ 0.00 Taxes 0.00 Total Amount 650.00

Items Details Memo & Instructions Attachments Custom Open Activities Activity History Packages Add

PACKAGENO	TRACKING NO	WEIGHT	ACTIONS
1	3	3	

Processing your Ship Doc Transaction

Once the Ship Doc has been generated and based on your item availability, the order can be processed by selecting the appropriate status from the drop down menu. On the top right side of the screen next to **Status**, use the drop down menu to change the status of your Ship Doc. The following status options will be available for your Ship Doc:

- **Payment Pending:** Ship Doc is on hold until payment is received.
- **Picked:** Item has been picked up from the warehouse.
- **Voided:** The Ship Doc has been voided.
- **Shipped:** The Items have been shipped.
- **Closed:** The Order is closed.

Sales > Ship Docs > Ship Doc

Ship Doc - 999897 Create PDF EMPTY

Status: Processing

Processing
 Payment Pending
 Released
 Picked
 Shipped
 Voided
 Closed

General
 No. 999897
 Customer 1496316 Ontario Inc.
 Date 4/2/2018
 Customer PO
 Contact

Bill Address
 TORONTO, ON M4V 3T5

Ship Address
 TORONTO, ON M4V 3T5

Summary Revision: 1
 Subtotal
 Ship Amount
 Discount \$
 Taxes
 Total Amount 650.00

Items Details Memo & Instructions Attachments Custom Open Activities Activity History Packages

Name/Number Search Items

IMAGE	ITEM	DESCRIPTION	QUANTITY	UOM	PRICE	EXT.	TAX CODE	LINKEDINFO DOCNO	ACTIONS
	105	Parts	10	EA	50.00	500.00	Non	35	
	101	1/4" Trays	10	EA	15.00	150.00	Non	35	

All the statuses are informational up to **Shipped**. At the point before Shipped, the inventory is shown as *Committed*, that is, the items are not available but still *Owned* and *On hand*.

Item - 105 EDIT

General
 Description Parts
 Type Parc
 Group Parts Group Change group
 UOM EA
 Price 0.00
 Std. Cost 4.00

Summary
 Available 11
 Required 23
 On order 5 ETA-1/21/2018

Note EDIT

Inventory Custom On Order Detail Required Detail Transactions Vendors Related Items Customer Bases Item Image Attachments

LOCATION	BIN	UOM	AVAILABLE	LOT / SERIAL NUMBER	EXPIRATION DATE	ON HAND	OWNED	COMMITTED
HQ	Floor	EA	10		4/2/2018	14	24	5
Virtual WH	Default	EA	1		4/2/2018	1	1	0

The status can be changed to Shipped or Closed, depending on the **Accounting Integration's** specification of the status that should trigger a Sync.

Ship Doc - 999897 Create PDF RETURN

Status: Shipped

General
 No. 999897
 Customer 1496316 Ontario Inc.
 Date 4/2/2018
 Customer PO
 Contact

Bill Address
 TORONTO, ON M4V 3T5

Ship Address
 TORONTO, ON M4V 3T5

Summary Revision: 1
 Subtotal 400.00
 Ship Amount 0.00
 Discount \$ 0.00
 Taxes 0.00
 Total Amount 400.00

Items Details Memo & Instructions Attachments Custom Open Activities Activity History Packages

IMAGE	ITEM	DESCRIPTION	QUANTITY	UOM	PRICE	EXT.	TAX CODE	LINKEDINFO DOCNO
	105	Parts	5	EA	50.00	250.00		35
	101	1/4" Trays	10	EA	15.00	150.00	Non	35

After Shipped, the inventory is removed from *Owned* and *On hand*.

Item - 105 [EDIT](#)

General		Summary		Image	
Description	Parts	Available	11	NO IMAGE	
Type	Part	Required	23		
Group	Parts Group Change group	On order	5 ETA-1/21/2018		
UOM	EA				
Price	0.00				
Std. Cost	4.00				

Note [EDIT](#)

Inventory | Custom | On Order Detail | Required Detail | Transactions | Vendors | Related Items | Customer Aliases | Item Image | Attachments

LOCATION	BIN	UOM	AVAILABLE	LOT / SERIAL NUMBER	EXPIRATION DATE	ON HAND	OWNED	COMMITTED
HQ	Floor	EA	10		4/2/2018	9	19	0
Virtual WH	Default	EA	1		4/2/2018	1	1	0

Print your Ship Doc

To print your Ship Doc, click on the **Create PDF** icon next to the Ship Doc number on the screen. The following options are available:

- Save the document to your preferred drive.
- Save and send the Ship Doc to your customer and CC your company associates.

In addition to the standard Sales Order information, the Ship Doc contains a few additional fields such as tracking number, the number of packages in the shipment, and the total weight of the shipment.

If you do not allow negative inventory quantity (meaning the box is checked in [Company Preference > Inventory](#)) and you do not have enough inventory, the quantity will be zero or will be the number you currently have in inventory.

You can edit the Ship Doc independently at any time. Once a Sales Order is converted to a Ship Doc, you can edit the quantities manually.

[More about Order Management with Order Time](#)