

Fulfillment Batch

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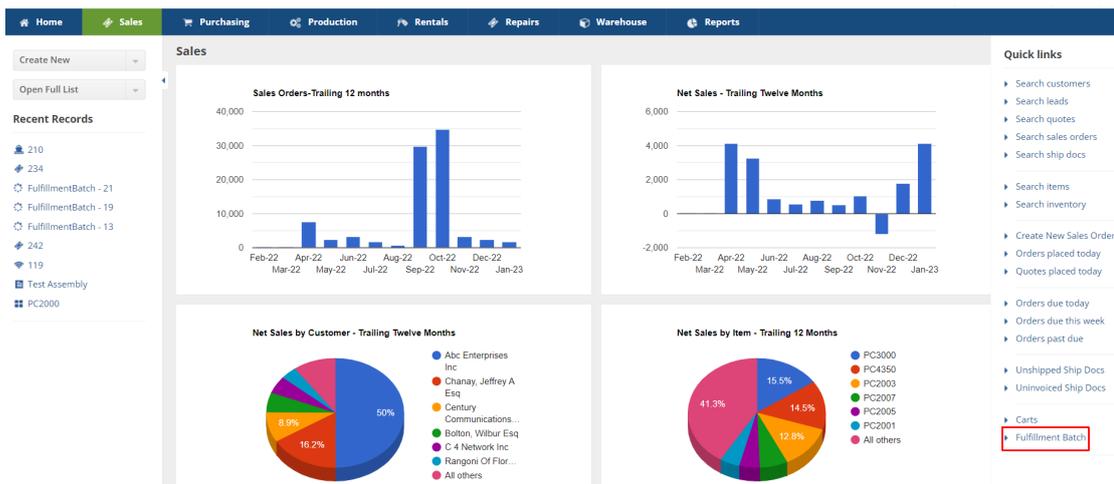
Overview

Creating a ship doc for one sales order at a time may suit your needs but if you want to process multiple sales orders at one time then you should use the Fulfillment Batch functionality in OrderTime. You can take all open sales orders and instantly create Ship Docs from them, no matter how many orders you have, with Fulfillment Batch.

The Fulfillment Batch tool is very useful when you just want to ship those orders which have items contained in a new receipt of inventory.

Creating a Fulfillment Batch

1. You can launch Fulfillment Batch from the **Sales** tab, then click the **Fulfillment Batch** link on the right side of the screen, under **Quick Links**.



2. On the **Batch Ship** page, click the **+New Fulfillment Batch** button.



3. The next page is the **Fulfillment Batch - Edit Batch**. This page contains different filters that you can use to determine which orders will be shipped. Select the value or values from the choices provided for each filter.

- Location - is where the sales orders are coming
- Promise Date - is filtered from the selected date up to and including the promise date
- Order By - is how you want to sort the orders (Order no., Order date or Promise date)

Sales > Batch Ship > Fulfillment Batch - Edit Batch

FulfillmentBatch Save Reset

Location

From Promise Date

To Promise Date 2/3/2023

Consider Sales

Orders that must ship complete

Order by

Specific Customers and Locations

- Specific Customers - the entity that you are processing the orders for. **Note:** You can select multiple customers.
- Ship Method - You can filter the Fulfillment Batch by Ship Method
- Specific Items - the article or unit ordered. **Note:** You can select multiple items.
- Memo - A field for you to add additional information

Specific Customers

Ship Method

Specific Items

Memo

Specific Item Group, Vendor and Class

- Specific Item Group - the category to which the items belong (e.g. Assembly, Hardware, Style, Kits)
- Specific Vendor - is the entity providing the goods or service
- Specific Class - is the category that sorts transactions, items or customers

Specific Item Group

Specific Vendor

Specific Class

Status

- Status - You can filter the Fulfillment Batch to show orders with Approved or a custom Approved Doc Status

Status

Approved

Approved for Next Week

4. Click **Save**.

Sales > Batch Ship > Fulfillment Batch - Edit Batch

FulfillmentBatch Save Reset

Location: HQ
 From Promise Date:
 To Promise Date: 2/9/2023

Consider Sales Orders that must ship complete
 Order by:

Specific Customers:
 Ship Method:

Specific Items:

Memo:

Specific Item Group: Additional Fees, Assembly 2, Assembly Group, Jobs Group

Specific Vendor: Kate Beads, PC Cases R US, PCs for All

Specific Class: Test Class, Test Class 2

Status: Approved, Approved for Next Week

Once saved, the batch shipment runs.

Sales > Batch Ship

Batch Ship New Fulfillment Batch

Search Fulfillment Batch

ID	LOCATION	RECORD INFO CREATED DATE/TIME	FINISHED ON	ACTIONS
21	HQ	2/9/2023 02:51 PM		
20	HQ	2/9/2023 02:50 PM	2/9/2023 07:50 PM	

5. After the Finished On date and time appear, then you can click the **fulfillment batch/batch shipment number** under the **ID** column.

Sales > Batch Ship

Batch Ship New Fulfillment Batch

Search Fulfillment Batch

ID	LOCATION	RECORD INFO CREATED DATE/TIME	FINISHED ON	ACTIONS
21	HQ	2/9/2023 02:51 PM	2/9/2023 07:51 PM	
20	HQ	2/9/2023 02:50 PM	2/9/2023 07:50 PM	

6. The next screen will be the **Batch Details** page. The list of orders are displayed on the left pane. Click on any part of the order under the list pane to view the details of that order.

Sales > Batch Ship > Fulfillment Batch - Batch Details

Created By Edward McDowell 2/9/2023 2:51 PM Modified By Edward McDowell 2/9/2023 2:51 PM

Search Fulfillment B Create PDF

Fulfillment Batch - 21 MARKED AS FILLED

FILL ALL

- No. 234
Name: ABC Enterprises Inc
Order Date: 1/31/2023
Promise Date: 1/31/2023
Date:
Fill Status: All
- No. 237
Name: ABC Enterprises Inc
Order Date: 2/1/2023
Promise Date: 2/1/2023
Date:
Fill Status: All
- No. 241
Name: ABC Enterprises Inc
Order Date: 2/7/2023
Promise Date: 2/7/2023
Date:
Fill Status: All

General

No. 234
 Customer: ABC Enterprises Inc
 Order Date: 1/31/2023
 Promise Date: 1/31/2023
 Terms

Shipping Address

678 33RD AVE
 MIAMI, FL 33196
 MIAMI-DADE

Line item

LINE NO.	ITEM	DESCRIPTION	OPEN QUANTITY	ALLOCATED	UOM	ACTIONS
1	PC3101	MICRO ATX BLACK	1.00	1.00	EA	

Total Records: 1

Allocation - 1

BIN	LOT / SERIAL NUMBER	ALLOCATED	RUNNING AVAILABLE
Default		1.00	478

The Fill Status for each open order is shown on the list pane. It can be:

- All - Stock is available to ship for all the open items on the order.
- Partial - Stock is available to ship with:
 - some items complete
 - some items partially complete
 - some with no items

Below are the different sections of the order details:

- General - displays the customer order number, customer name, order date and promise date
- Shipping Address

Fulfillment Batch - 21 [Create PDF](#)

General	Shipping Address	MARKED AS FILLED
No. 234 Customer: Abc Enterprises Inc Order Date: 1/31/2023 Promise Date: 1/31/2023 Terms	678 33RD AVE MIAMI, FL 33196 MIAMI-DADE	

- Line Item - shows the Open Quantity (quantity that the customer ordered) and Quantity Allocated (how much is allocated)

Line item

LINE NO.	ITEM	DESCRIPTION	OPEN QUANTITY	ALLOCATED	UOM	ACTIONS
1	PC3101	MICRO ATX BLACK	1.00	1.00	EA	

Total Records: 1

- Allocation - shows the Bin where the orders are coming from, Quantity Allocated and Running Available (available units)

Allocation - 1

BIN	LOT / SERIAL NUMBER	ALLOCATED	RUNNING AVAILABLE
Default		1.00	478



You can manually change the allocated quantity of an item by clicking on the row under Quantity Allocated column.

7. Click the **Fill All** button to create all Ship Docs for all orders at the same time.

Alternatively, click the **Marked As Filled** button to create a Ship Doc one at a time.

Sales > Batch Ship > Fulfillment Batch - Batch Details Created By Edward McDowell 2/9/2023 2:51 PM Modified By Edward McDowell 2/9/2023 2:5

Fulfillment Batch - 21 Create PDF

FILL ALL

No. 234
 Name: **ABC Enterprises Inc**
 Order Date: 1/31/2023
 Promise Date: 1/31/2023
 Fill Status: All

General

No. 234
 Customer: **ABC Enterprises Inc**
 Order Date: 1/31/2023
 Promise Date: 1/31/2023
 Terms

Shipping Address MARKED AS FILLED

678 33RD AVE
 MIAMI, FL 33196
 MIAMI-DADE

Line item

LINE NO.	ITEM	DESCRIPTION	OPEN QUANTITY	ALLOCATED	UOM	ACTIONS
1	PC3101	MICRO ATX BLACK	1.00	1.00	EA	

Total Records: 1

- *Ship Doc - This will become available after the Ship Doc(s) is/are created.

 *To access the Ship Doc created, click the **Ship Doc number** under **Ship Doc** section. You can also click **View PDF** to see or print the Ship Doc.

Fulfillment Batch - 21 Create PDF

General

No. 234
 Customer: **ABC Enterprises Inc**
 Order Date: 1/31/2023
 Promise Date: 1/31/2023
 Terms

Shipping Address

678 33RD AVE
 MIAMI, FL 33196
 MIAMI-DADE

Ship Doc

Ship Doc: **210**
 PDF View PDF

At this point, the Ship Docs are marked as 'picked' and get released to **Ship Station**.

Creating a PDF File for your Fulfillment Batch

Click the **Create PDF** picklist next to the Fulfillment Batch number.

- Select **Fulfillment Batch** to print the fulfillment batch form one at a time.
- Select **All Fulfillment Batch** to print the fulfillment batch form for all orders.

Sales > Batch Ship > Fulfillment Batch - Batch Details

Fulfillment Batch - 21 Create PDF

FILL ALL

No. 234
 Name: **ABC Enterprises Inc**
 Order Date: 1/31/2023
 Promise Date: 1/31/2023
 Date

General

No. 234
 Customer: **ABC Enterprises Inc**
 Order Date: 1/31/2023
 Promise Date: 1/31/2023
 Terms

Create PDF dropdown menu:

- Fulfillment Batch
- All