

Select Items to Ship

Last Modified on 05/09/2022 10:55 am EDT

Overview:

Sometimes there Sales Orders that contain many Items but only a few of those Items are able to be shipped immediately. There is now the option to Select Items to Ship. This allows you to pick and choose which Items to add to the Ship Doc. Prior the options were manually add the Items to a blank Ship Doc or create the Ship Doc from a Sales Order and remove the items that were not going to be shipped.

Solution:

On an Approved Sales Order click on the Ship Docs tab to find the Select Items to Ship button.

The screenshot displays a sales order management interface. At the top, it shows 'Sales > Sales Orders > Sale Order' and 'Created By Ian Benolie 4/29/2022 1:54 PM Modified By Ian Benolie 4/29/2022 1:54 F'. Below this, the 'Sales Order - 2109' is shown with buttons for 'TRANSFER', 'ALLOCATE', 'Create PDF', 'Export', and 'Print Label'. The status is 'Approved'. The interface is divided into several sections: 'General' (No. 2109, Customer: 70E Solutions Inc, Date: 4/29/2022, Promise Date: 4/29/2022, Customer PO, Contact, Total Margin: 42.900 %), 'Bill Address' (70E SOLUTIONS INC, 1900 SILVER STAR RD., ORLANDO, FL 32804, Total Weight: 6.36), 'Ship Address' (70E SOLUTIONS INC, 1900 SILVER STAR RD., ORLANDO, FL 32804), and 'Summary' (Revision: 1) with a table of financials: Subtotal (1,013.60), Ship Amount (0.00), Discount (-0.00), Additional Fee (0.00), FL-Broward (7,000 %) (70.95), Total Amount (1,084.55), Paid Amount (-0.00), and Balance (1,084.55). A navigation bar includes 'Items', 'Details', 'Memo & Instructions', 'Custom', 'Payments', 'Ship Docs', 'Dependency', 'Attachments', 'Open Activities', and 'Activity History'. Below the navigation bar, there are icons for settings, print, and share, and two buttons: 'Ship Docs' and 'Select Items to Ship' (highlighted with a red box). At the bottom, a table header is visible with columns: NO., DATE, SHIP TO, LOCATION, TRACKING NO, CUSTOMER PO, TOTAL AMOUNT, SHIPPED, STATUS, and ACTIONS.

After selecting this button there will be a pop up menu displaying a list of the Items from the Sales Order with check boxes next to each. Select the Items you wish to add to your Ship Doc and click Save. The Ship Doc will be created containing only those Items from the Sales Order.

General

Bill Address

Ship Address

Add Select Items To a New Ship Doc

Customer
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Customer
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<input type="checkbox"/>	ITEM	DESCRIPTION	OPEN QUANTITY	SHIP DATE	NO.	ORDER TYPE
<input type="checkbox"/>	112	VIRGIN RESIN	1	5/9/2022 12:00 AM	2110	Sales Order
<input type="checkbox"/>	A100001	An variable length widget assembly	1	5/9/2022 12:00 AM	2110	Sales Order
<input type="checkbox"/>	02-1189		1	5/9/2022 12:00 AM	2110	Sales Order
<input type="checkbox"/>	111-1	test descripton	1	5/9/2022 12:00 AM	2110	Sales Order

Save Cancel

DATE SHIP TO LOCATION TRACKING NO CUSTOMER PO TOTAL AMOUNT SHIP P