Shipping Multiple Sales Orders

Last Modified on 08/13/2021 3:20 pm EDT

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 batch shipping functionality in All Orders. With batch shipping you can take all open sales orders and instantly create Ship Docs from them, no matter how many you have. From the Sales menu select New Batch Shipment.

By default the open sales orders which are due to ship will be loaded. You have the ability change the load criteria using the filters based. You can filter based on Ship Date, Order Date, Customer, and Location.   By default the list of orders are sorted by (and also allocated by) the Order #.

In other words the Allocate By option will dictate how available inventory will be allotted to your sales orders. For example say you have 100 units of item XYZ.   You have 3 orders that Require XYZ in the amount of 200 units.   If the Allocate By option is set to Order #, it will allot the available stock of XYZ to the orders in ascending order (lowest to highest).   The result is summarized in the Status column.

- All: Stock is available to ship for all the open items on the order

- Partial: Stock is available to ship some items complete, some items partially or some items none.

- None: No items will ship.

There are two ways of viewing this list, in 1) Item mode (default) or 2) Order Mode. Item mode allows you to view items that will be shipped for all the orders listed in aggregate while order mode allows you to view the items on an order by order basis.

To toggle between to Order Mode click the following check box.

Item Mode

In Item Mode you can chose to include or exclude a particular item from shipping in any of the orders listed. Click the Incl. check box. You cannot change the allocated quantity in Item mode but you can in Order Mode.

Incl.	Item		Location	Available	Required	Allocated	Un-Allocated	
✔	Wood Door		HQ	0.00	3.00	0.00	0.00	
✔	Counter	①	HQ	0.00	1.00	0.00	0.00	
✔	Lighting		HQ	N/A	14.00	14.00	N/A	
✔	Window		HQ	N/A	1.00	1.00	N/A	
✔	Concrete Slab		HQ	N/A	1.00	1.00	N/A	

Order Mode

In Order Mode you can exclude or include a particular order by checking or unchecking the Incl. checkbox.

Incl.	Order #	Customer	Ship To	Ship From	Order Date	Ship Date	Status
✔	4	Abercrombie, Kristy	Default	HQ	9/8/2006	9/8/2006	All
✔	5	Abercrombie, Kristy ②	Default	HQ	9/6/2006	9/8/2006	Partial
✔	6	Melton, Johnny	Default	HQ	9/8/2006	9/8/2006	All
✔	7	Abercrombie, Kristy	Default	HQ	9/8/2006	9/8/2006	None
✔	8	Smith, Lee	Default	HQ	9/8/2006	9/8/2006	All

In Order Mode you can manually change the allocated quantity of an item. If there are multiple locations from which an Item can be shipped, the item will be listed for each location of which there is available.   Changing the allocated from one location will automatically change all other locations.

LineNo	Item		Location	Available	Required	Allocated	Un-Allocated
1	Lighting	②	HQ	N/A	14.00	14.00	N/A
2	Window		HQ	N/A	1.00	1.00	N/A

Additionally, the Item listings pane can be filtered by Item or by shipping Location:

Filter Item [▼]   Filter Location [▼]

After typing in any required Memo information, simply click the Process button to start creating the Ship Docs, or click Cancel to exit the screen without creating them.

[Process] [?] [Close]

From here, you'll be taken automatically to the Batch Shipments List, where you can view information about all batches you've processed as well as print the Batch Report and all Ship Docs.

Note: If you create additional Sales Orders while this screen is open a click of the Reload Orders button will them to the batch list.