

Creating Ship Docs

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Ship Docs are transactions that show what Items are shipped to Customers. Ship Docs usually correspond to Sales Orders to show how much of the Ship Doc needs to be filled. However, Ship Docs can be created without Sales Orders.

Ship Docs are easily created from Sales Orders by navigating to the order in question and clicking the Fill button on the tab's toolbar:



You can also create a new Ship Doc from scratch by choosing New Ship Doc from the Sales menu. 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.

If created from a Sales Order, all information from the SO will be brought in to populate the fields. Otherwise, you have to fill them in manually. Additionally, if your company makes use of bar code scanners to keep track of Items, you can place your cursor in the following text box...



...and scan the Item (s) in. Typing the name of the Item and then pressing Tab also works.

As you can see, the forms in All Orders are designed to be very similar, all the way from quote to order to shipping (and if necessary, to return). But there are also some fields here not featured on either the Sales Quote or Sales Order form.

A screenshot of a "Ship Doc" form. It includes fields for "Doc # 572", "Ship Date 12/30/2013", checkboxes for "Shipped" and "NC Only", and a field for "Exg Rt : 1". There is also a checkbox for "Not recorded in QuickBooks".

Ship Doc			
Doc #	572	Ship Date	12/30/2013
<input type="checkbox"/> Shipped	<input type="checkbox"/> NC Only		
Not recorded in QuickBooks		Exg Rt :	1

If you do not use QuickBooks with All Orders, be sure to check the NC Only box above. It allows you to close out a Ship Doc without recording it in QuickBooks. In the QuickBooks Synchronization preference ->Advanced tab, select how you want to apply your NC only transactions.

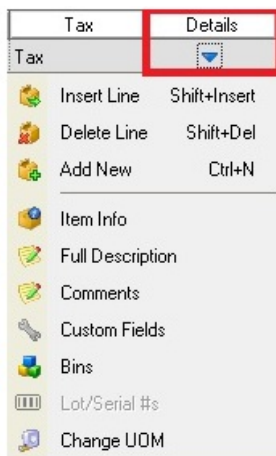
Now, a Ship Doc has two states: Allocated (meaning Not Shipped) and Shipped. Check the Shipped checkbox when you actually send the contents listed on the document. This removes the quantity from your inventory On Hand. Once a Ship Doc has been checked as Shipped, it cannot be edited.

Term	Sales Rep	FDB	Class
Due on receipt	Mike Hollings		Remodel
Ship Doc Reference	Customer PO	# Pckg	Weight
2734	X4375	2.00	60

In addition to the standard Sales Order information, the Ship Doc contains a few additional fields such as the Ship Doc Reference (typically a tracking #), the number of packages in the shipment, and the total weight of the shipment. When the ship doc reference field is filled in a link will appear so if a valid tracking # is entered the link can be clicked to track the shipment.

On the far-right of the line item is the Details column with a blue arrow on each line. This allows you to complete the listed actions including:

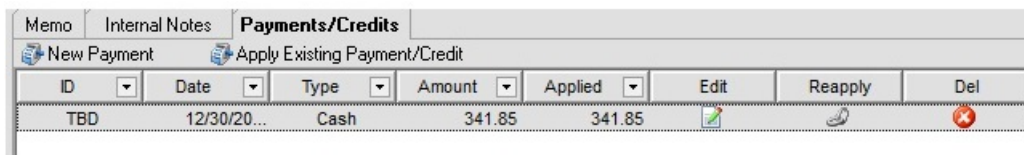
selecting the Bins, Lot/Serial #s, and Change the Unit of Measure just for this order.



Below the order grid, you have a few additional fields for choosing discounts and freight. Add tax codes for shipping charges and discounts per document:

Discount	1 to 10	5.00 %	Ship Method	UPS Group	Tax	Tax Code	i.Domingo (7.5%)
Subtotal	121.00	Discount \$ 6.05	Non	Freight \$ 10.00	Pre-Tax Total	124.95	Tax 9.83 Total 134.78

When choosing a Term type, if the Customer does not receive payment terms from you, then a Payments/Credits tab will appear in the lower left-hand corner of the screen:



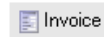
Please see the Receiving Payments screen for more information on filling out the payment dialog.

To print out the Ship Doc, just use the Print toolbar button. You can include this document as a packing list. By using its drop-down list, you can print one of several other reports about the current document:

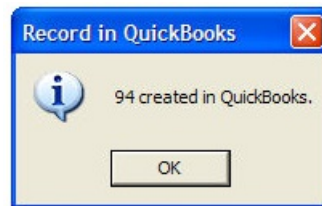
- Pick ticket. Used to identify the location (by bin) of the Items to be shipped.
- Ship Doc Log. This is a ledger-type report of the current Ship Doc.
- Bill of Lading. Lists one line for summary info of the Ship Doc.

- Items Shipped Without Serial No. Displays only those Items without serial numbers.
- Items Shipped With Serial No. Displays only those Items with serial numbers.

If you are also working with QuickBooks, when the Items are actually shipped to Customers, the Ship Doc needs to be closed out so that quantities can to be deducted from QuickBooks. This is done by creating an invoice for the customer. To create an invoice, just click the Invoice toolbar button:



The invoice for the shipment will then be created from within QuickBooks, you'll receive an alert that tells you the invoice number:



QuickBooks need not be open in order to do this, but you must perform a synchronization before it will show up in QB. If you change your mind and wish to remove the invoice from QB, you have the option of clicking the Undo Invoice button on the toolbar.