

Ship and Invoice Orders User Guide

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1 Overview

Ship and Invoice Orders provides the following functionality:

- Ship multiple orders at the same time.
- Optionally invoice the shipments.
- Optionally consolidate multiple orders from the same customer into one shipment/invoice.
- Pick individual orders to be shipped and/or invoiced or ship/invoice all outstanding orders.
- Optionally print the picking slips as they are created.
- Optionally print the invoices as they are created.

2 Shipping and Invoicing Outstanding Orders

The following figure shows an example of the main screen of the application.

Ship	Invoice	Order No	Order Date	Exp. Ship Date	Description	CustomerNo	Bill To Name	Bill To Address	Ship To Name	Ship To Address
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ORD00000000000001	1/15/2019	1/15/2019	Ship asap	1200	Mr. Ronald Black	2820 Wabash Road	Warehouse	Receiving Doc
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ORD00000000000002	1/15/2019	1/15/2019	No backorder	1210	ACME Plumbing	927 Warehouse Road	ACME Plumbing	927 Warehouse
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ORD00000000000063	6/30/2020	6/30/2020	Backorder OK	1105	Bargain Mart - Oakland	Bargain Mart Plaza	Bargain Mart - Oakland	Bargain Mart P
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ORD00000000000064	6/20/2020	6/20/2020	ship to the back door	4030	The House Doctors	1215 13th Street E	The House Doctors	1215 13th Stre
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ORD00000000000065	8/5/2020	8/5/2020		2235	Forester Building Supplies	#46 North Gate Mall	Forester Building Supplies	#46 North Gat
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ORD00000000000066	7/1/2020	7/1/2020		1200	Mr. Ronald Black	2820 Wabash Road	Mr. Ronald Black	2820 Wabash
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ORD00000000000067	7/1/2020	7/1/2020		1200	Mr. Ronald Black	2820 Wabash Road	Mr. Ronald Black	2820 Wabash
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ORD00000000000068	6/30/2020	6/30/2020		1200	Mr. Ronald Black	2820 Wabash Road	Mr. Ronald Black	2820 Wabash
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ORD00000000000069	2/8/2013	2/8/2013		1200	Mr. Ronald Black	2820 Wabash Road	Mr. Ronald Black	2820 Wabash
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ORD00000000000070	2/8/2013	2/8/2013		1200	Mr. Ronald Black	2820 Wabash Road	Mr. Ronald Black	2820 Wabash
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ORD00000000000071	4/26/2022	4/26/2022	Order with prepayment	1201	Mr. Ronald Black (1)	2820 Wabash Road	Mr. Ronald Black (1)	2820 Wabash
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ORD00000000000073	7/19/2022	7/19/2022		1200	Mr. Ronald Black	2820 Wabash Road	Mr. Ronald Black	2820 Wabash
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ORD00000000000074	8/8/2022	8/8/2022		1200	Mr. Ronald Black	2820 Wabash Road	Mr. Ronald Black	2820 Wabash
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ORD00000000000075	8/23/2022	8/23/2022		1200	Mr. Ronald Black	2820 Wabash Road	Mr. Ronald Black	2820 Wabash
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ORD00000000000076	8/23/2022	8/23/2022		1200	Mr. Ronald Black	2820 Wabash Road	Mr. Ronald Black	2820 Wabash

The outstanding orders can be limited by a range of customer numbers, range of order numbers, range of expected ship dates, description, and whether or not they have prepayments. Clicking the Load button shows all matching orders in a list. By default, all orders are selected for shipping and invoicing, but you can individually unselect some of the orders if you don't want them to be shipped or invoiced. Also, Select All and Unselect All buttons are available.

Once ready, click the Ship/Invoice button and all selected orders will be shipped/invoiced. Optionally, picking slips and invoices can be printed at the same time. See the Settings section for more details.

3 Settings

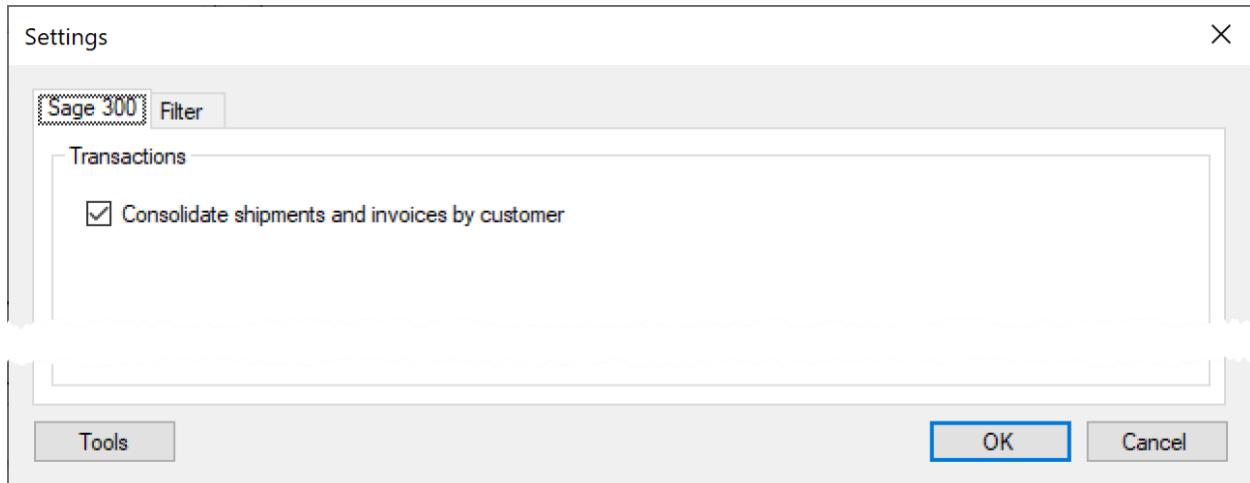
The Settings screen (accessible through the Settings menu) is used for the following:

1. Specify whether multiple orders for the same customer should be consolidated into one shipment/invoice or not.

2. Configure printing
3. Configure additional filters

3.1 Consolidating Shipments

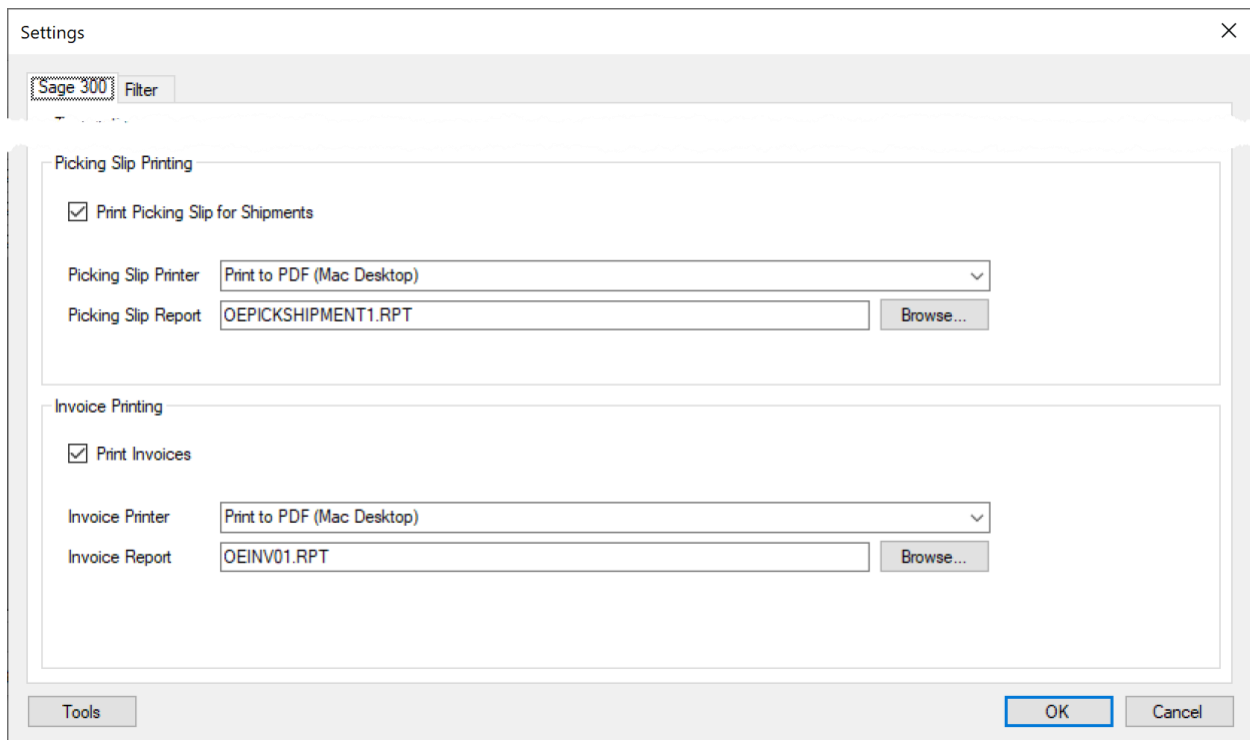
If you want multiple orders from the same customer to be consolidated into one shipment/invoice, select the checkbox as shown below.



The screenshot shows a 'Settings' dialog box with a close button (X) in the top right corner. At the top left, there is a 'Sage 300 Filter' button. Below it is a 'Transactions' section containing a single checkbox labeled 'Consolidate shipments and invoices by customer', which is checked. At the bottom of the dialog, there are three buttons: 'Tools', 'OK', and 'Cancel'.

3.2 Printing Invoices

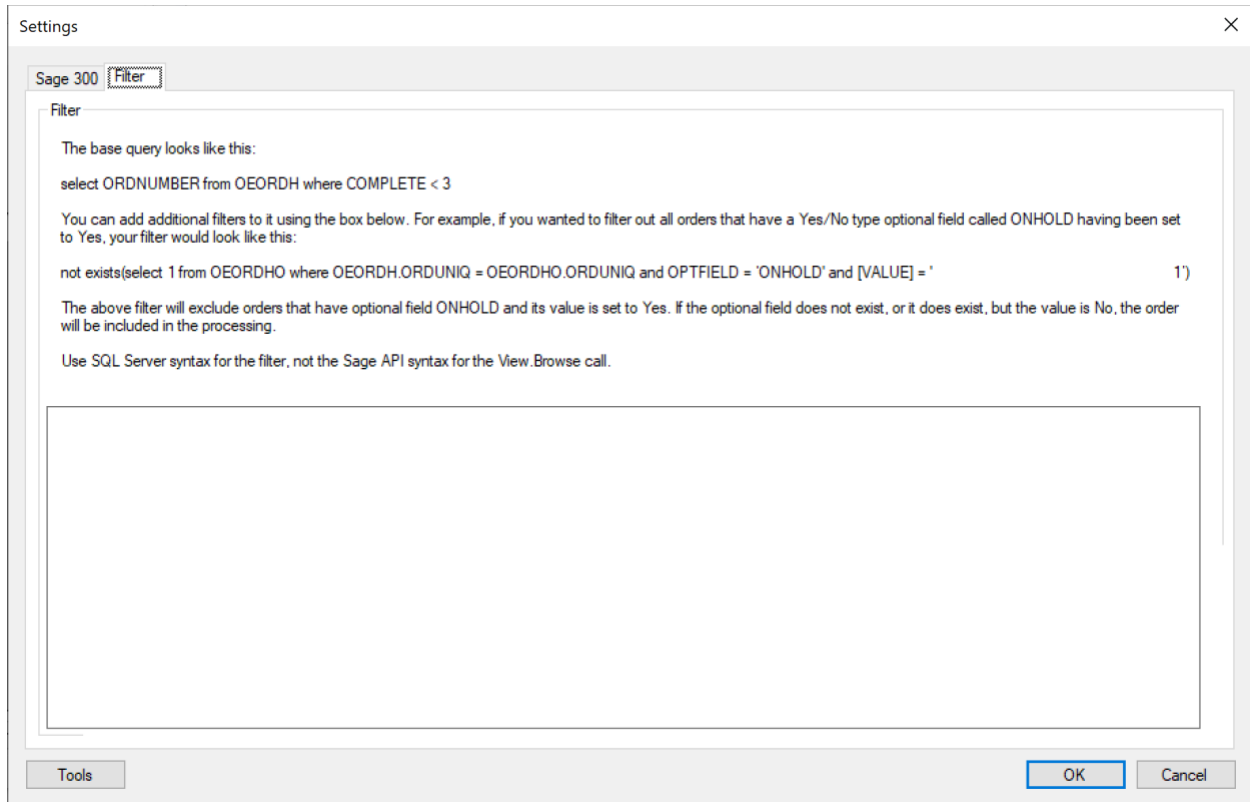
In order to auto-print picking slips and invoices, select the respective checkboxes and specify the printer name and the RPT file name to be used.



The screenshot shows a 'Settings' dialog box with a close button (X) in the top right corner. At the top left, there is a 'Sage 300 Filter' button. Below it are two sections: 'Picking Slip Printing' and 'Invoice Printing'.
In the 'Picking Slip Printing' section, there is a checked checkbox 'Print Picking Slip for Shipments'. Below it, 'Picking Slip Printer' is set to 'Print to PDF (Mac Desktop)' in a dropdown menu, and 'Picking Slip Report' is 'OEPICKSHIPMENT1.RPT' in a text field with a 'Browse...' button to its right.
In the 'Invoice Printing' section, there is a checked checkbox 'Print Invoices'. Below it, 'Invoice Printer' is set to 'Print to PDF (Mac Desktop)' in a dropdown menu, and 'Invoice Report' is 'OEINV01.RPT' in a text field with a 'Browse...' button to its right.
At the bottom of the dialog, there are three buttons: 'Tools', 'OK', and 'Cancel'.

3.3 Filter Shipments

By default, all orders that have not been completed yet are included. However, you can specify additional filters using the Filter tab of the Settings screen.



The screen provides an example of a filter that checks an optional field on the order header level, but you could also filter by any field on the header. The filter must conform to the SQL server syntax for the WHERE clause of the SQL SELECT statement.

4 Technical Requirements

The application is designed to work with Sage 300 version 2018, 2019, 2020 or later. It requires .NET Framework version 4.8. If required version of .NET Framework is not present on the target computer, you will be prompted to download it and directed to appropriate Microsoft web site.