

# TaiRox Productivity Tools User Guide

## Summary - Ship Orders

Ship Orders eliminates the time-consuming steps involved in shipping Order Entry orders from the Sage 300 Order Entry module. Ship Orders provides the ability to quickly print a number of order-related forms, without navigating to another window.

In many business situations items are on backorder and orders cannot be fulfilled. When items are received orders can be fulfilled and shipments need to be processed. In order to ship an order it must be identified and called up in the Order Entry module and shipped, which is a process that is very time consuming. Ship Orders allows you to easily identify those orders to be shipped by displaying a filtered list. Standard filtering by range and special filtering for items and locations is available.

Select from scenarios by choosing a drop-down option to ship:

- Only Orders That Can Be Completely Shipped
- Only Back Ordered Quantities in Selected Orders
- Only Committed Quantities in Selected Orders
- All Selected Orders, Allowing Partial Shipments

When large numbers of orders are processed, the accounting processing may lag behind the physical processing of the orders. Ship Orders provides a convenient way to adjust the Shipment and Invoice Dates.

## Overview - Ship Orders

Ship Orders selects Order Entry orders with the same mechanisms used by core modules when printing reports. You can also select orders that have line items which contain a specific item or items from a set of item numbers that you determine. Filtering by location is also available. After selection, the selected orders can be “cherry-picked” for shipment. Pressing a Process button completes the operation in one-step. Orders which are shipped can also be invoiced at the same time.

**Important Note Re Credit Limits:** If shipping orders would cause a customer to go beyond their credit limit and you wish the limit to be overridden, an option is provided to enter the name and password of a user with the rights to override this limit.

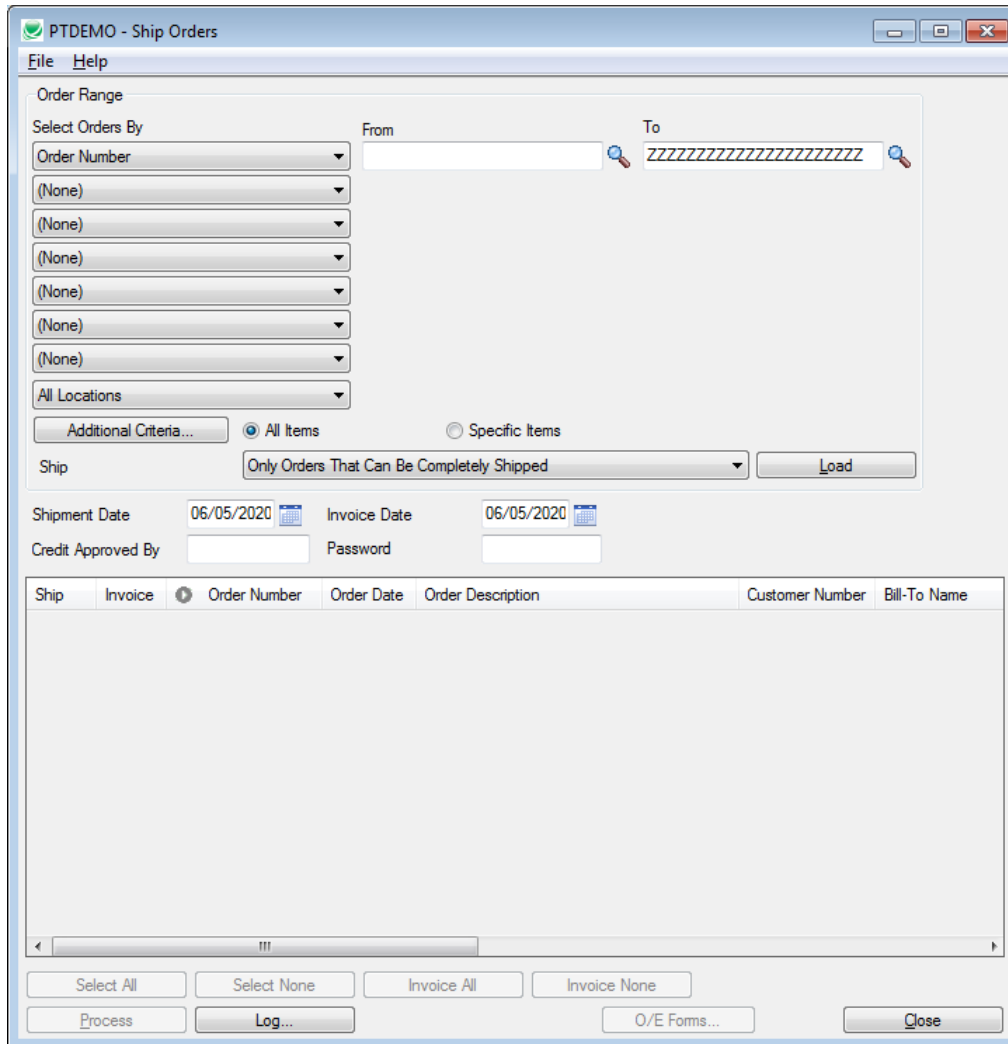
## Running Ship Orders

Once the TaiRox Productivity Tools are installed and activated, the Ship Orders icon will be shown from the TaiRox Productivity Tools menu on the Sage 300 desktop (and can be copied to other menu locations). If you choose to select orders using a specific item or set of items all orders that contain one or more items from the item set will be selected.

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## Running Ship Orders (continued)

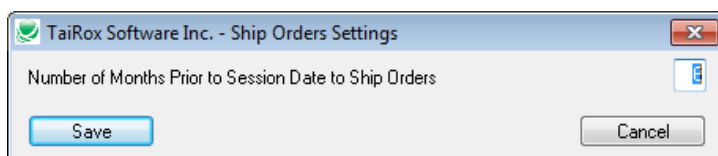
Launching the program will present a screen that allows you to select orders for shipment using various ranges:



### Notes:

- The last select-by-orders drop-down provides a means to filter by location. This means that orders are selected, any of whose detail lines match the specific location.
- There are radio buttons for selecting "All Items" or "Specific Items". When Specific Items is selected an icon will appear next to the radio buttons.

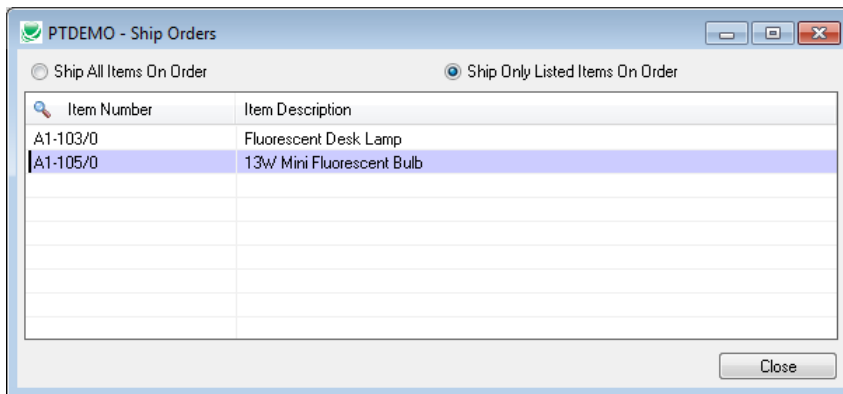
When a range of Order Dates is used, the default values are controlled by settings accessed through the File menu:



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## Running Ship Orders (continued)

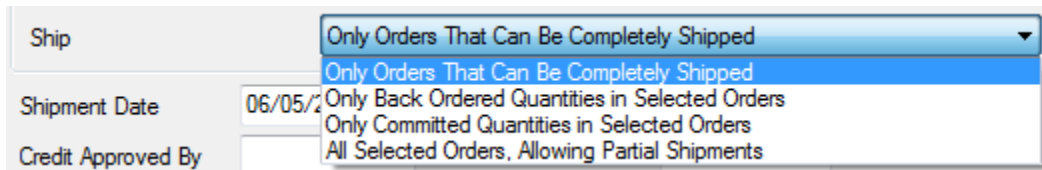
Clicking on the icon to select specific items will show you a pop-up window:



You can select to “Ship All Items on Order”, or “Ship Only List Items On Order”. If you choose “Ship All Items on Order” then all the items for the selected order will be shipped. If you choose “Ship Only List Items on Order” then all the items that you enter in the list will be shipped on an order, and any other items that appear on the order will not be shipped. Any miscellaneous charges that are entered on an order will also appear on the shipment.

## Shipment Scenarios

There are options to control shipments:



**Notes:** The A/R Customer Invoicing option "Allow Partial Shipments" is respected only for the "All Selected Orders" option. This option will also ship orders that are comprised only of miscellaneous changes. For the first 3 options, miscellaneous charges will be included in a shipment if and only if some item is shipped.

**Important Note:** Orders are selected for inclusion based on the moment that the Load button is pressed. The order may change before processing. Consult the log to see the actual processing that has taken place.

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## Running Ship Orders (continued)

When the Load button is pressed, the active orders that match the selection criteria will be displayed, with full drill-down support:

The screenshot shows the 'PTDEMO - Ship Orders' application window. It features a search interface with the following elements:

- Order Range:** A section with 'Select Orders By' dropdowns. The first dropdown is set to 'Order Number'. Below it are five '(None)' options and an 'All Locations' option.
- Search Criteria:** 'From' and 'To' text boxes. The 'To' box contains a string of 20 'Z' characters.
- Ship Criteria:** A dropdown menu set to 'Only Orders That Can Be Completely Shipped' and a 'Load' button.
- Filters:** 'Additional Criteria...' button, radio buttons for 'All Items' (selected) and 'Specific Items'.
- Date Fields:** 'Shipment Date' (06/05/2020) and 'Invoice Date' (06/05/2020) with calendar icons.
- Form Fields:** 'Credit Approved By' and 'Password' text boxes.
- Table:** A table with columns: Ship, Invoice, Order Number, Order Date, Order Description, Customer Number, Bill-To Name. It contains 10 rows of order data.
- Buttons:** 'Select All', 'Select None', 'Invoice All', 'Invoice None', 'Process', 'Log...', 'O/E Forms...' (highlighted with a red box), and 'Close'.

Ship	Invoice	Order Number	Order Date	Order Description	Customer Number	Bill-To Name
No	No	ORD0000000000001	1/15/2019	Please ship ASAP	1200	Mr. Ronald Black
No	No	ORD0000000000002	1/15/2019	No backorder please	1210	ACME Plumbing
No	No	ORD0000000000063	6/30/2020	No backorder	1105	Bargain Mart - Oak
No	No	ORD0000000000066	2/5/2020		1200	Mr. Ronald Black
No	No	ORD0000000000067	2/5/2020		1210	ACME Plumbing
No	No	ORD0000000000068	2/5/2020		1240	The Courtyard
No	No	ORD0000000000069	2/5/2020		1500	Custom Comfort
No	No	ORD0000000000070	2/5/2020		1200	Mr. Ronald Black
No	No	ORD0000000000071	2/5/2020		1200	Mr. Ronald Black

The orders to be shipped and invoiced can be selected / de-selected on an individual basis (“cherry-picked”). You can choose to invoice orders as well as shipping those orders by selecting "Yes" in the Invoice column. A warning message will be displayed after pressing the Process button.

Clicking on the O/E Forms button pops-up a window, so that you can select a form to print using the Sage 300 printing functions.

The screenshot shows the 'O/E Forms' application window. It features a search interface with the following elements:

- Search Fields:** Three text boxes labeled 'Order Number', 'Shipment Number', and 'Invoice Number'. The 'Order Number' box contains 'ORD0000000000001'.
- Buttons:** 'Print Order Confirmation...', 'Print Picking Slip...', 'Print Invoice...', and 'Close'.