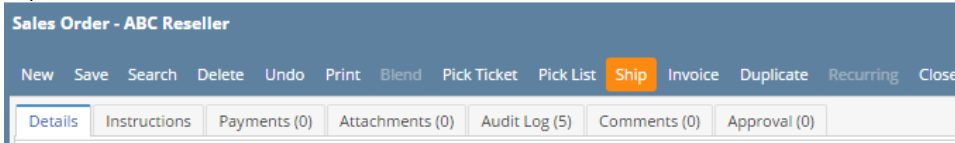


How to Process Sales Order to Inventory Shipment

1. Open the Sales Order record that will be processed to Inventory Shipment. If the sales order is not yet created, refer to [How to Create Sales Order](#).
2. Click the **Ship button**. If the Sales Order is not yet saved, it will be saved automatically. **BOL** and **Freight Terms** are required details during shipment.



Sales Order - ABC Reseller

New Save Search Delete Undo Print Blend Pick Ticket Pick List **Ship** Invoice Duplicate Recurring Close

Details Instructions Payments (0) Attachments (0) Audit Log (5) Comments (0) Approval (0)

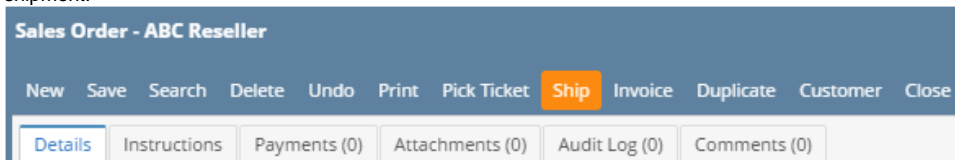
This button will process to Inventory Shipment the following items.

1. All non-lot track inventory items that are not yet invoiced.
2. All lot track inventory items.



Ship button will not process to Inventory Shipments the following item types: 1) Non-Inventory, 2) Other Charge, 3) Software, 4) Service, 5) miscellaneous items. These items are directly [processed to Invoice](#).

1. Open the Sales Order record that will be processed to Inventory Shipment. If the sales order is not yet created, refer to [How to Create Sales Order](#).
2. Click the **Ship button**. If the Sales Order is not yet saved, it will be saved automatically. BOL and Freight Terms are required details during shipment.



Sales Order - ABC Reseller

New Save Search Delete Undo Print Pick Ticket **Ship** Invoice Duplicate Customer Close

Details Instructions Payments (0) Attachments (0) Audit Log (0) Comments (0)

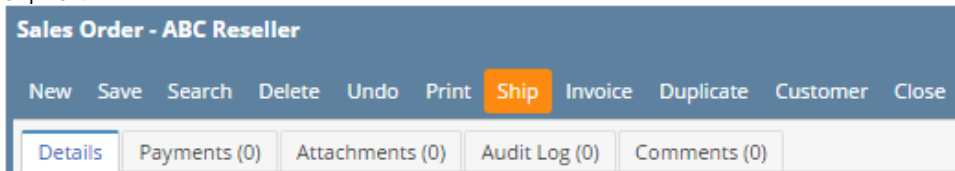
This button will process to Inventory Shipment the following items.

1. All non-lot inventory items that are not yet invoiced.
2. All lotted inventory items.



Ship button will not process to Inventory Shipments the following item types: 1) Non-Inventory, 2) Other Charge, 3) Software, 4) Service, 5) miscellaneous items. These items are directly [processed to Invoice](#).

1. Open the Sales Order record that will be processed to Inventory Shipment. If the sales order is not yet created, refer to [How to Create Sales Order](#).
2. Click the **Ship button**. If the Sales Order is not yet saved, it will be saved automatically. BOL and Freight Terms are required details during shipment.



Sales Order - ABC Reseller

New Save Search Delete Undo Print **Ship** Invoice Duplicate Customer Close

Details Payments (0) Attachments (0) Audit Log (0) Comments (0)

This button will process to Inventory Shipment the following items.

1. All non-lot inventory items that are not yet invoiced.
2. All with lot inventory items.



Ship button will not process to Inventory Shipments the following item types: 1) Non-Inventory, 2) Other Charge, 3) Software, 4) Service, 5) miscellaneous items. These items are directly [processed to Invoice](#).

The item types Other Charge, Software, Service, and Non-Inventory will not be processed to Inventory Shipment. In order to invoice these items, you can add this to Invoice transaction via Add Inventory Shipment screen. Refer to [How to Process Sales Order to Invoice](#).

1. Open the Sales Order record that will be processed to Inventory Shipment.

Sales Order - ABC Reseller

Details Attachments Audit Log

Type: Standard Recurring: ☐ Bill To: ABC Reseller Ordered By: irelyadmin Order No: SO-5

Customer: 0001005066 Ship To: ABC Reseller PO Number: PO#04 Salesperson: 0001005049 Status: Open

Date: 01/21/2016 Due: 01/21/20 Ship Via: Truck BOL No: BOL#04 Split: Currency: USD

Location: 0001 - Fort Wayne Terms: Due on Receipt Freight Term: Truck Comments: Sample sales order. DUP: SO-4

Item No	Contract...	Description	UOM	Shipped	Ordered	Discoun...	Tax	Price	Total	Tax Group
87G		87 Unleaded Gasoline	Gallon	0.00	100.00	0.00	12.95	1.850000	185.00	IN SST
		sample misc item		0.00	5.00	0.00	0.00	4.160000	20.80	
				0.00	0.00	0.00	0.00	0.000000	0.00	

Bill To: ABC Reseller Somewhere St. Fortville, IN 46040 United States

Ship To: ABC Reseller Somewhere St. Fortville, IN 46040 United States

Item: On Hand: On Order (PO): Committed: Back Order:

Subtotal: 205.80
Shipping: 0.00
Tax: 12.95
Total: 218.75

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2. Click the **Process** toolbar button. If the Sales Order is not yet saved, it will be saved automatically.

Sales Order - ABC Reseller

New Save Search Delete Undo Print **Process** Duplicate Customer Close

Details Attachments Audit Log



BOL No and **Freight Terms** are required details when processing a Sales Order to Inventory Shipment.

The Sales Order will be closed and the Inventory Shipment screen will be displayed.

Inventory Shipment - IS-3

Details Charges Notes Attachments Audit Log

Order Type: Sales Order Source Type: None Ship Date: 01/21/2016 Reference Number: SO-5 Requested Arrival: Customer: 0001005066 Customer Name: ABC Reseller Freight Terms: Truck Shipment No: IS-3

Shipping Details Shipping Company Delivery

Ship From: 0001 - Fort Wayne 4242 Flagstaff Cove Ship To: ABC Reseller Somewhere St. Instructions: Comments: Sample sales order. DUP: SO-4

Order No.	Item No.	Description	Order Qty	Order UOM	Sub Location	Storage Location	Quantity	UOM	Weight UOM	Unit
SO-5	87G	87 Unleaded Gasoline	100	Gallon			100	Gallon		
							0			

Ready Page 1 of 1

The item types Other Charge, Software, Service, and Non-Inventory will not be processed to Inventory Shipment. In order to invoice these items, you can add this to Invoice transaction via Add Inventory Shipment screen. Refer to [How to Process Sales Order to Invoice](#).

1. Open the Sales Order record that will be processed to Inventory Shipment.

Sales Order - Home Dealers

Customer: HOMEDEALER Location: 1000-Location A Date: 06/30/2015 Currency: USD BOL No: 123XWU2 Order Status: Open Order No: SO-4

Bill To: US Ship To: US

US 18 Central St. Edison, OH, 43320

US 18 Central St. Edison, OH, 43320

Salesperson: JAS PO Number:

Ship Via: UPS Ground Terms: Due 28th of the Month

Ordered By: AGADMIN Due Date: 07/28/2015

Comments: Process sales order to inventory shipment. Freight Terms: Deliver Split:

Item No	Description	UOM	Ordered	Shipped	Discoun...	Tax	Price	Total
Bag	Inventory Type	Dozen	1.00	0.00	0.00	0.00	22.00	22.00
Other Charge	other charge	Week	1.00	0.00	0.00	0.00	21.55	21.55
			0.00	0.00	0.00	0.00	0.00	0.00

Item: Bag - Inventory Type

On Hand: 0 On Order (PO): 0

Committed: 0 Back Order: 0

Subtotal: 43.550000

Shipping: 0.000000

Tax: 0.000000

Total: 43.550000

2. Click the **Process** toolbar button. If the Sales Order is not yet saved, it will be saved automatically.

Sales Order - Home Dealers

New Save Search Delete Undo **Process** Duplicate Customer Close

Details Attachments



BOL No and **Freight Terms** are required details when processing a Sales Order to Inventory Shipment.

The Sales Order will be closed and the Inventory Shipment screen will be displayed.

Inventory Shipment - INVSHIP-1

Order Type: Sales Order Ship Date: 06/30/2015 Reference Number: SO-4 Requested Arrival: Customer: HOMEDEALER Customer Name: Home Dealers Freight Terms: Deliver Shipment No: INVSHIP-1

Shipping Details: Ship From: 1000-Location A, 100 E Main St Ship To: US, 18 Central St. Instructions: Comments: Process sales order to inventory shipment.

Order No	Item No	Description	Sub Location	Order Qty	Order UOM	Quantity	UOM	Weight UOM	Unit Price	Tax Code
SO-4	Bag	Inventory Type		1	Dozen	1	Dozen		22	
						0			0	

Subtotal: 43.550000

Shipping: 0.000000

Tax: 0.000000

Total: 43.550000