

Ship and Invoice Orders User Guide

Table of Contents

- 1 Overview3
- 2 Shipping and Invoicing Outstanding Orders3
- 3 Settings.....3
 - 3.1 Consolidating Shipments.....4
 - 3.2 Printing Invoices4
 - 3.3 Filter Shipments4
- 4 Technical Requirements.....5

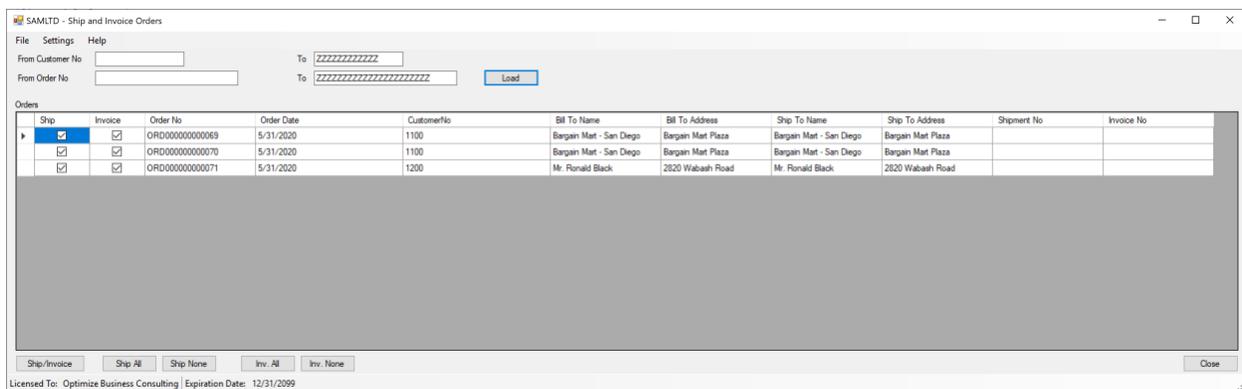
1 Overview

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.



The outstanding orders can be limited by a range of customer numbers and a range of order numbers. 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.

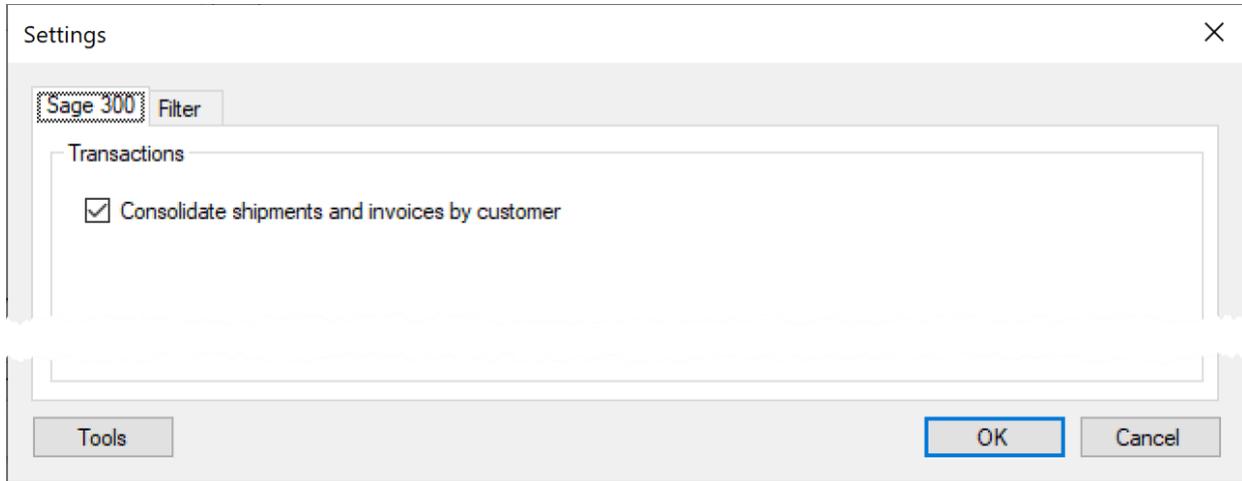
3 Settings

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

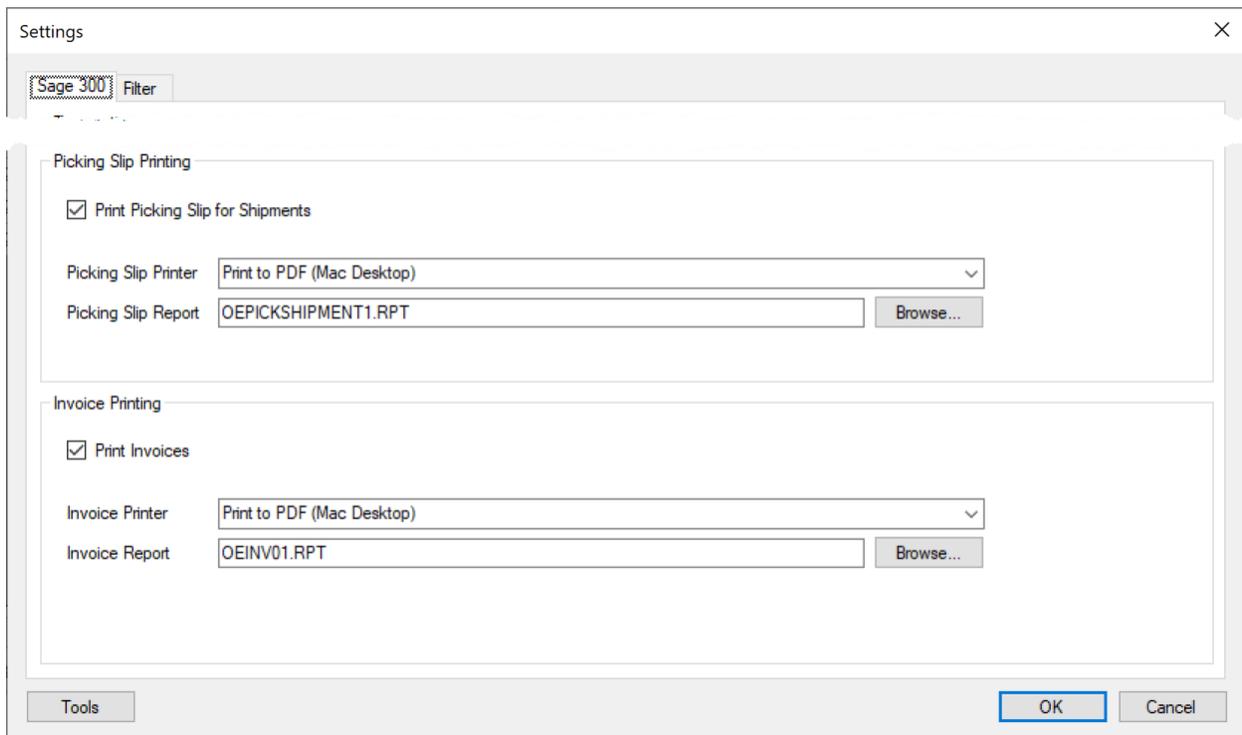
3.1 Consolidating Shipments

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



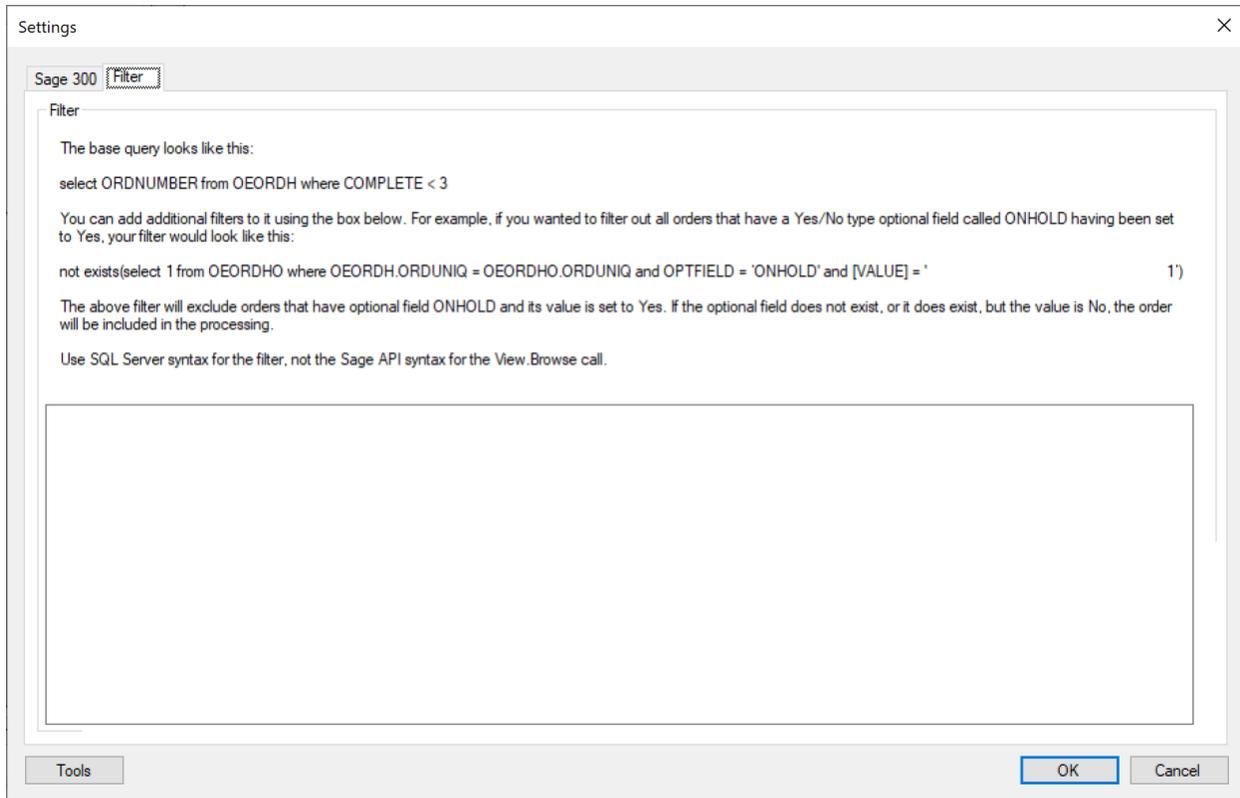
3.2 Printing Invoices

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.



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.