

Collect and then Ship

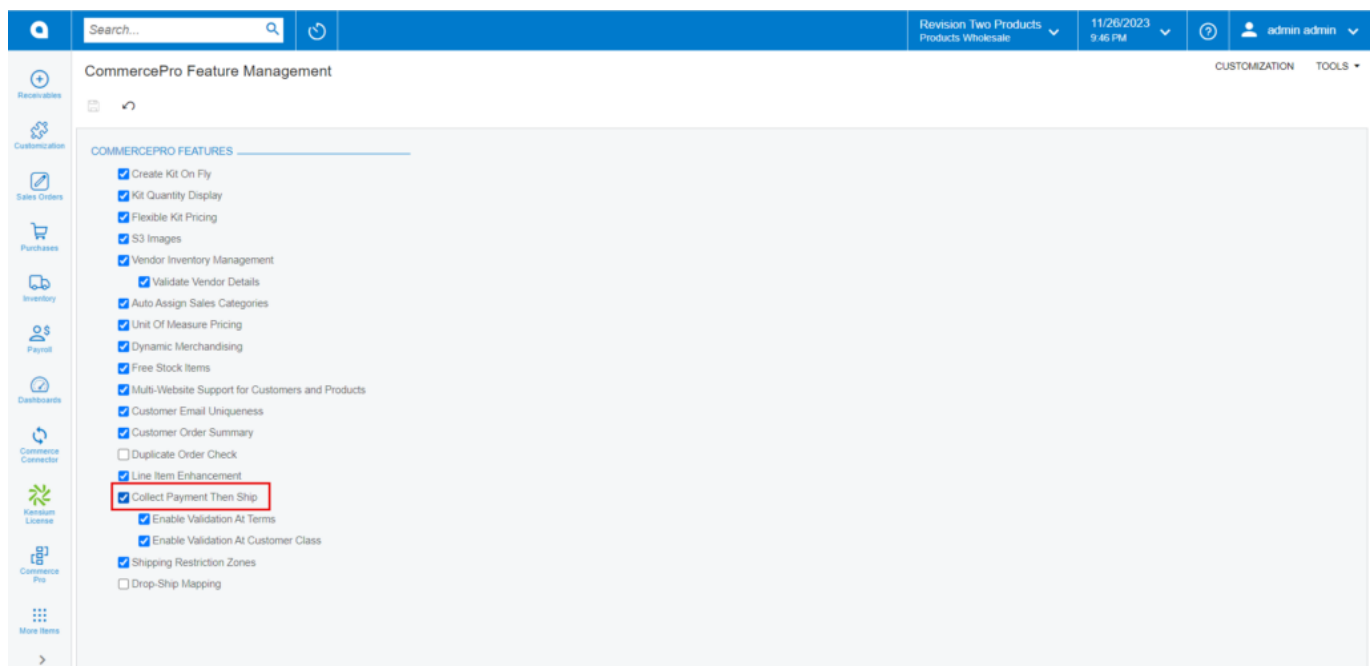


The payment validation for shipments is a configuration feature that a customer has an unpaid balance. If a shipment is attempted on an unpaid order, the system will display an alert message.

- To access **[Collect and then ship]**, you must enable the check box for **[collect and then ship]**, under CommercePro Features.
- Click on **[Save]**.

The Impacted areas for Collect and then ship is below.

- Customer Class
- Credit Items
- Sales Orders
- Shipment
- Process Orders
- Process Shipments



CommercePro

- You need search for **[Customer Classes]** or **[Credit Terms]** to view the **[shipment control settings]**.

Acumatica

CREDIT

Revision Two Products Products Wholesale

11/22/2023 1:02 AM

admin admin

Material Requirements Planning

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Receivables

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CommercePro

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Discrepancy by Account

Discrepancy by Customer

Discrepancy by Document

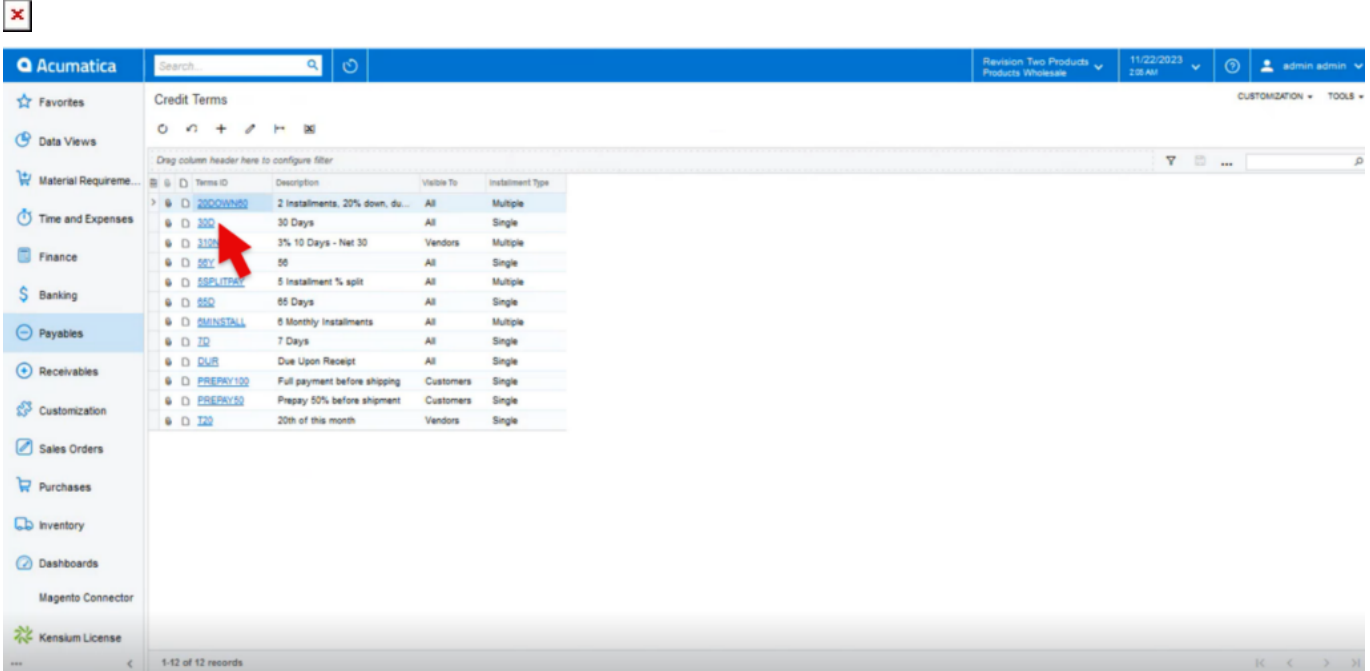
Contract Management

Customization

Tools

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- Click on **[Credit Terms]** under Profiles.
- You will be navigated to the screen below.

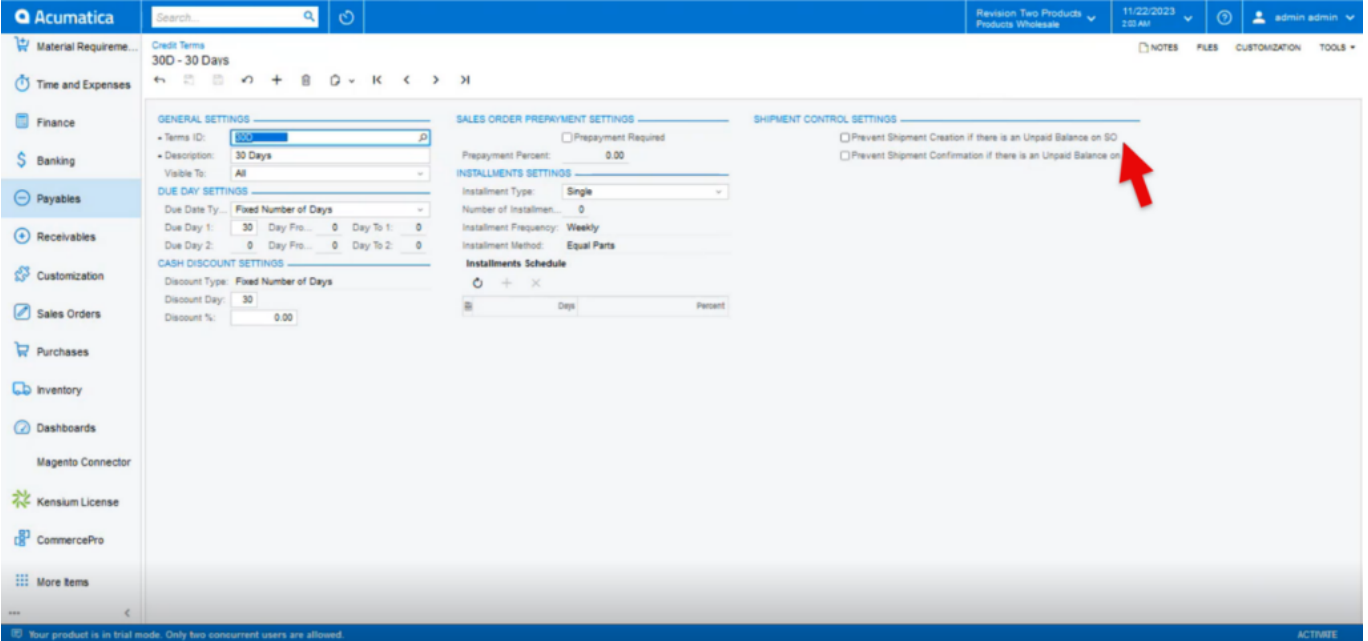


The screenshot shows the Acumatica interface with the 'Credit Terms' screen. The left sidebar contains various navigation options, and the main area displays a table of credit terms. A red arrow points to the '200' term ID in the first column of the table.

| Terms ID | Description | Value To | Instalment Type |
|-----------|--------------------------------|-----------|-----------------|
| 200 | 2 Instalments, 20% down, de... | All | Multiple |
| 200 | 30 Days | All | Single |
| 210 | 3% 10 Days - Net 30 | Vendors | Multiple |
| 501 | 50 | All | Single |
| 50PLT001 | 5 Instalment % split | All | Multiple |
| 50Q | 60 Days | All | Single |
| 50INSTALL | 6 Monthly Instalments | All | Multiple |
| 70 | 7 Days | All | Single |
| DU0 | Due Upon Receipt | All | Single |
| PREPAY100 | Full payment before shipping | Customers | Single |
| PREPAY50 | Prepay 50% before shipment | Customers | Single |
| 720 | 20th of this month | Vendors | Single |

Credit terms (1)

- Click on one of the **[Terms ID]**, you will be navigated to the below screen.



The screenshot shows the Acumatica CommercePro interface. The left sidebar contains navigation options like Material Requirements, Time and Expenses, Finance, Banking, Payables, Receivables, Customization, Sales Orders, Purchases, Inventory, Dashboards, Magento Connector, Kensium License, CommercePro, and More Items. The main area displays the 'Credit Terms' configuration for '30D - 30 Days'. It is divided into three sections: GENERAL SETTINGS, SALES ORDER PREPAYMENT SETTINGS, and SHIPMENT CONTROL SETTINGS. The SHIPMENT CONTROL SETTINGS section is highlighted with a red arrow and contains two checkboxes: 'Prevent Shipment Creation if there is an Unpaid Balance on SO' and 'Prevent Shipment Confirmation if there is an Unpaid Balance on SO'.

Credit terms(2)

You can view **[Prevent Shipment Creation If There Is an Update Balance On SO]**, **[Prevent Shipment Confirmation If There Is an Update Balance On]** under **[Commerce Pro Shipment Control Settings]**.

- Prevent Shipment Creation If There Is an Update Balance On SO: If you enable this radio button the sales orders shipment will be stopped If there is any unpaid balance for a sale order at shipment creation level.

Note: If the credit limit is zero, you will then receive an alert; if the credit limit is any other amount, you will not receive any alert messages.

- Prevent Shipment Creation If There Is an Update Balance On: If you enable this radio button the sales orders shipment will be stopped If there is any unpaid balance for a sale order at shipment Confirmation level.