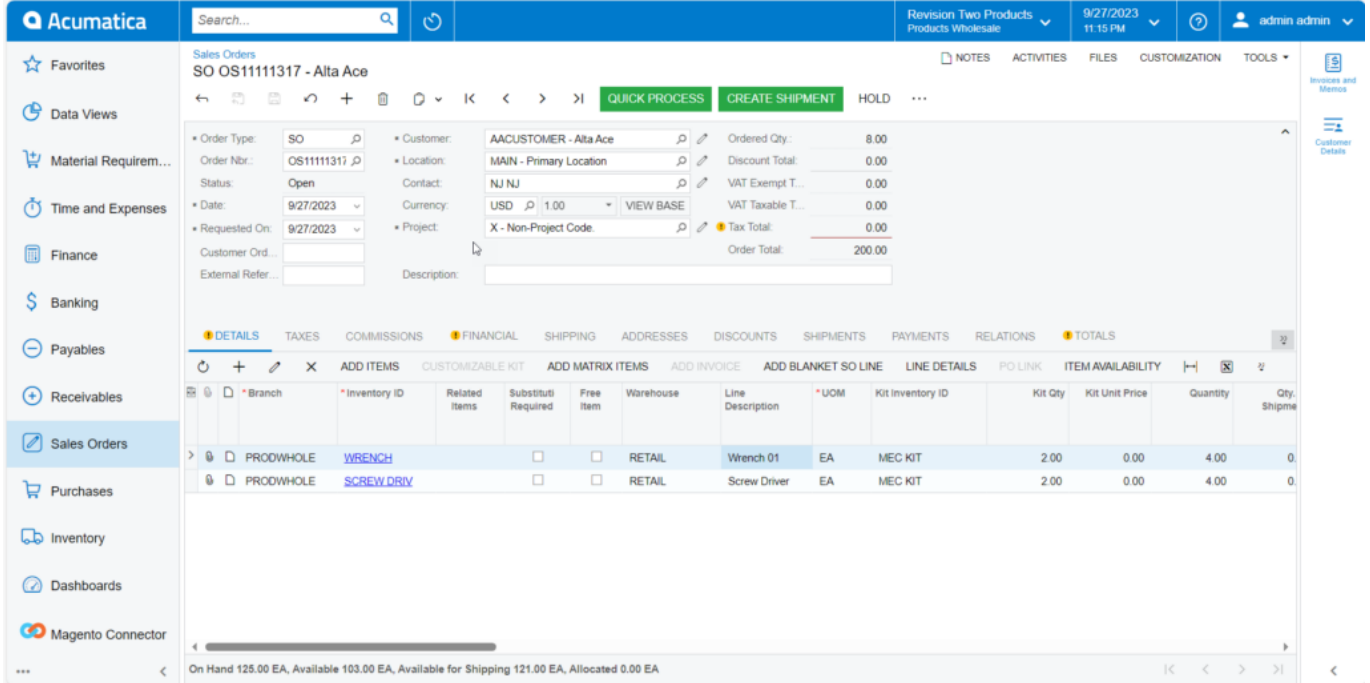


# Creating Shipment



To create a shipment, click on the **[Create Shipment]** tab from the sales order as shown in the following screenshot.

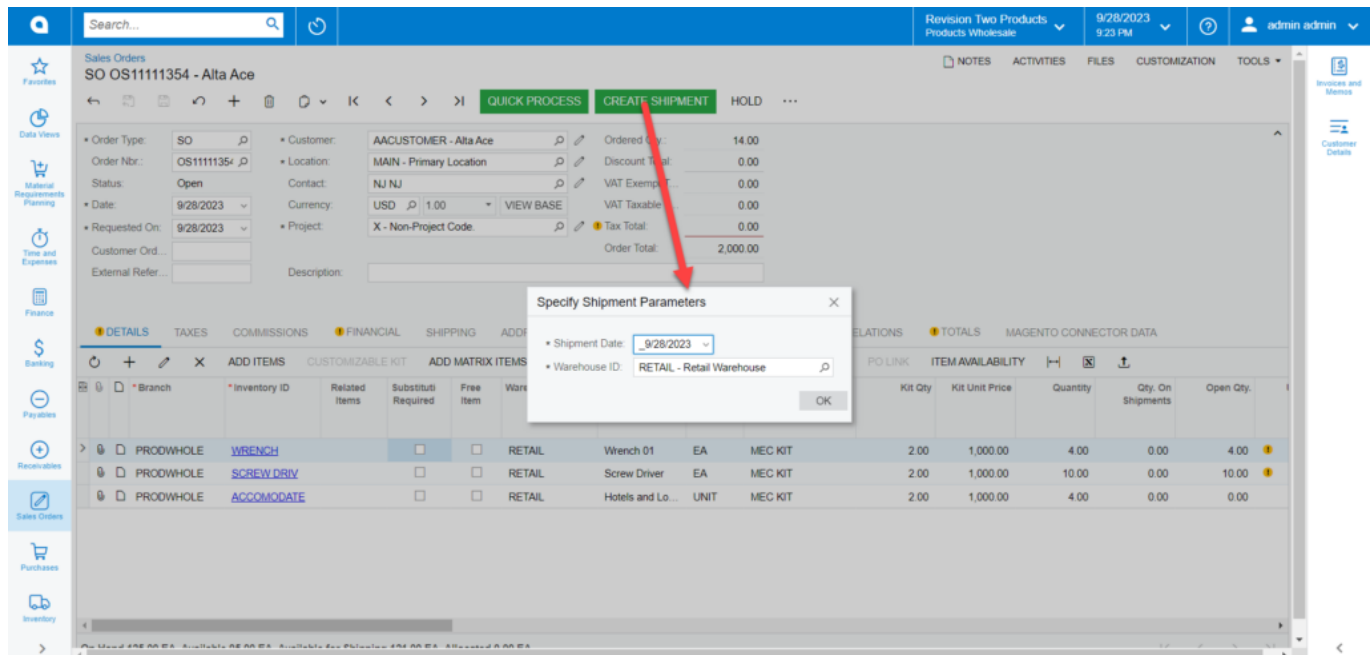


The screenshot shows the Acumatica Sales Order interface. The top navigation bar includes the Acumatica logo, a search bar, and user information (admin admin). The left sidebar lists various modules like Favorites, Data Views, Material Requirements, Time and Expenses, Finance, Banking, Payables, Receivables, Sales Orders (highlighted), Purchases, Inventory, Dashboards, and Magento Connector. The main content area displays the Sales Order details for 'SO OS11111317 - Alta Ace'. The 'CREATE SHIPMENT' tab is active, showing fields for Order Type (SO), Order Nbr (OS11111317), Status (Open), Date (9/27/2023), Requested On (9/27/2023), Customer (AACUSTOMER - Alta Ace), Location (MAIN - Primary Location), Contact (NJ NJ), Currency (USD 1.00), Project (X - Non-Project Code), and Order Total (200.00). Below these fields, there are tabs for DETAILS, TAXES, COMMISSIONS, FINANCIAL, SHIPPING, ADDRESSES, DISCOUNTS, SHIPMENTS, PAYMENTS, RELATIONS, and TOTALS. The 'DETAILS' tab is selected, showing a table with columns for Branch, Inventory ID, Related Items, Substituted, Free Item, Warehouse, Line Description, UOM, Kit Inventory ID, Kit Qty, Kit Unit Price, Quantity, and Qty. The table lists two items: 'WRENCH' and 'SCREW DRIVER', both with a quantity of 4.00. At the bottom, a status bar indicates 'On Hand 125.00 EA, Available 103.00 EA, Available for Shipping 121.00 EA, Allocated 0.00 EA'.

Create Shipment option in Sales Order

By clicking on the **[Create Shipment]** tab a pop-up will appear on the screen **[Specify Shipment Parameter]** on the Sales Order screen. This includes the following as shown below:

- **Shipment Date:** You can choose the date from the calendar on the cart button.
- **Warehouse ID:** Select the Warehouse ID.

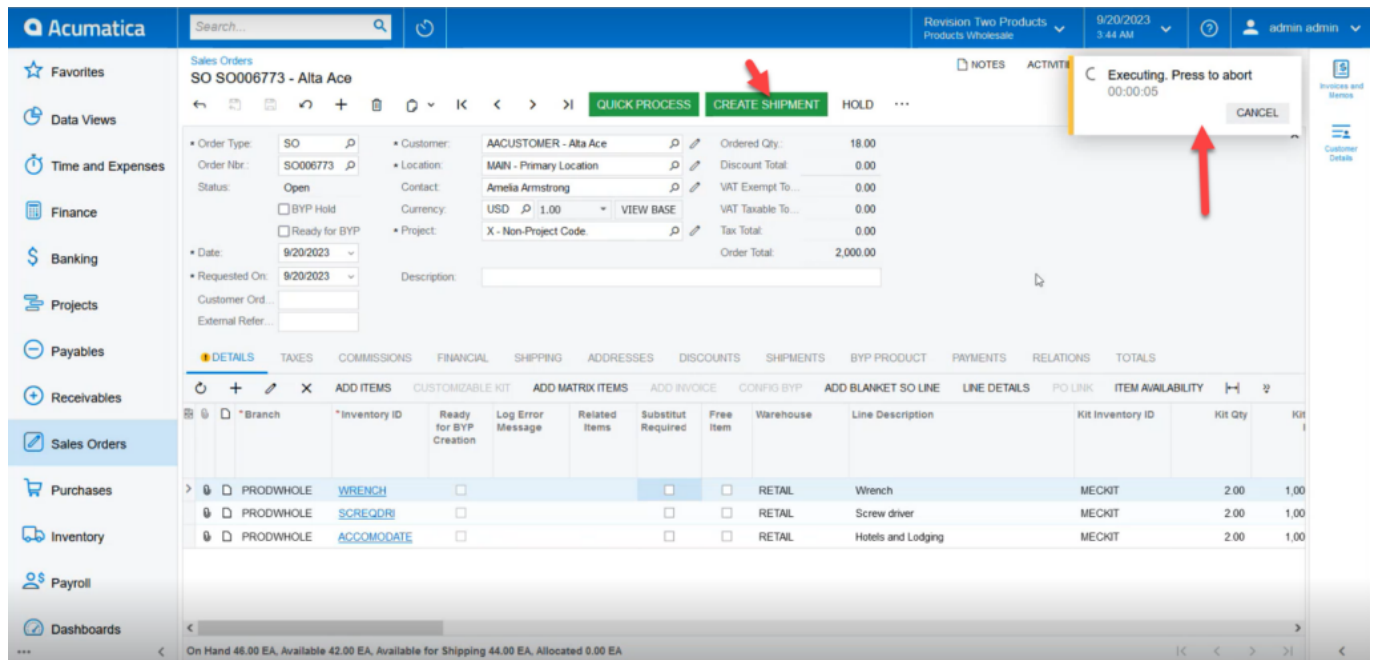


The screenshot shows the Fusion Customizable Kits application interface. At the top, there is a search bar and a navigation menu. The main area displays a sales order for 'SO OS11111354 - Alta Ace'. A red arrow points to the 'CREATE SHIPMENT' button. A dialog box titled 'Specify Shipment Parameters' is open, showing a 'Shipment Date' of '9/28/2023' and a 'Warehouse ID' of 'RETAIL - Retail Warehouse'. The dialog box has an 'OK' button. Below the dialog box, there is a table with columns: 'Branch', 'Inventory ID', 'Related Items', 'Substituted', 'Free Item', 'Warehouse', 'Kit Qty', 'Kit Unit Price', 'Quantity', 'Qty. On Shipments', and 'Open Qty.'. The table contains three rows of data for 'WRENCH', 'SCREW DRIV', and 'ACCOMMODATE'.

Branch	Inventory ID	Related Items	Substituted	Free Item	Warehouse	Kit Qty	Kit Unit Price	Quantity	Qty. On Shipments	Open Qty.
PRODWHOLE	WRENCH				RETAIL	2.00	1,000.00	4.00	0.00	4.00
PRODWHOLE	SCREW DRIV				RETAIL	2.00	1,000.00	10.00	0.00	10.00
PRODWHOLE	ACCOMMODATE				RETAIL	2.00	1,000.00	4.00	0.00	0.00

### Specify Shipment parameters

Clicking on **[OK]** the application will show the progress at the top right-hand corner of the screen as shown in the following screenshot.



The screenshot shows the Acumatica software interface. On the left is a navigation menu with options like Favorites, Data Views, Time and Expenses, Finance, Banking, Projects, Payables, Receivables, Sales Orders (highlighted), Purchases, Inventory, Payroll, and Dashboards. The main area displays a Sales Order for 'SO SO006773 - Alta Ace'. It includes fields for Order Type (SO), Order Nbr (SO006773), Status (Open), Date (9/20/2023), and Customer (AACUSTOMER - Alta Ace). A 'CREATE SHIPMENT' button is visible and highlighted with a red arrow. A modal dialog box is open in the top right corner, displaying 'Executing. Press to abort' and a 'CANCEL' button, also highlighted with a red arrow. Below the order details is a table with columns for Branch, Inventory ID, Ready for BYP Creation, Log Error Message, Related Items, Substituted Required, Free Item, Warehouse, Line Description, Kit Inventory ID, Kit Qty, and Kit. The table lists three items: WRENCH, SCREWDRI, and ACCOMODATE, all with a quantity of 2.00.

Shipping Order processed in Acumatica

Once the process is complete within Acumatica you will be able to view the following screen.

Acumatica

Search...

Revision: Two Products  
Products Wholesale

9/20/2023  
3:44 AM

admin admin

Shipment: 004369 - Alta Ace

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

CONFIRM SHIPMENT HOLD

Shipment Nbr.: 004369 Customer: AACUSTOMER - Alta Ace Shipped Quant.: 18.00  
 Type: Shipment Location: MAIN - Primary Location Shipped Weight: 0.000000  
 Status: Open Warehouse ID: RETAIL - Retail Warehouse Shipped Volume: 0.000000  
 Operation: Issue Workgroup: Packages: 0  
 Shipment Date: 9/20/2023 Owner: Maxwell Baker Package Weight: 0.000000  
 Description:

DETAILS ORDERS SHIPPING PACKAGES

Order Type	Order Nbr.	Inventory ID	Free Item	Warehouse	Location	UOM	Kit Inventory ID	Kit Qty	Shipped Qty.	Ordered Qty.	Open Qty.	Picked Qty.	Packed Qty.
SO	SO006773	WRENCH		RETAIL	STORAGE	EA	MECKIT	2.00	4.00	4.00	0.00	0.00	0.0
SO	SO006773	SCREWDRI		RETAIL	STORAGE	EA	MECKIT	2.00	10.00	10.00	0.00	0.00	0.0
SO	SO006773	ACCOMODATE		RETAIL	STORAGE	DAY	MECKIT	2.00	4.00	4.00	0.00	0.00	0.0

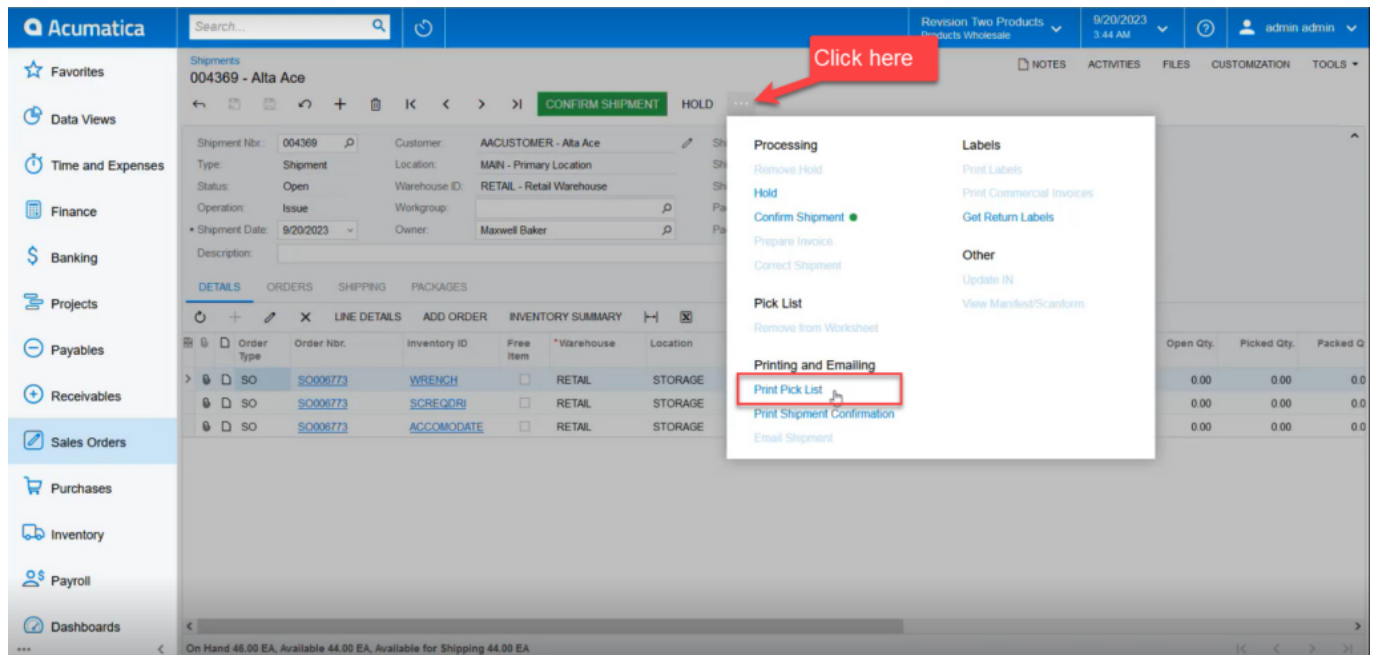
On Hand 46.00 EA, Available 44.00 EA, Available for Shipping 44.00 EA

Option for [Confirm Shipment]

You will be able to view an ellipse [...] button followed by **[Confirm Shipment]**. You need to click on the ellipses button you will get a smart panel with the following option.

- Processing
- Labels
- Pick List
- Other
- Printing and Emailing

Under the Printing and Emailing click on the [Print Pick List] and you will be redirected to **[Pick List]**.



The screenshot shows the Acumatica software interface. On the left is a sidebar with navigation icons for Favorites, Data Views, Time and Expenses, Finance, Banking, Projects, Payables, Receivables, Sales Orders (highlighted), Purchases, Inventory, Payroll, and Dashboards. The main area displays a 'Shipments' form for '004369 - Alta Ace'. The form includes fields for Shipment Nbr., Type, Status, Operation, Shipment Date, Customer, Location, Warehouse ID, Workgroup, and Owner. Below these fields are tabs for DETAILS, ORDERS, SHIPPING, and PACKAGES. The 'DETAILS' tab is active, showing a table with columns: Order Type, Order Nbr., Inventory ID, Free Item, Warehouse, and Location. The table contains three rows of data. A dropdown menu is open from the 'CONFIRM SHIPMENT' button, with a red arrow pointing to it and the text 'Click here'. The menu has several sections: 'Processing' (Remove Hold, Hold, Confirm Shipment, Prepare Invoice, Correct Shipment), 'Pick List' (Remove from Worksheet), 'Printing and Emailing' (Print Pick List, Print Shipment Confirmation, Email Shipment), and 'Labels' (Print Labels, Print Commercial Invoices, Get Return Labels, Update IN, View Manifest/Scanform). The 'Print Pick List' option is highlighted with a red box.

Print Pick List option under Printing and Emailing

Based on the selection of Report Setting **[Child/ Parent/Both]** the [Pick List] will show the values.

Pick List

TOOLS

PRINT

SEND

EXPORT

Type your query here

Find

Company:

Revision Two Products

User:

admin admin

Date:

9/29/2023 3:45 AM

Page:

1 of 1

Pick List

Shipment Number

004369

Shipment Date

9/29/2023

Customer ID

AACUSTOMER

Customer Name

Alta Ace

Warehouse

RETAIL

Contact

Maxwell Baker

Ship Via

1

STORAGE

WRENCH Wrench

0.00

0.00

EA

4.00

2

STORAGE

SCREEDR Screw driver

0.00

0.00

EA

10.00

3

STORAGE

ACCOMODATE Hotels and Lodging

0.00

0.00

DAY

4.00

Total Weight

0.00

Total Volume

0.00

Pulled

Inspected


Packed

Scan to Confirm Picked Items

1 of 1

Preview of Print Pick List

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