

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

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(+)	CommercePro Feature Management			CUST	TOMIZATION	TOOLS .
Receivables	□ 0					
253	<u> </u>					
Customization	COMMERCEPRO FEATURES					
	Create Kit On Fly					
Sales Orders	Kit Quantity Display					
	Flexible Kit Pricing					
Å	✓ S3 Images					
Purchases	Vendor Inventory Management					
G	✓ Validate Vendor Details					
Inventory	✓ Auto Assign Sales Categories					
ద్ది	✓ Unit Of Measure Pricing					
Payroll	Dynamic Merchandising					
-	✓ Free Stock Items					
Dashboards	Multi-Website Support for Customers and Products					
	🗹 Customer Email Uniqueness					
\$	Customer Order Summary					
Connector	Duplicate Order Check					
	Cline Item Enhancement					
Kensium License	Collect Payment Then Ship					
License	Enable Validation At Terms					
ر ^ا	Enable Validation At Customer Class					
Commerce Pro	Shipping Restriction Zones					
PTO	Drop-Ship Mapping					
More Items						
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CommercePro

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





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7 illes	Customer Classes New Record						► NOTES	ACTIVITIES	FILES CUS	TOMIZATION	TOOLS .
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ews	Class ID:	م									
1	Description:										
and ses	GENERAL GLACCO	UNTS DUNNING ATTRIBUT	ES MAILING & PRINTING	3							
	DEFAULT GENERAL SETT	INGS	DEFAULT FINANCIAL SE	TTINGS		COMMERCE PRO	SHIPMENT CONTROL SETTINGS				
	Country:	US - United States of America ,P	Terms:	30D - 30 Days	Q,		Prevent Shipment Creation if there	is an Unpaid Balar	ice on SO		
~	Restrict Visibility To:	~	Statement Cycle ID:	EOM	Q.		Prevent Shipment Confirmation if the	ere is an Unpaid B	alance on		
9	Tax Zone ID:	Q	Payment Method:	CHECK - Check	k "P	COMMERCE PRO	MULTI BRANCH SUPPORT				
		Require Tax Zone		Auto-Apply Pa	ryments	Website(s):			~		
ta .	 Entity Usage Type: 	Default v		Apply Overdu	e Charges						
		Require Entity Usage Type	Overdue Charge ID:								
) les		Default Location ID from Branch		Z Enable Write-	Offs						
	Price Class:	Q	Write-Off Limit:	10.00							
)	Default Restriction Group	Q,	Currency ID:	USD ,P 🛃	Enable Currency Override						
bles	Salesperson ID:	SP0001 - Jason Mendenhall ,0	Currency Rate Type:	SPOT ,P	Enable Rate Override						
	DEFAULT DELIVERY SET	TINGS	Group/Document Disco.	50.00							
ation	Ship Via:	Q,		Pay by Line							
	Shipping Terms:	Q,		Apply Retaina	ge						
) Iders	Shipping Rule:	Cancel Remainder v	DEFAULT PRINT AND EN	AIL SETTINGS							
	DEFAULT CREDIT VERIFI	CATION SETTINGS	Send Invoices by Em	ail 🗌 Pr	int Invoices						
1	Credit Verification:	Limit and Days Past Due 🗸 🗸	Send Dunning Letters	s by Email 🛛 🛃 Pr	int Dunning Letters						
105	Credit Limit:	10,000.00	Send Statements by	Email Pr	int Statements						
, I	Over-Limit Amount:	0.00	Statement Type:	Open I	tem v						
	Credit Days Past Due:	90		Multi	Currency Statements						

CommercePro (1)

Acumatica	CREDIT I Q				Revision Two Products Products Wholesale	11/22/2023 203 AM	0	💄 admin	admin 🗸
Material Requireme	MENU ITEMS (\$8)	TRANSACTION	S AND PROFILES	HELP TOPICS	FILES	×		CUSTOMIZATION	TOOLS .
Time and Expenses	(9) Data Views						^		
Finance	Inquiries								^
\$ Banking	Customers on Credit Hold Customers over the Credit Limit								
Payables	Time and Expenses								
Receivables	Tasks	Time Tracking	Preferences				П		
Customization	Tasks Events	Weekly Crew Time Entry	Activity Types						
Sales Orders	Payables								
Purchases	Profiles	Inquiries	1099 Reporting						
linventory	Credit Terms	Discrepancy by Account	Create E-File						
🕢 Dashboards		Discrepancy by Vendor Discrepancy by Document							
Magento Connector	Receivables								
🔆 Kensium License	Profiles	Processes	Inquiries						
CommercePro	Credit Terms	Write Off Balances and Credits	Discrepancy by Account						
La commercerro		Manage Credit Holds	Discrepancy by Customer						
More items		Generate VAT Credit Memos	Discrepancy by Document						
	Contract Management						~		

Credit terms





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

Acumatica	Search	ৎ ৩				Revision Two Products Products Wholesale	11/22/2023 205 AM		🚊 admin	
Tavorites	Credit Terms							CUS	OMZATION +	TOOLS
Data Views	0 0 + 1	· • 💌								
	Drag column header here to configure filter						7 🗈			
Material Requireme	B G D Terms ID	Description	Visible To	Installment Type						
	> . D 2000WN60	2 Installments, 20% down, du	All	Multiple						
Time and Expenses	0 D 300	30 Days	All	Single						
Finance	© D 3100	3% 10 Days - Net 30	Vendors	Multiple						
Finance	0 D 55Y	56	All	Single						
S Banking	D SSPLITPAY	5 instalment % split	All	Multiple						
J banking	€ D <u>\$50</u>	65 Days	All	Single						
Payables	D MINSTALL	6 Monthly Installments	All	Multiple						
0.444	© D <u>T</u> D	7 Days	All	Single						
Receivables	O DUR	Due Upon Receipt	Al	Single						
	D PREPAY100 D PREPAY50	Full payment before shipping Prepay 50% before shipment	Customers	Single						
Customization	© D 122	20th of this month	Vendors	Single						
	• 0 144		Tenoors	and a						
Sales Orders										
Purchases										
b Inventory										
Dashboards										
Magento Connector										
Kensium License										
	1-12 of 12 records								K K	

Credit terms (1)

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





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Material Requireme	Credit Terms 30D - 30 Days		Chotes Ples customedrion				
Time and Expenses		Я					
Finance	GENERAL SETTINGS	SALES ORDER PREPAYMENT SETTINGS	SHIPHENT CONTROL SETTINGS				
\$ Banking	Description: 30 Days Visible To: All	Prepayment Percent: 0.00 INSTALLMENTS SETTINGS	Prevent Shipment Creation if there is an Unpaid Istance on SD Prevent Shipment Confirmation if there is an Unpaid Balance on				
 Payables 	DUE DAY SETTINGS Due Date Ty Fixed Number of Days	Installment Type: Single v Number of Installmen 0	1				
Receivables	Due Day 1: 30 Day Fro 0 Day To 1: 0 Due Day 2: 0 Day Fro 0 Day To 2: 0	Installment Frequency: Weekly Installment Method: Equal Parts					
Customization	CASH DISCOUNT SETTINGS Discount Type: Fixed Number of Days	Installments Schedule O + ×					
Sales Orders	Discount Day: 30 Discount %: 0.00	E Days Percent					
Purchases							
linventory							
Dashboards							
Magento Connector							
Kensium License							
CommercePro							
More items							

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.

