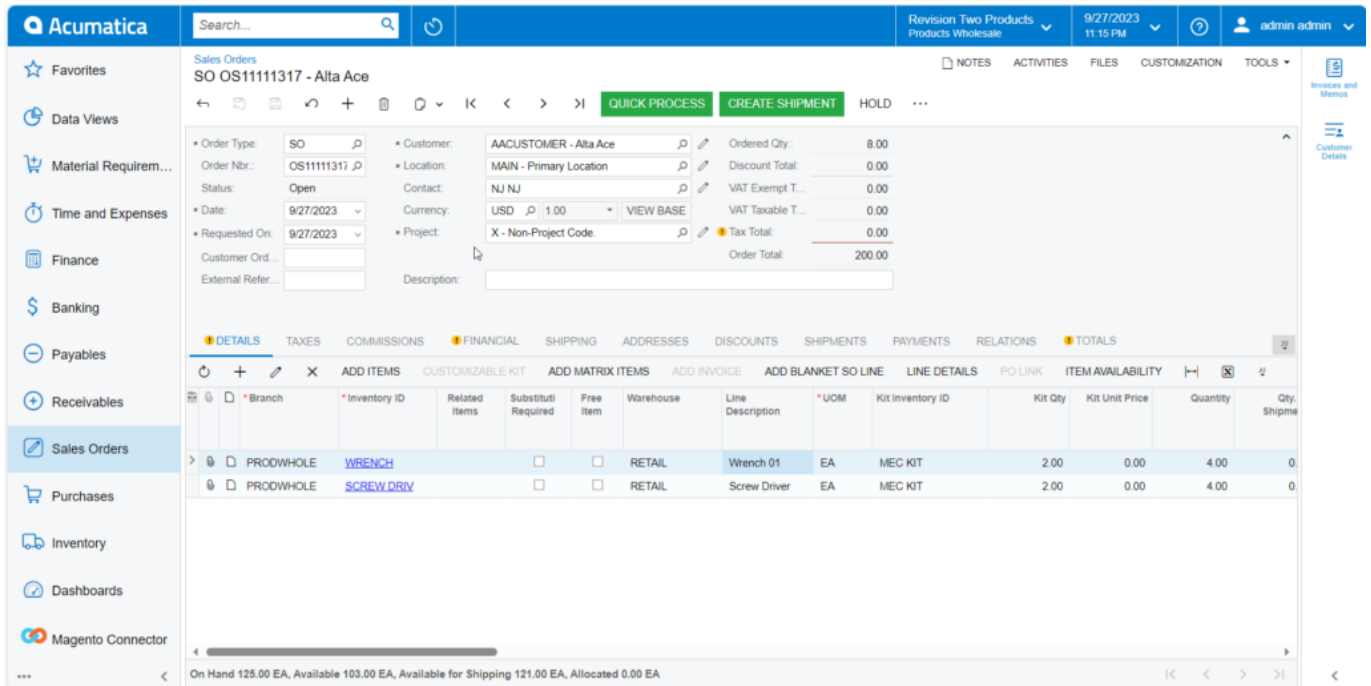


Creating Shipment

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

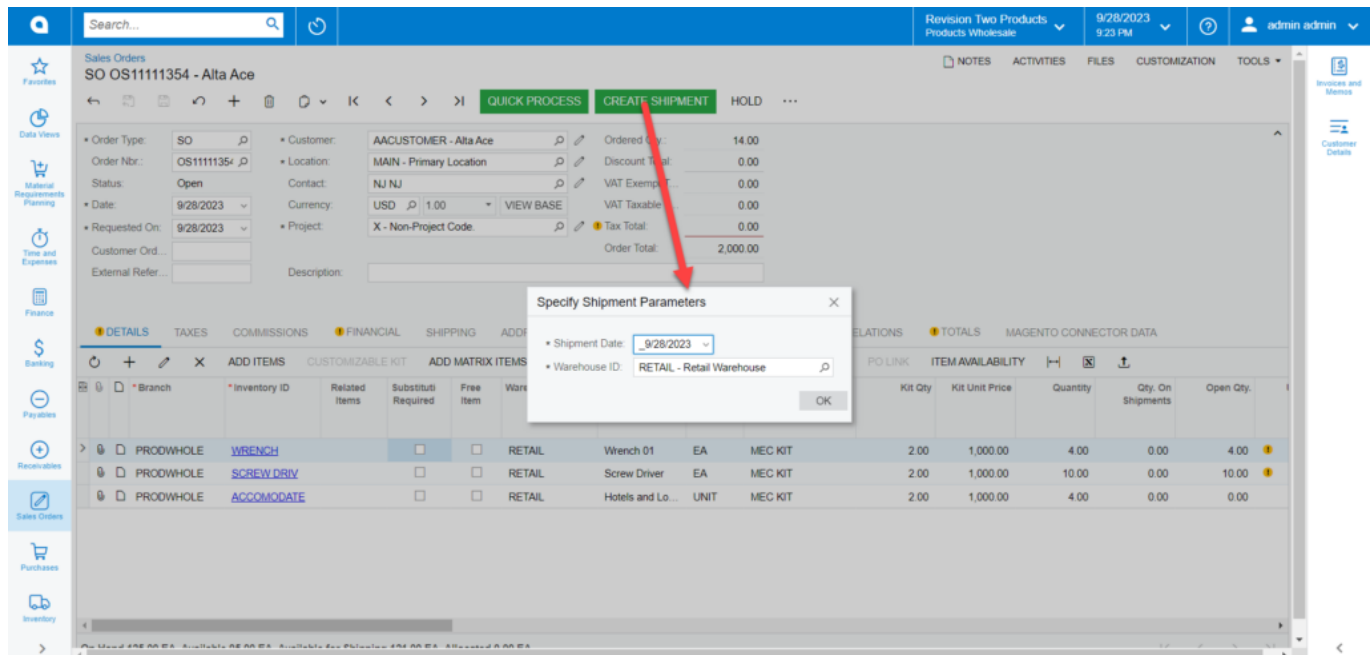


The screenshot shows the Acumatica Sales Order interface. The top navigation bar includes the Acumatica logo, a search bar, and user information (admin admin). The left sidebar lists various modules like Favorites, Data Views, Material Requirements, Time and Expenses, Finance, Banking, Payables, Receivables, Sales Orders, Purchases, Inventory, Dashboards, and Magento Connector. The main 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), and Project (X - Non-Project Code). The 'QUICK PROCESS' and 'CREATE SHIPMENT' buttons are visible. Below the order details, there are tabs for DETAILS, TAXES, COMMISSIONS, FINANCIAL, SHIPPING, ADDRESSES, DISCOUNTS, SHIPMENTS, PAYMENTS, RELATIONS, and TOTALS. The 'SHIPMENTS' 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 contains two rows: one for 'WRENCH' and one for 'SCREW DRIV'. The bottom status bar shows '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.

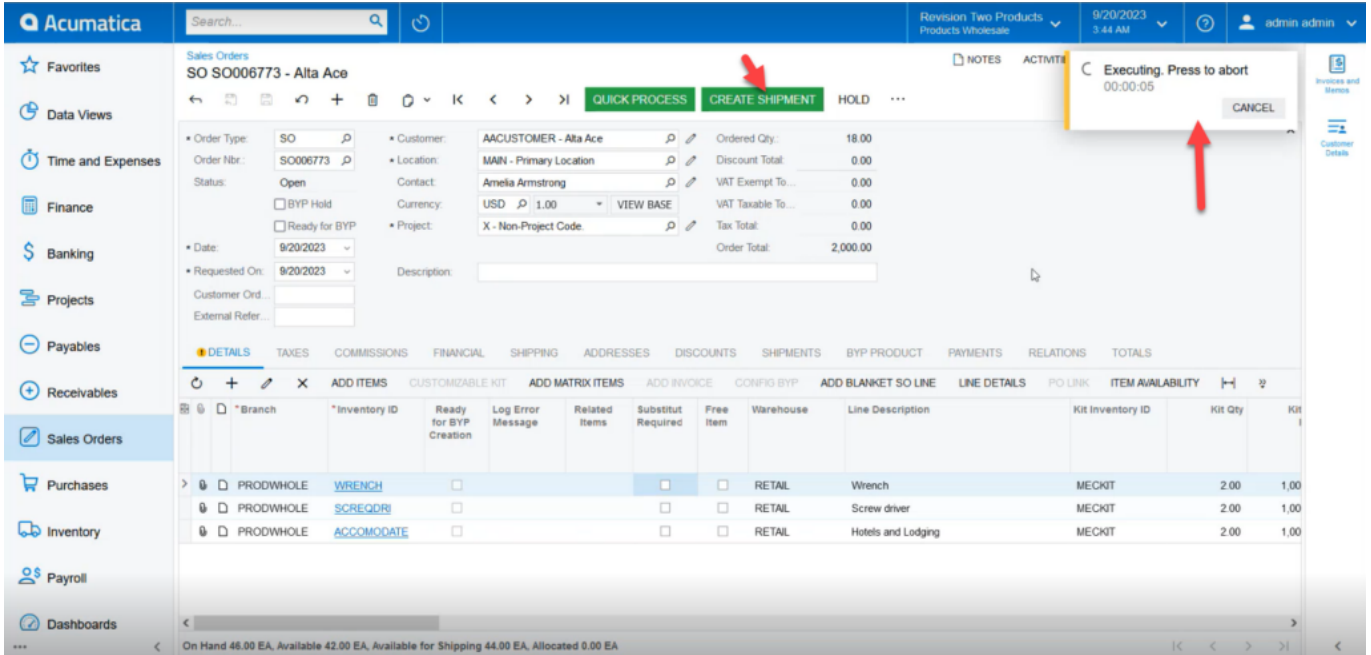


The screenshot shows the 'Sales Orders' screen for order SO OS11111354 - Alta Ace. The 'CUSTOMIZABLE KIT' section is active, displaying a table of items. The 'Specify Shipment Parameters' dialog box is open, allowing the user to specify the shipment date and warehouse ID. The 'Shipment Date' is set to 9/28/2023 and the 'Warehouse ID' is set to RETAIL - Retail Warehouse. The 'OK' button is visible in the bottom right corner of the dialog box.

Kit Qty	Kit Unit Price	Quantity	Qty. On Shipments	Open Qty.
2.00	1,000.00	4.00	0.00	4.00
2.00	1,000.00	10.00	0.00	10.00
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 interface for a Sales Order (SO SO006773 - Alta Ace). The 'CREATE SHIPMENT' button is highlighted with a red arrow. A modal window is open in the top right corner with the text 'Executing. Press to abort' and a 'CANCEL' button, also indicated by a red arrow. The interface includes a sidebar with navigation options like Favorites, Data Views, Time and Expenses, Finance, Banking, Projects, Payables, Receivables, Sales Orders, Purchases, Inventory, Payroll, and Dashboards. The main area displays order details and a table of items.

Branch	*Inventory ID	Ready for BYP Creation	Log Error Message	Related Items	Substitut Required	Free Item	Warehouse	Line Description	Kit Inventory ID	Kit Qty	Kit
PRODWHOLE	WRENCH	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	RETAIL	Wrench	MECKIT	2.00	1.00
PRODWHOLE	SCREQDR	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	RETAIL	Screw driver	MECKIT	2.00	1.00
PRODWHOLE	ACCOMODATE	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	RETAIL	Hotels and Lodging	MECKIT	2.00	1.00

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

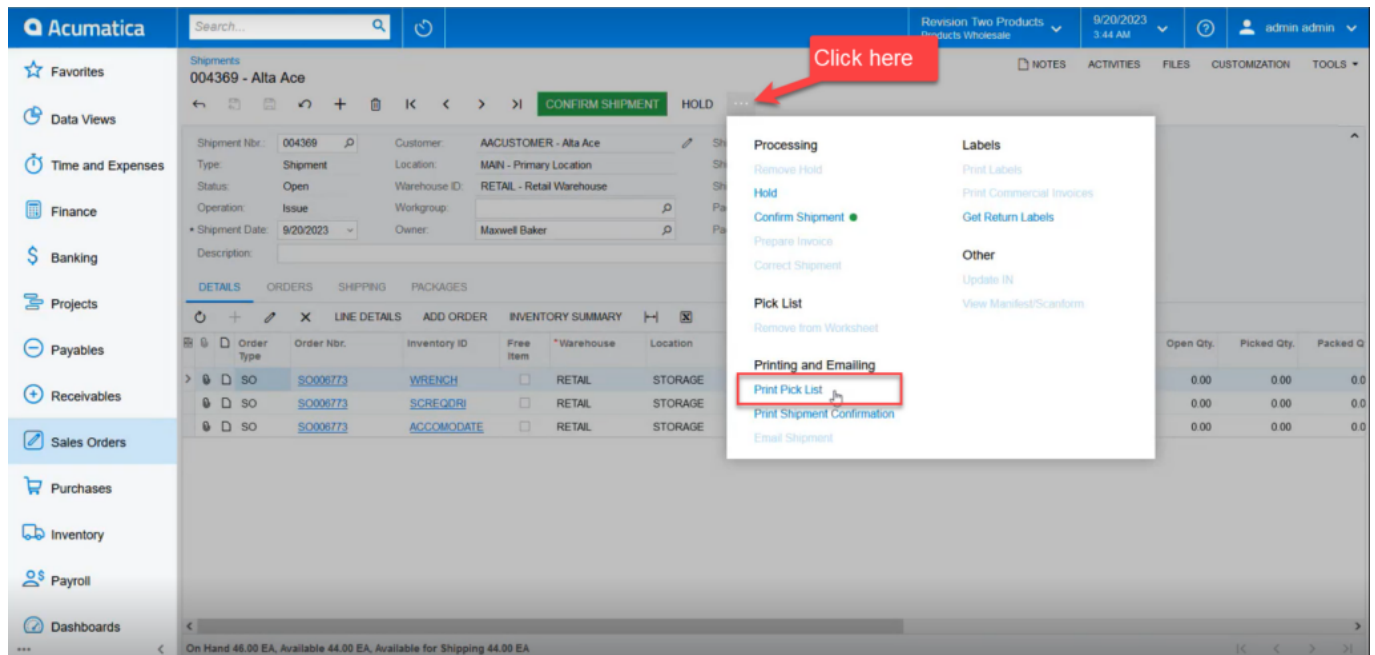
On Hand 46.00 EA, Available 44.00 EA, Available for Shipping 44.00 EA

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]**.



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

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

Shipment Number

Shipment Date

Customer ID

Customer Name

Warehouse

Contact

Ship Via

004369

9/29/2023

AACUSTOMER

Alta Ace

RETAIL

Maxwell Baker

No.

Location

Item

Unit Weight

Unit Volume

UOM

Qty

Qty. Picked

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

Pulled

Total Volume

0.00

Inspected


Packed

Scan to Confirm Picked Items

1 of 1

Preview of Print Pick List

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