

# Dock Operations

## How to Make New Sales Order Shipments and ship product

### Where is Sales Order Shipment Located?

- **Dock Operations > Start a Task > New Sales Order Shipment**

### Why & When New Sales Order Shipment is Used

In order to ship product, a Sales Order Shipment must be created. Pallet Tags must be assigned to the shipment and then assigned to a Sales Load. You cannot ship product in a standard way without the Sales Order Shipment.

### How to Make a New Sales Order Shipment

1. **Dock Operations > Start a Task > New Sales Order Shipment**
2. Click the dropdown beside SO Shipment Station to choose a sales order station.
3. Click the dropdown beside load to select a load or into the box to begin to type the requested load.
4. Once the load is selected, fields will populate, such as the **Ship To** field.
5. The area in the middle will list all the Product Lines associated with that load and sales order.
6. There are four ways to assign pallet tags to the product lines.
  - i. Typing in the pallet tag number
  - ii. Selecting from the Dropdown
  - iii. Scanning a tag with a tethered/wireless scanner
  - iv. Using a Wifi Handheld device to scan a tag.

If you are using a wifi handheld device, reference the document **Handheld - How to Ship Tags**.
7. If you have automatic product matching turned on, your pallet tag will best match with a product line. If you do not, the Product Line Assignment window opens and you will assign the tag to the number of the product line, by clicking the dropdown and selecting a line.
8. Assign pallet tags to each product line. When all tags are assigned to the product lines you may print or view related documents or Mark as Shipped.
9. The **Mark Load as Shipped** window opens. Click **Yes** to ship.
10. It is now in shipped status.

### Troubleshooting & Tips

- Access to documents Bill of Lading, Loading Instruction, and Shipping Instructions are easily accessible even after the load is shipped. Print, View or Email (if enabled).

Unique solution ID: #1102

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Last update: 2017-05-17 01:06

Page 1 / 1

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URL: <https://help.envioag.com/index.php?action=artikel&cat=11&id=103&artlang=en>