

Company

Virtual Shipping Setup

Prerequisite

You must have at least one Sales Order Station set up that you want to use for Virtual Shipping. See [How Do I Make a Station?](#)

Where is Virtual Shipping located?

- **Sales > "Any New or Open" Sales Order**

Why & When Virtual Shipping is Used

Ship product without ever physically having the item in stock. Use Virtual Shipping to mark a sales order as shipped when a supplier drop-ships or direct ships an item to your customer.

Virtual Shipping Setup (One-Time)

1. To Create a New **Sales Order Shipment Station** with Virtual Shipping enabled: **Company > Start a Task > New Station**. Name the new SO Shipment station VSHIP.
2. OR designate a current SO Shipping station to enable virtual shipping.
 - See [How Do I Make a Station?](#) for directions on how to make a new station.
3. Click the Station's Policies Tab.
4. Navigate to **Policies > Proces Type: SO Shipment > Group Defaults > Use Ship Date Default Selector**. Click the right-most checkbox.
5. In **Policies > Process Type: SO Shipment > Group: Number Banks and Tags**. In the right side empty space of the **Virtual Ship Tag Number Bank** row, click to select a number bank. In the **Virtual Ship Tag Prefix**, right-most column, type in a character to help differentiate these orders from standard orders. We recommend a V or VS.
 - To create a number bank reference [Manage Process Numbers](#).
6. Navigate to **Policies > Process Type: SO Shipment > Group: Warn Allow > Allow Virtual Shipping from Outside Suppliers**. Click the right-most checkbox.
7. Navigate to **Company > Policies > Process Type: Sales Order > Group: Virtual Shipment > Sales Order Virtual Shipment Station**. Click the right-most checkbox to activate the dropdown options. Choose the Sales Order Shipping Station selected in step 2.
8. Navigate to **Company > Policies > Process Type: Sales Order > Group: Warn Allow > Allow Virtual Shipping from Outside Suppliers**.
9. Now that all the policies are active, navigate to **Company > Trading Partners > Supplier**. Double-click the row of the supplier that requires virtual shipping.
10. Under the Supplier tab, click the **Virtual Shipping** checkbox to enable this trading partner to use virtual shipping.
 - A supplier may NOT have the Packout Run box and the Virtual

Company

Shipping box checked. If you pack from the supplier and ship virtually, we recommend making another trading partner and making the virtual ship code begin with a **VS-**.

11. **Save and Close.** Repeat steps 9 and 10 with as many suppliers as needed.

Troubleshooting & Tips

- Many of these policies are available at the Station and Company level.

Unique solution ID: #1091

Author: Melanie Jones

Last update: 2017-05-05 00:55