Shipping & Receiving - How To's

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Help Topics

This screen enables users in the warehouse to TRACK all of the Shipments IN and OUT of the Warehouse in these ways:

View a list of Transactions (from Sales Orders, Stock Transfers, and Return Authorizations (RA's) that require Items to be SHIPPED OUT of the warehouse. (The Transactions will be listed, based on which Nav Button is clicked by the user, as explained further below).
View a list of Transactions (from Purchase Orders, Stock Transfers, and Return Authorizations (RA's) that require Items to be RECEIVED INTO the warehouse.
The 'Sales Order Statuses' and 'Sales Order Status Workflow' are user defined and can be created, deleted, or disabled in the Settings > Items > Shipping / Receiving screen.

The Sales Order Statuses (created by the user) will determine the 'sub nav' options that will appear on the Left side of the screen. When clicked the center screen will display items to be shipped out the door--filtered to the items that have Orders with the selected status.
The Sales Order Status Workflow will help the system determine 'which' Status to assign the Sales Order to next, when certain events are completed--such as Printing the Sales Order, or Scanning the Order to be Picked, etc...

Left Sub-Nav Bar

- **Warehouse**: Displays the name of the User's warehouse (by default). If there is more than one warehouse, click on the **drop down** arrow to see the list and select the warehouse that you want to see.
- **Items to Ship**: This contains the Sub-group statuses of items to be shipped which will be displayed IF set to '**Active**' status (**Settings** > **Warehouse** > **Shipping/Receiving** > **Shipping** - **Sales Order Statuses**).
- **Items to Receive**: This contains the Sub-group statuses of items to be received which will be displayed IF set to '**Active**' status (**Settings** > **Warehouse** > **Shipping/Receiving** > **Receiving - Purchase Order Statuses**).

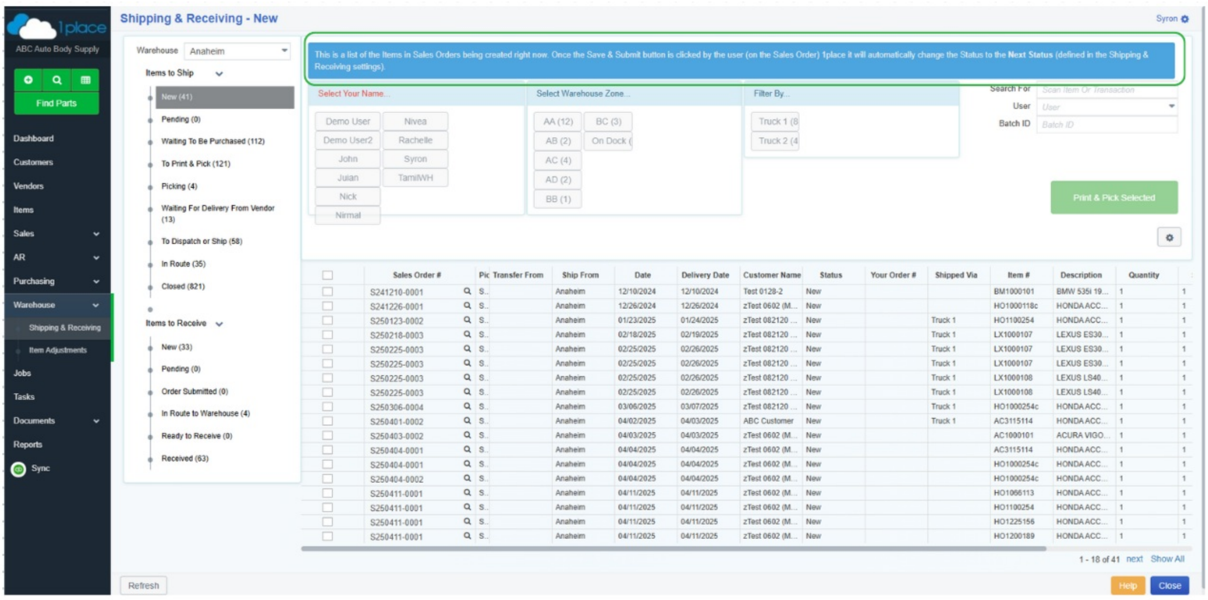
Center Screen: This changes depending on which Sub-group status is selected/displayed. *(See Center Screen Design & Functionality - By Status)*

Footer

- **Refresh**
- **Help**
- **Close**

This displays the list of all Sales Orders with a '**New**' status.

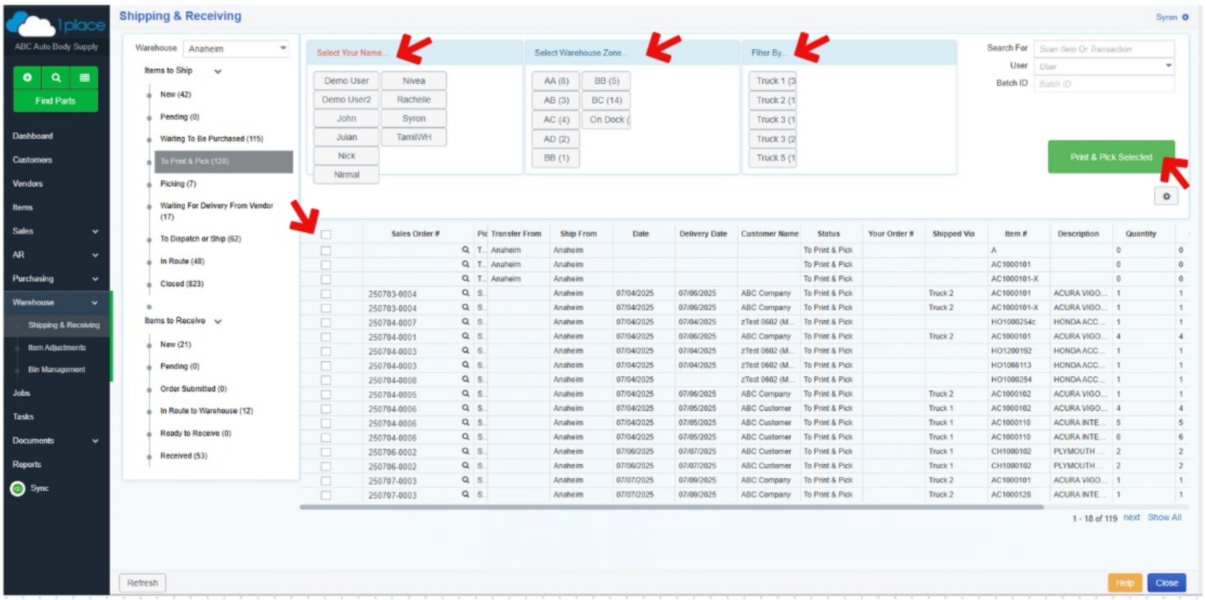
When the **Save & Submit Order button** (green button on the bottom right of a newly-created **Sales Order** screen) is clicked, the system determines the user defined 'Next' Status and changes the Sales Order Header AND each of the Sales Order Line Items to that Next status.



The following are the sections and fields that are visible on this screen:

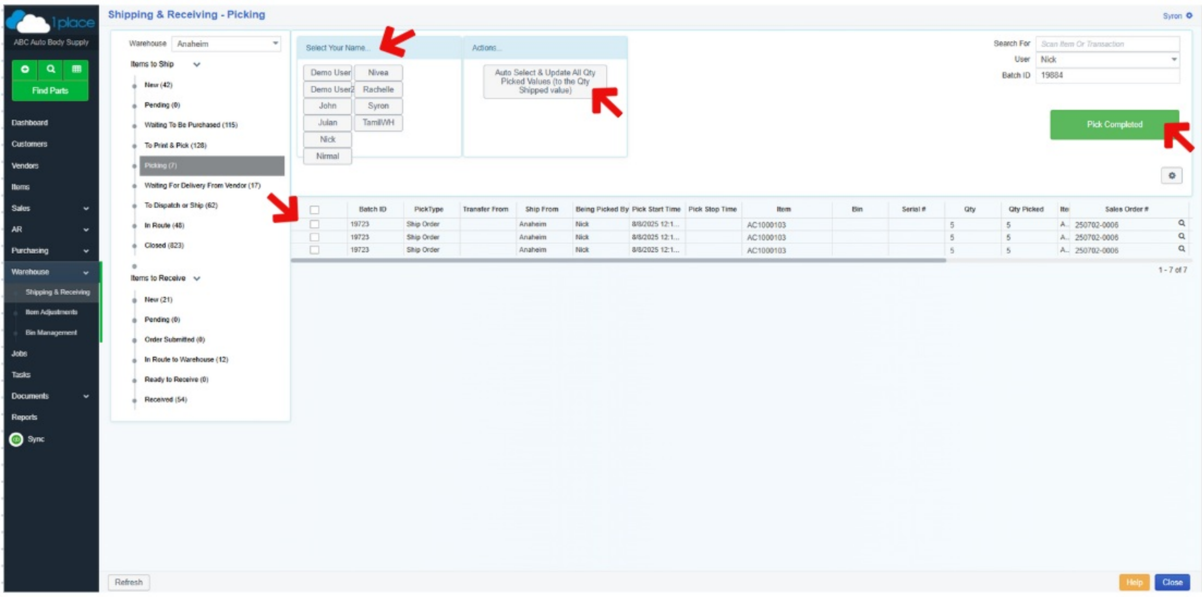
- **Select Your Name** (section)
- **Filter By** (section)
- **Select Orders** (section)
- Fields on top right:
  - **Search For** *(Scan Item or Transaction)*
  - **User**
  - **Batch ID**
- **Print & Pick Selected** (button)
- **Line Items** (section)

        - Sales Order #
        - Pick Type
        - Transfer From
        - Ship From
        - Date
        - Customer Name
        - Status
        - Your Order #
        - Shipped Via
        - Item #
        - Description



The following are the sections and fields that are visible on this screen:

- **Select Your Name** (section)
- **Actions** (section)
- Fields on top right:
    - **Search For** *(Scan Item or Transaction)*
    - **User**
    - **Batch ID**
- **Pick Completed** (button)
- **Line Items** (details section)
    - **Batch ID**
    - **Pick Type**
    - **Ship From**
    - **Being Picked By**
    - **Pick Start Time**
    - **Pick Stop Time**
    - **Pick Stop Time**
    - **Item**
    - **Bin**
    - **Lot/Serial #**
    - **Qty**
    - **Qty Picked**
    - **Item Description**



Details Section (Columns/Fileds)

- **Sales Order #**
- **Sales Date**
- **Customer Name**
- **Shipped Via**
- **Item Name**
- **Item Description**
- **Vendor Name**

Notes

- All items on this screen were entered on a Sales Order for special order where,
  - On the **Sales Order Add/Edit Line Items** section:
    - 1--The **PO** field box(es) checked, and
    - 2--Do NOT yet have PO#(s) in the **PO #** field.
  - These item(s) for special order are automatically moved to **'Waiting To Be Purchased'** status.
- All items on this screen are flagged to be purchased.

Details Section (Columns/Fileds)

- **Sales Order #**
- **Sales Date**
- **Customer Name**
- **Shipped Via**
- **Item Name**
- **Item Description**
- **PO #**

Notes

- After you have successfully created a Purchase Order using the **Sales Order PO (to create)** screen, the items (on that PO) automatically move from **'Waiting To Be Purchased'** status to the **Next Status** (defined in the settings) or to the **'Waiting For Delivery From Vendor'** status (if nothing is defined as the Next Status).

The following are the sections and fields that are visible on this screen:

- **Select Driver** (section)
- **Dispatch Information** (section)
- **Shipped Via** (section)
- Fields on top right:
    - **Find Order**
    - **Find Dispatch #**
    - **Find Batch ID**
    - **Set Run Departure Time**
    - **Driver**
    - **Batch ID**
- **Dispatch Selected** (button)
- **Line Items** (details section)
    - **So Status**
    - **Area / Region (?)**
    - **Run Departure**
    - **Shipped Via**
    - **Customer Name**
    - **Ship To Company**
    - **Customer Order #**
    - **# Items on Order**
    - **# items Prev Ship**
    - **# Items Ready**
    - **Sales Order #**
    - **Invoice #**
    - **Stop #**
    - **Criver**
    - **Dispatch #**
    - **Date Dispatched**
    - **Time Dispatched**

- NOTE: When the PO line item is received, the Line Item status (of the related Sales Order) will be moved to the **Next Status** (defined in the settings) or to **'To Dispatch'** status (if nothing is defined as the Next Status).

The following are the sections and fields that are visible on this screen:

- **Select Your Name** (section)
- **Filter By** (section)
- **Select Orders** (section)
- Fields on top right:
    - **Search For**
    - **User**
    - **Batch ID**
- **Print & Pick Selected** (button)
- **Line Items** (details section)
    - **Sales Order #**
    - **PickType**

        - **Transfer From**
        - **Ship From**
        - **Date**
        - **Customer Name**
        - **Status**
        - **Your Order #**
        - **Shipped Via**
        - **Item #**
        - **Description**
        - **Quantity**
        - **Ship Qty**
        - **Bin**
        - **Lot/Serial #**

The fields and buttons on this screen are similar to **'Pending'** & **'To Cancel/Restock'** Sub Nav.

The fields and buttons on this screen are similar to **'Pending'** & **'To Invoice'** Sub Nav.

The following are the sections and fields that are visible on this screen:

- **Select Your Name** (section)
- **Select Dispatch Number** (section)
- **Move to Status** (section)
- Fields on top right:
    - **Search For**
    - **User**
    - **Batch ID**
- **Update Selected** (button)
- **Line Items** (details section)
    - **Sales Order #**
    - **Dispatch Number**
    - **PickType**
    - **Transfer From**
    - **Ship From**
    - **Date**
    - **Customer Name**
    - **Status**
    - **Your Order #**
    - **Shipped Via**
    - **Item#**
    - **Description**
    - **Quantity**
    - **Ship Qty**
    - **Bin**
    - **Lot/Serial #**

Go to **Settings** > **Warehouse** > **Warehouses** > **General Settings**.

Put a check mark on **Enable Multi-Warehouse Functionality**.

Note: When this is enabled, you can create more than 1 warehouse in the **Warehouse List** section.

Go to **Settings** > **Warehouse** > **Warehouses** > **Warehouse List.**

Click on the pencil icon

to edit Warehouse information as follows:

- **Adress Type**
- **Warehouse Code**
- **Warehouse Name**
- **Attention**
- **Address Info**
- **Default Warehouse Y/N?**
- **Quickbooks Online Warehouse (Location)** - To make the Profit and Loss ans other reports display Sales and Expense figures per Warehouse (Location), every 1place Warehouse must be linked to a Qui

Click on **Save** button to save all the changes you made.

Click on the

button to delete a warehouse.

Go to **Settings** > **Warehouse** > **Shipping/Receiving > Shipping - Sales Order Statuses.**

On the **Shipping-Sales Order Statuses section table**, you can:

- Check the '**Active**' checkbox of the statuses that you would like to activate in tracking your Inventory flow. These statuses will also appear on the drop down list of '**Status**' field on the **Sales Order Screen**.
- Put a check mark on the '**Show on Shipping & Receiving Screen**' column to let the selected statuses appear on the **Shipping & Receiving screen > Left Sub-Nav Bar > Items to Ship**.
- Edit/Rename the Statuses (however you want to call them) on the '**User Defined Status Name**'.
- Assign the **Next Status** by selecting from the **drop down** list which status comes after that status on that row.
- Put a check mark to enable adding/editing/deleting line items and deleting order on the Statuses (on the following columns/fields):
  - **Can All Line Items**
  - **Can Edit Line Items**
  - **Can Delete Line Items**
  - **Can Delete Order**
- Sort the sequence of statuses by clicking on the **Sort**

  button under the **Action** column.

Go to **Settings** > **Warehouse** > **Shipping/Receiving > Receiving-Purchase Order Statuses.**

On the **Receiving-Sales Order Statuses section table**, you can:

- Do some settings similar to the **Shipping-Sales Order Statuses section table** (as discussed above) EXCEPT to assign the next status after that status on that row.

Go to **Settings** > **Warehouse** > **Shipping/Receiving > Stock Transfer - Statuses.**

Create a new table called: **ItemStockTransfers.** (See OneSource V4 for ideas)

When transfers are initiated by users, on various screens, a new record, for each item being transferred will be created in the ItemStockTransfers table to track the Status (movement) of the stock transfer.

How to increase the number of records shown per page?

Click on the Records Per Page Drop down list located at the bottom of the list and the following option is available: 20, 50, 100, 500, 1000, ALL.

On the **Main Menu Bar**, click on **Warehouse < Shipping & Receiving.**

On the **Shipping & Receiving** screen, click on **To Print & Pick** on the left side of the screen under **Items to Ship**.
Select your **User Name**.
Select the item/s by checking the box/es on the first column on the left.
Click on **Print & Pick Selected** (green button, upper right part).
The **Print Picking Documents** popup screen will be displayed.
NOTE: On this popup screen, you can print multiple documents simultaneously by clicking on the **drop down arrow** and selecting the document to print. If you want to edit the document format, click on the **Gear** button under **Properties** column. Click on **X** button if you want to remove the document to exclude from printing.
Click on **Print** button.
Click on **Save & Update Status**.
You have just created a batch of item/s to be picked.
NOTES
A Batch ID is generated by the system every time you create a Pick Ticket.
A User Name cannot make a new Pick ticket when it has an existing 'not finalized' Pick Ticket.

On the **Shipping & Receiving** screen, click on **Picking** on the left side of the screen under **Items to Ship**.
Select your **User Name**.
If finalizing to pick ALL items for this batch, click on **Auto Select & Update All Qty Picked Values (to the Qty Shipped value)**.
NOTE: This action automatically changes the **Qty Picked** values to be the same as the **Qty** values. You may still change the **Qty Picked** values (cannot be greater than the **Qty** value). This will trigger the email about **Picking Problem(s) - Short Picked** to automatically popup for notification.
If finalizing to pick selected items, check the box/es and update the **Qty Picked** field.
Click on **Pick Completed** (green button, upper right part). Item/s will now be ready for dispatch.

On the **Shipping & Receiving** screen, click on **To Dispatch** on the left side of the screen under **Items to Ship**.
Select the item(s) for Dispatch by checking the box(es).
Select **Driver Name** button under the **Select Driver** Box (upper left).
Tick the **Circle Icon** of the corresponding date of dispatch.
Click on **Create Dispatch #** button to generate dispatch code.
Note: The **Shipped Via** section has a dropdown list with all available shipping methods in alphabetical order. This filter can help you with your dispatch.
Click on **Dispatch Selected** (green button, middle right).
Dispatch Print Selection screen will pop up.
Dispatch # - This is auto-filled after clicking the **Dispatch Selected** button. Note: If the screen is opened

after the original dispatch has already been printed (such as if reprinting a Manifest) then you will have to input the Dispatch#.

Pre-Print Options - check to select:

[ ] **Auto ship any recently received back ordered items.** - Check this box if you opt to loop through all selected line items for all selected Orders for your selected Dispatch.

[ ] **Auto create related Invoices for Sales Orders in this Dispatch.**

'Route delivery stops using' drop down arrow - choose whether to use **Scanned Order** or **Google Maps**.

Click on **Proceed**.

The **Print Dispatch Documents** popup screen will be displayed.

NOTE: On this popup screen, you can print multiple documents simultaneously by clicking on the **drop down arrow** and selecting the document to print. Click on **X** button if you want to remove the document to exclude from printing.

Click on **Print and Update Status**.

How to Edit and/or Reprint a Delivery Manifest (That Has Already Been Dispatched)

- Click on Warehouse Shipping / Receiving > Dispatch
- Click on the button called **Edit / Reprint Delivery Manifest**

On the **Shipping & Receiving** screen, click on **In Route** on the left side of the screen under **Items to Ship**.

Select the item to be re-dispatched.

Click on your User Name under **Select Your Name** section.

On the **Select Dispatch Number** section, click on the drop down arrow and select the Dispatch Number of the particular item.

Note:The system can recall previously generated Dispatch Numbers and are sequentially listed on the drop down from latest (up) to oldest (down). This makes it easier for the user to input the code.

On the **Move to Status** section, click on the drop down arrow and select **To Dispatch**.

Click on **Update Selected** (green button, to the right).

The item is now back to **'To Dispatch'** status and you may proceed to dispatch another delivery run for that item.

How to Assign Order Pickers in the Shipping and Receiving Screen

When items are ready to be shipped, they will appear in the To Print & Pick status, waiting to be assigned to a picker.

There are two ways to assign orders to be picked.

Method 1: Manual Assignment

1. Under **Select Your Name**, choose the **picker** who will handle the orders.
2. From the order list,**check the box beside each order**you want the picker to handle.
3. Click **Print and Pick Selected** (upper right corner).
4. A screen will appear to**print picking documents**such as:

    - Labels
    - Sales Order
    - Packing Slip
    - Pick Ticket
5. Click **Preview** to view the documents.
6. Click **Save and Update Status** to change the order status to Picking.

Method 2: Assigning by Warehouse Zone

1. Beside Select Your Name, choose the **Warehouse Zone** instead.
    - Warehouse zones are defined in the **Bin Management screen**.
    - Zones are made up of bins grouped by specific areas in your warehouse.
    - Each zone has a picker already assigned to it.
2. Once a zone is selected, the system will **automatically assign the corresponding picker and the orders** located in that zone.
3. Click **Print and Pick Selected.**
4. A screen will appear to **print picking documents** such as:
    - Labels
    - Sales Order
    - Packing Slip
    - Pick Ticket
5. Click **Preview** to view the documents.
6. Click **Save and Update Status** to change the order status to Picking.

Pick Ticket Assignment Rules

To help manage workload and maintain accuracy, the system limits how many Pick Tickets a user can work on at a time.

How It Works:

- A **user** cannot be assigned new pick tickets if they already have a batch of picks assigned.
- When attempting to assign additional picks, the system will automatically route the user back to the picking screen to continue their current batch.

How to Dispatch All Orders That Are 100% Ready to Ship

When handling a large number of orders, it can be time-consuming to check one by one which orders are ready to ship. To make this easier, 1place provides a quick way to select and dispatch all orders that are 100% ready to ship — meaning all items are available and no backorders remain.

Follow these steps:

1. Go to the Shipping and Receiving Screen

- Navigate to the To Dispatch or Ship section.
- Under Select an Option, choose from:
  - Dispatch 1 Driver
  - Dispatch All Drivers
  - Invoice Selected Orders (optional step if you want to print batch invoices before dispatching).

2. Enter Dispatch Information

- Fill in the required details:
  - Driver
  - Day
- Click the Create Dispatch # button to generate a dispatch number.

3. Select Orders That Are 100% Ready

- In the list of orders, locate the checkbox in the header row (next to the column names).
- Click the checkbox to see three options:
- Select ALL Orders
- Select ALL Orders 100% Ready to Ship
- Unselect ALL Orders
- Choose Select ALL Orders 100% Ready to Ship.
- All orders with every item available (no backorders) will be automatically highlighted and selected.

4. Proceed with Dispatch

- Click the Proceed button located on the upper-right side above the list of orders.
- A Dispatch Print Selection popup will appear.

5. Print Dispatch Documents

- Under Select Dispatch Batch To Print, select the dispatch number you just created.
- A Print Dispatch Documents popup will appear.
- Choose the documents to print (most commonly the Manifest).
- Click Print and Update Status.

6. Finalize the Dispatch

- A print preview will be displayed.
- After reviewing, click Update Status.
- The selected orders will now move to In Route status.
- Once delivered, their status can be updated to Closed.

That’s it! You’ve successfully dispatched all orders that are 100% ready to ship in just a few clicks.

Multi-warehouse Management

The **Multi-Warehouse feature** allows businesses to efficiently manage inventory across multiple locations. This includes tracking stock levels, fulfilling orders, and transferring products between warehouses — all from within **1place.**

With this functionality, you can:

- Set up multiple warehouses to represent different physical locations.
- Allocate inventory to specific warehouses for better visibility and control.
- Ship orders from the most appropriate warehouse.
- Transfer inventory between warehouses to balance stock levels.
- Get accurate reporting on stock movement by location.

How to Setup my Warehouses?

Step 1: Enable Multi-Warehouse Functionality

1. Go to Settings from the main navigation menu.
2. Under Settings Type, select Warehouse → Warehouses.
3. Locate the Multi-Warehouse Functionality checkbox.
4. Check the box to enable the feature.

This step is required before you can add and manage multiple warehouses.

Step 2: Add a New Warehouse

Once Multi-Warehouse is enabled, you can start adding warehouse locations.

1. Under the Warehouse List, click New
2. Fill out the required details:
    1. Warehouse Name – The name of the warehouse (e.g., Main Warehouse).
    2. Warehouse Code – A unique short code for easy reference (e.g., WH1).
    3. Address – The physical location of the warehouse.
    4. Phone Number – A contact number for the warehouse.
    5. Location Code
    6. Timezone – Select the timezone where the warehouse is located.

How do I track Inventory Quantities per Warehouse?

The Multi-Warehouse feature in 1place allows you to track stock levels at each warehouse location individually. This helps you see where inventory is stored, manage fulfillment, and plan transfers effectively.

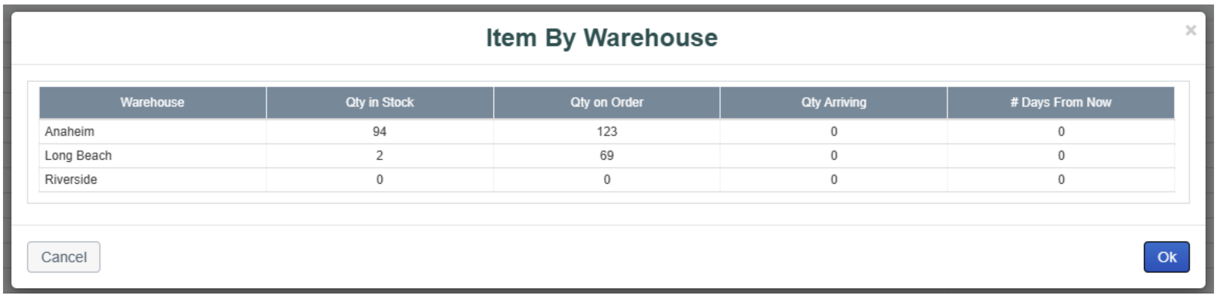
1. Go to the Item List from the main menu.

2. Select the item you want to view.

3. Open the Stock tab to access inventory information.

4. Click on the View Item by Warehouse button.

5. A table will display showing the inventory quantities per warehouse, including details like current stock, committed inventory, and available quantities.



Warehouse	Qty in Stock	Qty on Order	Qty Arriving	# Days From Now
Anaheim	94	123	0	0
Long Beach	2	69	0	0
Riverside	0	0	0	0

Special Tasks