

Shipping and Receiving (New)

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Overview of the Shipping and Receiving Screen

The Shipping & Receiving screen in 1place serves as the central hub for managing all outbound and inbound warehouse operations.

It provides real-time visibility into every Sales Order and Purchase Order moving through your warehouse – whether items are being picked, shipped, or received.

Sales Order #	Item #	PickType	Transfer Fro	Ship From	Date	De	Customer Name	Status	Your Order #	Shipped Via	Description	Zone	Quan	Ship Qty	Bin
250923-0003	Q AC1000101	Transfer	Anaheim	Long Beach		0	ABC Company	To Print & P.		Truck 2	ACURA ...	2	2		
250930-0002	Q AC1000104	Transfer	Anaheim	Long Beach		1	ABC Company	To Print & P.		Truck 2	ACURA L...	AA	1	1	ReturnsAn
250930-0002	Q AC1000104	Transfer	Anaheim	Long Beach		1	ABC Company	To Print & P.		Truck 2	ACURA L...	On Dock	1	1	On Dock
250929-0002	Q AC1000107	Transfer	Anaheim	Long Beach		1	ABC Company	To Print & P.		Truck 2	ACURA L...	3	3		
250923-0002	Q AC1000124	Transfer	Anaheim	Long Beach		0	Best Auto Collisio	To Print & P.		Truck 1	ACURA 2...	4	4		
251003-0001	Q AC1000114C	Transfer	Anaheim	Long Beach		1	Richard Cooper	To Print & P.			ACURA L...	On Dock	2	2	On Dock
251003-0001	Q AC1000119	Transfer	Anaheim	Long Beach		1	Richard Cooper	To Print & P.			ACURA L...	AA	4	4	ReturnsAn
251001-0001	Q AC1000126	Transfer	Anaheim	Long Beach		1	ABC Company	To Print & P.		Truck 2	ACURA 3...	On Dock	2	2	On Dock
251003-0001	Q AC1000114C	Transfer	Anaheim	Long Beach		1	Richard Cooper	To Print & P.			ACURA L...	On Dock	1	1	On Dock
250723-0009	Q HO130227	Ship Order	Anaheim		07/23/...	0	zTest 9602 (McD	To Print & P.			HONDA...	1	1		
250723-0009	Q HO1300254C	Ship Order	Anaheim		07/23/...	0	zTest 9602 (McD	To Print & P.			HONDA...	BC	1	1	3-3-3
250723-0009	Q HO1300254-C	Ship Order	Anaheim		07/23/...	0	zTest 9602 (McD	To Print & P.			HONDA...	1	1		
250723-0009	Q HO1300255C	Ship Order	Anaheim		07/23/...	0	zTest 9602 (McD	To Print & P.			HONDA...	1	1		
250723-0009	Q HO1300255C	Ship Order	Anaheim		07/23/...	0	zTest 9602 (McD	To Print & P.			HONDA...	AA	1	1	2-23-22
250723-0009	Q HO1300256	Ship Order	Anaheim		07/23/...	0	zTest 9602 (McD	To Print & P.			HONDA...	AA	1	1	789
250723-0009	Q HO1300256C	Ship Order	Anaheim		07/23/...	0	zTest 9602 (McD	To Print & P.			HONDA...	AC	1	1	101-08-13
250723-0009	Q HO1209189	Ship Order	Anaheim		07/23/...	0	zTest 9602 (McD	To Print & P.			HONDA...	1	1		
250723-0009	Q HO1209192	Ship Order	Anaheim		07/23/...	0	zTest 9602 (McD	To Print & P.			HONDA...	1	1		
250723-0009	Q HO1234123	Ship Order	Anaheim		07/23/...	0	zTest 9602 (McD	To Print & P.			HONDA...	AA	1	1	456
250723-0009	Q HO1006177C	Ship Order	Anaheim		07/23/...	0	zTest 9602 (McD	To Print & P.			HONDA...	AB	1	1	101
250723-0009	Q HO1006177C	Ship Order	Anaheim		07/23/...	0	zTest 9602 (McD	To Print & P.			HONDA...	AB	1	1	101

This screen works hand in hand with the 1place Scan (Scanner):

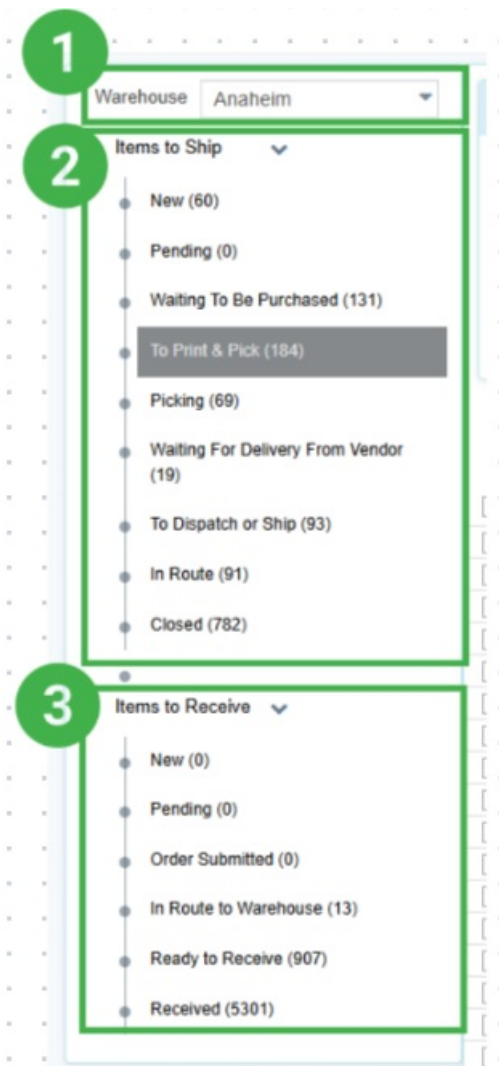
- Warehouse staff use the scanner to physically pick, ship, and receive items.
- Warehouse managers use the Shipping & Receiving screen to assign orders, monitor activity, perform bulk updates, and manually adjust statuses when needed.
- Together, they keep your warehouse operations organized, accurate, and up to date in real time.

Screen Layout

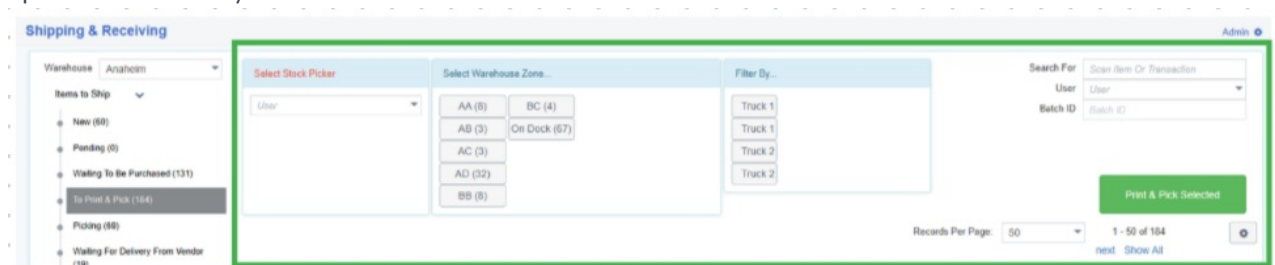
The Shipping & Receiving screen is divided into three main areas:

1. Warehouse Selector
2. Items to Ship

3. Items to Receive



When you click a status under either section, the right-hand side displays a list of orders or items within that stage. Above the list are key functions such as Assign Driver, Filter, Search, Print, and Bulk Actions for managing daily operations efficiently.



Warehouse Selector

- Located at the top-left corner of the screen.
- Use this dropdown to choose which warehouse you're currently managing.
- The system defaults to the main warehouse assigned to your user account.

- Switching warehouses updates all data displayed in both the Items to Ship and Items to Receive sections.

Items to Ship

The Items to Ship section manages all parts and orders leaving your warehouse. It tracks every Sales Order's progress through a series of shipping statuses.

Warehouse staff advance orders through these stages by scanning items with the 1place Scan, while warehouse managers use this screen to assign pickers, monitor workflow, or manually move orders between statuses.

Common functions available at the top of each list include:

- Assign Picker / Driver
- Filter and Search Orders
- Print Sales Orders, Labels, and Shipping Documents
- Bulk Update Multiple Orders

Shipping Status Stages

Status	Description
New	Items from Sales Orders currently being created. When the Sales Order is Saved & Submitted, it automatically moves to the next defined status.
Pending	A user-defined holding status for staging or grouping orders before processing.
Waiting for Delivery	Indicates parts that need to be purchased. When a Purchase Order is created from the Sales Order PO's screen, the status changes automatically to Waiting for Delivery from Vendor.
To Print and Pick	Orders ready for picking. Managers can assign pickers, print documents, and prepare for scanning. Once items are scanned, the order moves forward automatically.
Picking	Items actively being picked using the 1place Scan. The system updates the status automatically when picking is complete.
Waiting for Delivery from Vendor	Items linked to a PO and waiting for vendor delivery. Once the PO is received, 1place advances to the next defined status.
To Dispatch / Ship	Orders ready for dispatch. Managers can assign drivers, print invoices in batches, and confirm shipments. Once scanned for dispatch, the status moves to In Route.
In Route	Orders currently out for delivery. Managers can update statuses to Completed, Cancelled, or other custom outcomes.
Closed	Completed and finalized orders. No further actions are needed.

Items to Receive

The Items to Receive section manages the incoming flow of parts from vendors. It gives visibility into all Purchase Orders that are in progress, in transit, or received into inventory.

Like shipping, any scanning done through the 1place Scan app automatically updates statuses here. Warehouse managers typically use this section to monitor inbound shipments, review discrepancies, or manually finalize receipts.

At the top of each list, users can:

- Search and filter Purchase Orders
- View Items to receive from Vendors
- Update Status of Purchase Order Receipt
- Perform bulk receive actions if needed

Receiving Status Stages

Status	Description
New	Lists items included in Purchase Orders currently being created. Once submitted to a vendor, they move to the next defined status.
Pending	A user-defined holding status used for internal review or organization before submission.
Order Submitted	Displays Purchase Orders sent to vendors and awaiting shipment.
In Route to Warehouse	Shows orders currently in transit from the vendor to your warehouse.
Ready to Receive	Lists orders or parts that have arrived and are ready to be scanned into inventory. Scanning or manual confirmation updates them to Received.
Received	Displays completed POs that have been successfully received and added to inventory.

Integration with 1place Scan (Scanner)

The 1place Scan is directly linked to this screen. As warehouse staff scan items during picking, shipping, or receiving, the system automatically updates the corresponding statuses in the Shipping & Receiving screen.

This ensures:

- Managers always see real-time progress without manual refreshes
- Fewer manual status changes or data entry errors
- Streamlined coordination between warehouse staff and supervisors

Customizing Statuses

Every business operates differently — that’s why 1place allows each company to define its own Shipping and Receiving statuses.

Administrators can customize:

- The names, and order of statuses
- Which statuses trigger automatic transitions (e.g., after scanning, submitting, or receiving)
- Which statuses appear in Shipping vs. Receiving workflows

These settings can be configured under:

Settings → Shipping & Receiving Settings

This flexibility allows each company to mirror its own operational workflow within 1place — whether you follow a simple Pick-Pack-Ship model or a more detailed multi-step process.

Shipping Statuses – Detailed Guide and Functionalities

The Shipping Statuses screen in 1place provides a comprehensive view of all outbound orders. Each status represents a stage in the fulfillment process, allowing warehouse managers and staff to coordinate picking, packing, and shipping efficiently.

This guide covers all nine shipping statuses, including detailed functions, workflows, and best practices.

New

Shipping & Receiving - New

Syron

Warehouse: Anaheim

Items to Ship

New (61)

Pending (0)

Waiting To Be Purchased (130)

To Print & Pick (193)

Picking (61)

Waiting For Delivery From Vendor (20)

To Dispatch or Ship (105)

In Route (92)

Closed (782)

Items to Receive

New (4)

Pending (0)

Order Submitted (0)

In Route to Warehouse (13)

Ready to Receive (0)

Received (4)

This is a list of the Items in Sales Orders being created right now. Once the Save & Submit button is clicked by the user (on the Sales Order) 1place it will automatically change the Status to the Next Status (defined in the Shipping & Receiving settings).

Select Stock Picker

Select Warehouse Zone...

Filter By...

User

AA (14) BB (2)

AB (2) BC (5)

AC (4) On Dock (1)

AD (4)

BA (1)

Truck

Truck

Truck

Truck

Search For

Scan Item Or Transaction

User

Batch ID

Batch ID

Print & Pick Selected

Records Per Page: 50

1 - 50 of 61

next

Show All

	Sales Order #	PickType	Transfer Fro	Ship From	Date	Delivery Date	Customer Name	Status	Your Order #	Shipped Via	Item #	Z
☐	250910-0015	Q	Transfer	Anaheim	Long Beach		09/12/2025	ABC Company	New			
☐	250910-0015	Q	Transfer	Anaheim	Long Beach		09/12/2025	ABC Company	New	Truck 2	AC1000101	On Do
☐	250910-0014	Q	Transfer	Anaheim	Long Beach		09/12/2025	ABC Company	New	Truck 2	AC1000101	AA
☐	250911-0015	Q	Transfer	Anaheim	Long Beach		09/12/2025	ABC Company	New	Truck 2	AC1000133	On Do
☐	250911-0015	Q	Transfer	Anaheim	Long Beach		09/12/2025	Best Auto Coll...	New	Truck 1	A	AD
☐	250911-0015	Q	Transfer	Anaheim	Long Beach		09/12/2025	Best Auto Coll...	New	Truck 1	A	AD
☐	250924-0002	Q	Transfer	Anaheim	Long Beach		09/26/2025	ABC Company	New	Truck 2	AC1000120	On Do
☐	250924-0002	Q	Transfer	Anaheim	Long Beach		09/26/2025	ABC Company	New	Truck 2	AC1000101-X	On Do
☐	250910-0015	Q	Transfer	Anaheim	Long Beach		09/12/2025	ABC Company	New	Truck 2	AC1000101	BC
☐	250910-0015	Q	Transfer	Anaheim	Long Beach		09/12/2025	ABC Company	New	Truck 2	AC1000101	AA
☐	250910-0015	Q	Transfer	Anaheim	Long Beach		09/12/2025	ABC Company	New	Truck 2	AC1000101	BC
☐	250910-0015	Q	Transfer	Anaheim	Long Beach		09/12/2025	ABC Company	New	Truck 2	AC1000101	BB
☐	250911-0003	Q	Transfer	Anaheim	Long Beach		09/12/2025	Bill To Custom...	New	Truck 2	AC1000101	On Do

Refresh

Help

Close

Purpose

- Displays items from Sales Orders currently being created.
- Acts as the entry point for all new outbound orders.

How Orders Enter This Status:

- Sales Order is created but not yet submitted.
- Automatically moves to the next status after the Sales Order is Saved & Submitted.

Available Functions / Buttons:

- View sales order details

☐	Sales Order #		PickType	Transfer Fro
☐	250910-0015		Transfer	Anaheim
☐	250910-0015		Transfer	Anaheim
☐	250910-0014		Transfer	Anaheim
☐	250911-0015		Transfer	Anaheim
☐	250911-0015		Transfer	Anaheim

Pending

Purpose

- A user-defined holding or staging status.
- Useful for grouping orders before processing or batching pick tasks.

How Orders Enter This Status:

- Manually assigned by warehouse managers, or automatically if configured in Shipping & Receiving Settings.

Available Functions / Buttons:

- View sales order details
- Filter and search orders
- Bulk update order status

Waiting to be Purchased

Shipping & Receiving - Waiting To Be Purchased

Warehouse

Anaheim

Items to Ship

New (61)

Pending (0)

Waiting To Be Purchased (130)

To Print & Pick (193)

Picking (61)

Waiting For Delivery From Vendor (20)

To Dispatch or Ship (105)

In Route (92)

Closed (782)

Items to Receive

New (4)

Pending (0)

Order Submitted (0)

In Route to Warehouse (13)

Ready to Receive (0)

Received (4)

Refresh

Help

Close

These items are flagged to be purchased. When you use the Sales Order PO's screen to create PO's the status will automatically be changed to: Waiting For Delivery From Vendor

		Sales Order #	Sales Date	Delivery Date	Customer Name	Shipped Via	Item Name	Item Description	Vendor Name
☐		250528-0001	5/28/2025	5/30/2025	ABC Company	Truck 2	HO1000254-Copy	HONDAACCORD	Tong Yang
☐		250626-0002-B1	6/27/2025	6/27/2025	ABC Company	Truck 2	AC1000147	ACURA 3.5RL 03-C	
☐		250704-0008	7/4/2025		zTest 0602 (McDona		AC1000114	ACURA LEGEND E	Tong Yang
☐		250704-0009	7/4/2025	7/4/2025	zTest 0602 (McDona		zTestSergio	Test Sergio Part	X Vendor
☐		250709-0003	7/9/2025	7/9/2025	A & H AUTO REPAIR		HO1225106	HONDA CIVIC 90-4	
☐		250709-0003	7/9/2025	7/9/2025	A & H AUTO REPAIR		HO1225106	HONDA CIVIC 90-4	
☐		250723-0009-B1	7/23/2025	7/23/2025	zTest 0602 (McDona		HO1327104	HONDAACCORD	
☐		250723-0009-B1	7/23/2025	7/23/2025	zTest 0602 (McDona		HO1170140C	HONDAACCORD	
☐		250723-0009-B1	7/23/2025	7/23/2025	zTest 0602 (McDona		HO1200222	HONDAACCORD	
☐		250723-0009-B1	7/23/2025	7/23/2025	zTest 0602 (McDona		HO1202104	HONDAACCORD	
☐		250723-0009-B1	7/23/2025	7/23/2025	zTest 0602 (McDona		HO1202104C	HONDAACCORD	
☐		250723-0009-B1	7/23/2025	7/23/2025	zTest 0602 (McDona		HO1067113	HONDAACCORD	Tong Yang
☐		250723-0009-B1	7/23/2025	7/23/2025	zTest 0602 (McDona		HO1133102	HONDAACCORD	
☐		250723-0009-B1	7/23/2025	7/23/2025	zTest 0602 (McDona		HO1323133	HONDAACCORD	
☐		250723-0009-B1	7/23/2025	7/23/2025	zTest 0602 (McDona		HO1068112	HONDAACCORD	
☐		250723-0009-B1	7/23/2025	7/23/2025	zTest 0602 (McDona		HO1234122	HONDAACCORD	
☐		250723-0009-B1	7/23/2025	7/23/2025	zTest 0602 (McDona		HO1170140	HONDAACCORD	Tong Yang
☐		250723-0009-B1	7/23/2025	7/23/2025	zTest 0602 (McDona		HO1230156	HONDAACCORD	
☐		250723-0009-B1	7/23/2025	7/23/2025	zTest 0602 (McDona		HO1301110	HONDAACCORD	
☐		250723-0009-B1	7/23/2025	7/23/2025	zTest 0602 (McDona		HO1324110	HONDAACCORD	
☐		250723-0009-B1	7/23/2025	7/23/2025	zTest 0602 (McDona		HO1106175	HONDAACCORD	
☐		250723-0009-B1	7/23/2025	7/23/2025	zTest 0602 (McDona		HO1106175C	HONDAACCORD	
☐		250723-0009-B1	7/23/2025	7/23/2025	zTest 0602 (McDona		HO1170139	HONDAACCORD	
☐		250723-0009-B1	7/23/2025	7/23/2025	zTest 0602 (McDona		HO1170139C	HONDAACCORD	
☐		250723-0009-B1	7/23/2025	7/23/2025	zTest 0602 (McDona		HO1960144	HONDAACCORD	
☐		250723-0009-B1	7/23/2025	7/23/2025	zTest 0602 (McDona		HO1351162	HONDAACCORD	

Purpose

- Represents items that need to be purchased due to insufficient stock.

How Orders Enter This Status:

- Inventory unavailable when the Sales Order is submitted.
- Automatically moves to Waiting for Delivery from Vendor after a PO is created.

Available Functions / Buttons:

- No available functions

To Print & Pick

Shipping & Receiving - To Print & Pick Syron

Warehouse: Anaheim

Items to Ship

- New (51)
- Pending (0)
- Waiting To Be Purchased (130)
- To Print & Pick (193)**
- Picking (51)
- Waiting For Delivery From Vendor (20)
- To Dispatch or Ship (105)
- In Route (92)
- Closed (782)

Items to Receive

- New (4)
- Pending (0)
- Order Submitted (0)
- In Route to Warehouse (13)
- Ready to Receive (0)
- Received (4)

Select Stock Picker

User

Select Warehouse Zone...

AA (7)

AB (3)

AC (4)

AD (36)

BA (1)

BB (8)

BC (4)

On Dock (6)

Filter By...

Truck

Truck

Truck

Search For

Scan Item Or Transaction

User

Batch ID

Batch ID

Print & Pick Selected

Records Per Page: 50 1 - 50 of 193 next Show All

	Sales Order #	Pick Type	Transfer From	Ship From	Date	Delivery Date	Customer Name	Status	Your Order	Shipped	Item #	Z
☐	251003-0001	Q Transfer	Anaheim	Long Beach		10/03/2025	Richard Cooper	To Print & Pick			AC1000114C	On Do
☐	251014-0001	Q Transfer	Anaheim	Long Beach		10/14/2025	American Gener...	To Print & Pick			AC1000101	
☐	251014-0001	Q Transfer	Anaheim	Long Beach		10/14/2025	American Gener...	To Print & Pick			AC1000101	
☐	251003-0001	Q Transfer	Anaheim	Long Beach		10/03/2025	Richard Cooper	To Print & Pick			AC1000119	AA
☐	251003-0001	Q Transfer	Anaheim	Long Beach		10/03/2025	Richard Cooper	To Print & Pick			AC1000114C	On Do
☐	250923-0002	Q Transfer	Anaheim	Long Beach		09/24/2025	Best Auto Collis...	To Print & Pick		Truck 1	AC1006124	
☐	250723-0009	Q Ship Order	Anaheim		07/23/2025	07/23/2025	zTest 0602 (Mc...	To Print & Pick			HO1000255c	AA
☐	250723-0009	Q Ship Order	Anaheim		07/23/2025	07/23/2025	zTest 0602 (Mc...	To Print & Pick			HO1000256	AA
☐	250723-0009	Q Ship Order	Anaheim		07/23/2025	07/23/2025	zTest 0602 (Mc...	To Print & Pick			HO1000256c	AC
☐	250723-0009	Q Ship Order	Anaheim		07/23/2025	07/23/2025	zTest 0602 (Mc...	To Print & Pick			HO1200189	
☐	250723-0009	Q Ship Order	Anaheim		07/23/2025	07/23/2025	zTest 0602 (Mc...	To Print & Pick			HO1200192	
☐	250723-0009	Q Ship Order	Anaheim		07/23/2025	07/23/2025	zTest 0602 (Mc...	To Print & Pick			HO1234123	AA
☐	250723-0009	Q Ship Order	Anaheim		07/23/2025	07/23/2025	zTest 0602 (Mc...	To Print & Pick			HO1006177C	AB
☐	250723-0009	Q Ship Order	Anaheim		07/23/2025	07/23/2025	zTest 0602 (Mc...	To Print & Pick			HO1006177C	AB
☐	250723-0009	Q Ship Order	Anaheim		07/23/2025	07/23/2025	zTest 0602 (Mc...	To Print & Pick			HO1066113	

Refresh Help Close

Purpose

- Orders are ready to be **picked from inventory** and prepared for shipment.

How Orders Enter This Status:

- Orders move automatically from **Pending** or **Waiting for Delivery from Vendor** (after stock is available).

Available Functions / Buttons:

- Assign pickers

Shipping & Receiving - To Print & Pick

Warehouse: Anaheim

Items to Ship

- New (51)
- Pending (0)
- Waiting To Be Purchased (130)
- To Print & Pick (193)**
- Picking (51)
- Waiting For Delivery From Vendor (20)
- To Dispatch or Ship (105)
- In Route (92)

Select Stock Picker

Demo User

Demo User

Demo User2

John

Julian

Nick

Nirmal

Nivea

Rachelle

Syron

TamilWH

Select Warehouse Zone...

AA (7)

AB (3)

AC (4)

AD (36)

BA (1)

BB (8)

BC (4)

On Dock (6)

Filter By...

Truck

Truck

Truck

Records Per Page: 50 1 - 50 of 193 next Show All

	Sales Order #	Pick Type	Transfer From	Ship From	Date	Delivery Date	Customer Name	Status	Your Order	Shipped	Item #	Z
☐	251003-0001	Q Transfer	Anaheim	Long Beach		10/03/2025	Richard Cooper	To Print & Pick			AC1000114C	On Do

- Print Sales Orders, labels, and picking documents

Shipping & Receiving - To Print & Pick

Warehouse: Anaheim

Items to Ship

- New (51)
- Pending (0)
- Waiting To Be Purchased (130)
- To Print & Pick (193)**
- Picking (51)
- Waiting For Delivery From Vendor (20)
- To Dispatch or Ship (105)
- In Route (32)
- Closed (782)

Select Stock Picker: Demo User

Select Warehouse Zone:

- AA (7)
- AB (3)
- AC (4)
- AD (36)
- BA (1)
- BB (8)
- BC (4)
- On Dock (6)

Filter By:

- Truck
- Truck
- Truck

Search For: Scan Item Or Transaction

User: User

Batch ID: Batch ID

Records Per Page: 50

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Print & Pick Selected

next

Show All

	Sales Order #	Pick Type	Transfer From	Ship From	Date	Delivery Date	Customer Name	Status	Your Order	Shipped	Item #	Z
☒	251003-0001	Q	Transfer	Anaheim	Long Beach	10/03/2025	Richard Cooper	To Print & Pick			AC1000114C	On D
☒	251014-0001	Q	Transfer	Anaheim	Long Beach	10/14/2025	American Gener...	To Print & Pick			AC1000101	
☒	251014-0001	Q	Transfer	Anaheim	Long Beach	10/14/2025	American Gener...	To Print & Pick			AC1000101	

- Filter/search orders

Shipping & Receiving - To Print & Pick

Warehouse: Anaheim

Items to Ship

- New (51)
- Pending (0)
- Waiting To Be Purchased (130)
- To Print & Pick (193)**
- Picking (51)
- Waiting For Delivery From Vendor (20)
- To Dispatch or Ship (105)
- In Route (32)
- Closed (782)

Select Stock Picker: Demo User

Select Warehouse Zone:

- AA (7)
- AB (3)
- AC (4)
- AD (36)
- BA (1)
- BB (8)
- BC (4)
- On Dock (6)

Filter By:

- Truck
- Truck
- Truck

Search For: Scan Item Or Transaction

User: User

Batch ID: Batch ID

Records Per Page: 50

1 - 50 of 193

Print & Pick Selected

next

Show All

	Sales Order #	Pick Type	Transfer From	Ship From	Date	Delivery Date	Customer Name	Status	Your Order	Shipped	Item #	Z
☒	251003-0001	Q	Transfer	Anaheim	Long Beach	10/03/2025	Richard Cooper	To Print & Pick			AC1000114C	On D
☒	251014-0001	Q	Transfer	Anaheim	Long Beach	10/14/2025	American Gener...	To Print & Pick			AC1000101	
☒	251014-0001	Q	Transfer	Anaheim	Long Beach	10/14/2025	American Gener...	To Print & Pick			AC1000101	

- Link to related Sales Order

Picking

Purpose

- Tracks orders actively being picked from inventory.

How Orders Enter This Status:

- Automatically updated when a warehouse worker starts scanning items from To Print & Pick.

Available Functions / Buttons:

- Update picking progress
- Link to related Sales Order
- Manual status override (if needed)

Waiting for Delivery from Vendor

Purpose

- Items that have been ordered from a vendor but have not yet arrived.

How Orders Enter This Status:

- System automatically updates from Waiting for Delivery when a PO is created.

Available Functions / Buttons:

- Assign pickers
-
- Print Sales Orders, labels, and picking documents
- Filter/search orders
- Link to Open Sales Order

To Dispatch / Ship

Purpose

- Orders are ready to be dispatched or shipped to customers.

How Orders Enter This Status:

- Automatically updated from Picking once items are scanned.

Available Functions / Buttons:

- Assign drivers
- Batch print invoices and shipping documents
- Filter/search orders
- Import/Export Options for external 3rd Party Apps
- Edit/Reprint Manifest or Invoices

In Route

Purpose

- Orders that are currently being delivered.

How Orders Enter This Status:

- Updated automatically after scanning items for dispatch.

Available Functions / Buttons:

- Update status to Completed, Cancelled, or other outcomes
- Track delivery routes

Closed

Purpose

- Displays **completed and finalized orders**.

How Orders Enter This Status:

- Orders move automatically from **In Route** once delivery is confirmed or manually updated by the manager.

Available Functions / Buttons:

- View completed orders.

Common Task and Scenarios

How do I view the related Sales Order from the Shipping & Receiving screen?

1. Go to the Shipping & Receiving screen and select the correct warehouse.
2. In several of the Items to Ship statuses, you can locate the Sales Order column.
3. Click the magnifying glass icon next to the Sales Order number.
4. The Sales Order opens in a new tab, showing all line items.

The screenshot shows the 'Shipping & Receiving' interface. A red arrow points to the 'Warehouse' dropdown menu set to 'Anaheim'. Another red arrow points to the 'To Print & Pick (191)' status in the 'Items to Ship' list. A third red arrow points to the magnifying glass icon next to the Sales Order number '251003-0001' in the table.

	Sales Order #	Stock Type	Transfer From	Ship From	Date	Delivery Date	Customer Name	Status	Your Order	Shipped	Item #	Z
☐	251003-0001	Q	Transfer	Anaheim	Long Beach	10/03/2025	Richard Cooper	To Print & Pick			AC1000114C	On Do
☐	251014-0001	Q	Transfer	Anaheim	Long Beach	10/14/2025	American Gener...	To Print & Pick			AC1000101	
☐	251014-0001	Q	Transfer	Anaheim	Long Beach	10/14/2025	American Gener...	To Print & Pick			AC1000101	
☐	251003-0001	Q	Transfer	Anaheim	Long Beach	10/03/2025	Richard Cooper	To Print & Pick			AC1000119	AA

Tip: Use this to quickly check all items in an order before picking or shipping.

How do I assign pickers and print shipping documents for Sales Orders?

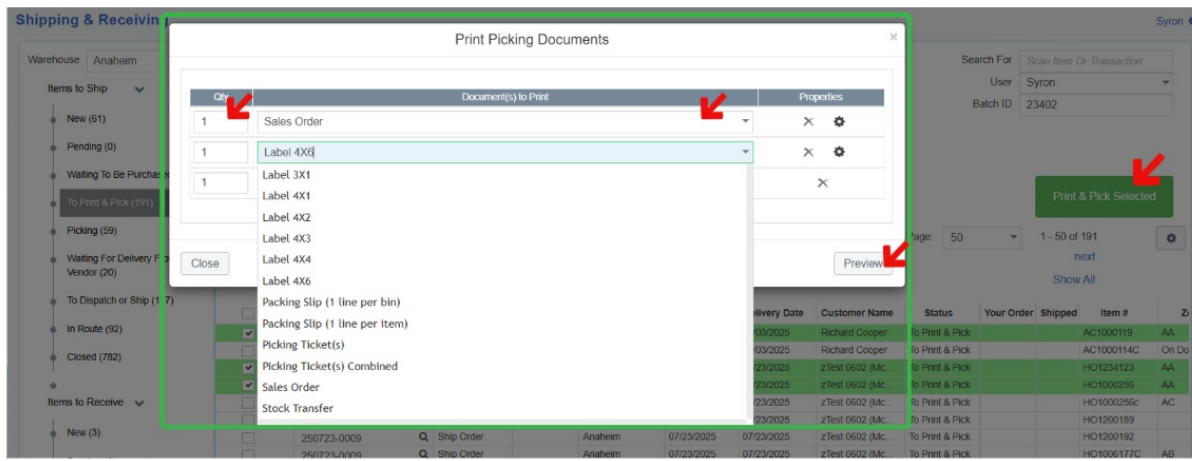
1. Go to the Shipping & Receiving screen and select the correct warehouse.
2. In Items to Ship, click the To Print & Pick status.
3. Select a stock picker first from the picker dropdown.
4. Select the orders you want to assign:
 - Use filters such as warehouse zone or route to automatically select orders in a specific zone or delivery route.
- The assigned picker will now see the orders in their 1place Scan app.

The screenshot shows the 'Shipping & Receiving' interface. On the left, a sidebar lists various order statuses under 'Items to Ship' and 'Items to Receive'. The 'To Print & Pick (191)' status is highlighted with a red arrow. The main area features a 'Warehouse' dropdown set to 'Anaheim' (also indicated by a red arrow). To the right of the warehouse dropdown are three selection boxes: 'Select Stock Picker' (with 'Syron' selected), 'Select Warehouse Zone(s)', and 'Select Route(s)'. These three boxes are grouped by a green rectangle. Further right, there are search filters for 'User' (set to 'Syron') and 'Batch ID' (set to '23402'). A green 'Print & Pick Selected' button with a red arrow pointing to it is located on the right side. Below these elements is a table of orders with columns for checkboxes, Sales Order #, PickType, Transfer From, Ship From, Date, Delivery Date, Customer Name, Status, Your Order, Shipped, Item #, and Z.

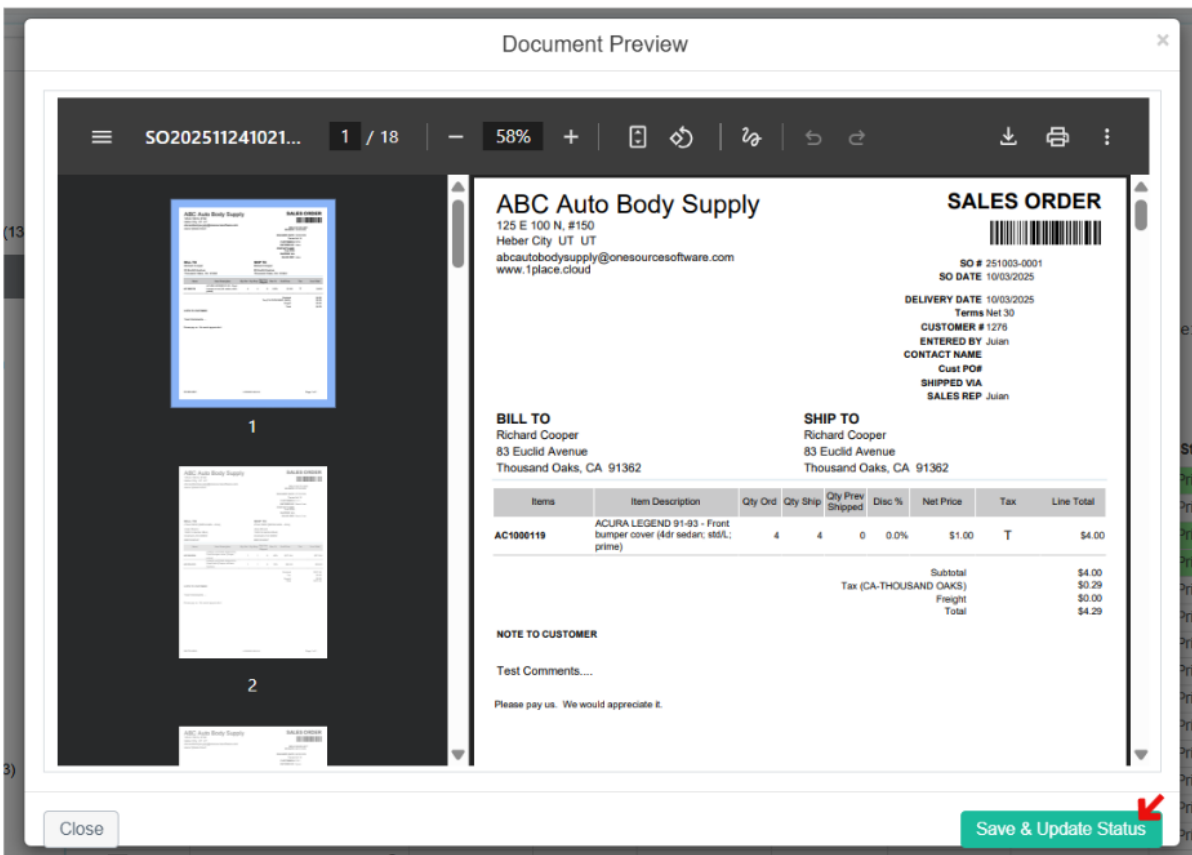
	Sales Order #	PickType	Transfer From	Ship From	Date	Delivery Date	Customer Name	Status	Your Order	Shipped	Item #	Z
☒	251003-0001	Q	Transfer	Anaheim	Long Beach	10/03/2025	Richard Cooper	To Print & Pick			AC1000119	AA
☐	251003-0001	Q	Transfer	Anaheim	Long Beach	10/03/2025	Richard Cooper	To Print & Pick			AC1000114C	On Do
☒	250723-0009	Q	Ship Order	Anaheim		07/23/2025	zTest 0602 (Mc...	To Print & Pick			HO1234123	AA
☒	250723-0009	Q	Ship Order	Anaheim		07/23/2025	zTest 0602 (Mc...	To Print & Pick			HO1000296	AA
☐	250723-0009	Q	Ship Order	Anaheim		07/23/2025	zTest 0602 (Mc...	To Print & Pick			HO1000296c	AC

How do I print shipping documents (labels, packing slips, pick tickets, and Sales Orders)?

1. After selecting the orders you want to print, click Print & Pick Selected.
2. The Print Picking Documents window will appear.
3. Select the documents you want to print, such as:
 1. Labels
 2. Packing slips
 3. Pick tickets
 4. Sales Orders
4. Enter the quantity to print if needed.



5. A preview of the document will be shown.



6. Click Save & Update Status to complete printing and move the orders to the next status.

How do I complete the picking process or tag orders as picked?

1. In the **Picking** status, select the specific picker/user.
 - The list of orders will be filtered to show only orders assigned to that user.
 - Select the orders to mark as completed:

- Check the **boxes** next to the orders, or
- Use the **Auto Select & Update All Qty Picked Values** action button to automatically set picked quantities equal to the shipped quantities.
- Click **Pick Completed** to tag the selected orders/items as picked.
- The orders will automatically proceed to the next **status**.

How do I dispatch items ready to ship?

1. Go to the To Dispatch / Ship status in the Items to Ship section.
2. Choose an option:
 - Dispatch 1 Driver – assign orders to a specific driver.
 - Dispatch All Drivers – assign orders for all drivers at once.
 - Invoice Selected Orders – create invoices for selected orders (covered in a separate scenario).
- If dispatching 1 driver:
 - Select the driver from the dropdown.
 - Select the day for dispatch.
- Enter a Dispatch Number, or click Create Dispatch # to generate one automatically.
- Now select the orders you want to dispatch using the checkboxes. You can use the first check box to automatically:
 - Select All Orders
 - Select All Orders 100% Ready to Ship
 - Select All Order Transfer Ready to Transfer
 - Un-select All Orders

Note: Selecting orders before choosing a driver will trigger an error “Pick a driver first.”
- Use the Ship Via filter if you need to filter orders by shipping method.
- Click Dispatch / Ship Selected to mark the orders as dispatched.
- The orders will now move to the In Route status.

How do I batch-invoice orders that are ready for dispatch?

1. Go to the To Dispatch / Ship status under Items to Ship.
2. Use filters (such as Ship Via) to narrow down the list if needed.
3. Select the orders you want to invoice using the checkboxes.
4. You may also use the first checkbox to automatically:
 - Select All Orders
 - Select All Orders 100% Ready to Ship
 - Select All Orders Transfer Ready to Transfer
 - Un-select All Orders
- Click Proceed.

- The Dispatch Print Selection pop-up will appear.
 - The Pre-print option – Auto create Invoices for Sales Orders in this Dispatch is automatically checked.
 - Click Proceed to continue.
- The Print Dispatch Documents pop-up will open.
 - Review which documents you want to print (invoices and any additional dispatch documents).
 - Click Print & Update Status.
- A print preview of the invoices and selected dispatch documents will appear.
- Click Print to print copies.

How do I reprint a Dispatch Manifest?

1. Go to the To Dispatch / Ship status in the Items to Ship section.
2. Click Edit / Reprint Manifest or Invoices at the bottom of the screen.
3. The Edit or Reprint Manifest screen will appear.
 - Select the Dispatch # for the orders you want to reprint.
- Select Reprint Selected Dispatch and click Proceed.
- The Print Dispatch Documents pop-up will open.
 - Select the documents you want to print.
- Click Print to generate a preview of the selected documents.
- Review the preview, then click Update Status to complete the process.

How do I reprint an Invoice Batch?

1. Go to the To Dispatch / Ship status under Items to Ship.
2. Click Edit / Reprint Manifest or Invoices at the bottom of the screen.
3. The Edit or Reprint Manifest window will open.
 - Select Reprint Invoice Batch.
 - Choose the Batch Number from the dropdown list.
- Click Proceed.
- A print preview of the invoices will appear.
 - Click the Print icon to print the batch.
 - (Optional) Use the Export Manifest option if needed.
- Click Close when finished.

How do I update the status of orders/items in In Route?

1. Go to the Shipping & Receiving screen.

2. Under Items to Ship, click the In Route status.
3. Select the order(s) you want to update by checking the box next to each one – or auto-select them using the Dispatch Number.
4. Choose the new status from the Move to Status dropdown
5. Click Update Selected to apply the change.
6. Once updated, the order(s) will move to the selected status (for example, Closed).

Administrator - How to Set Up and Use Shipping & Receiving Statuses to Control Order Flow

This section is intended for **Administrators** and users responsible for configuring the **Shipping & Receiving workflow**.

The Shipping and Receiving settings allow you to control how Sales Orders, Purchase Orders, and Stock Transfers move through the warehouse process.

You can configure:

- Which statuses are active
- Which statuses appear on the Shipping & Receiving screen
- The name displayed to users
- The next status in the workflow
- Whether users can add line items
- Whether users can edit line items
- Whether users can delete line items
- Whether users can delete the order
- Additional Shipping & Receiving options

How to Access Shipping and Receiving Settings

1. Click the **Gear icon** in the upper-right corner.
2. Click **Settings**.
3. Under **Warehouse**, click **Shipping and Receiving**.

The Shipping and Receiving settings contain the following sections:

- Shipping - Sales Order Statuses
- Receiving - Purchase Order Statuses
- Stock Transfer - Statuses
- Options

Shipping - Sales Order Statuses

The **Shipping - Sales Order Statuses** section is used to configure the statuses and workflow for Sales Orders as they move through the shipping process.

The status configuration is displayed in a table, with each **column** controlling a specific part of the workflow. These columns determine how a status is used, how it is displayed to users, what status comes next, and what actions users are allowed to perform while an order is in that status.

The following explains the purpose and functionality of each column.

Action

The **Action** column allows you to change the order of the status rows.

To change the order:

1. Click and hold the Action icon for the status you want to move.
2. Drag the status row to the desired position.
3. Release the row.
4. Click **Save**.

Active

The **Active** column determines whether the status is active.

Check **Active** to make the status available for use.

Clear **Active** when the status should no longer be active.

Show on Shipping and Receiving

The **Show on Shipping and Receiving** column determines whether the status appears on the Shipping & Receiving screen.

Check this option when the status should be displayed for users on the Shipping & Receiving screen.

Status

The **Status** column displays the system-defined status.

Examples include:

- New
- Pending
- WaitingToBePurchased
- To Print & Pick
- Picking
- WaitingForDelivery
- To Dispatch
- In Route to Customer

- To Cancel/Restock
- To Pack
- To Invoice
- To Load/Ship
- Closed

The system-defined Status identifies the status used by the system.

User Defined Status

The **User Defined Status** column allows you to customize the name displayed to users.

For example:

Status: WaitingForDelivery

User Defined Status: Waiting For Delivery

Another example:

Status: In Route to Customer

User Defined Status: In Route

Use names that are clear and easy for warehouse users to understand.

Next Status

The **Next Status** column determines the status that follows the current status in the workflow.

For example:

To Print & Pick

Next Status: **Picking**

Another example:

Picking

Next Status: **To Dispatch or Ship**

Select the appropriate Next Status from the dropdown.

Status Description

The **Status Description** column provides information about the purpose of the status.

Use this column to describe what the status means or what users should expect at that stage of the workflow.

Can Add Line Items

The **Can Add Line Items** column determines whether users can add line items to an order while the order is in that status.

Can Edit Line Items

The **Can Edit Line Items** column determines whether users can edit line items while the order is in that status.

Can Delete Line Items

The **Can Delete Line Items** column determines whether users can delete line items while the order is in that status.

Can Delete Order

The **Can Delete Order** column determines whether users can delete the order while it is in that status.

These columns allow administrators to control which changes users can make to an order at each stage of the workflow.

User Notes

The **User Notes** column allows administrators to add notes related to the status.

Receiving - Purchase Order Statuses

The **Receiving - Purchase Order Statuses** section controls the statuses used for Purchase Orders as they move through the receiving process.

The available columns include:

- Action
- Active
- Show on Shipping and Receiving
- Status
- User Defined Status
- Status Description
- Can Add Line Items
- Can Edit Line Items
- Can Delete Line Items
- Can Delete Order
- User Notes

The current configuration includes the following receiving statuses.

New

User Defined Status: New

New is the starting status for a Purchase Order.

Pending

User Defined Status: Pending

Pending can be used to place a Purchase Order on hold before it continues through the receiving process.

Waiting for Delivery

User Defined Status: Order Submitted

This status represents a Purchase Order that has been submitted and is waiting for delivery.

In Route to Warehouse

User Defined Status: In Route to Warehouse

This status represents a Purchase Order that is in route to the warehouse.

On Dock

User Defined Status: Ready to Receive

This status represents a Purchase Order that is ready to be received.

Received

User Defined Status: Received

This status represents a Purchase Order that has been received.

Stock Transfer - Statuses

The **Stock Transfer - Statuses** section controls the workflow for inventory being transferred between warehouses.

The available columns include:

- Action
- Active
- Status
- User Defined Status
- Next Status
- Status Description

The current configuration includes the following statuses.

New

User Defined Status: New

The starting status for a Stock Transfer.

Pending

User Defined Status: Pending

Used when a Stock Transfer is being held before processing.

To Print & Pick

User Defined Status: To Print & Pick

Next Status: Picking

Used when the Stock Transfer is ready to be picked.

Picking

User Defined Status: Picking

Next Status: To Dispatch

Used while the Stock Transfer is being picked.

To Dispatch

User Defined Status: To Dispatch

Next Status: In Route

Used when the Stock Transfer is ready to leave the source warehouse.

In Route

User Defined Status: In Route

Next Status: Closed

Used while the Stock Transfer is in route to the destination warehouse.

Received

User Defined Status: Received

Next Status: Closed

Used when the Stock Transfer has been received at the destination warehouse.

Closed

User Defined Status: Closed

The completed status for the Stock Transfer.

Options

The **Options** section contains additional settings that affect how users work with Shipping & Receiving.

When Warehouse Worker is Selected

The following option is available:

When Warehouse Worker is Selected (on To Print & Pick screen) auto select all Warehouse Zones assigned to the selected user, and then auto select all items in the selected zone(s).

When enabled, selecting a Warehouse Worker on the **To Print & Pick** screen will automatically:

1. Select all Warehouse Zones assigned to the selected user.
2. Select all items in the selected zones.

This can help speed up the process of assigning items to warehouse workers when Warehouse Zones have already been assigned to users.

Show Counts on Each Ship/Receive Status

The following option is available:

Show counts on each Ship/Receive statuses.

When enabled, the Shipping & Receiving screen displays the number of orders or transactions associated with each applicable Ship/Receive status.

This allows users to quickly see how many items or orders are currently waiting in each status.

How to Change the Status Workflow

1. Click the **Gear icon** in the upper-right corner.
2. Click **Settings**.
3. Under **Warehouse**, click **Shipping and Receiving**.
4. Open the appropriate status section.
5. Locate the status you want to change.
6. Review the **Active** setting.
7. Review the **Show on Shipping and Receiving** setting.

8. Review the **User Defined Status**.
9. Select the appropriate **Next Status**.
10. Review the line item and order permissions.
11. Click **Save**.

How to Activate a Status

1. Click the **Gear icon** in the upper-right corner.
2. Click **Settings**.
3. Under **Warehouse**, click **Shipping and Receiving**.
4. Open the appropriate status section.
5. Locate the status you want to activate.
6. Check **Active**.
7. Check **Show on Shipping and Receiving** if users need to work with the status from the Shipping & Receiving screen.
8. Review the **User Defined Status**.
9. Select the appropriate **Next Status**, if applicable.
10. Review the line item and order permissions.
11. Click **Save**.

How to Deactivate a Status

1. Click the **Gear icon** in the upper-right corner.
2. Click **Settings**.
3. Under **Warehouse**, click **Shipping and Receiving**.
4. Open the appropriate status section.
5. Locate the status.
6. Clear **Active**.
7. Clear **Show on Shipping and Receiving** if applicable.

8. Click **Save**.

How to Change the Name Users See

The **Status** and **User Defined Status** fields serve different purposes.

The **Status** is the system-defined status.

The **User Defined Status** is the name displayed to users.

To change the displayed name:

1. Click the **Gear icon** in the upper-right corner.
2. Click **Settings**.
3. Under **Warehouse**, click **Shipping and Receiving**.
4. Open the appropriate status section.
5. Locate the status.
6. Update the **User Defined Status** field.
7. Click **Save**.

For example:

System Status: On Dock

User Defined Status: Ready to Receive

Users will see **Ready to Receive** as the displayed status.

How to Control What Users Can Do at Each Status

The line item and order permission settings allow administrators to control what users can do while an order is in a particular status.

For each status, review:

- Can Add Line Items
- Can Edit Line Items
- Can Delete Line Items
- Can Delete Order

For example, a company may allow users to make changes while an order is in New but restrict changes once the order has entered Picking.

This can help prevent changes to an order after warehouse processing has started.

Recommended Approach to Setting Up Order Flow

Before changing the status configuration, determine how your warehouse actually processes orders.

For each stage, determine:

- What the status means
- Who is responsible for the order
- What the user needs to do
- What status should come next
- Whether the status should appear on Shipping & Receiving
- Whether users should be able to add line items
- Whether users should be able to edit line items
- Whether users should be able to delete line items
- Whether users should be able to delete the order

Configure the statuses so that the workflow in 1place matches the actual process followed by your warehouse.

For example, a basic Sales Order workflow can be:

New

Sales Order is created.

To Print & Pick

Order is ready to be assigned for picking.

Picking

Warehouse worker is picking the order.

To Dispatch or Ship

Order is ready to leave the warehouse.

In Route

Order has been dispatched and is being delivered.

Closed

Order has been completed.

Additional statuses such as **Pending**, **Waiting To Be Purchased**, **Waiting For Delivery**, and **To Cancel/Restock** can be used when your warehouse process requires additional steps.

How to Save Changes

After making changes to the Shipping and Receiving settings:

1. Review the status configuration.
2. Review the Active settings.
3. Review the Show on Shipping and Receiving settings.
4. Review the User Defined Status names.
5. Review the Next Status settings.
6. Review the line item and order permissions.
7. Review the Options settings.
8. Click **Save**.

The updated configuration will be used by the Shipping & Receiving workflow.
