

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.

The screenshot displays the 1place Shipping & Receiving interface. On the left is a sidebar with navigation links: Dashboard, Customers, Vendors, Items, Sales, AR, Purchasing, Warehouse, Shipping & Receiving (selected), Jobs, Tasks, Documents, and Reports. The main content area is titled 'Shipping & Receiving' and shows a 'Warehouse' dropdown set to 'Anaheim'. Below this are two main sections: 'Items to Ship' and 'Items to Receive'. Each section has a list of orders with checkboxes and status indicators. To the right of these sections are controls for 'Select Stock Picker' (a dropdown for 'User'), 'Select Warehouse Zone' (a grid of buttons for zones AA, AB, AC, AD, BB, BC, and 'On Dock'), and 'Filter By' (a dropdown for 'Truck 1', 'Truck 2', and 'Truck 3'). A search bar is located at the top right, and a 'Print & Pick Selected' button is at the bottom right. A table of orders is displayed at the bottom, with columns for Sales Order #, Item #, PickType, Transfer Fro, Ship From, Date, De, Customer Name, Status, Your Order #, Shipped Via, Description, Zone, Quan, Ship Qty, and Bin.

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

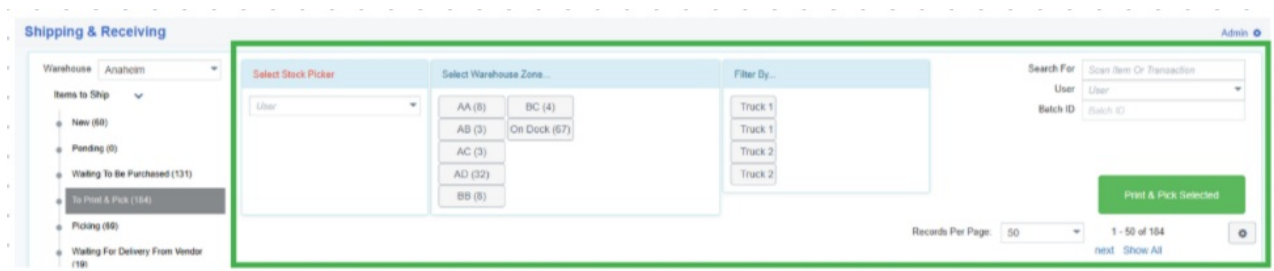
- Warehouse staff use the scanner to physically pick, ship, and receive items.
- Warehouse managers use the Shipping & Receiving screen to assign orders, monitor activity, perform bulk updates, and manually adjust statuses when needed.
- Together, they keep your warehouse operations organized, accurate, 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
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
To Print and Pick	Orders ready for picking. Managers can assign pickers, print documents, and prep
Picking	Items actively being picked using the 1place Scan. The system updates the status
Waiting for Delivery from Vendor	Items linked to a PO and waiting for vendor delivery. Once the PO is received, 1p
To Dispatch / Ship	Orders ready for dispatch. Managers can assign drivers, print invoices in batches,
In Route	Orders currently out for delivery. Managers can update statuses to Completed, C
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
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
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

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 #		Pick Type	Transfer From
☐	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

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

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

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)

Select Stock Picker

Demo User

Select Warehouse Zone...

AA (7) BB (8)

AB (3) BC (4)

AC (4) On Dock (6)

AD (36)

BA (1)

Filter By...

Truck

Truck

Truck

PickType	Transfer From	Ship From	Date	Delivery Date	Customer Name
Transfer	Anaheim	Long Beach		10/03/2025	Richard Cooper

- Print Sales Orders, labels, and picking documents

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)

Select Stock Picker

Demo User

Select Warehouse Zone...

AA (7) BB (8)

AB (3) BC (4)

AC (4) On Dock (6)

AD (36)

BA (1)

Filter By...

Truck

Truck

Truck

Search For

Scan Item Or Transaction

User

Batch ID

Batch ID

Records Per Page: 50

Print & Pick Selected

Sales Order #	PickType	Transfer From	Ship From	Date	Delivery Date	Customer Name	Status	Your Order	Shipped	Item #	On D
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 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 (762)

Select Stock Picker

Demo User

Select Warehouse Zone

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

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 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.

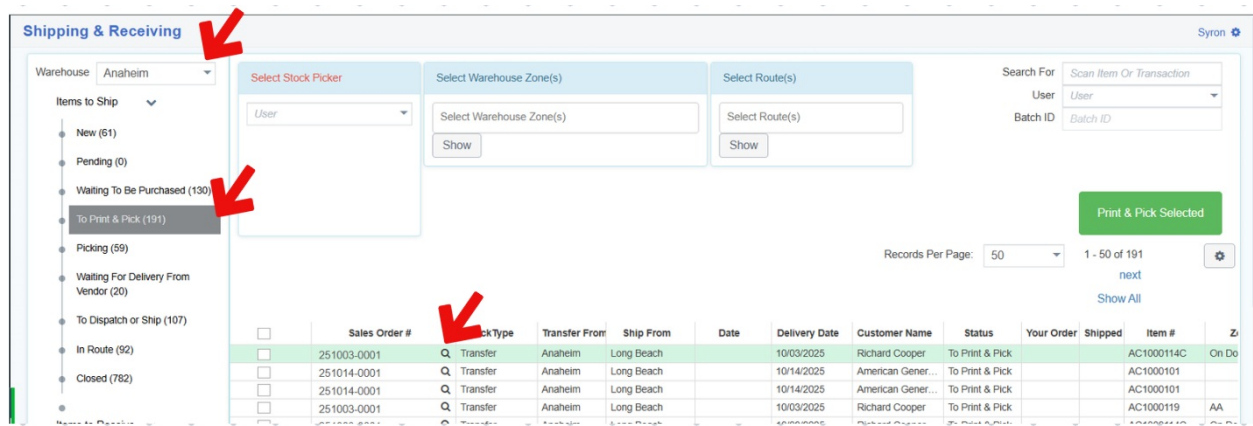
Available Functions / Buttons:

- View completed orders.

Common Task and Scenarios

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

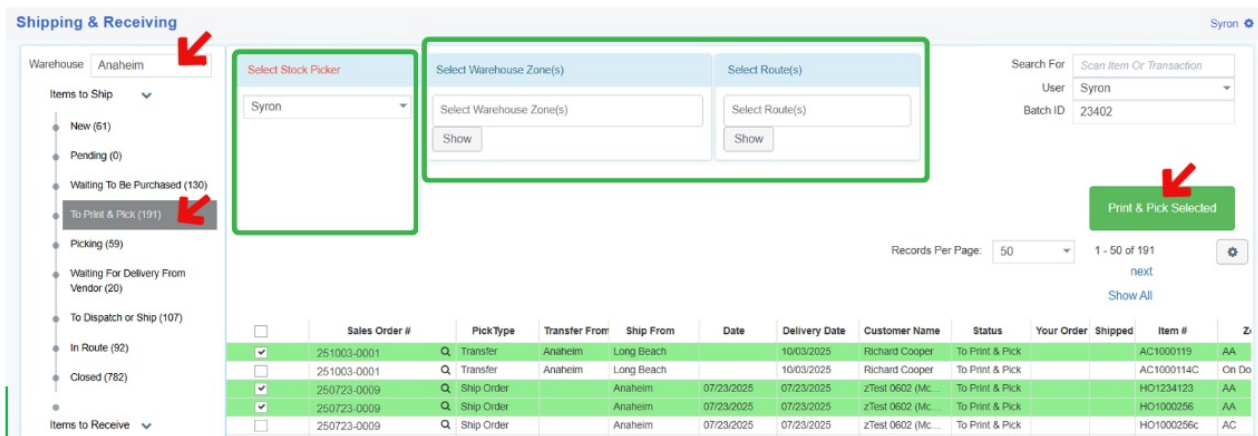
1. Go to the Shipping & Receiving screen and select the correct warehouse.
2. In several of the Items to Ship statuses, you can locate the Sales Order column.
3. Click the magnifying glass icon next to the Sales Order number.
4. The Sales Order opens in a new tab, showing all line items.



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?

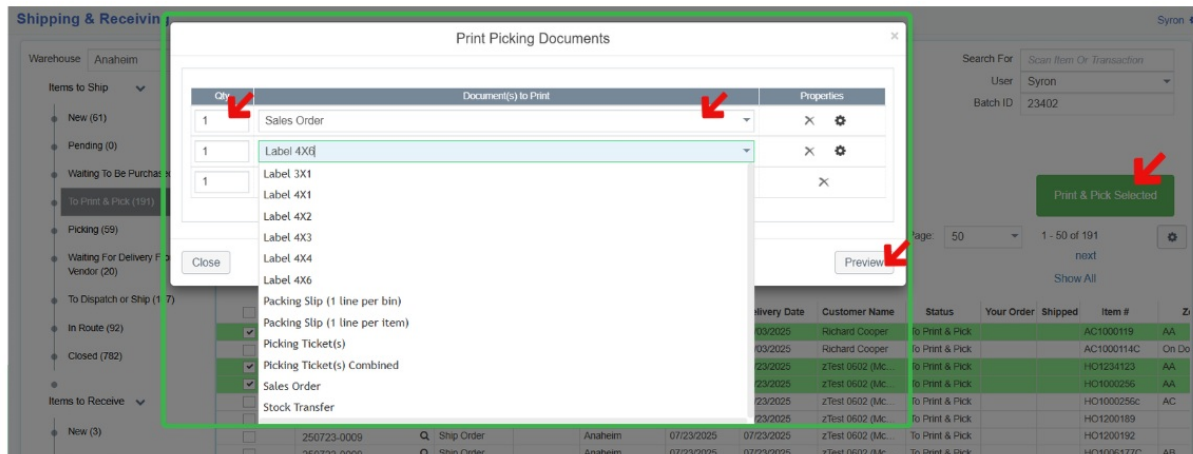
1. Go to the Shipping & Receiving screen and select the correct warehouse.
2. In Items to Ship, click the To Print & Pick status.
3. Select a stock picker first from the picker dropdown.
4. Select the orders you want to assign:
 - Use filters such as warehouse zone or route to automatically select orders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



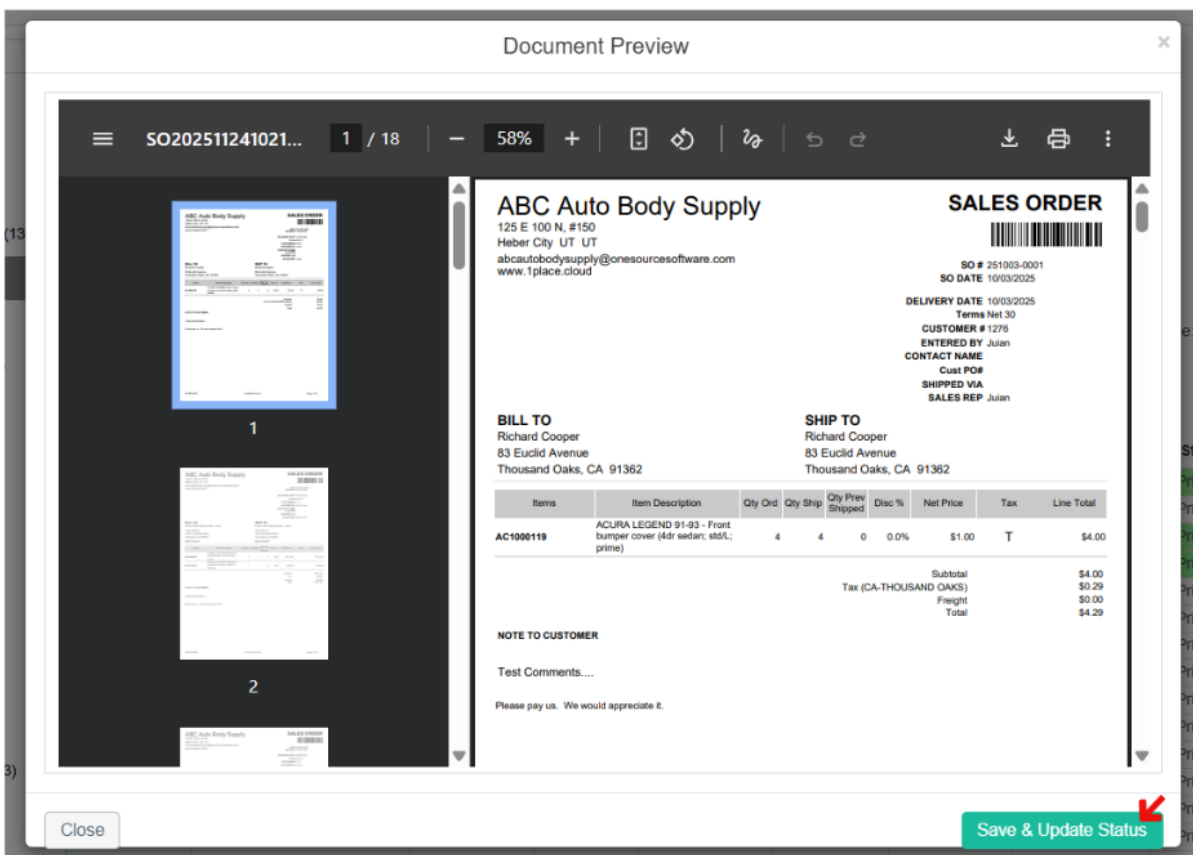
How do I print shipping documents (labels, packing slips, pick tickets, and Sales Orders)?

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**.
2. 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.
3. Click **Pick Completed** to tag the selected orders/items as picked.
4. 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).
3. If dispatching 1 driver:
 - Select the driver from the dropdown.
 - Select the day for dispatch.
4. Enter a Dispatch Number, or click Create Dispatch # to generate one automatically.
5. 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.”
6. Use the Ship Via filter if you need to filter orders by shipping method.
7. Click Dispatch / Ship Selected to mark the orders as dispatched.
8. 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
5. Click Proceed.
6. 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.
7. 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.
8. A print preview of the invoices and selected dispatch documents will appear.
9. 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.
4. Select Reprint Selected Dispatch and click Proceed.
5. The Print Dispatch Documents pop-up will open.
 - Select the documents you want to print.
6. Click Print to generate a preview of the selected documents.

7. 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.
4. Click Proceed.
5. A print preview of the invoices will appear.
 - Click the Print icon to print the batch.
 - (Optional) Use the Export Manifest option if needed.
6. 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).
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