

Fill/Ship Sales Orders

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Sales orders are entered when a customer commits to purchasing goods/services. When the item is delivered (shipped, picked up, etc.), the order needs to be filled so that the quantities can be deducted from inventory and the customer invoiced for the sale. Filling an order simply means that a shipped quantity has been placed on the order. Orders can be filled a number of ways::

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Option A: Fill a Single Order

Prior to using the Fill Single Order process, select **File > Preferences > Sales Orders > General** and choose the criteria the system should use when the Fill Single Order button is used.


1. Select **Processes > Sales > Sales Orders (Edit/Fill/Invoice)**.
2. Highlight the order to be filled and click **Fill Single Order**.

 Note: An order can also be manually filled by clicking Edit (instead of Fill Single Order) and manually entering Shipped Quantities on the Orders tab.

3. The order will be displayed and the **Quantity Shipped** fields will be auto-filled based on the option selected in the Preference mentioned above. If a serialized or lotted item is included on the order, click on the **Lot/Serial Number** detail button and select the lot or serial numbers that were provided to this customer.
4. Make any needed changes.
6. Click **Save**.

 Note: If the customer is on credit hold and the order has a Quantity Shipped when the Save button is clicked, a message will display preventing the order from being saved.

7. Click **Create Invoice** and complete the Post & Print screen, and then click **Create**.
8. Click **OK**.
9. The **Status** on the order will automatically change to **Filled** or **Partial Fill** depending on if all or just some of the items were shipped.

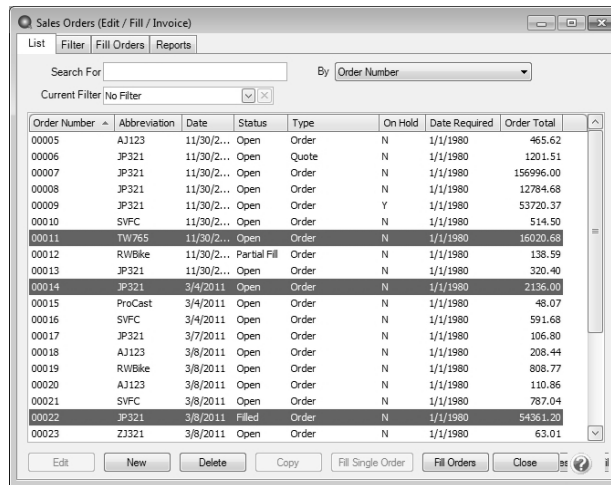
 Note: If the customer is on credit hold and the order has a Quantity Shipped when the Create Invoice button is clicked, a message will display preventing the invoice from being created for the customer.

Option B: Manually Fill a Single Order

1. Select **Processes > Sales > Sales Orders (Edit/Fill/Invoice)**.
2. Highlight the order to be filled and click **Edit**.
3. The order will be displayed and the **Quantity Shipped** fields will be zero. Enter the appropriate Quantity Shipped for each item. If a serialized or lotted item is included on the order, click on the **Lot/Serial Number** detail button and select the lot or serial numbers that were provided to this customer.
4. Make any needed changes.
5. Click **Create Invoices** and complete the Post & Print screen, and then click **Create**
6. Click **OK**.
7. The **Status** on the order will automatically change to **Filled** or **Partial Fill** depending on if all or just some of the items were shipped


Option C: Manually Select Multiple Orders to be Filled at the Same Time

1. Select **Processes > Sales > Sales Orders (Edit/Fill/Invoice)**.
2. Single-click on the first order to be filled. Then while holding down the Ctrl key on the keyboard, click on each additional order to be filled.



Order Number	Abbreviation	Date	Status	Type	On Hold	Date Required	Order Total
00005	A3123	11/30/2...	Open	Order	N	1/1/1980	465.62
00006	JP321	11/30/2...	Open	Quote	N	1/1/1980	1201.51
00007	JP321	11/30/2...	Open	Order	N	1/1/1980	156996.00
00008	JP321	11/30/2...	Open	Order	N	1/1/1980	12784.68
00009	JP321	11/30/2...	Open	Order	Y	1/1/1980	53720.37
00010	SVFC	11/30/2...	Open	Order	N	1/1/1980	514.50
00011	TW765	11/30/2...	Open	Order	N	1/1/1980	16020.68
00012	RWBike	11/30/2...	Partial Fill	Order	N	1/1/1980	138.59
00013	JP321	11/30/2...	Open	Order	N	1/1/1980	320.40
00014	JP321	3/4/2011	Open	Order	N	1/1/1980	2136.00
00015	ProCast	3/4/2011	Open	Order	N	1/1/1980	48.07
00016	SVFC	3/4/2011	Open	Order	N	1/1/1980	591.68
00017	JP321	3/7/2011	Open	Order	N	1/1/1980	106.80
00018	A3123	3/8/2011	Open	Order	N	1/1/1980	208.44
00019	RWBike	3/8/2011	Open	Order	N	1/1/1980	808.77
00020	A3123	3/8/2011	Open	Order	N	1/1/1980	110.86
00021	SVFC	3/8/2011	Open	Order	N	1/1/1980	787.04
00022	JP321	3/8/2011	Filled	Order	N	1/1/1980	54361.20
00023	Z3321	3/8/2011	Open	Order	N	1/1/1980	63.01

3. Once all orders to be filled are highlighted, click on **Fill Orders**.



The orders that will be filled are those that you have selected (highlighted) on the List tab.
Orders are selected for fulfillment in the order that they are listed on the List tab.
You can filter the list of orders to be selected by setting your selection criteria on the Filter tab. Commonly used filters (selection criteria) can be saved for future Sales Order processing.
When the Process button is clicked CenterPoint will perform the task selected below. A list of the orders will then be displayed, so that you can unselect or edit them as necessary.

Fill Sales Orders Options

Fill sales orders from available stock only. This option will cause back orders to be created when invoices are created.

Fill sales orders and disregard stocking quantities

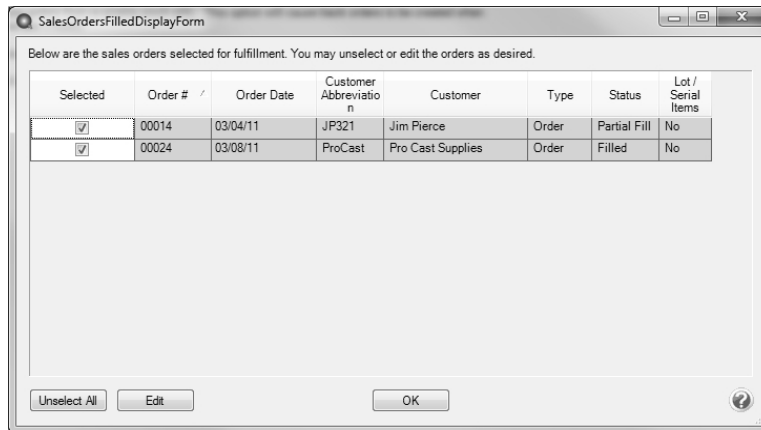
Only fill sales orders where all quantities are available

Process Cancel Close

4. Select the appropriate **Fill Sales Orders Option**.

- » **Fill sales orders from available stock only:** Each highlighted order will be filled. Inventory items will be filled only to the extent that there are quantities on hand. Service and Non-inventory items will be filled in full. The items not filled will be placed on a back order.
- » **Fill sales orders and disregard stocking quantities:** All items on all selected orders will be filled, even if there is not enough inventory on hand.
- » **Only fill sales orders where all quantities are available:** Only those orders where there is enough inventory to fill all items in full will be filled.

5. Click **Process** and **Yes** to continue.
6. Those orders that were filled will be displayed in the **Filled Sales Orders** screen. Those orders that could not be filled or partially filled (because of the Fill Sales Orders Option selected) will not be included. The **Status** will specify if the order was completely or partially filled. To review the details of what was filled on a specific order, click on it and click **Edit**.



7. If the Lot/Serial Items column displays Yes for any order, you must Edit that order and specify the lot or serial numbers used for this order. Once the order is displayed with the Edit button, click on the Lot/Serial Number detail button.
8. Click **OK** to complete the fill process.

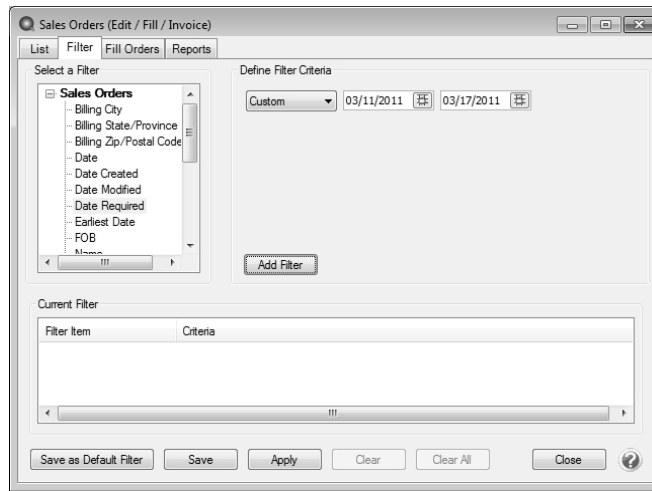
 **Note:** To unfill an order at this point, unselect the **Selected** box.

9. Click **Create Invoices** and complete the Post & Print screen, and then click **Create**.
10. Click **OK**.

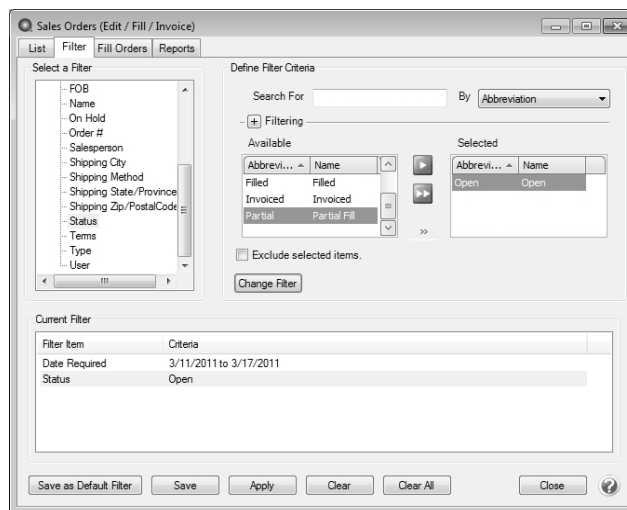
Option D: Use Filters to Select Multiple Orders to be Filled at the Same Time

Using Filters allows you to select multiple orders to be filled based on criteria that you have provided. For example, select all orders dated a certain day or all orders that are required by the customer next week.

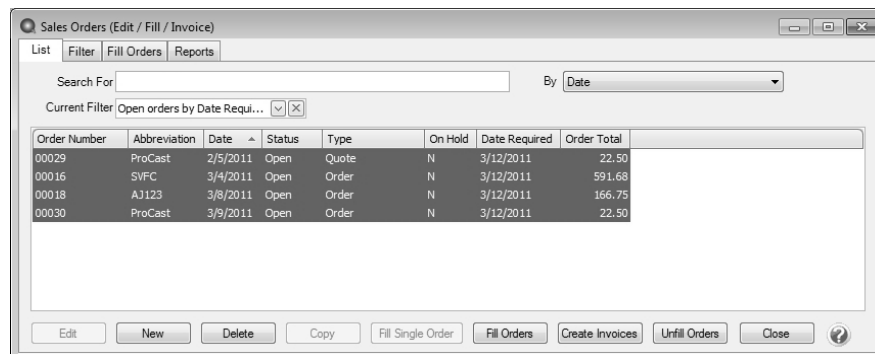
1. Select **Processes > Sales > Sales Orders (Edit/Fill/Invoice)**.
2. Click on the **Filter** tab.
3. Select the criteria to be used from the left side of the screen, (for example, Date Required) and then specify the filter criteria information on the right side of the screen.



4. Click **Add Filter**.
5. Repeat steps 3 and 4 if additional criteria is needed.



6. If this is criteria that you will be using again in the future to fill orders, then click **Save** to save this as a new filter. Otherwise, click **Apply**.
7. The List tab will now display only those orders that meet the criteria specified on the Filter tab. Single-click on the first order, hold the shift key down (on the keyboard), and then click on the last order to highlight all of the orders.



8. Click on **Fill Orders**.
9. Select the appropriate **Fill Sales Orders Option**.
10. Click **Process** in the Filled Orders screen and then **Yes** to continue.



Sales tax is not recalculated if a sales order is filled without a back order and is recalculated if a sales order is partially filled and a back order is created.

11. Click **Create Invoices** and complete the Post & Print screen, and then click **Create**.
12. Click **OK** to complete the fill process. At the main Sales Orders (Edit/Fill/Invoice) screen, use the **Current Filter** field to switch back to all orders (or all open orders).