

# Setup Guide: Creating Sales Order Views

This section will discuss the recommended sales order views used for advanced manifesting and shipping. There are four recommended standard Sales Order views to create and set up to efficiently organize and manifest orders:

- On-Hold Exception Orders
- Open Pick Orders
- Open Ship Orders
- Reprint Shipping Labels

Each view has a set of filters and columns in the grid list area to be utilized and assist in efficiently tracking, organizing, and shipping orders.

## On-Hold Exception Orders

Select Filters

Save and Close

Cancel

↑

↓

Enable Filters

✓

Sales Channel

✓

Service Level

✓

Order Status

✓

Hold Code

✓

Sales Order Type

✓

Fulfillment Ship Location

Buyer

Fulfillment Ship Channel

Fulfillment Source Channel

Fulfillment Source Location

Fulfillment Status

Have Outbound Shipment

Have Shipping Label

Item Quantity

Item Sku

Latest Ship Date

Multi Item

+

Sales Channel

▼

+

Shipping Level

▼

+

Order Status

▼

+

Hold Code

▼

+

Sales Order Type

^

+

Fulfillment Ship Location

▼

The on-hold exception orders views shows all orders in a review, hold or out of stock hold code. This view keeps track of the orders which are awaiting on a supplier shipment, need to be reviewed, and/or any possible test orders in the system. The most common exception is Out of Stock. The user can then assess and determine why the item is out of stock. To process these orders manually clear the hold code or change fulfillment method or update status of the order to remove the exception hold codes.

### Filter Settings:

- Sales Channel
  - Client and Manifestor Dependent
- Service Level
  - Client and Manifestor Dependent
- Order Status
  - Open
- Hold Code

+

Order Status

▼

+

Hold Code

▼

+

Sales Order Type

▲

+

Fulfillment Ship Location

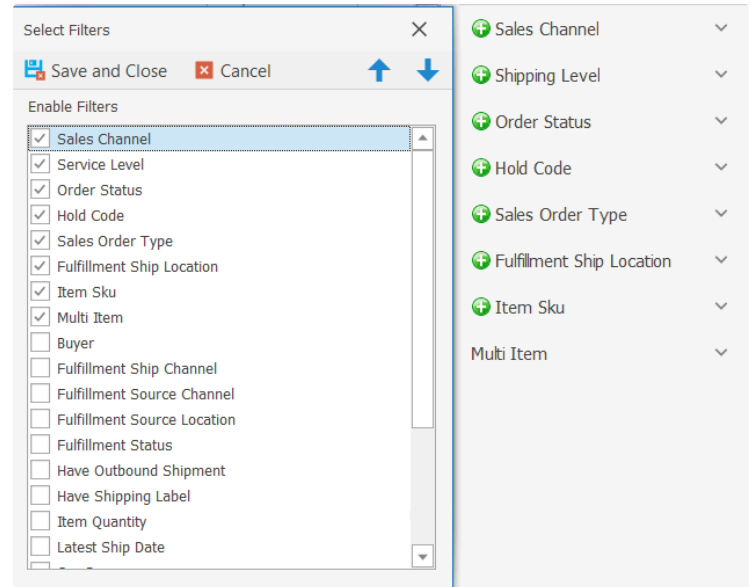
▼

- Hold
- Out of Stock
- Review
- Sales Order Type
  - Client and Manifestor Dependent
- Optional: Fulfillment Ship Location
  - Client and Manifestor Dependent

## Open Pick Orders

The Open Pick Orders view shows all orders in an open order status and a pick hold code. These orders are ready to be picked for manifesting. To move these orders through to the next view and transition to a hold code of “ship” a bulk pick ticket needs to be printed. The printing of the bulk pick ticket will move the hold code on the order to ship removing it from this view and progressing it forward to the Open Ship Orders View. There is potentially a need to have multiple open pick orders views if the client has multiple ship from locations and/or there is a need to switch between multi-item orders and single-item orders frequently. Also if the client has a manifestor that both picks and ships an order the Open Pick Orders View and Open Ship Orders view can be consolidated into one view of Open Ship Orders. Filter Settings:

- Sales Channels
  - Client and Manifestor Dependent
- Service Level
  - Client and Manifestor Dependent
- Order Status
  - Open
- Hold Code
  - Pick
- Sales Order Type



- Client and Manifestor Dependent
- Item Sku
  - Client and Manifestor Dependent
- Multi-Item
  - Client and Manifestor Dependent
- Optional: Fulfillment Ship Location
  - Client and Manifestor Dependent

Open Ship Orders

Select Filters

Save and Close

Cancel

Enable Filters

✓

Sales Channel

✓

Service Level

✓

Order Status

✓

Hold Code

✓

Sales Order Type

✓

Fulfillment Ship Location

✓

Item Sku

✓

Multi Item

✓

Package Type

Buyer

Fulfillment Ship Channel

Fulfillment Source Channel

Fulfillment Source Location

Fulfillment Status

Have Outbound Shipment

Have Shipping Label

Item Quantity

Select Filters

Clear Filters

+

Sales Channel

+

Shipping Level

+

Order Status

+

Hold Code

+

Sales Order Type

+

Fulfillment Ship Location

+

Item Sku

Multi Item

+

Package Type

The Open Ship Orders view shows all orders in a open order status and a ship hold code. These orders have been picked and are ready to be manifested with native shipping to create a shipping label. Filter Settings:

- Sales Channels
  - Client and Manifestor Dependent
- Service Level
  - Client and Manifestor Dependent
- Order Status
  - Open
  - Hold Code
  - Ship
- Sales Order Type
  - Client and Manifestor Dependent
- Item Sku
  - Client and Manifestor Dependent
- Multi-Item
  - Client and Manifestor Dependent
- Package Type
  - Client and Manifestor Dependent
  - Can be used to prefilter all orders for a recommended package type
- Optional: Fulfillment Ship Location
  - Client and Manifestor Dependent

+

Package Type

Box 11x8.5x6

2

Box 6x5x5

1

Bubble Mailer 12x6.5x3

1

Bubble Mailer 12x6.5x3.5

18

Bubble Mailer 12x6.5x4.75

1

Case 10x10x10

2

Case 10x8x6

3

Case 20x16x6

5

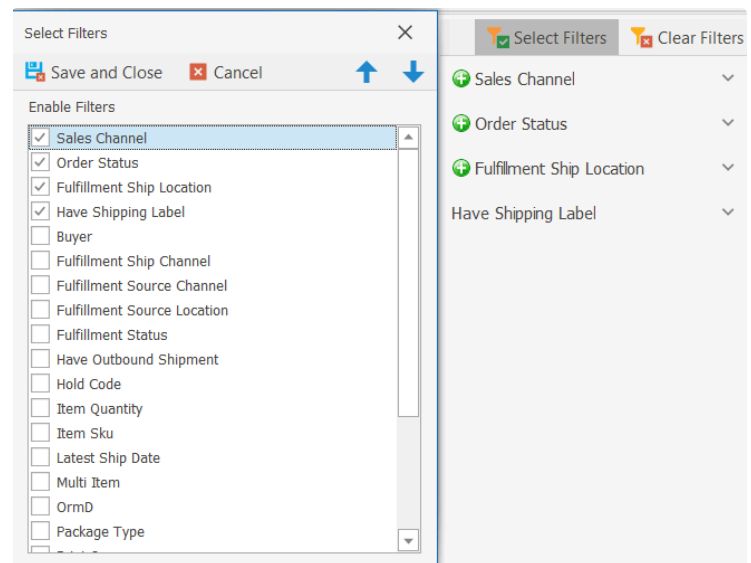
Case 9x8x6

1

## Have Shipping Label Orders

The last view is Reprint Shipping labels. This view shows all orders in a fulfilled order status with a shipping label. These orders have already been processed and is used to reprint a shipping label if the previous label was lost or damaged. Filter settings:

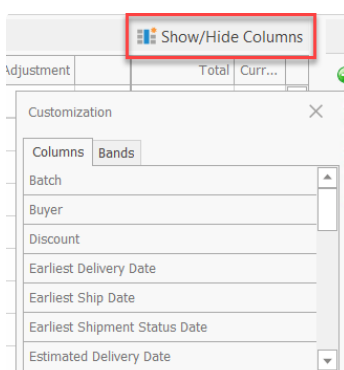
- Sales Channel
  - Client and Manifestor Dependent
- Service Level
  - Client and Manifestor Dependent
- Have Shipping Label
  - Yes
- Optional: Fulfillment Ship Location
  - Client and Manifestor Dependent



## Show/Hide Columns in Views

### Sales Orders

Sales Orders				
Exact Phrase Contains Advanced				
Latest Ship Date	Total Weight	Order Date	Order Number	
10/25/2021 11:59 PM	504	10/25/2021 5:43 PM	16772	
10/26/2021 11:59 PM	12	10/26/2021 3:39 PM	16773	



For each of the Sales Order views discussed in the previous pages there is a set of columns that should be visible in the grid list area. The grid list area that shows the orders, should have the following left most columns in the initial viewable area of the sales order view. This allows the manifestor to see the key and relevant data without having to scroll through the multitude of columns which are available in the sales orders grid list area.

- Latest Ship Date
- Total Weight