

Updating Shipments for Orders

Last Modified on 10/23/2023 5:13 pm EDT

This guide explains how to update a shipment for an order. It is intended for general users.


After an order is in Open status, you can process shipments for it.

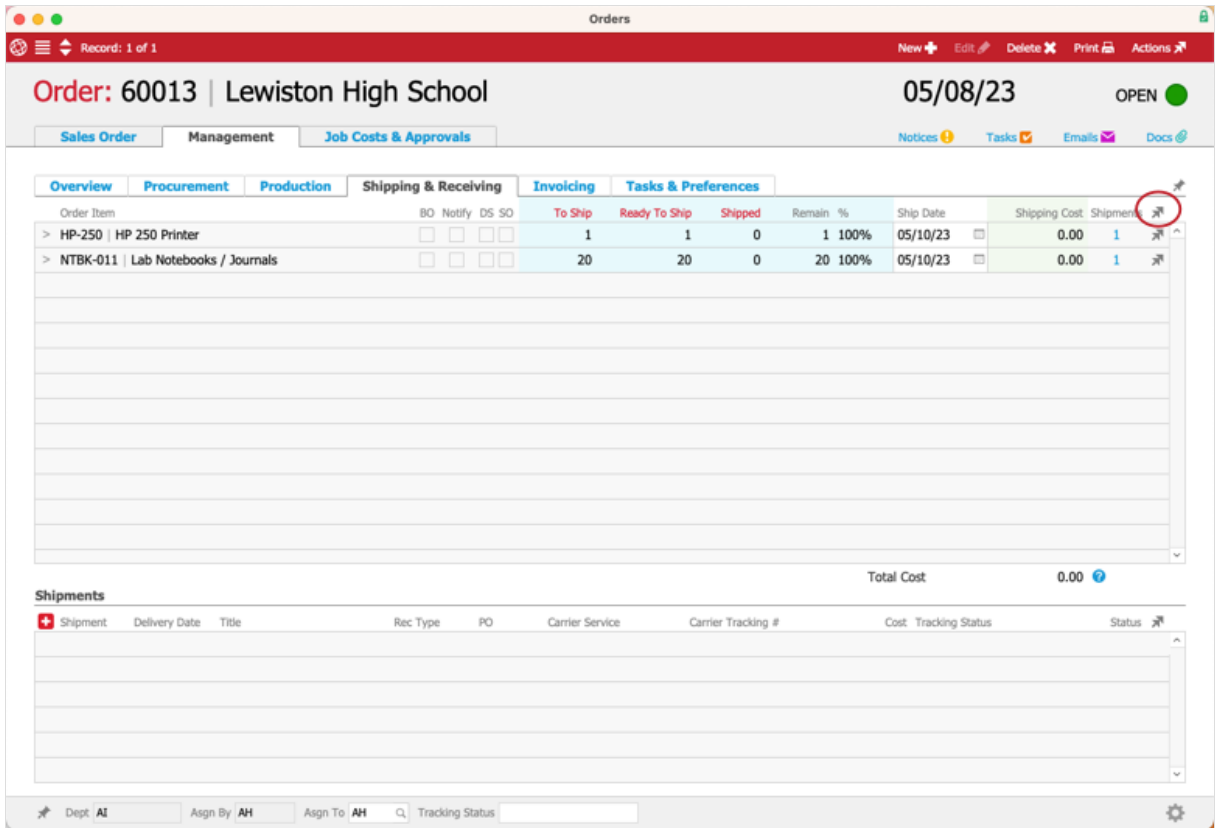
1. Navigate from **Main Menu > Order Management > Orders**.
2. Use the [Quick Search](https://aace6.knowledgeowl.com/help/using-the-quick-search-bar) (<https://aace6.knowledgeowl.com/help/using-the-quick-search-bar>) bar to locate the desired order.
3. At the detail view for the order, verify that the **Ship Type** field shows **Complete**. This delivery type is required for shipping integration. (Note: After an order has been invoiced, the Ship Type field *cannot* be changed. For more information, read about [shipping automation settings](https://aace6.knowledgeowl.com/help/automation-settings-for-shipping) (<https://aace6.knowledgeowl.com/help/automation-settings-for-shipping>.)

The screenshot displays the 'Orders' detail view for Order 60013 at Lewiston High School, dated 05/08/23, with an 'OPEN' status. The 'Ship To' section shows the 'Ship Type' field set to 'Complete' and the 'Ship Date' as 05/10/23. The 'Order Items' table lists two items: 'Lab Notebooks / Journals' (Code: NTBK-011, Quantity: 20, Unit Price: 10.00) and 'HP 250 Printer' (Code: HP-250, Quantity: 1, Unit Price: 262.86). The summary table at the bottom right shows a Subtotal of 462.86, Total of 462.86, Shipping of 99.80, Tax of 109.78, Grand Total of 572.64, and Payment Due of 572.64.

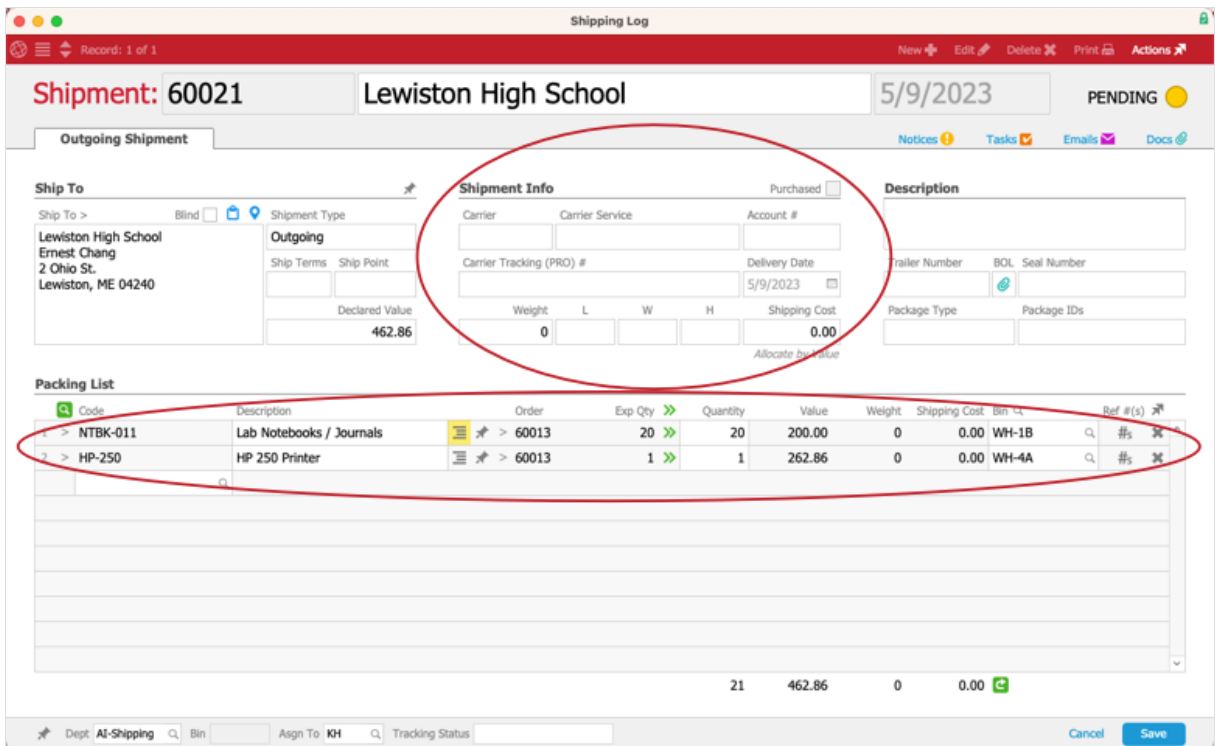
| Code | Description | Cases | Quantity | BO | DS | SO | Unit Price | Unit Adj | Total | Margin |
|--------------|--------------------------|-------|----------|----|----|----|------------|----------|--------|--------|
| 1 > NTBK-011 | Lab Notebooks / Journals | 1 | 20 | | | | 10.00 | 0.00 | 200.00 | 75% |
| 2 > HP-250 | HP 250 Printer | | 1 | | | | 262.86 | 0.00 | 262.86 | 65% |

| | | |
|-------------|--------|--------|
| Subtotal | 462.86 | 69% |
| Adjustment | 0.00 | |
| Total | 462.86 | 69% |
| Shipping | 99.80 | 109.78 |
| Tax | OUT | 0.00 |
| Grand Total | 572.64 | 58% |
| Payment Due | 572.64 | |

4. Click **Management** tab > **Shipping & Receiving** tab.
The Order Item section shows the auto-generated shipment for the order. (Note: Drop shipped items display in the Procurement tab instead.)
5. Click **Actions** () > **Generate Outgoing Shipment**.

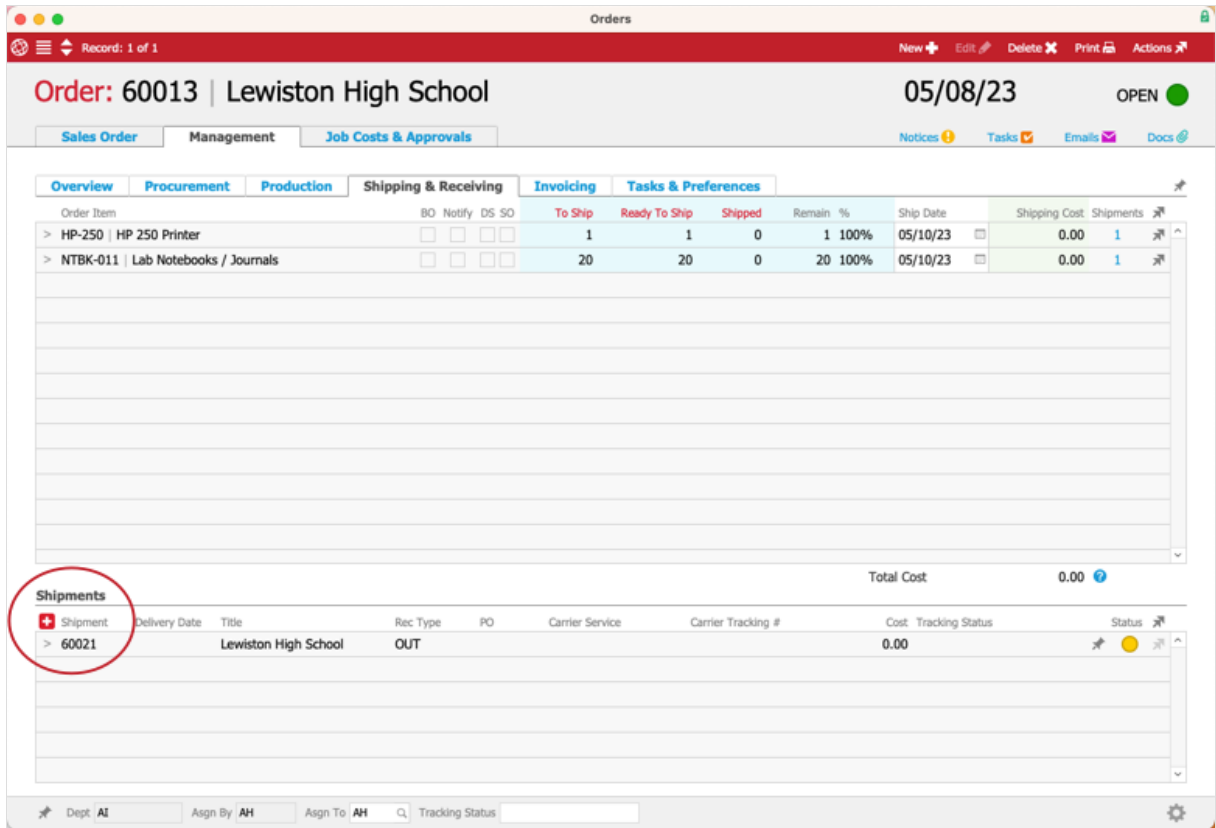


6. At the Shipping Log record, click **Edit**, then update the Shipment Info and other data as needed (including any adjustments to the items and quantities).



7. Click **Save**.

The shipment displays on the order record's section for Shipments.



Shipping Dates and Delivery Dates

A typical aACE deployment is configured so the Shipment Date automatically matches the date currently shown in the Delivery Date field. You can edit the delivery date as needed.

However, if your organization works with logistics where these dates can be different, your system administrator can [change this preference](https://aace6.knowledgeowl.com/help/managing-shipping-and-receiving#ShipmentDeliveryDates) (<https://aace6.knowledgeowl.com/help/managing-shipping-and-receiving#ShipmentDeliveryDates>).