



Split Shipments

OVERVIEW

Split Shipments is a feature in Syncore for processing an order shipping to multiple locations. Partners with access to the feature can use this in any Drop Ship Sales Order in Syncore (V2).

Benefits of this new feature:

- Save time processing these orders for invoicing
- Calculate tax for each shipment, including applicable tax on freight (shipping & handling)
- Send a single summarized invoice to your customer
- Apply a single payment to the invoice
- Validate the quantity between Sales Order and split shipments.

Users

Sales Reps, CSRs, Finance, Management and Admin Users.

Create a Split Shipment Sales Order (SO)

A Sales Order (SO) can be split so that the order can ship to multiple locations.

NOTES:

- Split Shipment orders are only available for Drop Ship Jobs (not Program or Corporate Jobs).
- SO status must be Pending or Open.
- Job status must be Pending, Submitted or WIP.
- For a Split Shipment SO, Users cannot:
 - make changes to a Job and SO in V1
 - repeat an order in V1.

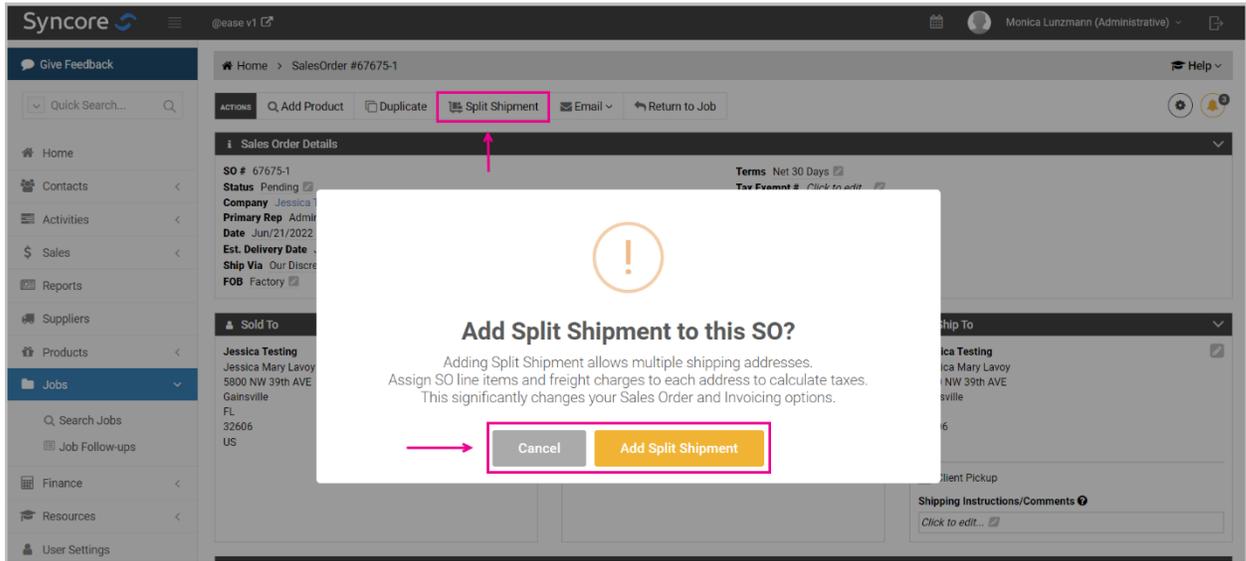
To create a Split Shipment in a Sales Order (SO):

1. In the SO, select **Split Shipment** in the ACTIONS bar.

The “Add Split Shipment to this SO?” window opens with the message:

“Adding Split Shipment allows multiple shipping addresses.
Assign SO line items and freight charges to each address to calculate taxes.
This significantly changes your Sales Order and Invoicing options.”

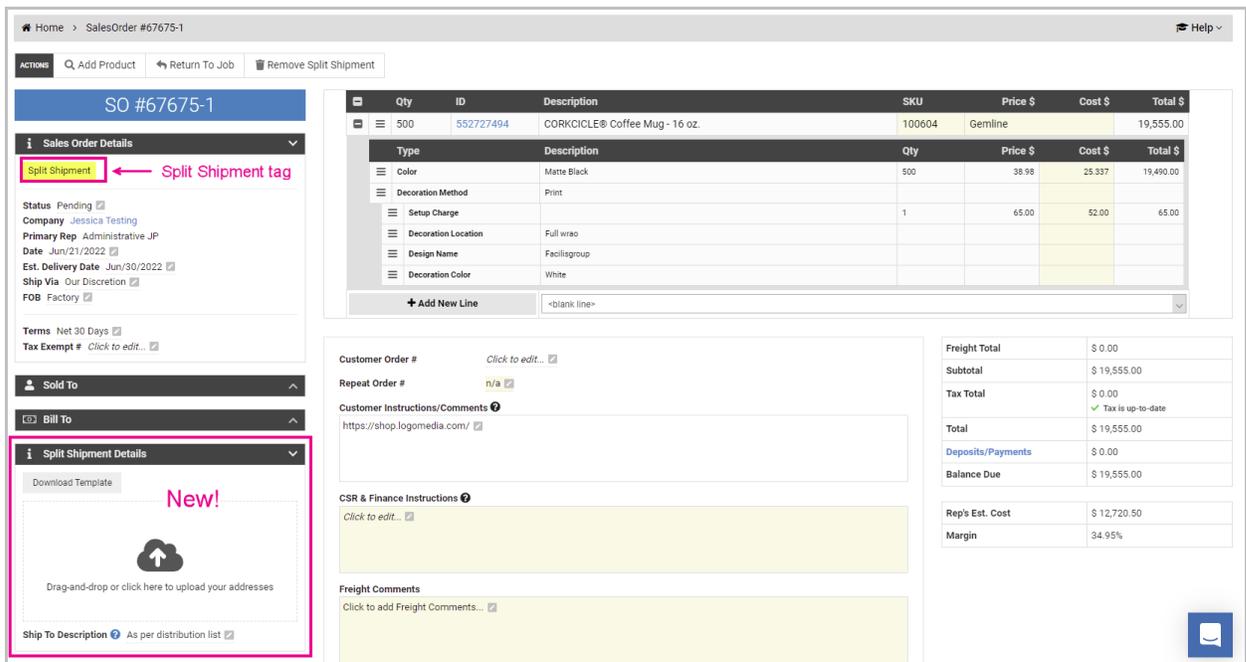
Syncore Knowledge Base



2. Select:

- **Add Split Shipment** to create a Split Shipment SO.
- **Cancel** to close without changing the SO.

The SO page opens with the Split Shipment (indicated by the Split Shipment tag in the Sales Order Details).





New Portlet: Split Shipment Details

When a Sales Order (SO) is changed to Split Shipment SO, a new “Split Shipment Details” portlet replaces the “Ship To” portlet. In the Split Shipment Details portlet, you can download a template, upload your addresses, and edit the “Ship To Description”.

Import/Upload Addresses

For efficiency and accuracy, you can import your file of addresses for split shipments.

You can use the Syncore MS Excel template to create your file or you can use your own file (if the column headers match exactly to the ones in the template and the rules are followed).

NOTES:

- i. File must be .xlsx
- ii. Only 1 file may be selected at a time.
- iii. File rows limit: 15,000 (15,001 including the header)
- iv. Upload must be less than 10 MB
- v. Ensure the SKU in the file matches the product in the Sales Order (SO).
- vi. Complete the color and size columns if there are multiple products with the same SKU but different colors and sizes.
- vii. The unit price for the product will be taken from the SO but the S&H (shipping and handling or freight charges) column must be completed.
- viii. The Add'l (additional charge for decoration) column is taken from the SO.

To download the Syncore template:

1. In Split Shipment Details select **Download Template**.

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The template downloads onto your computer.

NOTES:

- i. This template contains all the instructions and rules in the Notes tab for importing a file.
- ii. The file type is .xlsx.

To upload your addresses:

1. In Split Shipment Details either:

- Drag and drop your file into the Split Shipment Details portlet, *OR*
- Select (upload icon) and then select the file to upload on your computer.

A message will appear while the file is being processed:

"Uploading file, please do not refresh or leave page."

- **If the upload is successful**, message will change to:
"Upload successful. Processing, you may leave the page".
- **If there is an issue**, message will change to:
"File unable to upload, please try again or contact Concierge".

Syncore Knowledge Base

Message when importing is complete: "Split Shipment details successfully imported".
 "Split Shipment Address Details" line appears.

Home > SalesOrder #67675-1

SO #67675-1

Split Shipment

Status Pending

Company Jessica Testing

Primary Rep Administrative JP

Date Jun/21/2022

Est. Delivery Date Jun/30/2022

Ship Via Our Discretion

FOB Factory

Terms Net 30 Days

Tax Exempt # Click to edit...

Sold To

Bill To

Split Shipment Details

Download Template

Split Shipment Address Details 56

Ship To Description As per distribution list

Qty	ID	Description	SKU	Price \$	Cost \$	Total \$
500	532727494	CORKCICLE® Coffee Mug - 16 oz.	100604	Gemline		19,555.00
Type	Description	Qty	Price \$	Cost \$	Total \$	
Color	Matte Black	500	38.98	25,337	19,490.00	
Decoration Method	Print					
Setup Charge		1	65.00	52.00	65.00	
Decoration Location	Full wrap					
Design Name	Facilisgroup					
Decoration Color	White					

Customer Order # Click to edit...

Repeat Order # n/a

Customer Instructions/Comments

https://shop.logomedia.com/

CSR & Finance Instructions

Click to edit...

Freight Comments

Click to add Freight Comments...

Freight Total	\$ 0.00
Subtotal	\$ 19,555.00
Tax Total	\$ 0.00
Total	\$ 19,555.00
Deposits/Payments	\$ 0.00
Balance Due	\$ 19,555.00
Rep's Est. Cost	\$ 12,720.50
Margin	34.95%

- Select the number beside "Split Shipment Address Details" to open the imported file in Syncore.
 The Split Shipments page opens.

Home > SalesOrder #67675-1 > Split Shipment Details

Return to SO Calculate Taxes Delete Address Details

Split Shipment Details for Sales Order #67675-1

To sort by column, select column header

Page navigation and number of rows displayed

Full Name	Address 1	Address 2	City	State	Country	Zip	Phone #	Email	SKU	Color	Size	Supplier	QTY	Price (\$)	Add'l (\$)	Taxable	Freight (\$)	Tax (%)	Tax (\$)	Line Total (\$)
Alexis Aubry	1635 S. Brentwood Blvd	Suite 835	St. Louis	MO	USA	631 79	3143009 602	test@facilisgroup.com	LQK00 063	Dark Navy	M		1	0	0	Y	0.1	0	0	0
Alina Rubinshteyn	1619 S. Brentwood Blvd	Suite 819	St. Louis	MO	USA	631 63	3143009 586	test@facilisgroup.com	LQK00 063	Dark Navy	L		1	0	0	Y	0.1	0	0	0
Amy Rabideau	1603 S. Brentwood Blvd	Suite 803	St. Louis	MO	USA	631 47	3143009 570	test@facilisgroup.com	LQK00 063	Dark Navy	XL		1	0	0	Y	0.1	0	0	0
Ashley McCune	1607 S. Brentwood Blvd	Suite 807	St. Louis	MO	USA	631 51	3143009 574	test@facilisgroup.com	LQK00 063	Dark Navy	L		1	0	0	Y	0.1	0	0	0
Beata Wojsyk	1646 S. Brentwood Blvd	Suite 846	St. Louis	MO	USA	631 90	3143009 613	test@facilisgroup.com	LQK00 063	Dark Navy	S		1	0	0	Y	0.1	0	0	0
Becca Lenzini	1622 S. Brentwood Blvd	Suite 822	St. Louis	MO	USA	631 66	3143009 589	test@facilisgroup.com	LQK00 063	Dark Navy	M		1	0	0	Y	0.1	0	0	0
Claire Lavoy	1616 S. Brentwood Blvd	Suite 816	St. Louis	MO	USA	631 60	3143009 583	test@facilisgroup.com	LQK00 063	Dark Navy	L		1	0	0	Y	0.1	0	0	0
Daryl Sonnylal	1610 S. Brentwood Blvd	Suite 810	St. Louis	MO	USA	631 54	3143009 577	test@facilisgroup.com	MQK00 075	Dark Navy	M		1	0	0	Y	0.1	0	0	0

3. Select any column header to sort the table by that column.
4. Above the table, select the downward arrow beside 20 (default) to open the dropdown menu and select the number of rows you would like to display.
 - Options available: 10, 20, 50 and 100.
5. Above the table, select the arrows to navigate through the pages:
 - > to go to the next page
 - < to go to the previous page.
6. Select **Return to SO** in the ACTIONS bar to return to the Sales Order page.

File Errors

If your file is unable to upload, you can download the Error File to view the errors. The Error File is available for 7 days.

To download the Error File and make corrections:

1. In Split Shipment Details select **Download Error File**.

The screenshot shows the 'Split Shipment Details' section of a sales order. A table lists items with columns for Qty, ID, Description, SKU, Price \$, Cost \$, and Total \$. The row for 'CORKCICLE® Coffee Mug - 16 oz.' is highlighted in yellow, indicating an error. Below the table, there are sections for 'Customer Order #', 'Repeat Order #', 'Customer Instructions/Comments', and 'CSR & Finance Instructions'. A 'Download Error File' button is visible in the bottom left corner of the interface.

Qty	ID	Description	SKU	Price \$	Cost \$	Total \$	
500	552727494	CORKCICLE® Coffee Mug - 16 oz.	100604	Gemline		19,555.00	
		Type	Description	Qty	Price \$	Cost \$	Total \$
		Color	Matte Black	500	38.98	25,337	19,490.00
		Decoration Method	Print				
		Setup Charge		1	65.00	\$2.00	65.00
		Decoration Location	Full wrap				
		Design Name	Facilisgroup				
		Decoration Color	White				

The Error File downloads onto your computer.

The rows with errors are highlighted in yellow and a new column (Error) is added to the end with the error message (with reference to the cell with the error – i.e. “E5”)

2. Edit the rows with errors to make the corrections.
3. Upload the corrected file.

Delete Address Details

You can delete the file of uploaded addresses. After the file is deleted, you can upload a new file.

NOTES:

- i. Sales Order (SO) status must be Pending or Open.
- ii. Job status must be Pending, Submitted or WIP.
- iii. You cannot delete address details if the Job is in Completed or Delivered status and/or the SO is in Invoiced or Paid status.

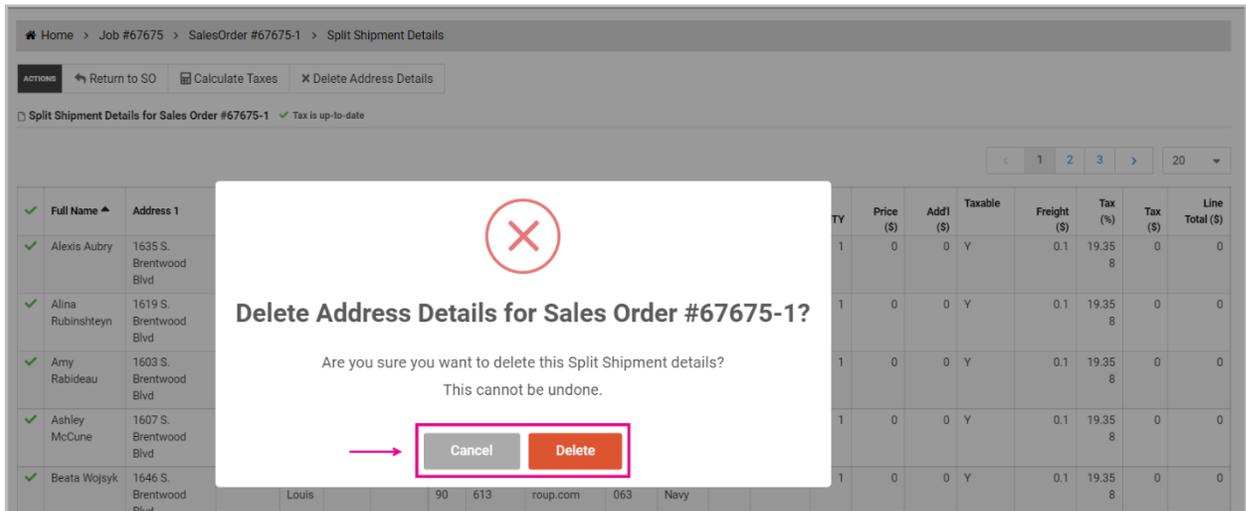
To delete address details:

1. Select **Delete Address Details** from the ACTIONS.

Full Name	Address 1	Address 2	City	State	Country	Zip	Phone #	Email	SKU	Color	Size	Supplier	QTY	Price (\$)	Addl (\$)	Taxable	Freight (\$)	Tax (%)	Tax (\$)	Line Total (\$)
Alexis Aubry	1635 S. Brentwood Blvd	Suite 835	St. Louis	MO	USA	631 79	3143009 602	test@facilisgroup.com	LQK00 063	Dark Navy	M		1	0	0	Y	0.1	19.35 8	0	0
Alina Rubinshteyn	1619 S. Brentwood Blvd	Suite 819	St. Louis	MO	USA	631 63	3143009 586	test@facilisgroup.com	LQK00 063	Dark Navy	L		1	0	0	Y	0.1	19.35 8	0	0
Amy Rabideau	1603 S. Brentwood Blvd	Suite 803	St. Louis	MO	USA	631 47	3143009 570	test@facilisgroup.com	LQK00 063	Dark Navy	XL		1	0	0	Y	0.1	19.35 8	0	0
Ashley McCune	1607 S. Brentwood Blvd	Suite 807	St. Louis	MO	USA	631 51	3143009 574	test@facilisgroup.com	LQK00 063	Dark Navy	L		1	0	0	Y	0.1	19.35 8	0	0
Beata Wojsyk	1646 S. Brentwood Blvd	Suite 846	St. Louis	MO	USA	631 90	3143009 613	test@facilisgroup.com	LQK00 063	Dark Navy	S		1	0	0	Y	0.1	19.35 8	0	0
Becca Lenzini	1622 S. Brentwood Blvd	Suite 822	St. Louis	MO	USA	631 66	3143009 589	test@facilisgroup.com	LQK00 063	Dark Navy	M		1	0	0	Y	0.1	19.35 8	0	0
Claire Lavoy	1616 S. Brentwood Blvd	Suite 816	St. Louis	MO	USA	631 60	3143009 583	test@facilisgroup.com	LQK00 063	Dark Navy	L		1	0	0	Y	0.1	19.35 8	0	0
Daryl Sonnylal	1610 S. Brentwood Blvd	Suite 810	St. Louis	MO	USA	631 54	3143009 577	test@facilisgroup.com	MQK00 0075	Dark Navy	M		1	0	0	Y	0.1	19.35 8	0	0

The “Delete Address Details for Sales Order #[xxxxx-x]?” window opens with the message:

“Are you sure you want to delete this Split Shipment details?
This cannot be undone.”



2. Select:

- **Delete** to delete the Split Shipment details.
- **Cancel** to close without changing the Split Shipment SO.

The file with Split Shipment details (addresses) is deleted.

The SO page opens.

An entry is added to the Job’s audit log:

Job #[xxxxx] : Sales Order [xxxxx-x] Split Shipment details were deleted.

Tax Calculations

Taxes are calculated for each address of a Split Shipments Sales Order (SO). For Syncore US, addresses and product information are sent to Avalara and returned to Syncore.

NOTE: Taxes are calculated based on the split shipment details (not what is in the Sales Order).

To calculate taxes:

1. Select **Calculate Taxes** from the ACTIONS bar.

Message appears: “Calculating taxes. Do not refresh or leave page”.

If successful, taxes are calculated for each address. Message when complete: “Tax is up-to-date”, along with a green check mark.

Syncore Knowledge Base

Home > Job #67675 > SalesOrder #67675-1 > Split Shipment Details

ACTIONS: [Return to SO](#) [Calculate Taxes](#) [X Delete Address Details](#)

Split Shipment Details for Sales Order #67675-1 ✔ Tax is up-to-date

	Full Name ▲	Address 1	Address 2	City	State	Country	Zip	Phone #	Email	SKU	Color	Size	Supplier	QTY	Price (\$)	Addl (\$)	Taxable	Freight (\$)	Tax (%)	Tax (\$)	Line Total (\$)
✔	Alexis Aubry	1635 S. Brentwood Blvd	Suite 835	St. Louis	MO	USA	631 79	3143009 602	test@facilisgroup.com	LQK00 063	Dark Navy	M		1	0	0	Y	0.1	19.35 8	0	0
✔	Allina Rubinshteyn	1619 S. Brentwood Blvd	Suite 819	St. Louis	MO	USA	631 63	3143009 586	test@facilisgroup.com	LQK00 063	Dark Navy	L		1	0	0	Y	0.1	19.35 8	0	0
✔	Amy Rabideau	1603 S. Brentwood Blvd	Suite 803	St. Louis	MO	USA	631 47	3143009 570	test@facilisgroup.com	LQK00 063	Dark Navy	XL		1	0	0	Y	0.1	19.35 8	0	0
✔	Ashley McCune	1607 S. Brentwood Blvd	Suite 807	St. Louis	MO	USA	631 51	3143009 574	test@facilisgroup.com	LQK00 063	Dark Navy	L		1	0	0	Y	0.1	19.35 8	0	0
✔	Beata Wojsyk	1646 S. Brentwood Blvd	Suite 846	St. Louis	MO	USA	631 90	3143009 613	test@facilisgroup.com	LQK00 063	Dark Navy	S		1	0	0	Y	0.1	19.35 8	0	0
✔	Becca Lenzini	1622 S. Brentwood Blvd	Suite 822	St. Louis	MO	USA	631 66	3143009 589	test@facilisgroup.com	LQK00 063	Dark Navy	M		1	0	0	Y	0.1	19.35 8	0	0
✔	Claire Lavoy	1616 S. Brentwood Blvd	Suite 816	St. Louis	MO	USA	631 60	3143009 583	test@facilisgroup.com	LQK00 063	Dark Navy	L		1	0	0	Y	0.1	19.35 8	0	0
✔	Daryl Sonnylal	1610 S. Brentwood Blvd	Suite 810	St. Louis	MO	USA	631 54	3143009 577	test@facilisgroup.com	MQK0 0075	Dark Navy	M		1	0	0	Y	0.1	19.35 8	0	0

A green check mark is displayed at the beginning of each row for which tax has been calculated successfully.

A red **x** is displayed at the beginning of each row when there is an issue with taxes for a specific address.

2. Select **Return to SO** in the ACTIONS bar.

The SO page opens.

Syncore Knowledge Base

The screenshot shows a web application interface for a Sales Order. The top navigation bar includes 'Home > SalesOrder #67675-1' and a 'Help' icon. Below the navigation, there are 'ACTIONS' (Add Product, Return To Job, Remove Split Shipment) and a search bar. The main content area is divided into several sections:

- SO #67675-1**: A large blue header for the sales order.
- Sales Order Details**: A sidebar containing 'Split Shipment' (highlighted in yellow), 'Status: Pending', 'Company: Jessica Testing', 'Primary Rep: Administrative JP', 'Date: Jun/21/2022', 'Est. Delivery Date: Jun/30/2022', 'Ship Via: Our Discretion', 'FOB: Factory', 'Terms: Net 30 Days', and 'Tax Exempt #'. It also has buttons for 'Sold To', 'Bill To', and 'Split Shipment Details'.
- Product Line Table**: A table with columns: Qty, ID, Description, SKU, Price \$, Cost \$, Total \$. It lists one item: 56 units of 'CORKCICLE® Coffee Mug - 16 oz.' with a total of 2,247.88. Below this is a 'Type' table with columns: Type, Description, Qty, Price \$, Cost \$, Total \$. It lists details like 'Color: Matte Black', 'Decoration Method: Print', 'Setup Charge: 1', 'Decoration Location: Full wrap', 'Design Name: Facilisgroup', and 'Decoration Color: White'.
- Summary Table**: A table on the right with columns: Field, Amount. It includes: Freight Total (\$ 5.60), Subtotal (\$ 2,253.48), Tax Total (\$ 6.28) - highlighted with a pink box and containing 'Tax is up-to-date', Total (\$ 2,259.76), Deposits/Payments (\$ 0.00), Balance Due (\$ 2,259.76), Rep's Est. Cost (\$ 1,470.87), and Margin (34.57%).
- Customer Order #**: Click to edit... n/a
- Customer Instructions/Comments**: https://shop.logomedia.com/
- CSR & Finance Instructions**: Click to edit...
- Freight Comments**: Click to add Freight Comments...

The tax calculated for the Split Shipment is displayed in the “Tax Total” field, with the message “Tax is up-to-date”.

Remove Split Shipment

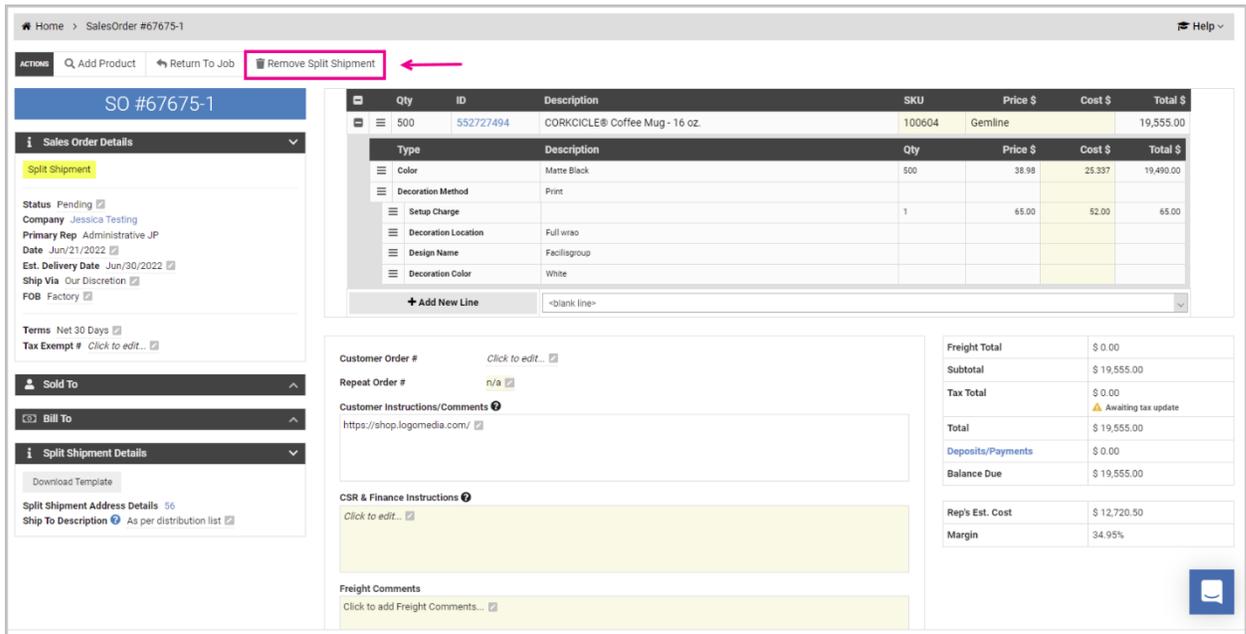
The Split Shipment feature can be removed from the Sales Order (SO) to change it back to a regular SO.

NOTE: You cannot remove a Split Shipment if the Job is in Completed and/or the SO is in Invoiced or Paid.

To remove a Split Shipment:

1. Open the Split Shipment SO.
2. Select **Remove Split Shipment** in the ACTIONS bar.

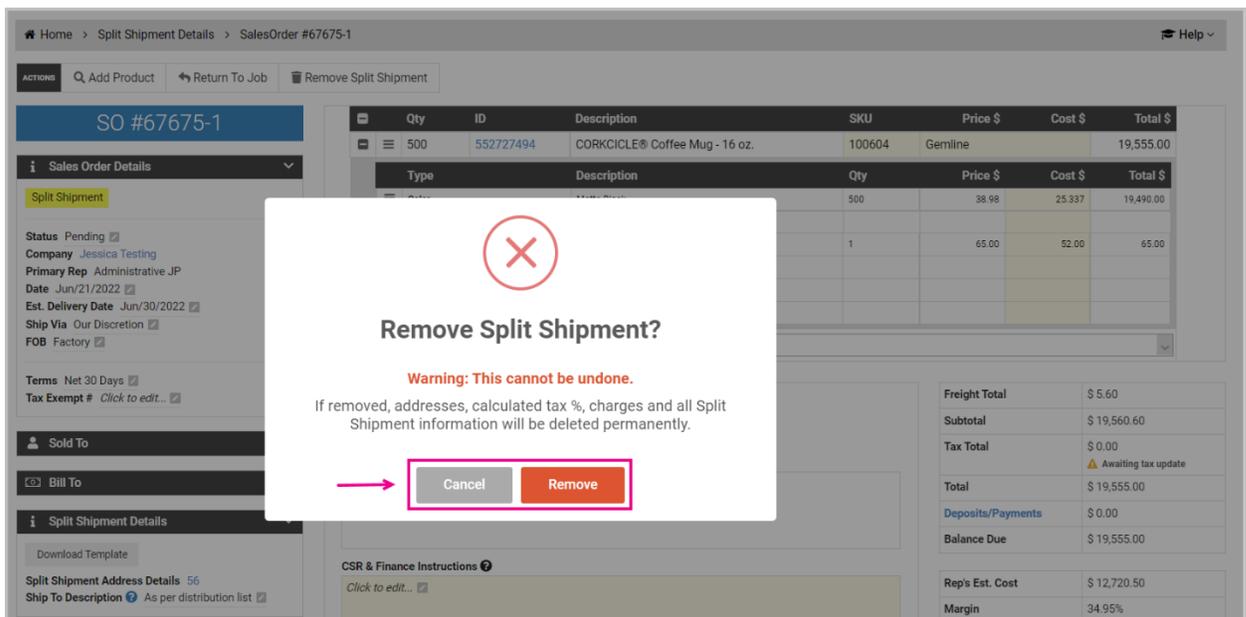
Syncore Knowledge Base



The “Remove Split Shipment?” window opens with the message:

“**Warning: This cannot be undone.**

If removed, addresses, calculated tax %, charges and all Split Shipment information will be deleted permanently.”



3. Select:

- **Remove** to remove the Split Shipment.
- **Cancel** to close without changing the Split Shipment SO.

Syncore Knowledge Base

The Split Shipment is removed and the regular SO page opens.

Job Page

You can return to the Job page from the Sales Order (SO) page at anytime.

To return to the Job page:

1. Select **Return to Job** in the ACTIONS bar.

The Job page opens.

The screenshot displays the 'Job #67675' page. At the top, there are navigation links and an 'ACTIONS' bar with options like 'Repeat Job', 'Move Job', 'Email', 'Graphic Services', and 'V1 Job'. Below this, a status bar shows 'PENDING Jun/21/2022' and other statuses like 'SUBMITTED', 'WIP', 'DELIVERED', and 'COMPLETED'. A summary section shows key financial metrics: Total Sales of \$19,555.00, Total Cost of \$0.00, 100.0% GPM, and a Commission of \$9,777.50. The 'Sales Orders' section contains a table with one entry: a sales order with status 'Is Pending', a subtotal of \$19,555.00, and a freight of \$5.60. A pink box highlights the 'Is Pending' status, and a pink arrow points from it to the 'Is Split Shipment' legend item. The 'Purchase Orders' section is currently empty, showing 'No data available in table'. At the bottom right, there is a 'Cost Total' of \$0.00 and a 'Misc. Charges' of \$0.00.

The Split Shipment in the Sales Order (SO) is indicated by the shopping cart icon in the Status column of the SO.

Split Shipment Emails

After the Split Shipment has been invoiced, the invoice of the Split Shipment can be previewed and emailed to the Client.

NOTE: The Split Shipment SO status must be invoiced or paid.

Before invoicing, the Ship To Description can be edited. This is what will show on the invoice for the ship to address.

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To edit the Ship To Description:

1. In the Split Shipment Details portlet, select  (pencil icon) beside **Ship To Description** to open the field and edit the text.

Default text: "As per distribution list"

2. Select  to cancel.
3. Select  to save your edits.

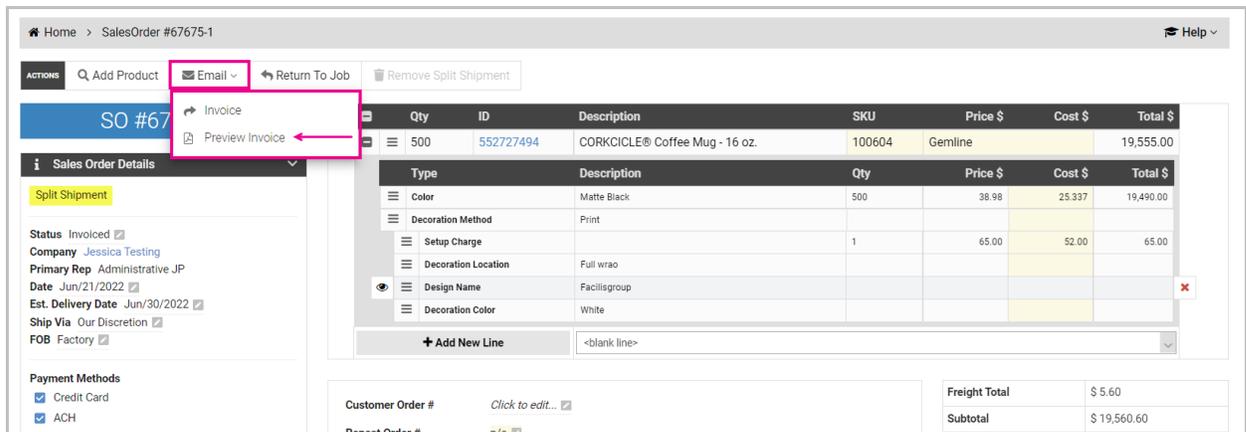
To change the status of the SO:

1. In the Sales Order Details portlet, select  (pencil icon) beside **Status** and select **Invoiced** in the dropdown menu.

2. Select  to cancel.
3. Select  to save.

To preview and download the invoice PDF:

1. Select **Email** in the ACTIONS bar then select **Preview Invoice** from the dropdown menu.



The screenshot shows the 'Sales Order #67675-1' details page. In the 'ACTIONS' bar, the 'Email' dropdown menu is open, and 'Preview Invoice' is highlighted with a red arrow. The main table displays the following data:

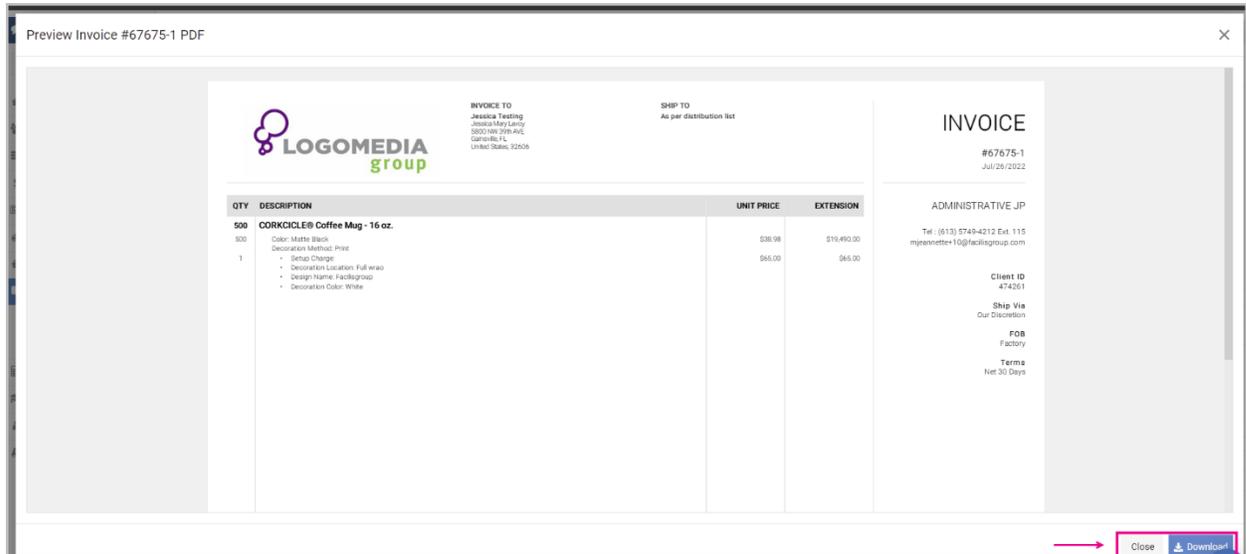
Qty	ID	Description	SKU	Price \$	Cost \$	Total \$
500	552727494	CORKCICLE® Coffee Mug - 16 oz.	100604	Gemline		19,555.00
Type	Description	Qty	Price \$	Cost \$	Total \$	
Color	Matte Black	500	38.98	25,337	19,490.00	
Decoration Method	Print					
Setup Charge		1	65.00	52.00	65.00	
Decoration Location	Full wrap					
Design Name	Facilisgroup					
Decoration Color	White					

Summary Totals:

Freight Total	\$ 5.60
Subtotal	\$ 19,560.60

Syncore Knowledge Base

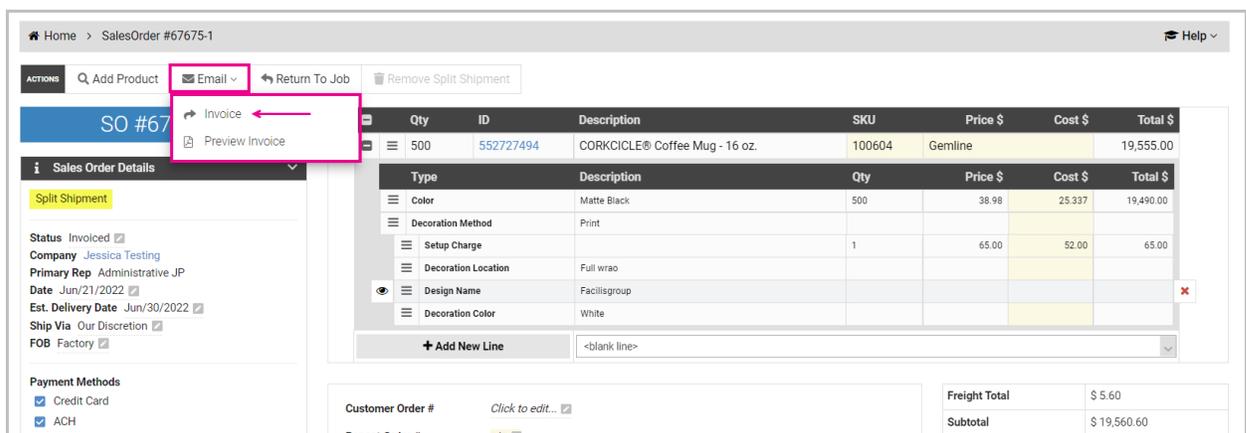
A preview of the Invoice opens.



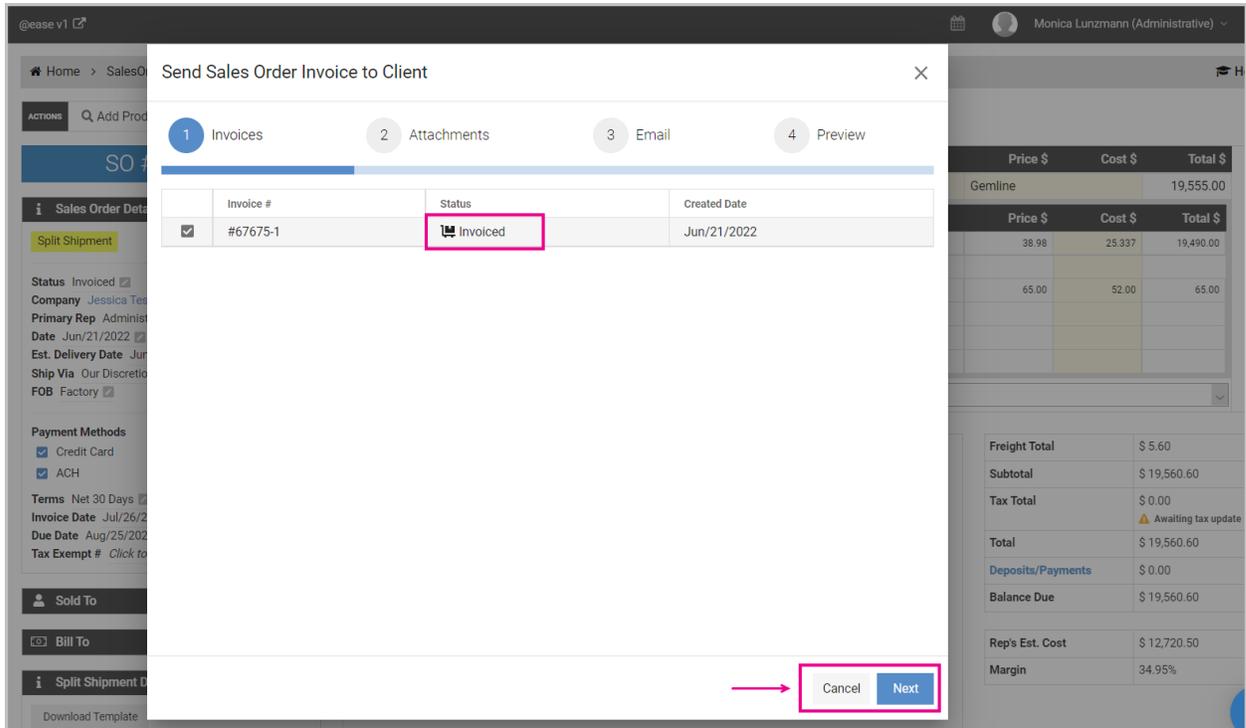
2. Select **Close** in the bottom right to close and return to the SO page.
NOTE: You can also select the **x** in the top right corner to close the preview.
3. Select **Download**.
The Invoice PDF downloads onto your device.

To send the invoice:

1. Select **Email** in the ACTIONS bar then select **Invoice** from the dropdown menu.



The Send Invoice wizard window opens to Step 1: Invoices.



- The Invoice is selected (default).
- The Split Shipment is indicated by the shopping cart icon in the Status column.

2. Select:

- **Cancel** to close and return to the SO page.
- **Next** to go to Step 2: “Attachments”.

Message if no attachments:

“No data available”

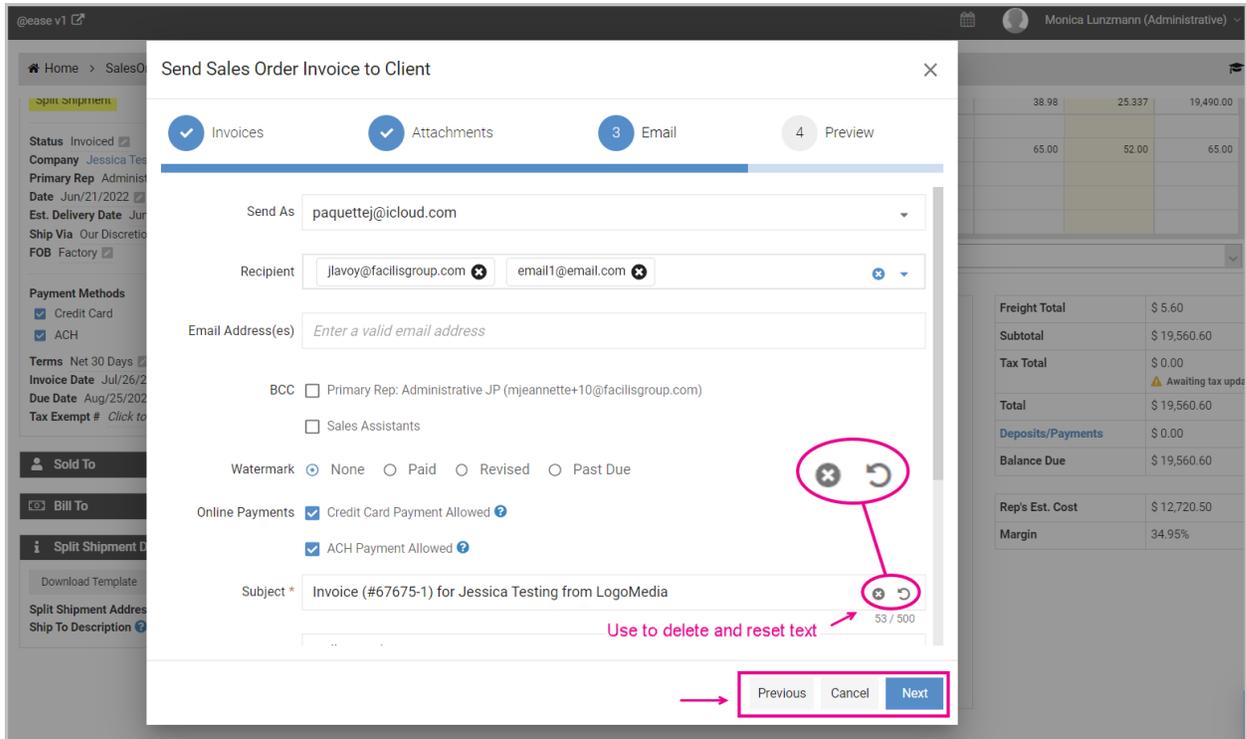
3. Select:

- **Previous** to return to Step 2
- **Cancel** to close and return to the SO page.
- **Next** to go to Step 3: “Email”.

NOTE: Tax is not re-calculated for Split Shipment invoices.

Syncore Knowledge Base

“Send Sales Order Invoice to Client” Step 3: Email opens.



4. Complete the following fields, scrolling down as required:

- **Send As:** open the dropdown menu to change the person sending the email (optional)
- **Recipient:** choose the recipient
- **Email Addresses:** enter additional addresses (optional).
- **Watermark:** choose to add a watermark. Options:
 - None (default)
 - Paid
 - Revised
 - Past Due.
- **Online Payments:** choose one or both methods of payment:
 - Credit Card Payment Allowed
 - ACH Payment Allowed.

Syncore Knowledge Base



- **Subject***: edit as required:
 - Default text: “Invoice (#xxxx-x) for [Client] from [PartnerName]”.
- **Salutation***: edit as required:
 - Default text: “Hello [ClientName],”
- **Message***: edit as required:
 - Default text taken from Partner profile.

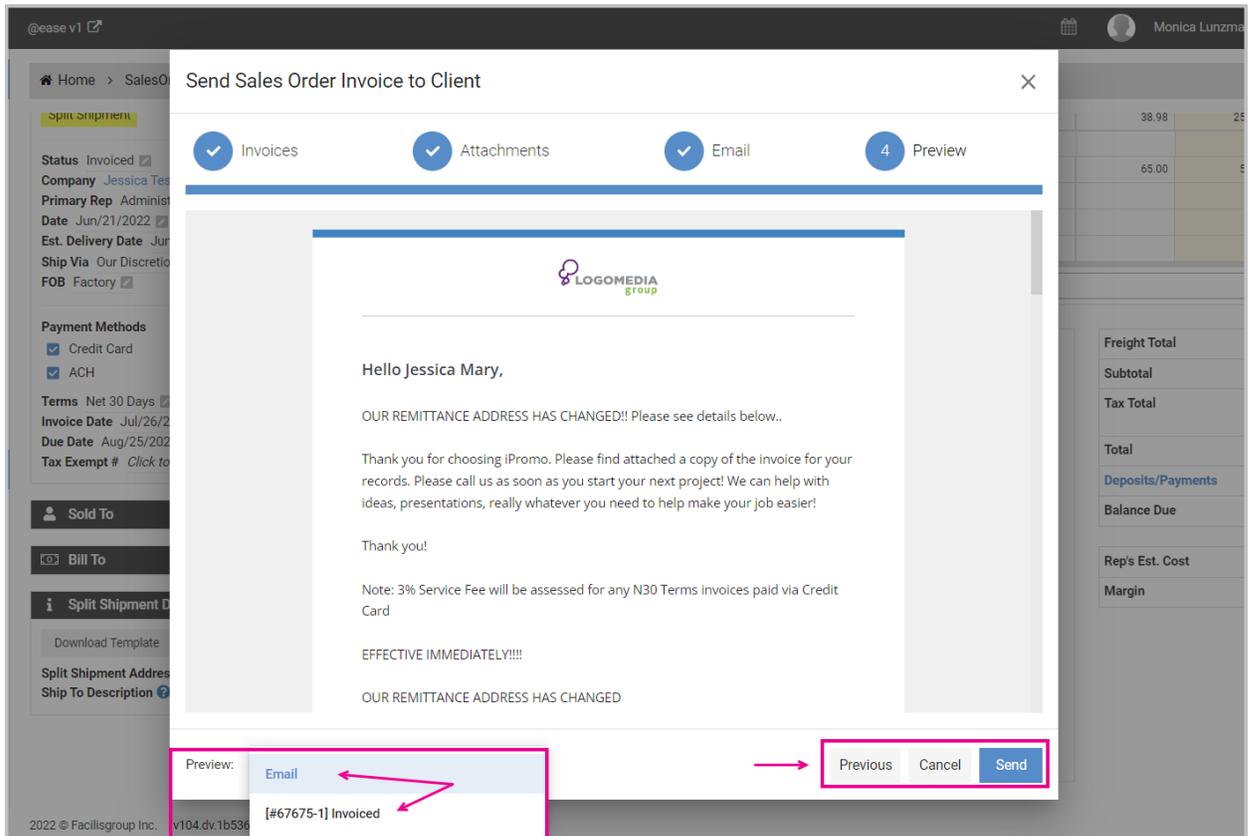
*** In the Subject, Salutation and Message fields, use:**

- (delete icon) to delete all text
- (reset icon) to return to default text.

5. Select:

- **Previous** to return to Step 3
- **Cancel** to close and return to the SO page.
- **Next** to go to Step 4: “Preview”.

A preview of the Email opens.





6. OPTIONAL: Select the field beside **Preview** to open the dropdown menu and select **[#xxxx-x] Invoiced** to preview the Invoice PDF.
7. Select:
 - **Previous** to return to Step 3
 - **Cancel** to close and return to the SO page.
 - **Send** to go send the email and Invoice PDF to the client.

An email with the Invoice PDF and any attachment(s) is sent to the recipients.