## **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:

- i. Split Shipment orders are only available for Drop Ship Jobs (not Program or Corporate Jobs).
- ii. SO status must be Pending or Open.
- iii. Job status must be Pending, Submitted or WIP.
- iv. 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."



- 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).

₩ Home > SalesOrder #67675-1						8
Actions Q, Add Product SP Return To Job	plit Shipment					
SO #67675-1	C Qty ID	Description	SKU	Price \$	Cost \$	Total \$
	■ ≡ 500 552727494	CORKCICLE® Coffee Mug - 16 oz.	10060	4 Gemline		19,555.00
i Sales Order Details V	Туре	Description	Qty	Price \$	Cost \$	Total \$
Split Shipment Split Shipment tag	≡ Color	Matte Black	500	38.98	25.337	19,490.00
Status Pending 🛛	Decoration Method     Seture Charge	Print	1	65.00	52.00	65.00
Company Jessica Testing	Decoration Location	Full wrao		00.00	52.00	00.00
Date Jun/21/2022	E Design Name	Facilisgroup				
Est. Delivery Date Jun/30/2022 Ship Via Our Discretion	Decoration Color	White				
FOB Factory	+ Add New Line	   				~
Terms Net 30 Days 🜌						
fax Exempt # Click to edit 🔽	Customer Order # Click to	edit		Freight Total	\$ 0.00	
Sold To	Repeat Order # n/a Z			Subtotal	\$ 19,5	55.00
	Customer Instructions/Comments 😧			Tax Total	\$ 0.00	is up-to-date
의 Bill To	https://shop.logomedia.com/			Total	\$ 19,5	55.00
i Split Shipment Details 🗸 🗸 🗸				Deposits/Payments	\$ 0.00	
Download Template				Balance Due	\$ 19,5	55.00
New!	CSR & Finance Instructions			Ben's Est Cost	¢ 12.7	20.50
	Click to edit 🖬			Margin	34.959	6
				-		
Drag-and-drop or click here to upload your addresses	Freight Comments					
	Click to add Freight Comments					
Ship To Description 👔 As per distribution list 🛛						

### **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**.

#### 🄀 facilisgroup

## Syncore Knowledge Base

SO #67675-1	•	Qty	ID	Description	SKU
		500	552727494	CORKCICLE® Coffee Mug - 16 oz.	100604
i Sales Order Details V		Туре		Description	Qty
Split Shipment	=	Color		Matte Black	500
	=	Decoration Me	thod	Print	
Company Jessica Testing	=	Setup Char	ge		1
Primary Rep Administrative JP	=	Decoration	Location	Full wrao	
Date Jun/21/2022	=	Design Nam	ne	Facilisgroup	
Ship Via Our Discretion	=	Decoration	Color	White	
FOB Factory 🖾		+ Add Ne	w Line	 dank line>	
Sold To  Sold To  Sold To  Download Template	Repeat Order Customer Ins https://shop	# structions/Co .logomedia.c	n/a 🔽 omments 😧 com/ 🔁		
	CSR & Financ	ce Instruction	ns 🕜		
♠ ←	Click to edit.	2 e			
Drag-and-drop or click here to upload your addresses	Freight Comn	nents			
	Click to add	Freight Comr	ments 💌		
Ship To Description 🚱 As per distribution list 🗾					

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".



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

# Home > SalesOrder #67675-1						H 🕿
ACTIONS Q Add Product S Return To Job	Split Shipment					
SO #67675-1	🗖 Qty ID	Description	SKU	Price \$	Cost \$	Total \$
	<b>a a</b> 500 552727494	CORKCICLE® Coffee Mug - 16 oz.	100604	Gemline		19,555.00
i Sales Order Details V	Туре	Description	Qty	Price \$	Cost \$	Total \$
Split Shipment	≡ Color	Matte Black	500	38.98	25.337	19,490.00
Status Pending	Decoration Method	Print				
Company Jessica Testing	Setup Charge     Decemption Leastion	Fullyana	1	65.00	52.00	65.00
Date Jun/21/2022	20         Remove Split Shipmet           20         Control Split Shipmet					
Est. Delivery Date Jun/30/2022	Decoration Color	White	SKU         Price \$         Cost \$         Total \$           100604         Gemine         19,555.00           500         3.9.98         25.337           1         65.00         52.00           1         65.00         52.00           2         95.00         500           1         65.00         52.00           2         95.00         500           3         1         65.00           1         65.00         52.00           1         65.00         52.00           5         5         5           2         5         5           2         5         5           2         95.00         5           3         19,555.00         5           3         19,555.00         5           1         5         9,055.00           1         5         9,055.00           1         19,555.00         10           1         19,555.00         10           1         19,555.00         10           1         19,555.00         10           1         19,555.00         10			
FOB Factory	+ Add New Line	   				~
Terms Net 30 Days 🔀						
Tax Exempt # Click to edit 🜌	Customer Order # Click to edit	2	Fr	eight Total	\$ 0.00	
• caldTa	Peneat Order # p/a		Su	btotal	\$ 19,5	55.00
	Customer Instructions/Comments		Та	x Total	\$ 0.00	aiting tax update
Bill To ^	https://shop.logomedia.com/ 🔯		То	tal	\$ 19,5	55.00
i Split Shipment Details V			De	posits/Payments	\$ 0.00	
Download Template			Ba	lance Due	\$ 19,5	55.00
Solit Shinment Address Details 56	I emore Spit Shipment         Image: Spit Shipment Shipment         Image: Spit Shipment Shipment         Image: Spit Shipment Shipment Shipment         Image: Spit Shipment Shipment Shipment Shipment         Image: Spit Shipment S					
Ship To Description 🕜 As per distribution list 🖾	Click to edit 🔽		SKU         Price \$         Cost \$         Total \$           100604         Gemine         19,555.00           Qty         Price \$         Cost \$         Total \$           600         38.98         25.337         19,400.00           1         95.00         32.00         95.00           1         95.00         32.00         95.00           1         95.00         32.00         95.00           2         1         90.00         30.00           Subtotal         \$19,555.00         100           Total         \$0.00         Anaritry tas update           Total         \$19,555.00         100           Balance Due         \$10,250         100           Balance Due         \$10,250         100           Balance D			
	Image: split shipe:     Image: split spl					
	Freight Comments					
	Click to add Freight Comments 🜌					

2. Select the number beside "Split Shipment Address Details" to open the imported file in Syncore.

The Split Shipments page opens.

4.5.1																				
IONS 🦘 Retu	irn to SO 🖬	Calculate Tax	es X	Delete A	ddress Det	ails														
olit Shipment D	etails for Sales C	Order #67675-1	🛕 Awa	iting tax up	odate															
т	o sort by colu	ımn, select c	olumn I	neader					Pa	ge navig	ation a	nd number	of row:	s displaye	ed —	→ 🖂	1 2	3	>	20 -
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@facilisg roup.com	LQK00 063	Dark Navy	М		1	0	0	Y	0.1	0	0	(
Alina Rubinshteyn	1619 S. Brentwood Blvd	Suite 819	St. Louis	MO	USA	631 63	3143009 586	test@facilisg roup.com	LQK00 063	Dark Navy	L		1	0	0	Y	0.1	0	0	(
Amy Rabideau	1603 S. Brentwood Blvd	Suite 803	St. Louis	MO	USA	631 47	3143009 570	test@facilisg roup.com	LQK00 063	Dark Navy	XL		1	0	0	Y	0.1	0	0	(
Ashley McCune	1607 S. Brentwood Blvd	Suite 807	St. Louis	MO	USA	631 51	3143009 574	test@facilisg roup.com	LQK00 063	Dark Navy	L		1	0	0	Y	0.1	0	0	
Beata Wojsyk	1646 S. Brentwood Blvd	Suite 846	St. Louis	MO	USA	631 90	3143009 613	test@facilisg roup.com	LQK00 063	Dark Navy	S		1	0	0	Y	0.1	0	0	
Becca Lenzini	1622 S. Brentwood Blvd	Suite 822	St. Louis	MO	USA	631 66	3143009 589	test@facilisg roup.com	LQK00 063	Dark Navy	М		1	0	0	Y	0.1	0	0	
Claire Lavoy	1616 S. Brentwood Blvd	Suite 816	St. Louis	MO	USA	631 60	3143009 583	test@facilisg roup.com	LQK00 063	Dark Navy	L		1	0	0	Y	0.1	0	0	_
Daryl Sonnylal	1610 S. Brentwood Blvd	Suite 810	St. Louis	MO	USA	631 54	3143009 577	test@facilisg roup.com	MQK00 075	Dark Navy	М		1	0	0	Y	0.1	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.

Total \$           19,555.00           Total \$           19,490.00	
Total \$ 19,555.00 Total \$ 19,490.00	
19,555.00 Total \$ 19,490.00	
Total \$	
19,490.00	
Vabble to import file, invalid rows           SKU         Price \$         Cost \$         Total \$           100604         Gemline         19,555.00           Oty         Price \$         Cost \$         Total \$           500         39.98         25.37         19,4000           1         46.00         52.00         65.00           1         46.00         52.00         65.00           1         1         66.00         52.00         65.00           1         1         65.00         52.00         65.00           1         1         65.00         52.00         65.00           1         1         65.00         52.00         55.00           Subtotal         \$ 19,555.00         7         7           1         10         \$ 19,555.00         1           1         19,555.00         1         1           1         19,555.00         1         1           1         19,555.00         1         1           1         19,555.00         1         1           1         19,555.00         1         1           1         19,555.00         1	
1       Description       SKU       Price \$       Cost \$       Total \$         500       S52727494       CORKCICLE& Coffee Mug - 16 oz.       100604       Gemline       19,555.00         Type       Description       Qty       Price \$       Cost \$       Total \$         Description Leastion       Full was       1       6500       5200       6500         Description Leastion       Full was       1       6500       5200       6500         Description Leastion       Full was       restription       restription       restription       restription         restription Color       white       restription       restription       restription       restription         restription Color       white       restription       restription       restription       restription         restren	
SkU         Price \$         Cost \$         Total \$           100604         Gemine         19,555.00           Qly         Price \$         Cost \$         Total \$           500         38.98         25.337         19,400.00           1         65.00         52.00         65.00           1         65.00         52.00         65.00           2         2         2         2         2           2         2         2         2         2         2           1         65.00         52.00         65.00         52.00         50.00         50.00         50.00         50.00         50.00         7         7         7         7         1         8         19,555.00         50.00	
Aug         Aug	
Other ID         Description         SKU         Price S         Cost S         Total S           500         552727494         CORKCICLES Coffee Mug - 16 oz.         100604         Gemline         19,555.00           Type         Description         Qty         Price S         Coat S         Total S           Color         Mente Black         500         38.99         25.337         19,490.00           Color         Mente Black         500         38.99         25.330         19,490.00           Esteup Charge         1         65.00         52.00         65.00           Deconstain Leation         Full wrao	
	00
00	
50	
D	

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.

ñ	Home > Job	#67675 > Sal	esOrder #676	ö75-1 →	Split Sh	ipment Det	ails														
ACTI	NS 🦘 Return	n to SO 🖬 Ca	alculate Taxes	s × D	elete Ad	dress Detai	ls	←													
🗅 Sp	it Shipment Det	ails for Sales Ord	ler #67675-1	🗸 Tax is	up-to-date																
																		1 2	3	>	20 💌
~	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@facilisg roup.com	LQK00 063	Dark Navy	Μ		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@facilisg roup.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@facilisg roup.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@facilisg roup.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@facilisg roup.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@facilisg roup.com	LQK00 063	Dark Navy	Μ		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@facilisg roup.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@facilisg roup.com	MQK0 0075	Dark Navy	М		1	0	0	Y	0.1	19.35 8	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.

*	Home > Job	#67675 > Sal	esOrder #676	575-1 →	Split St	nipment Det	tails														
ACTI	ons Return	n to SO 🔛 Ca	Iculate Taxes	s X D ✓ Tax is	elete Ad	dress Detai	ls														
~	Full Name 📥	Address 1	Address 2	City	State	Country	Zip	Phone #	Email	SKU	Color	Size	Supplier	QTY	Price	Add'l	Taxable	1 2 Freight	3 Tax (%)	> Tax	20 ▼ Line Total (\$)
~	Alexis Aubry	1635 S. Brentwood Blvd	Suite 835	St. Louis	мо	USA	631 79	3143009 602	test@facilisg roup.com	LQK00 063	Dark Navy	М		1	0	0	Y	0.1	19.35 8	0	0
*	Alina Rubinshteyn	1619 S. Brentwood Blvd	Suite 819	St. Louis	МО	USA	631 63	3143009 586	test@facilisg roup.com	LQK00 063	Dark Navy	L		1	0	0	Y	0.1	19.35 8	0	0
<b>`</b>	Amy Rabideau	1603 S. Brentwood Blvd	Suite 803	St. Louis	мо	USA	631 47	3143009 570	test@facilisg roup.com	LQK00 063	Dark Navy	XL		1	0	0	Y	0.1	19.35 8	0	0
ŕ	Ashley McCune	1607 S. Brentwood Blvd	Suite 807	St. Louis	мо	USA	631 51	3143009 574	test@facilisg roup.com	LQK00 063	Dark Navy	L		1	0	0	Y	0.1	19.35 8	0	0
1	Beata Wojsyk	1646 S. Brentwood Blvd	Suite 846	St. Louis	мо	USA	631 90	3143009 613	test@facilisg roup.com	LQK00 063	Dark Navy	S		1	0	0	Y	0.1	19.35 8	0	0
1	Becca Lenzini	1622 S. Brentwood Blvd	Suite 822	St. Louis	мо	USA	631 66	3143009 589	test@facilisg roup.com	LQK00 063	Dark Navy	М		1	0	0	Y	0.1	19.35 8	0	0
<b>~</b>	Claire Lavoy	1616 S. Brentwood Blvd	Suite 816	St. Louis	мо	USA	631 60	3143009 583	test@facilisg roup.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	мо	USA	631 54	3143009 577	test@facilisg roup.com	MQK0 0075	Dark Navy	Μ		1	0	0	Y	0.1	19.35 8	0	

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

A red  $\mathbf{x}$  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.

#### 🄀 facilisgroup

## Syncore Knowledge Base



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.

#### 🄀 facilisgroup

## 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."

Home > Split Shipment Details > SalesOrder #67675-1      Help ~      Actor         Add Product   Return To Job   Remove Split Shipment          SO #67675-1          U    D         Escription   SKU   Price \$ Cost \$ Total \$         So0   S52727494   CORKCICLE® Confee Mug-16 oz. 100604   Gemline   19,555.00          Type   Description						
Actions Q Add Product Action To Job	TREMOVE Split Shipment					
SO #67675-1	C Qty ID	Description	SKU	Price \$	Cost \$	Total \$
	■ Ξ 500 552727494	CORKCICLE® Coffee Mug - 16 oz.	100604	Gemline		19,555.00
i Sales Order Details	∼ Туре	Description	Qty	Price \$	Cost \$	Total \$
Split Shipment	=		500	38.98	25.337	19,490.00
Status Pending Company Jessica Testing	$\mathbf{x}$		1	65.00	52.00	65.00
Date Jun/21/2022						
Ship Via Our Discretion	Remove Split S	Shipment?				~
Terms Net 30 Days 🗾	Warning: This canno	ot be undone.				
Tax Exempt # Click to edit 🔯	If removed, addresses, calculated	tax %, charges and all Split		Freight Iotal	S	5.60
Sold To	Q Add Product       Image: Remove Split Shipment         SO #67675-1       Image: Remove Split Shipment         des Order Details       Image: Remove Split Shipment         Shipment       Image: Remove Split Shipment         Pending II       Image: Remove Split Shipment         Yee Administrative JP       Image: Remove Split Shipment         Net 30 Days II       Image: Remove Split Shipment         Met To       Image: Remove Split Shipment         More Information will be deleted permanently.       Image: Remove Split Shipment         More Information will be deleted permanently.       Image: Remove Split Shipment         More Information will be deleted permanently.       Stotetal         Shipment Address Details Sto       0.00         Balance Due Status       Stotetal         More Information Will be deleted permanently.       Balance Due Status         More Remove Split Shipment Ottails       Stotetal         Stotetal       States         Stotetal       States         Stotetal       States         Stotetal       States         Stotetal       States         Stotetal       States         States       States         States       States         State France Instructions (Information will be d					
				Tax Total	Δ	Awaiting tax update
Bill To	> Cancel	Remove		Total	S	19,555.00
i Split Shipment Details				Deposits/Paymen	ts \$	0.00
Download Template				Balance Due	\$	19,555.00
Split Shipment Details       Cancel Remove       Total       \$19,555.00         Download Template       CSR & Finance Instructions @       Clock to edit       Clock to edit       Reps Est. Cost       \$12,720.50						
Ship To Description 🕜 As per distribution list 🛛				Margin	34	4.95%

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



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.

							😂 Help 🗸
ACTIONS @ Repeat Job  Move Job	II ~ 📓 Graphic Services	← V1 Job					
Job #67675	O PENDING Jun/21/2022	SUBMITTED	¢° WIP	💭 DELIVER	ED		ETED
i Job Details Status Pending Company Jessica Testing Primary Rep Administrative JP Secondary Rep Select Commission Split Select Primary Rep Commission \$9,777.50 Customer Service Rep Jen Manager Commission Code 508 detacts 107 Commission Split Select 107 Commission Split Select 107 Commission Code 508 detacts 107 Cod	\$19,5 Sales Orders Create Sales Order	55.00 Total Sales	\$0.00 Total Cost		).0% GPM	\$ dit ⊵ View PDF	9,777.50 Commission
Description Mugs For Monica 2 Type Standard Promo Sales 2 Date Jun/21/2022 2 Est Delivery Date Jun/30/2022 2 Priority Standard 2	status     Status     I     Use Pendin     Purchase Order	g			Subtotal \$19,555.00 \$19,555.00	Freight \$5.60 \$5.60	/ A C ×
Product Index Other	Create Purchase Order				LEGEND 🥒 View / E	idit 🗈 View PDF	🕤 Duplicate 🗴 Delete
Source AtEase	# 🔺 Status	Vendor	Production Worksheet 🕜	Receiving Memo 🕜	Subtotal	Freight	
Created By Jessica Lavoy Created Date Jun/21/2022			No data available	e in table			
					\$0.00	\$0.00	
¥ Follow-up Details ∨					М	isc. Charges	\$0.00
Status Pending						Art Charges	\$0.00
						Cost Total	\$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.

### 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 **K** to cancel.
- 3. Select **v** 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 **X** 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.

₭ Home > SalesOrder #67675-1										R	► H
Actions Q, Add Product Email ~ Action To	Job	Rem	nove Split Sh	nipment							
SO #67 C Invoice	-		Qty	ID	Description	SKU		Price \$	Cost \$	Total \$	\$
Preview Invoice		≡	500	552727494	CORKCICLE® Coffee Mug - 16 oz.	100604	G	emline		19,555.00	)
i Sales Order Details 🗸 🗸 🗸			Туре		Description	Qty		Price \$	Cost \$	Total \$	Ŀ
Split Shipment		≡	Color		Matte Black	500		38.98	25.337	19,490.00	
		≡	Decoration Me	ethod	Print						
Company Jessica Testing		=	Setup Char	rge		1		65.00	52.00	65.00	
Primary Rep Administrative JP		=	Decoration	Location	Full wrao						
Date Jun/21/2022	۲		Design Nar	me	Facilisgroup						×
Est. Delivery Date Jun/30/2022		=	Decoration	Color	White						
FOB Factory			+ Add Ne	ew Line	  hine>					~	-
Payment Methods											
Credit Card	Custom	er On	der #	Click to edit				Freight Total		\$ 5.60	
ACH								Subtotal		\$ 19,560.60	

### A preview of the Invoice opens.

Preview Invoice #67675-1 PDF									>
			NVOICE TO Jassid Tating 1900 W Sh Ak Garonis II United Bane, 5200	SHIP TO As per distribut	ion list		INVOICE #67675-1 Jai/20/2022		
	QTY	DESCRIPTION			UNIT PRICE	EXTENSION	ADMINISTRATIVE JP		
	500 800 1	CORRCICLER Coffee Mag - 16 oz. Doc Justin Halo Marcola Constant Second Second Second Second Second Second Decorates Location Mode Decorates Color Wilde			538.98 946.07	\$19,440.00 965.00	Tel : (613) 5749-4212 Evit. 115 mjænnetter 10@Racilisgovup.com Classification Our Electronist Our Electronist POB Factory Terms Net 30 Days		
								$\longrightarrow$	Close 🛃 Downloa

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.

CTIONS Q Add Product Email - Return To	Job 🍵 F		ove Split Shipment						
SO #67 C Invoice	•	Q	)ty ID	Description	SKU	Price \$	Cost \$	Total \$	\$
Preview Invoice	• •	≣ 5	500 55272	7494 CORKCICLE® Coffee Mug - 16 oz.	100604	Gemline		19,555.00	J
i Sales Order Details Y		т	Гуре	Description	Qty	Price \$	Cost \$	Total \$	1
Split Shipment		≣ c	Color	Matte Black	500	38.98	25.337	19,490.00	1
	5	≡ D	ecoration Method	Print					
Status Involced Company Jessica Testing		≡	Setup Charge		1	65.00	52.00	65.00	
Primary Rep Administrative JP		≡	Decoration Location	Full wrao					
Date Jun/21/2022	۲	≡	Design Name	Facilisgroup					×
Est. Delivery Date Jun/30/2022		=	Decoration Color	White					
Via Our Discretion  Factory  Add New Line				   				~	,
Payment Methods									
Credit Card	Custome	r Orde	er# Click	to edit		Freight Total	S	5.60	
ACH						Subtotal	s	19,560.60	

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

@ease v1 🗗					🛗 🌔 Monica	Lunzmann (A	Administrative) 🗸
♣ Home > Sales0	Send Sales Order Inve	oice to Client		×			r <del>e</del> H
ACTIONS Q Add Prod		2 Attachments	3 Email	4 Preview			
SO <del>(</del>					Price \$	Cost \$	Total \$
_	turnlan d	21×1×1	Out of Date		Gemline		19,555.00
i Sales Order Deta	#67675 1	Status	Created Date		Price \$	Cost \$	Total \$
Split Shipment	#07073*1		Juli/21/2022		38.98	25.337	19,490.00
Status Invoiced Z Company Jessica Tes					65.00	52.00	65.00
Primary Rep Administ Date Jun/21/2022							
Est. Delivery Date Jun Ship Via Our Discretio							
FOB Factory							
Payment Methods					Fueleta Travi		à 5 40
Credit Card					Subtotal		\$ 19.560.60
Terms Net 30 Days					Tax Total		\$ 0.00 Awaiting tax update
Due Date Aug/25/202 Tax Exempt # Click to					Total		\$ 19,560.60
					Deposits/Payme	nts	\$ 0.00
💄 Sold To					Balance Due		\$ 19,560.60
I Bill To					Rep's Est. Cost		\$ 12,720.50
Solit Shipment D					Margin		34.95%
Download Template				Cancel Next			

- 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.



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

@ease v1 🗗			Ê	Monica	a Lunzmann (A	dministrative) ~
☆ Home → SalesOr	Send Sales Order	Invoice to Client	×			<del>3</del>
spin snipment				38.98	25.337	19,490.00
Status Invoiced Z Company Jessica Tes	Invoices	Attachments 3 Email 4 Preview	_	65.00	52.00	65.00
Primary Rep Administ Date Jun/21/2022 Est. Delivery Date Jun Ship Via Our Discretio	Send As	paquettej@icloud.com				
FOB Factory	Recipient	jlavoy@facilisgroup.com 😵 email1@email.com 😵 😋 👻	18			
Payment Methods Credit Card				Freight Total	s	5.60
ACH	Email Address(es)	Enter a valid email address	1.00	Subtotal	s	19,560.60
Terms Net 30 Days	BCC	Primary Ren: Administrative . JP (mieannette+10@facilismoun.com)		Tax Total	s 4	0.00 Awaiting tax upda
Due Date Aug/25/202 Tax Exempt # Click to	500		1.00	Total	S	19,560.60
		Sales Assistants	1.00	Deposits/Paym	ents \$	0.00
💄 Sold To	Watermark	None O Paid O Revised O Past Due	18	Balance Due	S	19,560.60
💿 Bill To	Online Payments	Credit Card Payment Allowed 😮		Rep's Est. Cost	s	12,720.50
i Split Shipment D		ACH Payment Allowed 🕑	- 18	Margin	3	4.95%
Download Template	Subject *	Invoice (#67675-1) for Jessica Testing from LogoMedia	5			
Ship To Description @		Use to delete and reset text				
		Previous Cancel N	ext			

- 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)
    - o Paid
    - o Revised
    - o Past Due.
  - Online Payments: choose one or both methods of payment:
    - o Credit Card Payment Allowed
    - ACH Payment Allowed.

- **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:

- 3 (delete icon) to delete all text
- <sup>•</sup> (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.

Status Invoiced	Invoices	Attachments	Email	4 Preview		65.00	
Company Jessica les Primary Rep Administ Date Jun/21/2022	_				18		
Est. Delivery Date Jur Ship Via Our Discretio FOB Factory		PLOG	DMEDIA		18		
Payment Methods Credit Card						Freight Total	
ACH		Hello Jessica Mary,				Subtotal	
Terms Net 30 Days 🜌 Invoice Date Jul/26/2		OUR REMITTANCE ADDRESS HAS CHANGI	ED!! Please see details below			Tax Total	
Due Date Aug/25/202 Tax Exempt # Click to		Thank you for choosing iPromo. Please fi	nd attached a copy of the invoice for your			Total	
		records. Please call us as soon as you sta	rt your next project! We can help with			Deposits/Paymo	ents
💄 Sold To		ideas, presentations, really whatever you	need to help make your job easier!			Balance Due	
©∃ Bill To		Thank you!				Ren's Est. Cost	
		Note: 3% Service Fee will be assessed for	any N30 Terms invoices paid via Credit			Margin	
i Split Shipment D		Card					
Download Template		EFFECTIVE IMMEDIATELY!!!!					
Ship To Description 🔞		OUR REMITTANCE ADDRESS HAS CHANGE	ED				

- 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.