

Split Shipment Frequently Asked Questions (FAQs)

GENERAL

1. What Split Shipments features are still to come?

We are continuing to update Split Shipments. These are the next items we are currently working on:

- Exporting Split Shipment
- Editing and filtering
- Military addresses
- Validating quantity
- Reporting.

2. Can this process be used for Program Jobs?

Currently, the Split Shipment feature is only available for Drop Ship Jobs.

3. Does the Sales Order need to be in a specific status?

To create a Split Shipment Sales Order, the Sales Order must be in Pending or Open status.

4. Can we change the "Ship To Description" to "Split Ship Locations"?

Yes, this field is customizable (25 character limit).

5. Is this the recommended process for smaller Drop Ship lists of 5 or less?

This is recommended for any number of shipments when you want only one invoice to share and follow up (without needing to consolidate) and to apply a single payment.

6. Can tracking numbers be added to the spreadsheet?

Tracking numbers can be on the spreadsheet imported into Syncore however it will not be saved to the Split Shipment addresses. If this is something you need, please reach out to Support to share your feedback.

7. What if the Client's shipper number is being used?

If the Client's shipping account is being used, do not fill in the Shipping (\$) column.

8. Is there a way to communicate tracking information to Clients via the Syncore shipping confirmation?

The Syncore shipping confirmation supports up to 10 tracking numbers. For additional tracking numbers, we recommend uploading a file with the tracking numbers to the Job attachments to be included when emailing the shipping confirmation.

TEMPLATE

1. Is the template available for Sales Reps or CSRs?

Yes, the template is available for Sales Reps, CSRs, Management, Finance and Admin Users.

2. Is the template available while the Sales Order is in Pending status?

The template is always available for download for all Sales Order statuses: Pending, Open, Invoice and Paid.

3. Who should be filling out the template?

After the information has been collected from the Customer, the CSR, or Finance User, who typically inputs the shipping charges on the Sales Order, should enter this on the spreadsheet. The same person should also be uploading the file.

4. Will the template spreadsheet be available so a Customer can fill it out?

You will need to share the spreadsheet with the Customer to complete.

IMPORTING

1. Do the columns in the import file need to be in the same order as the template in Syncore?

No, the columns do not need to be in the same order. Only columns with a matching header name will be used when importing data.

2. Who will be completing and uploading the Split Shipment file to Syncore?

Our recommendation currently is that the CSR or Finance User upload this file just before invoicing.

3. Does the import file need the asterisk (*) in the column names that are required?

No, just identical spelling of the required columns — the asterisk (*) is not needed.

4. What if I do not see the error download file?

If you do not see the error file to download, ensure you have all the required column headers, and that they match exactly to the ones in the Notes tab. If this still is not working, please reach out to Support.

5. What happens if a Customer supplies the spreadsheet with all the information in Excel?

Syncore Split Shipment supports Excel files with the extension .xlsx. If a Customer provides the file in .xls, you will need to convert or re-save the file to .xlsx.

PRICING

1. What if the “Pricing” column is blank and not pulling from the SO?

- i. First, make sure the SKU on the SO line item matches the Split Shipment details.
- ii. If the pricing column is still blank, check if the SO product has specific color/size line items:
 - make sure the Split Shipment import file has the matching color/size information for these line items.

2. Where do the “Add'l” charges come from?

Add'l (additional) charges come from the decoration line items associated with the SKU. This could be setup or run charges, or any other Customer pricing from location, comments etc. The line items nested below “Decoration Method” make up the Add'l charges.

3. Is the pricing on the spreadsheet net or the Client’s price?

Pricing on the spreadsheet is the pricing from the Sales Order for the Client’s price.

4. Where is the SKU pricing pulling from?

Price on the Split Shipments page is pulled from the matching SKU and price on the Sales Order page.

To ensure accurate pricing, you may need to fill in the Color and/or Size columns on the spreadsheet.

TAXES

1. What tax shows on the invoice?

The invoice will show the total tax amount from all Split Shipment addresses in the totals section at the bottom.

2. What if I am noticing issues with the tax calculations or “clothing” setup?

Reach out to Concierge to investigate further. Taxes for split shipment are calculated with the same rules as a standard Sales Order.

3. Do we need to change the ship to address on the Sales Order to a non-taxable state for the tax to calculate correctly?

No, taxes are calculated based on the ship to address in each specific split shipment row. If you do not calculate taxes in a particular state, the taxes will display as 0% and \$0.00.

4. If the Sales Order is setup as tax exempt, is the tax field on the spreadsheet automatically set to No?

Correct, if the Sales Order is tax exempt, all the Split Shipment addresses will be set to tax exempt.

5. Does the Client see a breakdown of what taxes were charged per state?

Currently the Syncore invoice is a summary of all taxes. If this is something you and your Clients need, please reach out to Support to share your feedback.

6. When running month end reports, will all taxes be listed in the Avalara reports?

Avalara has full reporting of taxes for each state and for economic nexus. If you do not have access to your Avalara account, please reach out to Support.

7. What happens if the tax column on the spreadsheet is filled out wrong and does not match who our company pays taxes to?

Split Shipments uses the existing taxes rules in Sales Order today. By default, all Split Shipments are recommended to be set to “Yes” for taxable and Avalara will return the proper tax. Unless a specific address should be exempt, set the address to “No” for taxable.

INVOICING

1. Is there no Sales Order process or does it jump to Invoice?

We recommend following the existing Sales Order process and to use Split Shipment feature for the Invoicing process. You should only upload the file should after the shipping charges are confirmed.

2. Are the Split Shipment details sent with the invoice?

We are developing an export feature that will give Users the ability to include split shipment details when sending the invoice to the Customer. This feature will be announced when it is available.

3. If each split shipment address is different, does it create one invoice or multiple invoices?

All Split Shipment addresses will be summarized into a single invoice of shipping charges, taxes and total.

4. What if the Customer needs a separate Invoice for each shipment due to their taxes?

Currently Syncore provides a single consolidated invoice of all shipments. If this is something you and your Customers need, please reach out to Support to share your feedback.

5. What does the Client see if we email the invoice with a Split Shipment?

The Client sees the Invoice PDF. This can be previewed in Syncore before sending.