



Microsoft Dynamics™ GP
German Shipping Documents

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Shipping documents

Use this information to set up and use shipping documents in Sales Order Processing. The information is arranged in the order that you should complete the procedures.

This feature is available only if you have installed a German version of Microsoft Dynamics™ GP.

This documentation contains the following sections:

- [*Shipping documents overview*](#)
- [*Activating the shipping documents feature*](#)
- [*Setting up a shipping document ID*](#)
- [*Assigning a shipping document ID to an order ID*](#)
- [*Transferring an order to a shipping document during transaction entry*](#)
- [*Transferring an order to a shipping document during order fulfillment*](#)
- [*Printing a shipping document*](#)
- [*Printing multiple shipping documents*](#)
- [*Transferring a shipping document to an invoice*](#)
- [*Transferring multiple shipping documents to a single invoice*](#)
- [*Voiding a shipping document*](#)

Shipping documents overview

A shipping document is a legal document that accompanies goods that are shipped from a sales company to a customer. Shipping documents have several functions.

- The shipping document is the legal basis for transferring liability to the customer.
- The customer can compare the shipping document to the original order and the invoice.
- The sales company has proof that the items were shipped, because the customer confirms the delivery by signing for it.

For quantities that have been fulfilled, you can create a shipping document from the Sales Order Fulfillment window or the Sales Transaction Entry window. You can create one shipping document per order, multiple shipping documents per order, or one shipping document for multiple orders.

After you've created and printed the shipping document, you can transfer it to an invoice. You can transfer a single shipping document to a single invoice, or you can combine multiple shipping documents into one invoice.

Activating the shipping documents feature

Use the Company Setup Options window to activate the shipping documents feature. This feature is available only if you have installed a German version of Microsoft Dynamics GP.

After you activate the feature in the Company Setup Options window, you can set up shipping document IDs in the Sales Order Setup window. For more information, see [*Setting up a shipping document ID*](#) on page 2.

To activate the shipping documents feature:

1. Open the Company Setup Options window.
(Microsoft Dynamics GP >> Tools >> Setup >> Company >> Company >> Options button)
2. Mark the Enable Shipping Document in Sales Order Processing option.
3. Choose OK to save changes and close the Company Setup Options window.
4. Choose OK to close the Company Setup window.

Setting up a shipping document ID

Because shipping documents are handled as a special order type in Microsoft Dynamics GP, use the Sales Order Setup window to set up IDs for shipping documents.

To set up a shipping document ID:

1. Open the Sales Order Setup window.
(Microsoft Dynamics GP >> Tools >> Setup >> Sales >> Sales Order Processing >> Order button)
2. Enter an order ID and next number for shipping documents.



When you set up shipping document IDs, the value for the Order ID Next Number field for each order type ID must begin with at least one unique alphabetic character. For example, if you enter SHPDOC in the Order ID field, you can use SHPDOC0000001 as the Order ID Next Number as long as the Order ID Next Number field for any other order ID does not begin with SHPDOC.

3. Mark the Shipment option.



Remember that order IDs are set up also in this window. If you don't mark the Shipment option, the document ID you create will function as an order.

4. In the Use Invoice ID field, select the invoice ID to use when transferring shipping documents to invoices.
5. Choose Save to save the shipping document ID.

Assigning a shipping document ID to an order ID

Before you can transfer an order to a shipping document, you must assign a shipping document ID to that order ID.

To assign a shipping document ID to an order ID:

1. Open the Sales Order Setup window.
(Microsoft Dynamics GP >> Tools >> Setup >> Sales >> Sales Order Processing >> Order button)
2. Select the order ID to transfer the shipping document to.
3. Mark the Use Separate Fulfillment Process option.

4. In the Use Shipment ID field, select the shipment ID to use when transferring orders to shipping documents.
5. Choose Save.

Transferring an order to a shipping document during transaction entry

You can use the Sales Transaction Entry window to transfer a single sales order or a portion of a sales order to a shipping document. You can transfer orders to new shipping documents or add orders to existing shipping documents.

When you transfer an order to a shipping document, freight and miscellaneous charges for orders that require multiple shipments will appear on the first shipping document that is created. Trade discounts are calculated per shipping document. When multiple orders are combined on a single shipping document and there is more than one comment ID, the Comment ID field is cleared.

Before you can transfer an order to a shipping document, you must assign a shipping document ID to that order ID. See [Assigning a shipping document ID to an order ID](#) on page 2 for more information.

To transfer an order to a shipping document during transaction entry:

1. Open the Sales Transaction Entry window.
(Transactions >> Sales >> Sales Transaction Entry)
2. Enter a sales order. For more information about entering a sales order, see the Sales Order Processing documentation.
3. Choose Transfer to open the Sales Transfer Documents window.
4. Mark the Transfer to Shipment option.
5. Choose Transfer.
6. Select a report destination, then choose OK.
7. To remove items that will not be included in the shipment, select the item in the Sales Transaction Entry window then choose Edit >> Delete Row.
8. Choose Save to save the shipping document.

Transferring an order to a shipping document during order fulfillment

You can use the Sales Order Fulfillment window to transfer orders to shipping documents during order fulfillment. You can transfer orders to new shipping documents or add orders to existing shipping documents. If you select a new shipping document number when you transfer an order, a new shipping document is created. If you select an existing shipping document when you transfer an order, the quantity fulfilled is added to the document you selected.

When multiple orders are combined on a single shipping document and there is more than one comment ID, the Comment ID field is cleared. Trade discounts are

transferred to the first shipping document created. Transferred trade discount amounts are calculated per shipping document.

Before you can transfer an order to a shipping document, you must assign a shipping document ID to that order ID. See [Assigning a shipping document ID to an order ID](#) on page 2 for more information.

To transfer an order to a shipping document during order fulfillment:

1. Open the Sales Order Fulfillment window.
(Transactions >> Sales >> Order Fulfillment)
2. Select an order.
3. In the Qty Fulfilled field, enter the quantity to ship (either the entire order quantity or a partial quantity) or choose Fulfill All.
4. Select a shipment number or accept the default value.
5. Choose Save.

Printing a shipping document

Use the Sales Transaction Entry window to print a single shipping document. You can transfer a shipping document to an invoice only if the shipping document has been printed, which indicates that the shipment has been sent to the customer. You can delete shipping documents after they have been printed.

All items that were fulfilled will be printed on the shipping document. Prices are not printed on the shipping document. The report format for shipping documents is selected in the Sales Order Setup window.

To print a shipping document:

1. Open the Sales Transaction Entry window.
(Transactions >> Sales >> Sales Transaction Entry)
2. Select the shipping document to print.
3. Choose File >> Print to open the Sales Document Print Options window.
4. Mark the Shipment format option and choose Print.
5. Select a report destination, then choose OK.

Printing multiple shipping documents

Use the Print Sales Documents window to print a range of shipping documents. You can transfer a shipping document to an invoice only if the shipping document has been printed, which indicates that the shipment has been sent to the customer. You can delete shipping documents after they have been printed.

All items that were fulfilled will be printed on the shipping document. Prices are not printed on the shipping document. The report format for shipping documents is selected in the Sales Order Setup window.

To print multiple shipping documents:

1. Open the Print Sales Documents window.
(Transactions >> Sales >> Print Sales Documents)
2. Select Order from the Document Type list, then select Shipment from the Include list.
3. Select a range of documents and choose Insert.
4. Choose Print.
5. Select a report destination, then choose OK.

Transferring a shipping document to an invoice

Use the Sales Transaction Entry window to transfer a shipping document to an invoice. After you ship an order, you'll want to create an invoice to bill the customer for the goods.

A shipping document can be transferred to an invoice only if the shipping document has been printed, which indicates that the shipment has been sent to the customer. See [Printing a shipping document](#) on page 4 for more information.

To transfer a shipping document to an invoice:

1. Open the Sales Transaction Entry window.
(Transactions >> Sales >> Sales Transaction Entry)
2. Select a shipping document.
3. Choose Transfer to open the Sales Transfer Documents window.
4. Mark the Transfer to Invoice option, then choose Transfer.



The sales tax is recalculated during the transfer to reflect the quantity of goods shipped.

5. Select a report destination, then choose OK.
6. Choose Save to save the invoice.

Transferring multiple shipping documents to a single invoice

Use the Transfer Shipments to Invoice window to combine several shipping documents into one invoice. To combine multiple shipping documents into one invoice, the documents must share the same currency ID, payment terms, and bill-to address.

A shipping document can be transferred to an invoice only if the shipping document has been printed, which indicates that the shipment has been sent to the customer. See [Printing a shipping document](#) on page 4 for more information.

The following rules apply to trade discounts:

- If the trade discount is a percentage of the total, the percentage must be the same for all of the documents you're combining.
- If the trade discount is a fixed amount, the discount can appear on only one document.
- You can't combine documents with percentage and fixed amount trade discounts.

To transfer multiple shipping documents to a single invoice:

1. Open the Transfer Shipments to Invoice window.
(Transactions >> Sales >> Transfer Shipments)
2. Select a customer ID and an invoice ID.
3. Mark the shipping documents to include on the invoice.



The sales tax is recalculated during the transfer to reflect the quantity of goods shipped.

4. Choose Transfer.
5. Select a report destination, then choose OK.

Voiding a shipping document

Shipping documents can be voided in the Sales Transaction Entry window just like other Sales Order Processing documents. You can void shipping documents that have not been moved to history, even if they have been printed. If the order is deleted in history, the associated shipping documents are not deleted; you must delete them separately. For more information on voiding Sales Order Processing documents, see the Sales Order Processing documentation.