

Creating Order Shipments:

The final steps to wrapping up and closing out orders

Creating Order Shipments: Getting Started

Entry of *package, shipping method, tracking* and *status* details is **required** to trigger payment in automated systems of some buying companies

- Log into your PrintGizmo *Dashboard* and navigate to: *Orders > Active Orders*
- Choose *View/Update Order* from the *Action Menu* of the Order for which you wish to create a shipment and close out

Creating Order Shipments: Configure Packages By Order

Choose when *all Order Products* will be *shipped together at the same time*, by the *same method*, under the *same tracking number*

- 1 Click the *Order Shipments* tab

View/Update Order » 12700

Order Date : 05-03-2022 Order Processing Update Order Action

Order Due Date : 05-17-2022

Invoice Number :

1

View Orders | Update Order Product | **Order Shipments** | Order History

Order Product Details

| ID | Product Image | Products | Quantity | Price |
|-------|---------------|-------------------------------|----------|---------|
| 19323 | | Brochures (Test Product Only) | 100 | \$25.00 |

Shipping/Billing Address

Shipping Address:
 1234 Main Street
 54321 City, State

Printer Details:
 1234 Main Street
 54321 City, State

- 2 Click the blue *Package Configuration* button in the *Create Shipment* area of the *Order Shipments* tab

View Orders | Update Order Product | **Order Shipments** | Order History | Quote History

Search :

Product Details | Weight - Package (L x W x H) | Shipping Company / Tracking | Action

No Records Found

Showing 0 to 0 of 0 entries | Show 25 records

Create Shipment

Production Order Number: 12700

By default, the system generates a single Shipment for all order items at once.
Click on "Package Configuration" button to EDIT weight and dimension of the package.
Click on the "Package Configuration" button to create Multiple Shipments using multiple package configuration.

2 Package configuration

Select Package: ☒ Brochures (Test Product Only) | ☐ Test Product 1 | **Total** |

- 3 Choose *Display by Order* in the *Create Shipment* area of the *Order Shipments* tab
 - *Display by Order* groups *all products* in the order into one or more packages which will be *shipped together*

View Orders | Update Order Product | **Order Shipments** | Order History

Search :

Product Details | Weight - Package (L x W x H) | Shipping Company / Tracking | Action

No Records Found

Showing 0 to 0 of 0 entries | Show 25 records

Create Shipment

Package configuration Save Reset Back

Shipment: ☒ **Display by Order** ☐ Display by Product

Creating Order Shipments:

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4 Enter Tracking Number

- If more than one physical package is being shipped, the tracking number must be applicable to all packages in the shipment

5 Enter the package Weight, Length, Width and Height in the appropriate fields

6 If multiple packages are required

- Click the green Add button
- Enter the Weight, Length, Width and Height of the added package in the appropriate fields
- Repeat as required

7 Click the blue Save button

8 Click the check box for the package you configured

- If multiple physical packages were configured, they will all be listed under one single check box

9 Select the Shipping Method (Carrier)

10 Select the Shipping Type (Service/Class)

- This drop down menu will appear once the Shipping Method has been selected

11 Make sure the Update Order Status toggle is On/green and select Shipped from the Select Status drop down menu

- The Notify Customer check box is not available for selection when you are printing for a broker as contact with broker customers is restricted.

12 Click the blue Submit button

After clicking the blue Submit button

- The Order Shipments tab changes leaving only the shipment summary visible as seen below:

Create Shipment

Package configuration

Shipment ☒ Display by Order ☐ Display by Product

Tracking Number

| No | Product Details |
|----|--|
| 1 | Brochures (Test Product Only) Test Quote 1 - RVS - 2022-05-03 Qty : 100 |

Add

| Weight (lbs) | Length (inches) | Width (inches) | Height (inches) | Delete |
|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------|
| <input type="text" value="5"/> | <input type="text" value="5"/> | <input type="text" value="5"/> | <input type="text" value="5"/> | |

Create Shipment

Production Order Number

• Packages are created, select the package to generate the Shipping Label. The system generates separate labels for each package.
• Edit the package using the "Edit" button and make the desired changes.

| Select Package | Weight | package | Tracking Number | Total Weight | Edit |
|---|--------|---------------|-----------------|--------------|------|
| <input checked="" type="checkbox"/> Brochures (Test Product Only) Test Quote 1 - RVS - 2022-05-03 (100 Qty) | 2 | 12L x 9W x 3H | 197346825 | 2 | |

Shipping Type : Free Shipping

Select Shipping Method

Shipping Type

Update Order Status ☒

Select status

Notify ☐ Customer

Submit

View Orders | Update Order Product | **Order Shipments** | Order History

Search:

| Product Details | Weight - Package (L x W x H) | Shipping Company / Tracking | Action |
|---|---------------------------------------|---|--------|
| Brochures (Test Product Only) Test Quote 1 - RVS - 2022-05-03 (100 Qty) | 2 - 12L x 9W x 3H Total Weight : 2 | USPS(USPS - Priority Mail) 197346825 | |

Date : 05-06-2022 15:39

Showing 1 to 1 of 1 entries

Show records

At this point, the order is considered to be shipped, complete and closed out.

Creating Order Shipments:

The final steps to wrapping up and closing out orders

Creating Order Shipments: Configure Packages By Product

Choose when *Order Products* will be *shipped separately* which may or may not be the same time, same method, or same tracking number

- 1 Click the *Order Shipments* tab

View/Update Order » 12700

Order Date : 05-03-2022 **Order Processing** [Update Order](#) Action ▾

Order Due Date : 05-17-2022

Invoice Number :

1

View Orders | Update Order Product | **Order Shipments** | Order History

Order Product Details

| ID | Product Image | Products | Quantity | Price |
|-------|---------------|-------------------------------|----------|---------|
| 19323 | | Brochures (Test Product Only) | 100 | \$25.00 |

Shipping/Billing Address

| Shipping Address | Printer Details |
|------------------|-----------------|
| 1001 (Sample) | 1001 (Sample) |

- 2 Click the blue *Package Configuration* button in the *Create Shipment* area of the *Order Shipments* tab

View Orders | Update Order Product | **Order Shipments** | Order History | Quote History

Search :

| Product Details | Weight - Package (L x W x H) | Shipping Company / Tracking | Action |
|------------------|------------------------------|-----------------------------|--------|
| No Records Found | | | |

Showing 0 to 0 of 0 entries Show 25 records

2 **Package configuration**

Production Order Number 12700

- By default, the system generates a single Shipment for all order items at once.
- Click on "Package Configuration" button to EDIT weight and dimension of the package.
- Click on the "Package Configuration" button to create Multiple Shipments using multiple package configuration.

Select Package ☒ Brochures (Test Product Only) | Test Quote 1 | Total

- 3 Choose *Display by Product* in the *Create Shipment* area of the *Order Shipments* tab
 - *Display by Product* allows for each product in the order to be shipped separately

View Orders | Update Order Product | **Order Shipments** | Order History

Search :

| Product Details | Weight - Package (L x W x H) | Shipping Company / Tracking | Action |
|------------------|------------------------------|-----------------------------|--------|
| No Records Found | | | |

Showing 0 to 0 of 0 entries Show 25 records

3

Package configuration [Save](#) [Reset](#) [Back](#)

Shipment ☐ Display by Order ☒ **Display by Product**

Creating Order Shipments:

The final steps to wrapping up and closing out orders

4 Enter Tracking Number

- This tracking number will be applied to products whose boxes are checked in Step 5

5 Click the check box for the *product* that will *ship with the entered tracking number* and enter *Weight, Length, Width and Height* in the appropriate fields

- If more than one product from a multi-product order will ship together, with the same tracking number, click the all appropriate check boxes

6 If multiple packages are required for the *product*

- Click the green *Add* button for the *product*
- Enter the *Weight, Length, Width and Height* of the added package in the appropriate fields
- Repeat as required

7 Click the blue *Save* button

Repeat Steps 2 through 7 for each remaining product in the order

8 Click the check box(es) for product(s) being shipped

- If multiple physical packages were configured for a product, they will all be listed under that product's check box

9 Select the *Shipping Method (Carrier)*

10 Select the *Shipping Type (Service/Class)*

- This drop down menu will appear once the *Shipping Method* has been selected

11 Make sure the *Update Order Status* toggle is *On/green* and select *Shipped* from the *Select Status* drop down menu

- *Update Order Status* and *Select Status* menu are only available once all products have been checked to be submitted as shipped.
- *Notify Customer* checkbox is not available for selecting the *Print* for a broker.

12 The *Notify Customer* checkbox is not available for selecting the *Print* for a broker as contact with broker customers is restricted.

After clicking the blue *Submit* button:

- The *Order Shipments* tab changes leaving only the shipment summary visible as seen below:

Create Shipment

Package configuration

7 Save Reset Back

Shipment ☐ Display by Order ☒ Display by Product

Tracking Number 4

| Product Details | Weight (lbs) - Package (inches) |
|--|---|
| 5 <input checked="" type="checkbox"/> Inventory Envelopes (9.75 x 4.37) 20210616015912 Qty : 500 | Weight 5 Length 5 Width 5 Height 5 <input type="button" value="Add"/> |
| <input type="checkbox"/> Inventory Envelopes (9.75 x 4.37) 20210616015912 Qty : 500 | Weight Length Width Height <input type="button" value="Add"/> |

Create Shipment

Production Order Number 11189

• Packages are created, select the package to generate the Shipping Label. The system generates separate labels for each package.
• Edit the package using the "Edit" button and make the desired changes.

| Select Package | Shipping Method | Shipping Type | Weight | Tracking Number | Total Weight |
|---|-----------------------|-----------------------------|----------------------------------|------------------------------|------------------|
| 8 <input checked="" type="checkbox"/> Inventory Envelopes [9.75 x 4.37] 20210616015912 (500 Qty) | Shipping Method : UPS | Shipping Type : 2nd Day Air | Weight : 5 package: 1L x 1W x 1H | Tracking Number : 1111111111 | Total Weight : 5 |
| 8 <input checked="" type="checkbox"/> Inventory Envelopes [9.75 x 4.37] 20210616015912 (500 Qty) | Shipping Method : UPS | Shipping Type : 2nd Day Air | Weight : 5 package: 1L x 1W x 1H | Tracking Number : 2222222222 | Total Weight : 5 |

Select Shipping Method 9

Shipping Type 10

Update Order Status ☒

Select status 11 Shipped

Notify ☐ Customer

12 Submit

| | | | |
|-------------|----------------------|-----------------|---------------|
| View Orders | Update Order Product | Order Shipments | Order History |
|-------------|----------------------|-----------------|---------------|

| | |
|----------|--|
| Search : | |
|----------|--|

| Product Details | Weight - Package (L x W x H) | Shipping Company / Tracking | Action |
|--|------------------------------|-----------------------------------|--|
| • Inventory Envelopes [9.75 x 4.37] 20210616015912 (500 Qty) | 5 - 1L X 1W X 1H | UPS(UPS - 2nd Day Air) 1111111111 | <input type="button" value="Edit"/> <input type="button" value="Print"/> <input type="button" value="Delete"/> |
| Date : 05-06-2022 18:51 | Total Weight : 5 | | |
| • Inventory Envelopes [9.75 x 4.37] 20210616015912 (500 Qty) | 5 - 1L X 1W X 1H | UPS(UPS - 2nd Day Air) 2222222222 | <input type="button" value="Edit"/> <input type="button" value="Print"/> <input type="button" value="Delete"/> |
| Date : 05-06-2022 18:52 | Total Weight : 5 | | |

At this point, the order is considered to be shipped, complete and closed out.