

Shipping orders

September 10, 2026

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A shipping order records the items selected for shipment and their shipping progress. It belongs to the project-management flow that connects ordering, stock, and delivery work.

If you need to...	Go to
Create a shipping order from a sales job	Create a shipping order
Find an order already in the system	Find a shipping order
Understand the wider project-management flow	Project management workspace
Find the sales job you need to select	Find sales job work
Continue with warehouse fulfillment	Warehouse fulfillment flow
Prepare the related delivery document	Delivery notes

The order begins in the **Draft** status and progresses through the shipment stages shown by the shipping-order filters, ending at shipment completion.

```
stateDiagram-v2
    [*] --> Draft
    Draft --> "Goods awaiting issue"
    "Goods awaiting issue" --> "Goods issued"
    "Goods issued" --> "Goods inspected"
    "Goods inspected" --> "Ready for shipping"
    "Ready for shipping" --> "Released for shipment"
    "Released for shipment" --> "Shipment complete"
```

Before you start

A shipping order starts from a sales job whose items are ready to be selected for shipment.

The sales job supplies the order number and related client information that appear on the shipping-order form.

Prerequisites

- Know which sales job supplies the shipment items.
- Have access to create a new shipping order or edit the saved order you need to open.
- For a saved order, work from the order's current status and without unsaved changes when leaving the form.

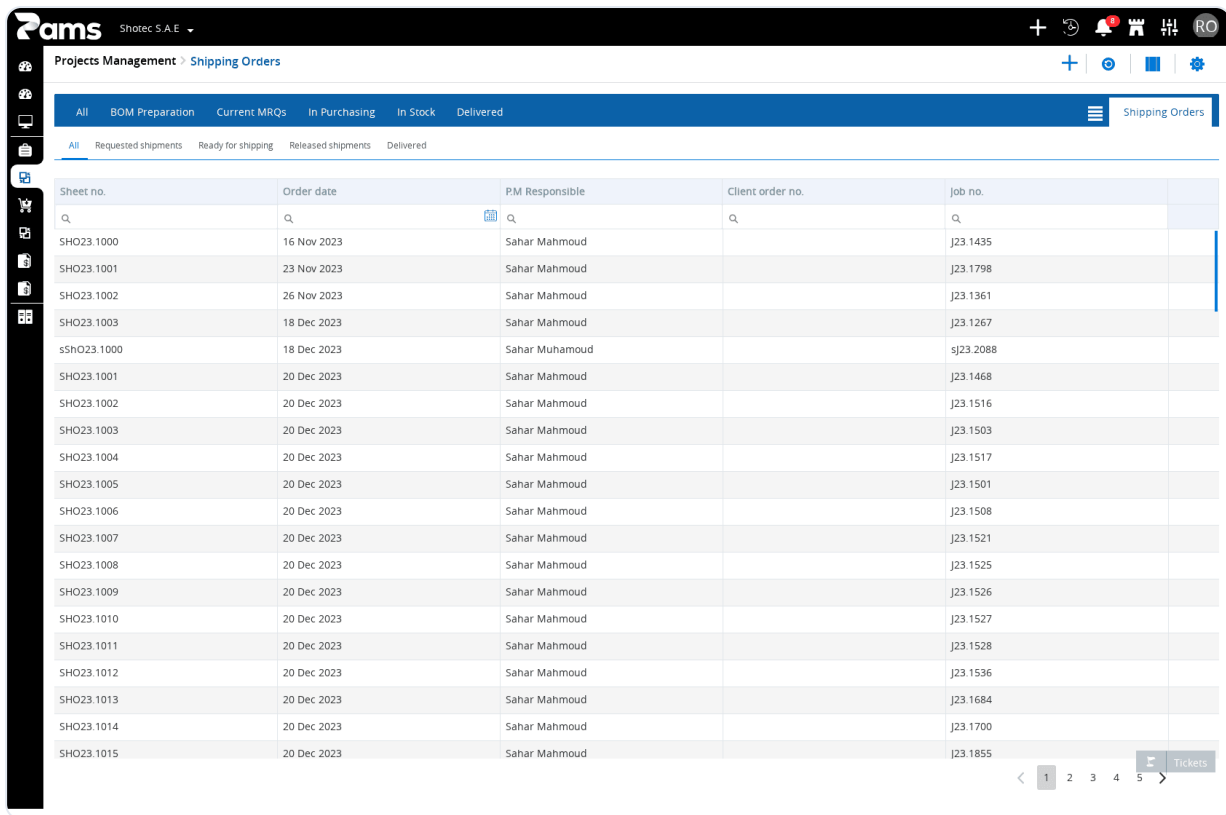
The new form fills **Shipping ordered by** from the signed-in user and **Shipping ordered on**

from the current date. Both fields are read-only. The date cannot be later than today.

Find a shipping order

The shipping-order list is where you filter orders by their current shipment status and select

an existing row. The list currently displays **Sheet no.**, **Order date**, **P.M Responsible**, **Client order no.**, and **Job no.**



Open the shipping-order list

Prerequisites

- Know whether you are looking for all orders, requested shipments, ready shipments, released shipments, or completed shipments.

Steps

1. Open the **Shipping Orders** list at `/projects-management/shipping-order/view`.
2. Select the filter that matches the work you need to locate.

If you need to...	Select
Review every shipping order	All
Review draft orders	Requested shipments
Review orders ready to ship	Ready for shipping
Review released shipments	Released shipments
Review completed shipments	Delivered

3. Select the shipping-order row you need.

Result: The selected shipping order opens for review.

The list also provides a **Filter by:** control above the status choices. Select the status choice that matches the shipment work you need to review.

Open a new shipping order

Prerequisites

- Have a sales job to use for the new order.

Steps

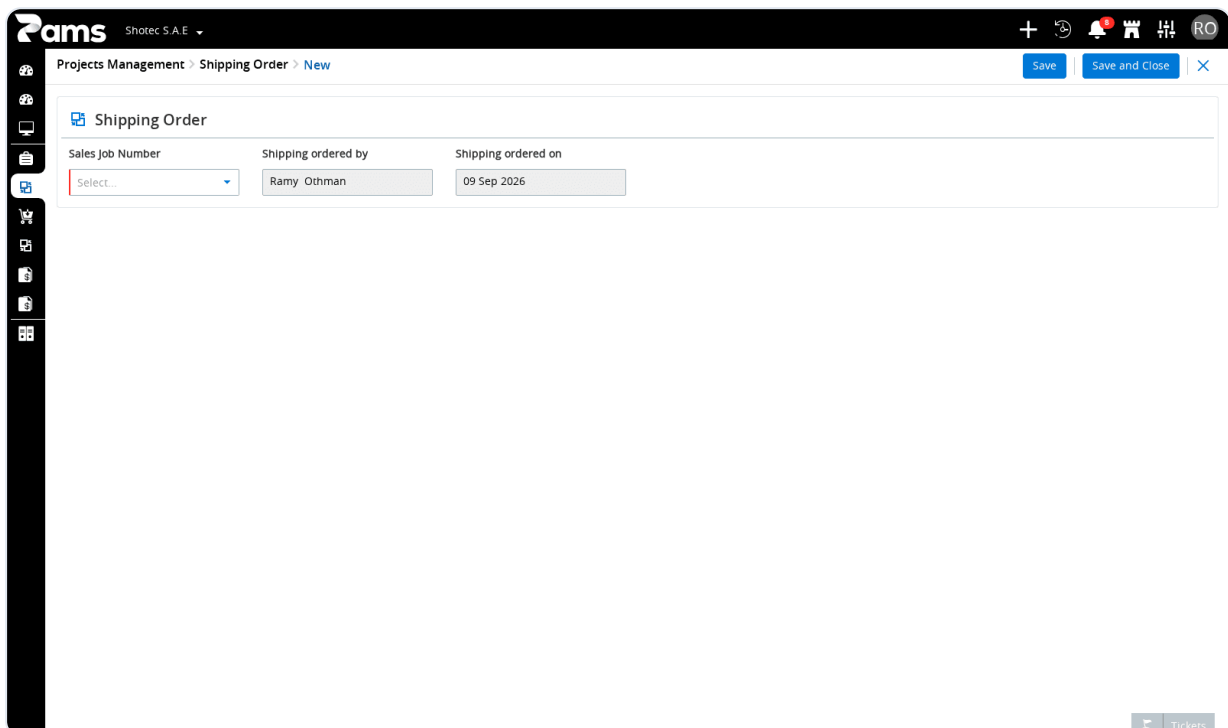
1. In the project-management list, open the new-record menu.
2. Select **Shipping Order**.

Result: The new **Shipping Order** form opens at `/projects-management/shipping-order/new` .

Understand the shipping-order screen

The new form identifies the sales job first, then shows the order details and shipment items.

After the order is saved, it also provides the **Last Modifications** history tab.



The screenshot shows the 'Shipping Order' form in the PAMS application. The breadcrumb navigation at the top reads 'Projects Management > Shipping Order > New'. The form contains three input fields: 'Sales Job Number' with a dropdown menu showing 'Select...', 'Shipping ordered by' with a text input containing 'Ramy Othman', and 'Shipping ordered on' with a date input showing '09 Sep 2026'. The application header includes the 'ams' logo, 'Shotec S.A.E', and various utility icons. A sidebar on the left contains a list of application icons. At the bottom right, there is a 'Tickets' tab.

Order information

Field	What it contains	Required or available state
Sales Job Number	The sales job selected for shipment	Required on a new order
Shipping ordered by	The signed-in user responsible for the shipping order	Required and read-only
Shipping ordered on	The order date	Required and read-only
Sales order number	The order number on a saved order	Read-only
Client	Information from the selected sales job	Read-only
Items	The selected shipment items and their quantities	At least one item is required before saving

Shipment progress

The saved order carries the shipment progress fields below. The progress controls become available according to the order's sales-job and shipment state.

Field	When it is used	What the form does
Ready for shipment	When the order has a sales job	Provides the readiness checkbox
Confirmed on	After readiness is selected	Remains disabled until readiness is selected
Confirmed by	With the readiness details	Remains disabled
Released for shipment	When the order has a sales job	Provides the release checkbox
Released on	After release is selected	Uses Confirmed on as its minimum date and today as its maximum
Released by	With the release details	Remains disabled
Delivered	On the delivery stage	Remains disabled
Delivery Date	With delivery details	Remains disabled and cannot be later than today
Delivered by	With delivery details	Remains disabled

The form does not show **Inventory**, **Moved to shipping on**, **Moved to shipping by**, **Client Order No.**, or **Contractual Delivery Date**. The saved-order tab is **Last Modifications**;
the **Comments** tab is not part of this screen.

Create a shipping order

A new shipping order connects one sales job to the items that are going to be shipped. Select the correct sales job before selecting items because the sales job supplies the client, order number, job type, and available shipment items.

The screenshot shows the 'ams' application interface for creating a new shipping order. The breadcrumb navigation indicates the path: Projects Management > Shipping Order > New. The form title is 'Shipping Order'. The form contains three input fields: 'Sales Job Number' (a dropdown menu with 'Select...' as the placeholder), 'Shipping ordered by' (a text field with 'Ramy Othman' as the value), and 'Shipping ordered on' (a date field with '09 Sep 2026' as the value). The form has a 'Save' button and a 'Save and Close' button. The 'ams' logo and 'Shotec S.A.E.' are visible in the top left corner. The top right corner shows a user profile 'RO' and several notification icons. The bottom right corner has a 'Tickets' button.

Prerequisites

- Have a sales job with shipment items available for selection.
- Be on the new **Shipping Order** form.

Steps

1. In **Sales Job Number**, select the sales job for the shipment.
2. Confirm that the form shows the related client and sales-order information.
3. Select **Product** to open the **Items for shipment** selection dialog.

4. In the dialog, select the items to include in the shipment.
5. Set any optional distribution values that the dialog shows.

If the dialog shows...	Do this
Dispatch priority	Choose the priority for item selection.
Target Qty	Enter the target quantity and review Selected Qty .

6. Select **OK** in the dialog.
7. Confirm that the selected items appear in **Items** with their quantities.
8. Choose the save action that matches what you need to do next.

If you want to...	Select
Continue editing	Save
Save and leave	Save and Close

The form validates the order and its item list. If the order is valid, it is saved with **Draft** status and remains available for further work.

Result: The order is saved with at least one shipment item. **Save and Close** displays `Your request was completed successfully` and closes the form. **Save** keeps the saved order available for further work.

Handle conditional shipping-order details

Some shipment details become useful only after the sales job or the order reaches the relevant stage. Use the fields that appear for the current order state rather than entering shipment progress before the order is ready for it.

Work with item-selection options

Prerequisites

- Be creating a new order with a selected sales job.
- Have the **Items for shipment** dialog open.

Steps

1. Select **Select all** when every available item belongs in the shipment.
2. Select **Unselect all** when you need to clear the current selection.
3. Review the item rows and select only the items that belong in this shipment.

Result: The dialog contains the item selection you intend to place in **Items**.

Split an item when the option is available

Prerequisites

- The order is an instant job.
- **Dispatch priority** is set to manual selection.

Steps

1. In the item-selection dialog, select **Split** for the item you need to divide.

Result: The split-item flow opens for that item.

Review shipment progress

Prerequisites

- The order has a sales job.

Steps

1. Select **Ready for shipment** when the order is ready for that stage.
2. Review **Confirmed on**.
3. Review **Confirmed by**.
4. Select **Released for shipment** when the goods are released for shipment.
5. Review **Released on**.
6. Review **Released by**.
7. Review **Delivered**.
8. Review **Delivery Date**.
9. Review **Delivered by** when delivery information is available.

Result: The order displays the shipment-progress information available for its current stage.

Out of scope on this screen

The **Finish and release to stock** action and **Inspection template** action are not active controls on the shipping-order screen. The generic save-error message is handled outside the shipping-order-specific corrections on this page.

When something goes wrong

Use the message text to locate the correction that the form requires.

What you see	What it means	What to do
Please enter sales item(s)	The order has no shipment items	Select Product , choose at least one item, and return to Items .
An error occurred while processing your request	The save request returned an error	Review the form and retry Save or Save and Close .
Some products are not available in stock	An item in the selection is unavailable	Remove the unavailable item from the selection and choose an available item.
Save or Save and Close does not commit a new order	The form has no changes or the required information is incomplete	Select a sales job, add at least one item, and review the required fields.

After you create or find the order

After saving, a new order is a draft shipping order. It appears under **Requested shipments** in the shipping-order list. The saved record also provides **Last Modifications**, which opens the order's log history.

Next steps

- Follow the [Warehouse fulfillment flow](#) for the broader shipment handoff.
- Open [Delivery notes](#) when the related delivery document is needed.
- Return to the [Project management workspace](#) to move between project-management work areas.

Result: You can locate the saved order under **Requested shipments**, reopen it from the

list, and review its **Last Modifications** history.