

Dispatch Orders

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[Relates to version](#)

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[Dispatch Order](#) [Transfer Order](#)

Dispatch Orders manage the movement of (mostly) finished goods out of a manufacturing site to the market or external organisations, usually associated with sales orders.

A Transfer Order is a type of Dispatch Order that manages the movement of goods between different sites within the MES system organisation (e.g., different manufacturing facilities / distribution warehouses / sub-contractors) - ownership is maintained in MES.



Dispatch Orders vs Sales Orders

It is important to be clear on the difference between Sales Orders and Dispatch Orders.

Sales Order: An external contract between the manufacturer and their customer to deliver / sell specified goods. These generally detail products, quantities and due dates at least.

Dispatch Order: An order to ship goods between the manufacturer and their customer or other external organisation – it may or may not involve a change of ownership. It may have multiple line items, each of which can be connected to different sales orders.

A Sales Order may trigger several different works orders (especially in a make-to-order production environment) and may lead to several corresponding Dispatch Orders.

Dispatch Order process and statuses

A Dispatch Order can have the following statuses:

- **Planned:** Dispatch is planned but has not yet taken place. Nobody is allowed to pick it.
- **Release:** Goods on the Dispatch Order are available to be picked.
- **Pick:** Line items on the Dispatch Order have been picked and the line item is closed.
- **Dispatch:** Line items on a dispatch order have been dispatched. For information, see [Dispatch](#).
- **In Transit:** Goods are being transported. Usually you are only interested in recording when goods have left, in which case this status is not required and the Dispatch Order is closed on dispatch. Sometimes you want to know when things have arrived, for example for a Transfer Order (Internal Transfer dispatch type). This is when you would set the status to **In Transit** for when goods have been dispatched but not yet received.
- **Closed:** A Dispatch Order is closed when goods are dispatched, and in the case of an Internal Transfer, finally received at their destination.
- **On Hold:** Dispatch Order is placed on hold and cannot progress until the hold status is cleared.
- **Cancelled:** Dispatch Order is cancelled.

When you add a Dispatch Order, you can only select **Planned** or **Release** status.

Organisations

Organisations, sites and contacts must be configured to define where goods are shipped to and from. This applies to shipping to a customer or transferring internally.

You need to have configured organisations and sites to define where you're shipping from. You need to have configured organisation, site and contact for the site you are shipping to.

For more information, see [Organisations](#) documentation.

Customer / Supplier

There may be more than one supplier / customer for a product. In the Products screen you can manage multiple customers / suppliers and set a default for each. For more information, see [Customer / Supplier](#) documentation.

Dispatch Order structure

The Dispatch Order header contains information about where the goods are going to be picked from, and who and where they are going to be dispatched to.

Each line item details exactly which products are expected, how much and when they are due.



Note

It is common for a single Sales Order to cover multiple shipments, potentially of the same product e.g., a company place a bulk order for 6 months' worth of raw materials but do not want to store it all on site, so 'call off' an amount to be delivered each week.

Note that the Dispatch Order number can be configured to generate automatically as set up in Serial Ranges and **Application Properties**.

Dispatch Order management screen

The Dispatch Order screen allows you to manage Dispatch Order headers the line items for a selected Dispatch Order. You can refine your search for Dispatch Orders based on Dispatch Type, Statuses or by typing in the part or all of the Dispatch Order number.

Dispatch Order header

1. Navigate to the **Dispatch Orders** page and click the **Add** button to display the **New Dispatch Order** input screen.

Add / Edit Dispatch Order

Blue fields in the form are required and are flagged with an asterisk () in this document.*

- **Dispatch Order No:** Dispatch Order number in the MES. The system will assign a unique Dispatch Order number if this field is left blank.
- **Dispatch Order Type*:** Types of dispatch are:
 - **Customer Shipment:** Send to a customer.
 - **Vendor Return:** Return item to a vendor.
 - **Internal Transfer:** Transfer from one location to another within the organisation.
 - **Sub Con:** Send to a sub-contractor.
- **Status*:** Statuses are Planned, Released, In Transit, Closed, On hold and Cancelled. See the section on Dispatch Order process and statuses above for more detail.
- **Order Raised:** Date the order was raised.
- **Planned*:** Planned shipment date.
- **Due Date*:** Date shipment is due to arrive.
- **Currency:** Currency on the order.

[Ship From](#)

You need to have configured organisation and sites to define where you are shipping from.

- **Organisation***: Organisation that will be shipping the item.
- **Site***: Details of the location where the item will be shipped from.
- **Warehouse**: Warehouse from which item will be dispatched.
- **Pick From**: Lot from which item is chosen.
- **Customer Ref**: Reference for the customer receiving the item.
- **Pick To**: Where the item will be kept before dispatching.
- **Comment**: Leave a comment.
- **Delivery No**: Delivery number on the Dispatch Order.
- **Vehicle Reg**: Registration of the vehicle that will be transporting the item.

Ship To

To be able to ship goods to a customer or supplier (for vendor return and sub contractor), you need to have created an organisation, site and contact for the site you are shipping to.

To ship the product to a customer or supplier, that customer or supplier must be configured for that product in the MES.

Invoice To

Contact name, organisation and address for the invoice of the Dispatch Order.

Pick List

The Pick List is a report showing details about the line items that have been picked.

On Hold

A dispatch order can be placed on hold. Line items cannot be picked and the Dispatch Order cannot be dispatched until it is released.

Dispatch

A dispatch is allowed when one of the following conditions are met:

- All the order lines have been closed.
- Some order lines are closed and you choose to move the open lines to another Dispatch Order, create a new Dispatch Order or delete them from the original order.

There are two scenarios for recording a dispatch:

1. Dispatch the order and record the dispatch without recording receipt.
2. Dispatch an order and record that it's arrived at its destination. This is always required for the **In Transit** dispatch type.

Dispatch with open line items

To dispatch when there are open line items that you want to move to a new dispatch order:

1. Select the order and click **Dispatch**. The **Move Open Line Items** pop-up is displayed.

Move Open Line Items input screen

- **Action**: Select one of the following options:
 - **Existing Dispatch Order**: Adds the line items to an existing dispatch order. Select the Dispatch Order number from the **Dispatch Order No** drop down that is displayed.
 - **New Dispatch Order**: Creates a new dispatch order that contains the incomplete line items. The **Dispatch Order No** field is displayed with this option where you must provide a dispatch order number.

- **Status:** Select a status for the new Dispatch Order:
 - **Planned:** Dispatch is planned but has not yet taken place. Nobody is allowed to pick it.
 - **Release:** Goods on the Dispatch Order are available to be picked.

Dispatch Note

There's often a requirement to have a document to show what was shipped on a delivery, such as a bill of lading.

Receipt

The receipt button displays when goods have an In Transit status on Transfer Orders. When goods are received, click the Receipt button to close the order.

Line Items

Line items can be added to a Dispatch Order as follows:

1. Select the Dispatch Order, and in the **Line Items** grid (below the **Dispatch Orders** grid), click the **Add** button to display the **New Dispatch Order Line Item** pop-up.

New / Edit Dispatch Order Line Item

Blue fields in the form are required and are flagged with an asterisk () in this document.*

- **Product*:** Select the product being ordered. The list of products will be filtered to just those products configured for the organisation.
- **3rd Party Part No:** Recipient's part number for the dispatched item.
- **Line No:** Specifies where in the list of line items this item appears.
- **Qty Ordered*:** Quantity of the product ordered.
- **Min Qty:** Minimum quantity required per order.
- **Max Qty:** Maximum quantity allowed per order.
- **Planned:** Date the item will be dispatched.
- **Customer PO:** Customer's Purchase Order number the Dispatch Order corresponds with.
- **Sales Order:** Sales Order number the Dispatch Order corresponds with.
- **Pallet Ref:** Pallet reference that will contain the item.
- **Comment:** Leave a comment for the line item.
- **Is Restricted By Sales Order Reference*:** When set to **Yes**, you may only pick material for a works order that shares the same Sales Order number provided in the Line Item. In a make-to-order environment, you create a job to satisfy a specific Sales Order and you want to peg that material (line item) to only allow it to be shipped. In the job, the Sales Order number must be entered in the **Sales Order** field for the job configured in the **Schedule Manager**.

Pick

To pick a line item:

1. Select the line item and click the **Pick** button to display the **Pick** input screen.

Pick input screen

Line Item Details

- **Line Item*:** Line item to be picked.
- **Product:** Product being picked.
- **Qty Ordered:** Quantity ordered.
- **Description:** Description of the item.
- **Qty Required:** Quantity required.
- **Quantity Dispatched:** Quantity already dispatched against the Dispatch Order Line.

- **Pallet Ref:** Pallet reference that will contain the item.

Material Item Selection

- **Serial No:** Serial number search to filter the next field. If the serial number doesn't exist, the Item Not Found window will display a list of items that contains the serial number search string but are not available for dispatch.
- **Select Item*:** Select the serial number of item to be picked.
- **Qty Available:** Quantity of the material item available to be picked.
- **Qty to Dispatch*:** Quantity of material item to be dispatched.
- **Unit*:** Unit of measure of the material item.
- Click **Pick & Continue** to pick another item, or select **Pick & Close** to close the Pick pop-up.

Line items have their Qty Picked and Qty Available highlighted in a colour.

- Qty Picked
 - Red: Nothing has been picked.
 - Amber: Part of the quantity ordered has been picked.
 - Green: Full order quantity has been picked.
- Qty Available
 - Red: Zero quantity is available.
 - Orange: Quantity available is below the ordered quantity.
 - Green: Available quantity can fully satisfy the ordered quantity.

Pick History

The **Pick History** screen shows information about pick and pick reverse transactions. You can perform a pick reverse in this screen.

Move

You can move line items from one Dispatch Order to another. For example, when you have multiple shipments scheduled to a customer, you might decide to send something that was planned for the morning shipment, in the afternoon shipment instead.

You can move a line item either internally or to an external organisation. To move a line item:

1. Select a line item and click **Move** to display the **Move Line Item** pop-up.

Move Line Item

- **Line No.*:** Line number of the item to be moved.
- **Product:** Pre-populated with the product name.
- **Qty Ordered:** Pre-populated with the quantity ordered.
- **Qty Dispatched:** Pre-populated with the quantity already dispatched.
- **Qty to Move*:** Provide how much/many of the line item will be moved.
- **Dispatch Order No*:** Number of the Dispatch Order handling the move.
- **Organisation:** Destination organisation.

Properties

You can view and edit properties related to the line item.

Close

Line items are automatically closed when the order quantity has been picked. You can manually close a line item when its minimum quantity has been picked.

Reports

Open Dispatch Order Lines by Product by Due Date

Design

FileHomeView

Export

Parameters

Show Orders Due Before:29/06/2026

☐ Null

Product(All)

View report

Ship To Company

eyelit

TECHNOLOGIES

MES

Open Dispatch Order Lines by Product by Due Date

Product	Description	Unit	22-Jan-17	03-Feb-17	20-Feb-17	25-Apr-17	23-Apr-21	12-May-21	24-May-21	29-Sep-21	06-Dec-21	10-Feb-22	01-Apr-22	15-Jun-22	16-Jul-22
001 460 80 80C	HELLO2	EA													
000547.55		EA													
Action Man - Jingle		EA						31	1	8	2		4		
D4Product 001	Dev 8.4 Product for Test	EA													
APSO Chair	added description	EA													
AAD- Office Table	Office Table Manufacturing	EA													
D4Second Product		KG													
Raw Vibranium		KG												1.123	
Buggy	Buggy Vehicle	KG													
Amit Product	Amit Product Description	TONNE													
Boat dg watch	Digital watch assemble	Box of 10													

Dispatch Order Line Items

Dispatch Order Line Items

Design

File

Home

View

I→ Export

<< < 1 > >>

Parameters

Product Name

(All)

Due After

Required (DD/MM/YYYY)

☒ Null

View report

Due Before

Required (DD/MM/YYYY)

☒ Null

Dispatch Order Number

Ship To Company

Status

All Lines

Sales Order Ref

Customer PO Ref

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TECHNOLOGIES

MES

Dispatch Order #	Line #	Product	Description	Ship To Co.	Status	Unit	Qty Ordered	Qty Dispatched	Plan Dispatch DT	Delivery Due DT	Sales Order Ref.	Customer Ref.
0001	1	Pixel 8 Pro	Pixel 8 Pro	AS ORG	Closed	EA	7	7	12/08/2024	12/08/2024		
0001	2	Buggy	Buggy Vehicle	AS ORG	Open	KG	20	0	12/08/2024	12/08/2024		
0001	3	Buggy	Buggy Vehicle	AS ORG	Closed	KG	1	1	12/08/2024	12/08/2024		
0001	4	Buggy	Buggy Vehicle	AS ORG	Open	KG	8	2	12/08/2024	12/08/2024		
00Test0802	1	Steak Pie		Customer A	Open	KG	12	6	08/02/2024	08/02/2024	12	
00Test0802	2	Buggy	Buggy Vehicle	Customer A	Closed	KG	1	1	08/02/2024	08/02/2024		
00Test0802	3	Buggy	Buggy Vehicle	Customer A	Open	KG	10	0	08/02/2024	08/02/2024		
09Test	1	Buggy	Buggy Vehicle	AS ORG	Open	KG	1	0	13/02/2024	13/02/2024		
0ASTEST	1	Steak Pie		AS ORG	Closed	KG	2	2	23/08/2023	23/08/2023		
12345	1	Action Man - Jingle		Alan Organisation 1234567890 1234567890 1234567890	Closed	EA	1	1	17/11/2021	17/11/2021		
63547	1	Steak Pie		AS ORG	Closed	KG	1	1	19/07/2023	19/07/2023		
A_2	1	kentest	kentestupdated	Internal	Closed	KG	5	5	14/12/2020	17/12/2020		