

OK to Ship Workflow

04/30/2025 3:17 pm CDT

Overview

Depending on your preferences and the structure of your operations, you can implement an additional verification step into your workflow for processing orders. For example, if you prefer to have a manager verify orders before allowing them to reach your Shippers, they can mark orders in Sellercloud as Ok or Not Ok to Ship. Alternatively, you can automate this process, so that orders are marked based on certain rules and criteria.

Mark Orders OK to Ship

Enable **OKtoShip Workflow** must be enabled in **Client settings > General Client Settings > Fulfillment > General**. By default, all of your orders will be marked as **Waiting to Ship**.

You can change your orders' OK to Ship status manually or automatically. To do that:

Manually

1. Navigate to **Orders > Manage Orders**.
2. Select your desired orders from the grid.
3. Go to **Actions > select Update Order Status**.
4. Choose the status from the Dropdown as shown in the screenshot below. This works for both single and multiple orders.

The screenshot shows the 'MANAGE ORDERS' interface with a table of orders. A dialog box titled 'UPDATE ORDER STATUSES' is open, showing various status options. The 'Rush Status' dropdown is set to 'OK To Ship'. The 'UPDATE' button is highlighted. Numbered callouts (1-6) indicate the steps: 1. Search button, 2. Selecting an order, 3. Update button, 4. Update button, 5. Selecting 'OK To Ship' in the dropdown, 6. Update button.

Automatically

When you enable the client setting **Enable OKtoShip Workflow**, all your orders will automatically be set to **Not OK**

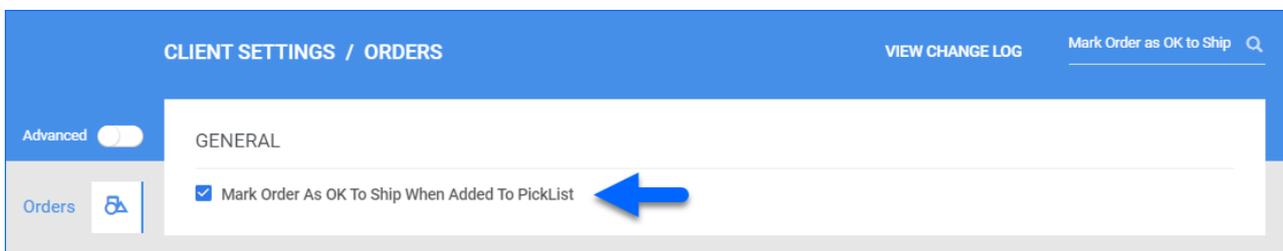
to Ship. In this case, you will need a User, an Order Rule, or a Plugin to mark them as **OK to Ship**.

Alternatively, you can implement a reverse function of the above workflow with the **Enable OKtoShip to default to OK status** client setting. This will set all of your orders as **OK to Ship** by default. This can be especially helpful for cases where there is an additional step required before shipping. For example, customer-related checks, channel requirements, etc.

When Added to Picklists

Marking orders as **OK to Ship** when added to Picklists is an important step to ensure that the orders are picked and packed in a timely and efficient manner and that the correct items are shipped out to customers. To enable this:

1. Navigate to **Settings > General Client Settings**.
2. Enable **Mark Order as OK to Ship when added to PickList**.
3. Click **Save**.

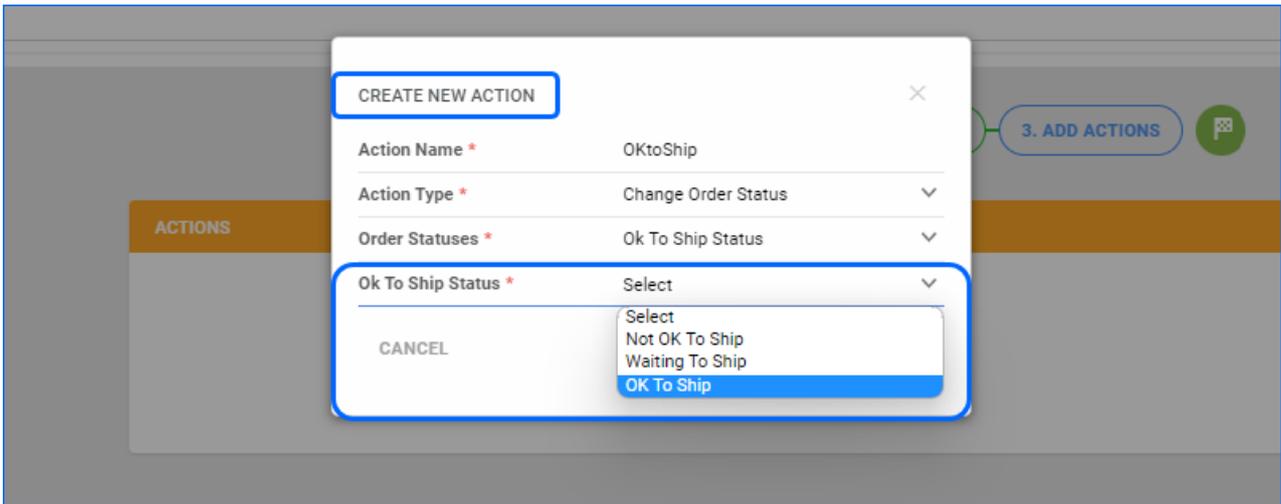


This setting works best when **Enable OKtoShip to default to OK status** is *disabled*. Any order part of a picklist will automatically be set as **OK to Ship**.

Order Rule Engine

You can set up a Rule in the [Order Rule Engine](#) that will update the Ok to Ship status based on certain criteria. To do that:

1. Navigate to **Settings > Orders > Rule Engine > Manage Rules**.
2. Click on the Plus icon to create a new **Rule**.
3. Set your desired criteria in the **Conditions** tab of the Wizard.
4. In the **Actions** tab, click on the Plus icon to create a new action.
5. Add **Action Name > Action Type: Change Order Status > Order Statuses: Ok To Ship Status**.
6. Select the option you want the Status to be changed *To*. (*i.e Not OK To Ship, Waiting To Ship, etc.*)
7. Click **Save**.



Related Client Settings

Setting

Enable OKtoShip Workflow

Enable OKtoShip to default to OK status

Mark Order as OK to Ship when added to PickList

Definition

Required. If this setting is not enabled, none of the other settings will take effect and the actions will *not* be visible.

Will set all orders as **OK to Ship**. Orders need to be flagged with the action **Set Not OK to Ship** to prevent shipping.

Orders will automatically become **OK to Ship** when added to a PickList.

Overview

Depending on your preferences and the structure of your operations, you can implement an additional verification step into your workflow for processing orders. For example, if you prefer to have a manager verify orders before allowing them to reach your Shippers, they can mark orders in Sellercloud as Ok or Not Ok to Ship. Alternatively, you can automate this process so that orders are marked based on certain rules and criteria.

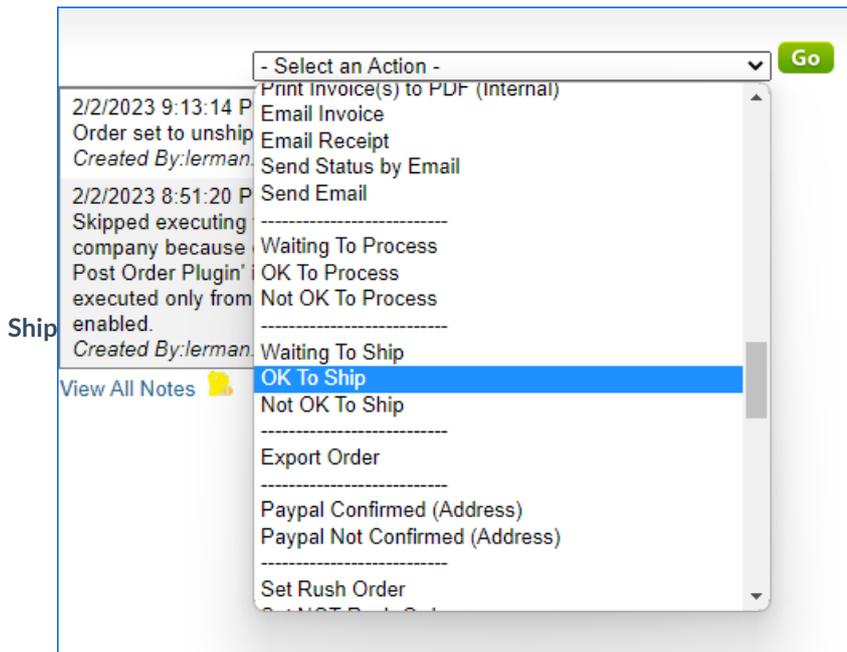
Mark Orders OK to Ship

Client Setting **Enable OKtoShip Workflow** must be enabled.

You can change your orders' OK to Ship status individually or in bulk.

Individually

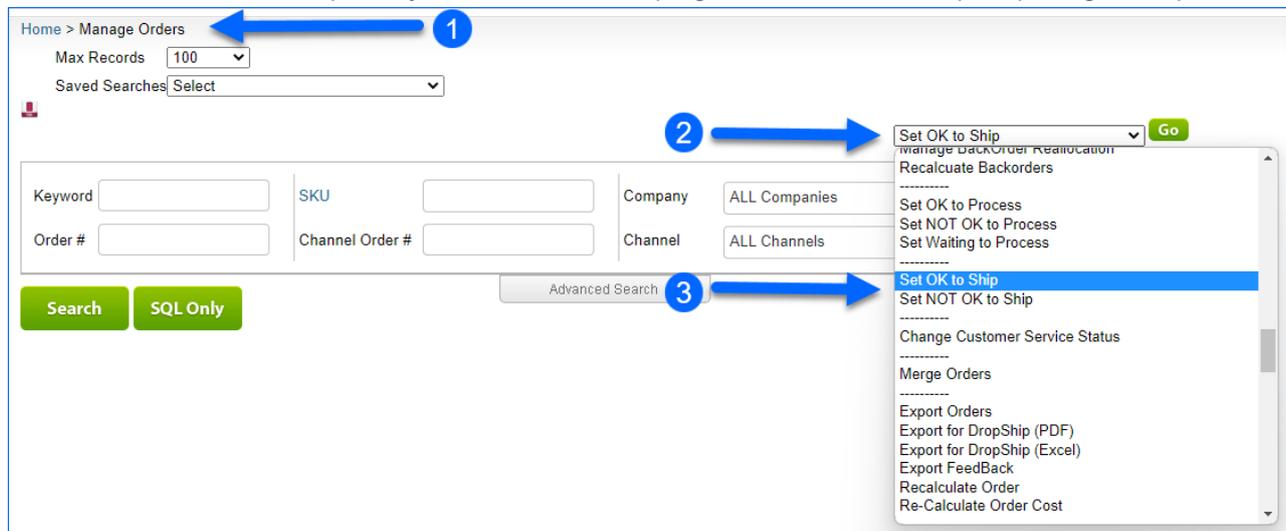
If you need to mark one individual order, you can open the Order Detail Page and open the Action Menu >**OK to**



In Bulk

You can also mark multiple orders in bulk. Go to Manage Orders > Apply filters and Search > Select your orders from the grid > Action Menu > Set OK to Ship

The bulk action will create a queued job. You can track the progress of the action and quickly recognize any issues.



Automatically

When you enable the client setting **Enable OKtoShip Workflow**, all your orders will automatically be set to **Not OK to Ship**. In this case, you will need a User, an Order Rule, or a Plugin to mark them as **OK to Ship**.

Alternatively, you can implement a reverse function of the above workflow with the **Enable OKtoShip to default to Ok status** client setting. This will set all of your orders as **OK to Ship** by default. This can be especially helpful for cases where there is an additional step required before shipping. For example, customer-related checks, channel requirements, etc.

When Added to Picklists

Marking orders as **OK to Ship** when added to Picklists is an important step to ensure that the orders are picked and packed in a timely and efficient manner and that the correct items are shipped out to customers. To enable this:

1. Navigate to **Settings > Client Settings**.
2. Enable **Mark Order as OK to Ship when added to PickList**.
3. Click **Save**.

This setting works best when **Enable OKtoShip to default to OK status** is *disabled*. Any order part of a picklist will automatically be set as **OK to Ship**.

Customized Rules

You can set up a Rule in the [Order Rule Engine](#) that will update the Ok to Ship status based on certain criteria. You can configure this feature only in Delta, however, once set up, it will apply to your orders regardless of which interface you prefer.

Related Client Settings

Setting	Definition
Enable OKtoShip Workflow	<i>Required.</i> If this setting is not enabled, none of the other settings will take effect and the actions will <i>not</i> be visible.
Enable OKtoShip to default to OK status	Will set all orders as OK to Ship . Orders need to be flagged with the action Set Not OK to Ship to prevent shipping.
Mark Order as OK to Ship when added to PickList	Orders will automatically become OK to Ship when added to a picklist.
