



Order Packing

Order Packing is an optional Package available to enhance your Billing/Order Entry module.

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Order Packing

Getting Started

Introduction

Thank you for selecting the *Order Packing* enhancement module from Samco Software Inc. *Order Packing* is designed to plug right into your existing Samco Billing module with very little setup.

To summarize, *Order Packing* provides a convenient way for:

- A shipper to enter picking information for an Order and optionally select the Order for billing;
- Generate shipping labels;
- Generate a packing slip to include with Orders;
- View shipping information for Orders (ideal for sales reps);
- View and printing shipping history.

The remainder of this Chapter will cover the installation of the *Order Packing* option, setting it up, and a brief overview of the new features added to *Billing*.

Installation

Order Packing is installed like any other *Samco Power Accounting* module. Please refer to the section; *Adding a New Module* in the *Changes After Installation* Chapter of your *Installation Guide*.

After it is installed you will need to activate the module. A call into our Support Department for the new serial number/activation code will be required. Call or email us at support@samco.com. We will gladly assist you.

1. Once the new activation code is installed you will need to restart your *Samco Power Accounting* in Order to activate the *Order Packing* feature.

Overview of Order Packing

Now that you have installed the *Order Packing* option you will need to become familiar with how it works and how you might incorporate it into your daily business operations. In addition, some minor set up will need to be done in Order to take full advantage of its many features. In this section we will guide you through the basic setup and provide highlights of the new features.

We will not discuss any points in any great detail, rather you will be directed to the section in this Manual where each field and function is elaborated on.

Since *Order Packing* is an add-on for *Billing*, all of the work you do with this option will be from within the *OE* module.

Setting Up

1. **Control Information:** To begin, you will need to make some changes to the *Setup >Control information* function on the 2nd page of the *BILLING* main Menu. A new screen of setup fields are available labeled **--Order Packing/EDI--**. (See the Chapter titled *Control Information* for details.)
2. **Labels:** If you will be printing waybills, shipping labels, or COD labels, you will need to first design these in the *Setup >Label formats* function of *BILLING*. Please note that waybills (which are label formats applied to ship via codes) were a new feature in Version 6.5A, and you will need to refer to the Release Notes for Version 6.5A for details.

Once you have your label formats completed you will need to update the **-- Order Packing/EDI --** section in *Setup >Control information* so that it uses these new formats as the default.

3. **Packing Slip:** In *Order Packing* you have the option of generating a packing slip which indicates what was actually shipped along with various other pieces of shipping information.

What makes a packing slip different from a picking ticket is that the picking ticket is usually used by the shipper to fill the Order and the packing slip is generated so as to tell the Customer what was shipped to them.

When setting up a packing slip you will need to create a new "P" type form ID. For convenience you may want to copy an existing form over and make any necessary changes. (All of the new form fields are discussed later on in the Chapter titled *New*

Features In Billing.)

Once you have created a new packing slip form you will need to update the **--Order Packing/EDI--** section in *Setup >Control information* so that it uses this new form as the default.

Changes to Billing

In this section we will discuss some of the new functions and major changes to *Billing* functions.

Orders >Enter: The **Ship date** field (available on both the first screen and for each line on an Order) now has a new option for entering extended shipping information; including the ship date, the date the client expects it by, the last date on which you can advise the Customer you are unable to ship, the date the product was actually shipped, the expected date the product should arrive at the Customer's site, the Customer's barcode/number for the line item, the line number from the Customers PO, and the unit of measure used by the Customer on their PO. Note that the last three are used most commonly in an EDI environment and are required in many cases for the Advanced Shipping Notice.

(See the Chapter titled *New Features in BILLING* for details.)

Order Packing: This is a new function added to *BILLING* which is used by the shipper to enter details about the Order. The shipper will also have the option of selecting the Order for billing, generating labels / waybill / packing slip, and entering additional information such as freight and miscellaneous charges.

Since *Order Packing* is an add-on for *Billing*, all of the work you do with this option will be from within the *BILLING* module.

View Orders: At the touch of a button you can now see information specific to the shipping/packing process. Including the date it was shipped on, how it was sent, the waybill number, who shipped it, the date and time it was packed, and where it was shipped to. This is ideal for sales people when a call comes in from a Customer regarding the status of their Order.

(See the Chapter titled *New Features in BILLING* for details.)

Shipping History: This is a new function which allows you to view, print and purge order shipping information. (See the Chapter titled *Shipping History* for details.)

Example Use of Order Packing

The following is a step-by-step look at how an Order is processed using the *Order Packing* function.

1. The Order is entered by a sales rep and a picking ticket printed.
2. Using the picking ticket printed in step 1, the shipping clerk picks the Order.

3. The shipping clerk then enters the picking information into *Order packing*. Shipping labels, COD labels, a packing slip, and a waybill can be optionally printed within *Order packing*.
4. If the Order is completed the shipping clerk can also select the o for billing. The Order will then be available for Invoice printing from within *Billing*.

Samco Support

The user manuals are designed to allow you to use Samco's Power Accounting application software without any additional help. However, if you encounter problems you cannot resolve by referring to these manuals, you may want to get additional assistance. Your supplier should be able to provide such assistance, or he may be able to recommend an independent source.

Samco Help Desk

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Samco provides support on **a fee-for-service basis**. Please ensure that you have the software release, serial number(s), media type, payment information (Visa or MasterCard) and other related information available when you call.

For a detailed description of Samco's support and Customer services, please check out our web site at <http://www.samco.com>.

You may go to your own dealer for training; however, if your dealer does not offer training, call Samco at (800) 663-2080, for information and cost.



Order Packing

Control Information

Before using *Order Packing* you will need to set some defaults and define how you want to use it. This is done through the *Setup >Control information* of the *BILLING* main Menu.

To begin press [F2] from the *BILLING* main Menu and select *Setup >Control information*. From here, press [PgDn] until the following screen is displayed:

Field #	Description	Value	Printer
75	Starting shipment #	Assigned using order #	
76	Mfg number system / ID	00 00000	
77	Next ucc128 carton serial	"not used"	
78	Default shipping pack type	Case/carton	
79	Default pack detail method	Detail	
80	Use pack-ref on lines ?	N	
81	Pack screen lines per item	1	
82	Display packing in order by	Location	
83	Default ship label-number	1	Printer 1
84	Default COD label-number	B	Printer 1
85	Packing slip form ID	1	Printer 1
86	Master/Mixed pack labels	PCK / PCK	Printer 3 / 1
87	Track user-id of picker	Y	
88	Track user-id of packer	Y	
89	Keep shipping history	Y	
90	Enter quantities only	N	
91	Pack screen line format	Ordered	
92	Master/Mixed content labels	PCK / PCK	Printer 3 / 3

Make changes, PgUp = previous screen, PgDn = next screen
 Field number to change ?

Enter the following information for each field on this screen:

Starting shipment number

Mfg. number system / ID

Next UCC128 carton serial #

These fields are only available with the *Global/DX* module and are used for creating UCC/EAN128 bar codes on the MH10 shipping label. They display “(not applicable)” and cannot be edited.

Default Shipping Pack Type

Enter the default type of packing you use for shipping your products. Available options include 0 for box / carton, 1 for pallet, and 2 for container.

Default Pack Detail Method

Pack detail indicates how you want to break down your shipments for each line item within the *Order packing* function. In summary mode you simply enter in the quantity shipped and how many packs (boxes, cartons, etc.) were used. Detail mode allows you to indicate not only how many packs were used but also how much went into each box and which boxes were used.

Enter D to default to detail entry mode or S for summary mode.

Use Pack-Ref on Lines ?

A pack-ref is an optional reference field for each line item which allows you to enter up to 25 characters of free form text. If you answer N here the pack-ref field will not be displayed.

Pack Screen Lines Per Item

Enter the number of lines of description (1 - 3) per line item to display on the *Order packing* screen. If you are using, Pack-ref's your options are 2 or 3.

Display Packing in Order By

This is the Order the line items from the Order are displayed on the *Order packing* screen. Enter S to display by sequence number or L for the location of the items within the warehouse. You will want to match this up with how your picking ticket is printed.

? Default Ship-Label Number

Enter the label format (set up in *Setup >Labels*) to use for printing shipping labels or press [F1] for “None”.

See the Chapter titled *Labels* in the *Billing* User Manual for details on setting up shipping label formats.

? Default COD Label Number

Enter the label format (set up in *Setup >Labels*) to use for printing COD labels or press [F1] for “None”.

See the Chapter titled *Labels* in the *Billing* User Manual for details on setting up COD label formats.

Packing Slip Form ID

Enter the form ID to default to for printing packing slips or press [F1] for “None”.

Track User-ID of Picker

Answer Y if you want to be able to enter the User ID of the person who picked the Order within the *Order packing* function. This is the person who physically walked around and filled the Order.

Track User-ID of Packer

Answer Y if you want to be able to enter the User ID of the person who packed the Order within the *Order packing* function. This is the person who is entering the picking information off of the picking ticket.

- **Hint: If you only have one shipper, or if the picker and packer are usually the same person, select only one of the two previous fields.**

Keep Shipping History ?

Answer Y if you want the system to store summarized shipping information in a separate history file. We suggest answering Y to this at first and seeing if it is valuable to you. If not you can always come back here and turn it off by answering N.



Order Packing

New Features in Billing

Order Packing puts new wrinkles on some very familiar *Order Entry* functions. Specifically:

- Expanded ship dates on the first screen and on each line item of *Orders/Enter*;
- Shipping information can be viewed within *View Orders*;
- Setting up a packing slip form.

In this Chapter we will discuss, in detail, the changes made to existing *BILLING* functions with the addition of *Order Packing* (not including the changes discussed in the previous Chapter).

Entering Orders

When entering or editing an Order (*Orders/Enter*) the **Ship date** field on both the first screen and for each line item has been expanded to support a number of new fields.

While at **Ship date** on the order header screen you can optionally press [F5] and a window similar to the following will display:

Additional Dates

When entering line items you can press [F5] and screen similar to the following is displayed:

1. Ship date
2. PO date
3. Needed-on
4. Cancel-on
5. Shipped-on
6. Arrive-on

Additional Info

1. Ship date
2. Needed-on
3. Cancel-on
4. Shipped-on
5. Arrive-on
6. Cust barcode
7. PO line #
8. PO units

Enter the following information at each field:

Ship Date

Enter the ship date in MMDDYY format or use one of the following options:

- [F1] -Inserts "ASAP" as the shipping date
[F2] -Inserts today's date on the header screen only and inserts the ship date from the header screen when entering line items.

This date is used when printing and tracking Orders within the system.

PO Date

(This field only displays at the order header screen.)

Enter the date the Customer issued their PO or press [F1] to set to "None".

Needed-On

Enter the date the client needs the product to arrive at their location or press [F1] for "None".

Cancel-On

Enter the last date the client will allow the Order to be cancelled if you cannot ship it on time, or press [F1] for "None".

Shipped-On

Enter the date the Order or product was shipped on or press [F1] for “None”.

Arrive-On

Enter the date the Order or line item should arrive at the Customer’s site or press [F1] for “None”.

Cust Barcode

(This field only displays for line items.)

Enter the barcode or item number the Customer used on their Purchase Order.

PO Line #

(This field only displays for line items.)

Enter the line number from the Customers PO that this line item came from.

PO Units

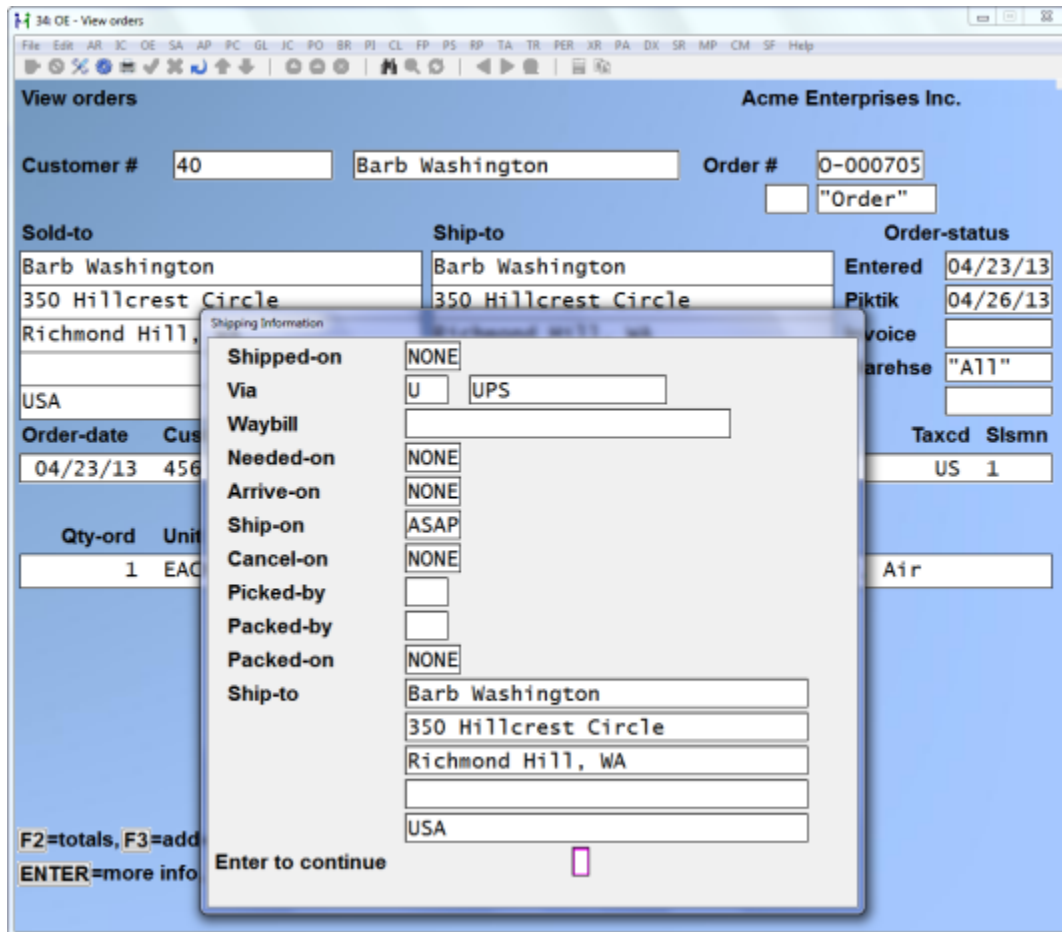
(This field only displays for line items.)

Enter the purchasing unit from the Customer’s PO. This field is most commonly used to identify the Customer’s ordering unit which may differ from your selling unit; i.e. the Customer uses BOX while you use BX.

The information you enter in these windows is later available through the *View Orders* and *Order packing* functions.

Viewing Orders

You can now view shipping detail for un-posted Orders by pressing [F7] while an Order is displayed. A window similar to the following will appear:



The fields displayed include:

- | | |
|-------------------|---|
| Shipped On | -The date the product was actually shipped. |
| Via | -How, the product is going to be or was shipped. |
| Waybill | -The waybill number the product was shipped on. |
| Needed-on | -Date the client needed the product to arrive by. |
| Arrive-on | -The date the product should be arriving at the client's site on. |
| Ship-on | -The date you originally anticipated shipping the product. |
| Cancel-on | -The last date the Customer will allow you to cancel the Order if it cannot be shipped on time. |
| Picked-by | -User ID of the person who actually picked the product (this only displays if set up in <i>Control information</i>). |
| Packed-by | -User ID of the person who entered in the packing information in <i>Order packing</i> (this only displays if setup in <i>Control information</i>). |
| Ship-to | -The ship-to address on the Order. |

Packing Slip

Order packing provides you with the ability to generate packing slips to send with your shipments (packing slips can also be referred to as shipping manifests). The packing slip form

itself is set up in *Setup >Forms* and must be a type “P” (usually reserved for picking tickets but it serves a dual purpose here).

Some of the new fields the *Order Packing* makes use of on the packing slip are listed and described below.

Header and Total Fields

Arrival date	-Date the shipment is expected to arrive.
Cancel date	-Last date the Customer allows you to cancel the Order if it cannot be shipped on time.
Deliver-by date	-Date the Customer wanted the product delivered.
Pack count	-Number of packs shipped.
Pack detail flag	-Y = Detail, N = Summary
Pack type	-0 = box/carton, 1 = pallet, 2 = container
Packed by code	-User ID of the person who packed the Order
Packed by name	-Name of the person who packed the Order
Packed date	-Date the Order was packed.
Packed time	-Time the Order was packed.
Picked by code	-User ID of the person who picked the Order
Picked by name	-Name of the person who picked the Order
PO date	-Date of the Customer’s Purchase Order
Shipped-out date	-Date the Order was shipped out.

Line Item Fields

Arrival date	-Date the shipment is expected to arrive.
Cancel date	-Last date the Customer allows you to cancel the Order if it cannot be shipped on time.
Customer bar code	-Customer’s bar code / item number
Deliver-by date	-Date the Customer wanted the product delivered.

Pack count	-Number of packs the line shipped in.
Pack reference	-Optional reference information for the pack.
PO Line #	-Line number from the Customer's PO
PO unit of measure	-Unit of measure from the Customer's PO
Shipped-out date	-Date the Order was shipped.



Order Packing

Order Packing

One of the primary functions of the *Order Packing* add-on is the ability for a shipping clerk to easily enter information related to the packing of products for Orders. The information the clerk enters can then carry through for generating a waybill, shipping labels, COD labels, printing a packing slip, and selecting the Order for billing. Much of the summary shipping information is stored in a shipping history file for viewing or reporting (see *Shipping History*).

The Basics

In order to use the *Order packing* function effectively we should first go over some basic concepts and ideas.

Picking

The process of physically filling an Order with product and recording this information in a hand held unit or on a picking ticket.

Packing

The process of entering the information from the picking ticket into the *Order packing* function.

Packs

A pack is simply a unit of measure. It can mean a box, carton, crate, bag, case, skid, pallet, or container.

Pack Detail Method

Packing information for line items on an order can be entered in either *Detail* or *Summary*. In *Detail* mode the User can enter in, for each line item on an Order, how much of each product

was actually shipped, an optional reference field, and which boxes the products went into.

In *Summary* mode the operator simply keys in how many packs each line item was shipped in and optionally the quantity of product shipped.

Packing Slip

A packing slip is used to enclose with an Order for the Customer's use. It reflects what was actually shipped as compared to a picking ticket which tells the shipper what needs to be shipped. The packing slip can also include information that was entered in the *Order packing* function.

Packing an Order

Let's now follow the steps an operator would take in using the *Order packing* function to process an Order that has been entered in the system.

First of all the operator selects *Order packing* from the *BILLING* main Menu. For most organizations a workstation would be set up in the shipping area and would be left at this screen until logging out at the end of the day.

An Order then needs to be selected for packing. This can be done by either entering in the Order number, pressing [F1] for the next Order on file, or entering a [?] and selecting an Order from the list of Orders displayed. Note that only Orders can be packed (Invoices, Credit Memos, Quotes, and RMAs do not apply to this function). Once the Order is chosen the screen will look something like this:

Item#	Description	Qty-ordered	Qty-shipped	Pack#
8	1" Steel bolts	150.00	150.00	
10	Compressor, Air	2.00	2.00	
2	Hammer, 16 Oz. Claw	1.00	1.00	1

F1 for Auto Pack, F2 for "Count", F5 for Summary

Pack Header Information

This is the information displayed on the top 3 lines which will characterize how the Order is to be packed.

Packs

At this point you can enter in the number of packs in the shipment, or use one of the options:

- [F1] **-Auto Pack:** This presumes that all of the quantities are correct and sets the number of packs to 1. *If one or more serial or lot controlled item exists on the Order and this information has not been recorded, Auto Packing cannot be done.*
- [F2] **-Count:** Counts the number of packs used based on the information you enter for the line items.
- [F3] **-Delete:** If packing information has been entered for an Order the operator can delete the packing information without deleting the Order.
- [F5] **-Toggles** between *Detail* and *Summary* mode.

- **NOTE: If you enter a quantity of 1 pack, the operator will not be prompted for specific pack information.**

Package Type

Enter the type of packaging the items are being shipped in; 0 = boxes or cartons, 1 = pallet or skid, and 2 = container.

Pack Line Item Information

How information is entered in this area of the screen is directly dependent on the options you chose in the header (top) area:

- **Auto Packing** will presume that all quantities are correct and that only 1 pack is used. Hence the operator will be immediately moved to the pack shipping screen.
- **Summary** mode allows the User to enter only the number of packs each line item was packed in. This is most useful when dealing with items where each unit is either (a) equal to 1 pack, or (b) where line items are not mixed in the same pack; i.e. only “A” items are in the same box together, “B” items are in the same box together, etc.
- **Detail** mode allows the User to specify which pack number(s) each line item went into.

Hint: While entering packing line information you can use the [↑][↓] keys to move back and forth between fields, and the [PgUp][PgDn] keys to move back and forth between pages of line items.

Detail Mode

This section describes entering pack line information in **Detail** mode.

Pack #

Enter the ID number of the pack (starting with 1) that the line item was packed in, use the [↑] to change the actual quantity shipped, or press [F2] for multiple packs if the line item was shipped in more than 1 pack.

If you press [F2] a window similar to the following is displayed:

Packing Details

Pack #	Qty-to-ship
1	

In the box displayed enter the pack #'s and the quantity of the line item that went into that pack.

An easy way of understanding pack #'s is to imagine that each pack you fill is sequentially numbered starting with 1. If, for example, you have 10 boxes you might put 5 of item "A" into box 2 and 3 in box 6, 2 of item "B" into box 1, 17 of item "C" into box 10, etc.

- *Hint: To change the quantity shipped press the [↑] at the Pack # field for that line.*

Reference

(This field only displays if *Use pack ref on lines ?* is set to Y.)

Although not labelled (appearing as a blank 25 character line), you have the option of entering a reference field for the each item. This field can later be printed on the packing slip.

Serial / Lot Numbers

If the line item is serialized or lot controlled the operator can enter in the serial number and lot information. This acts exactly the same as entering serial or lot detail on line items in *Orders* >Enter.

Summary Mode

Summary mode allows the operator to do two things:

- Enter in the total number of packs used for each line item, and
- Change the quantity shipped for each line item.

Summary mode is only useful where either (a) each unit shipped is equal to 1 pack (large items for example), or (b) where different line items are **not** mixed into the same pack.

An example use of *Summary* mode would be a fish processor who is shipping out 500 pounds of fish in 10 boxes. The quantity in each box does not matter, only the number of boxes shipped.

Enter the following information in *Summary* mode:

Packs

Enter the number of packs it took to fill this line. For example, if you are shipping 10 of item “A” and it takes 5 boxes you would enter in 5. Keep in mind this does not affect the actual quantity shipped only the number of containers (packs).

You can also press the [↑] key to change the quantity shipped or press [Tab] to move to the pack shipping screen (you can only press [Tab] after the pack information has been entered for all lines).

Reference

(This field only displays if *Use pack ref on lines ?* is set to Y.)

Although not labelled (appearing as a blank 25 character line), you have the option of entering a reference field for the each item. This field can later be printed on the packing slip.

Serial / Lot Numbers

If the line item is serialized or lot controlled the operator can enter in the serial number and lot information. This acts exactly the same as entering serial or lot detail on line items in *Orders* >*Enter*.

Pack Shipping Information

The final screen of *Order packing* is used for entering shipping information. This screen becomes available in one of 4 ways (presuming that all pack information has been entered correctly for each line item):

1. While editing pack line information you can press [Tab];
2. Pressing [Enter] to complete the last line of pack information;
3. Pressing [↓] at the last line item of pack information;
4. By *Auto Packing* an Order ([F1] at the *Packs:* field)

Depending on the options in *Control information*, the *Pack Shipping* screen will look something like this:

Order packing Acme Enterprises Inc. (Detail)

Order# 0-000721 Ship-to Smith's Renovations Customer 1
Packs 1 Branch Smith's Renovations
Package type Carton

1. Weight 195.10 KG
2. Volume 300.00 FT
3. Ship-via Courier A/C# E12555412
4. Ship-out date 11/21/13 6. Freight amount .00
5. Arrival date 11/21/13 7. Misc amount .00
8. Picked/Packed LGF / LGF
9. Ship labels Print? N Label# 1 Prtr# 1
10. COD labels Print? N Label# B Prtr# 1 Cash-only?
11. Content labels 1 Print? N Master# PCK Prtr# 3 Mixed# PCK P# 3
12. Inner label Print? N Label# Prtr#
13. Print waybill ? N
14. Waybill number
15. Packing slip ? N Form 1 Prtr#

F1=use pack weights, F2=pack window, F5=skip entry, F7=Reset pack weights

Enter the following information for each field:

Weight

The calculated total shipping weight for the Order is displayed and can be changed. When you use this function for the first time the system automatically calculates the net and pack weight. If you are entering in *Detail* mode you have the following options:

- [F1] -Will Add up the net weights the User entered for each pack.
- [F2] -Brings up a pack window showing the individual pack weights, volumes, reference information, and UCC128 number (only applicable if using *Global/DX*) for changes.
- [F7] -Recalculates the pack weights and net weight using the individual line item weights.

In *Summary* mode only [F7] is available for recalculating the net weight of the shipment using the individual item weights.

- NOTE: Weights are drawn from the Item file and are only available for automatic calculation if *Use weight per items ?* is set to Y in *Setup >Control information in Inventory Management*.

Volume

The calculated net shipment volume is displayed using the individual item volumes from the Item file. This calculation is only available if *Use volume per items ?* is set to Y in *Setup >Control information in Inventory Management*.

Since shipment volumes can vary depending on the packaging used, most of the time you will want to enter in either the net volume and/or individual pack volume.

In *Summary* mode you are only telling the system how many packs are being shipped and providing no specific pack detail. For this reason you can only enter in the net volume or press Y to calculate from the line item volume.

In *Detail* mode you can either enter in the net shipment volume or use one of the following options:

- [F1] -Will Add up the net volume using the figures entered by the User for Each pack.
- [F2] -Brings up a pack window showing the individual pack weights, volumes, reference information, and UCC128 number (only applicable if using *Global/DX*) for changes.
- [F7] -Recalculates the pack volumes and net volume using the individual line item volumes from the Item file.

? Ship-Via

Enter the code for ship via method used. The first time through an Order this defaults to the method entered on the Order and moves to the next field. You must press [↑] to make any changes.

Ship-Out Date

Enter the date the Order was shipped out (defaults to today's date or a date previously entered).

Arrival Date

Enter the date you expect the shipment to arrive at the Customer's site (defaults to today's date or a date previously entered).

Freight Amount

Enter a freight charge to be applied to the Order (defaults to the freight charge from the Order or an amount previously entered).

Misc. Amount

Enter a miscellaneous charge to be applied to the Order (defaults to the miscellaneous charge from the Order or an amount previously entered).

Picked

(This field only appears if *Track User-id of picker ?* is set to Y in *Setup >Control information in BILLING*.)

Enter the User ID of the person who physically picked the Order (defaults to the initials of the User who is entering the packing information).

- **NOTE:** User ID's are setup in *System Functions >Users*.

Packed

(This field only appears if *Track User-id of packer ?* is set to Y in *Setup >Control information in BILLING*.)

Enter the User ID of the person who is entering this packing information (defaults to the initials in the *Picked* User field [if entered], other it will default to the ID of the User who is entering the packing information).

- **NOTE:** User ID's are setup in *System Functions >Users*.

Ship Labels

Enter the number of shipping labels to print, press [F1] to default to the number of packs on the Order, or enter [0] if you do not want any labels at all. Next enter Y or N at the *Print ?* field to indicate whether or not you actually want labels printed, and then enter the label format to use.

The default label format and printer comes from *Setup >Control information in BILLING*.

COD Labels

Enter the number of COD labels to print, press [F1] to default to the number of packs on the Order, or enter [0] if you do not want any at all. At the *Cash only ?* prompt enter Y if only cash is acceptable. Next enter Y or N at the *Print ?* field to indicate whether or not you actually want labels printed, and then enter the label format to use.

The default label format and printer comes from *Setup >Control information in BILLING*.

Print Waybill ?

Answer Y if you want a waybill printed.

- **NOTE:** Waybills are actually shipping label formats that are applied to ship via codes. The format used will be dependent on the ship via method being used for the Order.

Waybill Number

Enter the waybill number the Order was shipped under. If you answer Y to *Print waybill ?* this field is skipped and can be filled in after the waybill form is printed.

Packing Slip ?

Answer Y if you want to print a packing slip, and then enter the form you want to use. The packing slip is used to enclose with the shipment and is sometimes referred to as a shipping manifest in certain industries.

- **NOTE: The packing slip form itself must be a “P” type form created in the *Setup >Forms* function in *BILLING*.**

Do You Want to Bill this Order ?

Once you have completed entering the information on the pack shipping screen you are asked whether or not to select this Order for billing. If you answer Y the Order is selected for billing and an Invoice can be generated through the *Billing* function in *BILLING*.

The system will then begin printing the packing slip and labels that were selected for printing. If a waybill is being printed the operator will be prompted to enter in the waybill number from the waybill form.

Packed Qty Not Matched to Shipped Qty

Do You Want to Unselect this Order ?

This prompt only appears if the packed quantity disagrees with the quantity shipped and the Order was already selected before it was packed. There's a remote chance that this should occur, however if it does happen you will want to unselect the Order and make any changes to the packing information.



Order Packing

Shipping History

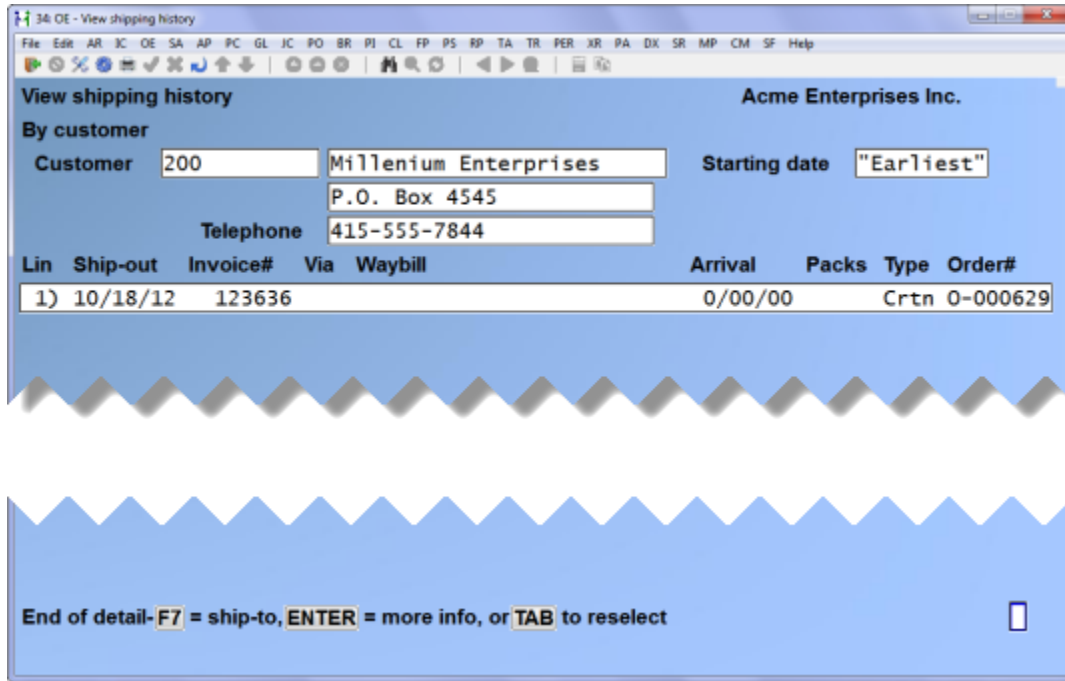
Summarized information from the *Order Packing* function is stored in a shipping history file when Orders are Invoiced and posted. This information can be viewed or printed from within the *Invoice history* function in *Billing*. A purge option is also available to remove dated information from the shipping history file.

Viewing Shipping History

To view shipping history select *Invoice history* → *View shipping history* from the *BILLING* main Menu. At the screen displayed enter in a Customer number (or use the [?] look up to select one from a list), press [ENTER] to select by Customer name or press [F1] to display shipping history for “All” Customers, or [TAB] to exit.

Viewing by One Customer

If you choose to view shipping history for only one Customer, you will be prompted to enter a starting date. Enter the date you wish to begin viewing history from or press [F1] for earliest. A screen similar to the following appears:



You now have the option of pressing [ENTER] to see additional shipping information, F7 to view where an Order was shipped to, or TAB to exit.

If you press F7 you will need to enter the line (left most column) you wish to view the ship-to detail for. A small window will appear with the ship-to name and address.

Viewing For All Customers

If you choose to view shipping history for "All" Customers, you will be prompted to enter a starting date. Enter the date you wish to begin viewing history from pro press F1 for earliest. A screen similar to the following appears:

34 OE - View shipping history

Acme Enterprises Inc.

View shipping history

By customer

Customer "All" Starting date "Earliest"

Telephone

Lin	Ship-out	Invoice#	Via	Waybill	Arrival	Packs	Type	Order#
1) Cust: Smith's Renovations Cust#: 1								
2)	9/26/12	123609			0/00/00		Crtn	0-000592
3)	10/11/12	123615			0/00/00		Crtn	0-000598
4)	10/12/12	123627			0/00/00		Crtn	0-000618
5)	10/18/12	123635			0/00/00		Crtn	0-000628
6)	11/05/12	123637			0/00/00		Crtn	0-000644
7) Cust: Jackson Kitchen Reno Cust#: 2								
8)	9/26/12	123610			0/00/00		Crtn	0-000593
9)	10/11/12	123616			0/00/00		Crtn	0-000599
10)	10/11/12	123620			0/00/00		Crtn	0-000603
11)	10/12/12	123628			0/00/00		Crtn	0-000619
12) Cust: Kipp Bathroom Reno Cust#: 3								
13)	9/26/12	123611			0/00/00		Crtn	0-000594
14)	10/11/12	123617			0/00/00		Crtn	0-000600
15)	10/11/12	123621			0/00/00		Crtn	0-000604
16)	10/12/12	123629			0/00/00		Crtn	0-000620

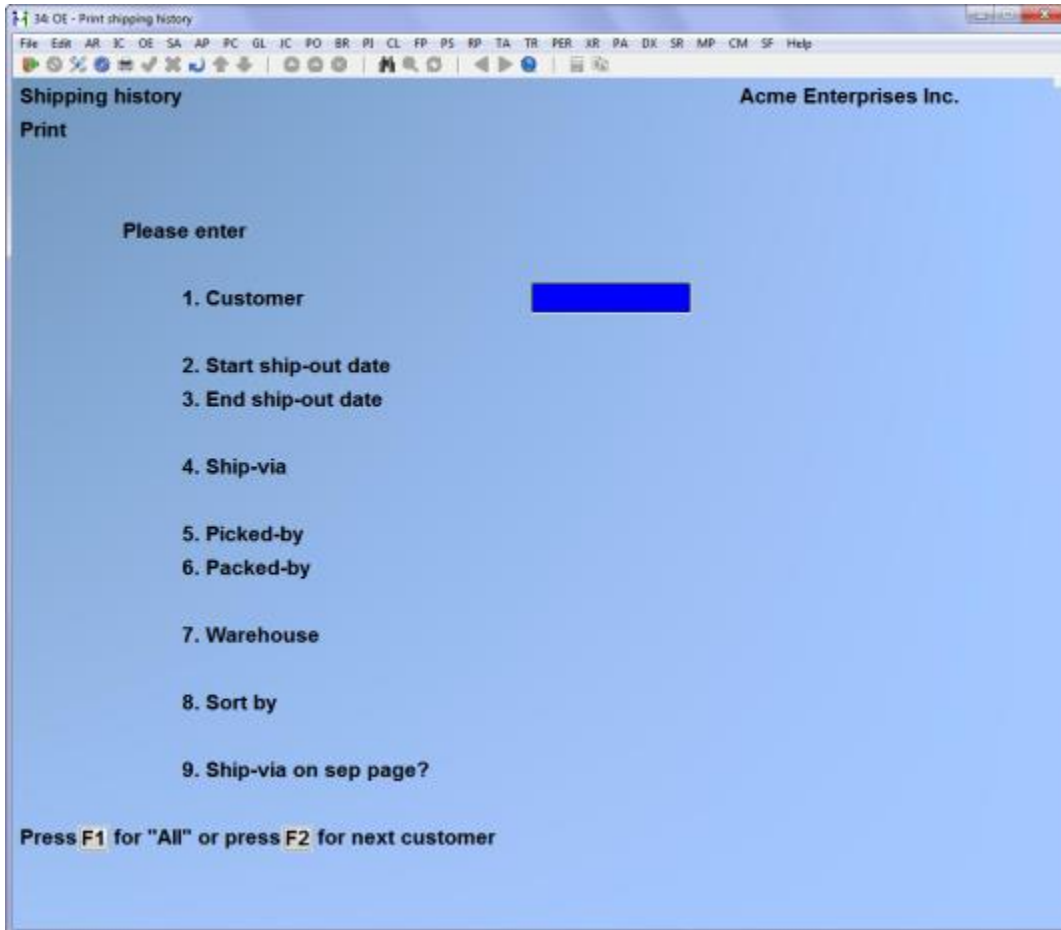
F1 = next page, F7 = ship-to, ENTER = more info, or TAB = reselect

You now have the option of pressing [ENTER] to see additional shipping information, [F7] to view where an Order was shipped to, or [TAB] to exit.

If you press F7 you will need to enter the line (left most column) you wish to view the ship-to detail for. A small window will appear with the ship-to name and address.

Printing Shipping History

The *Shipping History Report* is available in various forms depending on the options you select. To begin choose *Invoice history > Print shipping history* from the *BILLING* main Menu. The following screen appears for you to enter Report criteria:



Enter the following Report criteria:

? Customer

Select one Customer to print the Report for or enter [F1] for “All”.

Start Ship-Out Date

End Ship-Out Date

Enter a ship-out date range to include on the Report.

? Ship-Via

Select one ship via method to narrow the Report or press [F1] for “All”.

? Picked-By

This field defaults to “(not applicable)” if you are not tracing pick-by detail – see the Chapter titled *Control information*.

Enter the User ID of a picker if you want to narrow the Report down to 1 User, or press [F1] to include everyone.

? Packed-By

This field defaults to “(not applicable)” if you are not tracing pack-by detail – see the Chapter titled *Control information*.

Enter the User ID of a packer if you want to narrow the Report down to 1 User, or press [F1] to include everyone.

? Warehouse

Enter a warehouse if you want to narrow the Report down to shipments sent out of 1 warehouse, or press F1 to include “All”.

Sort By

If you choose to narrow the Report down by Customer, ship via or to one date your choices here reflect this i.e. if you choose 1 Customer you will not have the option of sorting by Customer.

Enter C to sort the Report by Customer, D by ship-out date, or V by ship via code.

Ship-Via on Separate Page ?

If you are sorting by ship via code, enter Y to print the shipping history for each ship-via code on a separate page.

You will then be prompted to select the printer to send the Report to.

Purging Shipping History

Purging is used to permanently remove information from the shipping history data file. Please use this function **only** if you absolutely have to.

Select *Invoice history >Purge shipping history* from the Billing main Menu. On the screen displayed enter the cut-off shipped-on date. Any shipping history records prior to this date will be deleted.