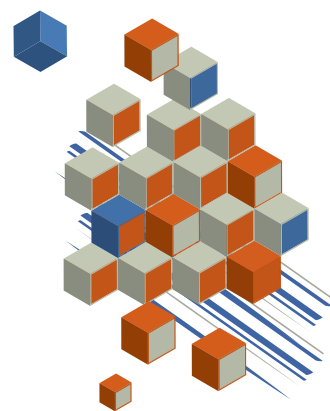




# Shipping

**SIMMS** Inventory Management Software 8.0

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# Shipping

By default, SIMMS auto-ships your sales orders, invoices, RMAOUT, and RTVOUT, assigning them the status of shipped when you save them. Typically, you use auto-shipping if you record your shipping activities outside of SIMMS or ship little or no stock.

You can manually process your shipments within SIMMS. The advantage to this is that you create a detailed record of your shipping activities directly in SIMMS. This includes information about what you shipped, what needs to be shipped, and the method your items were shipped by.

To enable manual processing of your shipments you need to change your global settings.

## Global Settings and Shipping

In Global Settings there are three options related to shipping. There you enable the manual shipping of your sales orders, invoices, RMAOUT, and RTVPUT. In addition, you can have SIMMS list only invoices in the Shipping Manager. And for the last option you can have SIMMS automatically generate your waybill numbers.

### Enable Manual Processing of Shipments

By default SIMMS auto-ships your sales orders, invoices, RMAOUT, and RTVPUT. To manually ship the items on these documents, you need to clear the Use AutoShip for invoices check box in Global Settings.

1. Open the **Setup** menu, click **Global Settings**, and then click the **Sales** tab.
2. Clear the **Use AutoShip for invoices** check box, and then click **Save**.

### List only Invoices in the Shipping Manager

You can have SIMMS list only your invoices in the Shipping Manager. You do this to ensure only invoiced items are shipped. And that you do not ship the same order twice, once for a sales order and once for an invoice.

**Note:** *Your RMAOUT and RTVOUT will also not appear in the Shipping Manager.*

To list only invoices in the Shipping Manager do the following steps:

1. Open the **Setup** menu, click **Global Settings**, and then click the **Sales** tab.
2. Click the **Shipping Manager - Show Invoices Only** check box, and then click **Save**.

### Auto Increment Your Waybill Numbers

You can auto increment your waybill numbers. In addition, you have the option to assign a prefix to your number and a separator to appear between your prefix and number.

Your sequence of waybill numbers begins at 1. Subsequent numbers are 1 plus your incremental. For example, if your incremental is 2, your prefix is WB, and your separator is a hyphen then your first few waybill number would look like this: WB-1, WB-3, WB-5 and so on.

1. Open the **Setup** menu, click **Global Settings**, and then click the **Sales** tab.
2. Click the **Use Auto Increment for WayBill No.** check box.

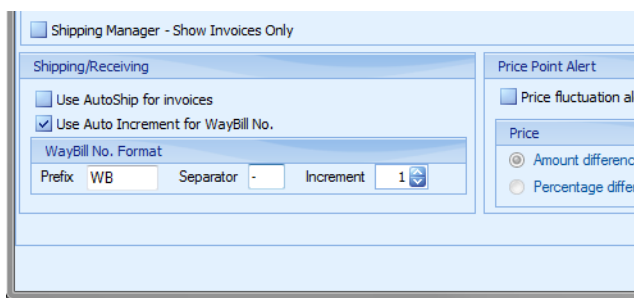


Figure 1: Auto incrementing you waybill numbers.

3. Under **WayBill No. Format**, in the **Prefix** text box, type the characters you want to appear at the beginning of your waybill number.
4. In the **Separator** text box, type the character you want to appear between your prefix and your auto-incremental number.
5. In the **Increment** box, type the amount you want to increase your waybill number by.
6. Click **Save**.

### Creating a Shipping Order

A shipping order is an inventory control document that is used to identify among other things what is shipped from your warehouse and to whom and where it is shipped.

You create your shipping orders from the Shipping Manager. In the Shipping Manager you open the Shipping Detail window in which you enter the details of your shipping order.

You have the option to ship only some of the items on a document (sales order, invoice, RMAOUT, RTVOUT), or include items from more than one document on the same shipping order.

In addition, from the Shipping Detail window you can create a purchase order for a freight forwarder, customs broker, port warehouse, or trucking broker.

If any of the items on your shipping order are serialized you can add their serial number to your shipping order.

## Enter a Shipping Order's Details

1. Open the **Sales** menu, open the **Sales** submenu, and then click **Shipping Manager**.

The Shipping Manager window opens.

2. Under **View Unshipped Orders**, select the customer you want to ship items to, and then click **New Shipment**.

The Shipping Detail window opens.

SIMMS automatically enters your customers name in the Customer text box.

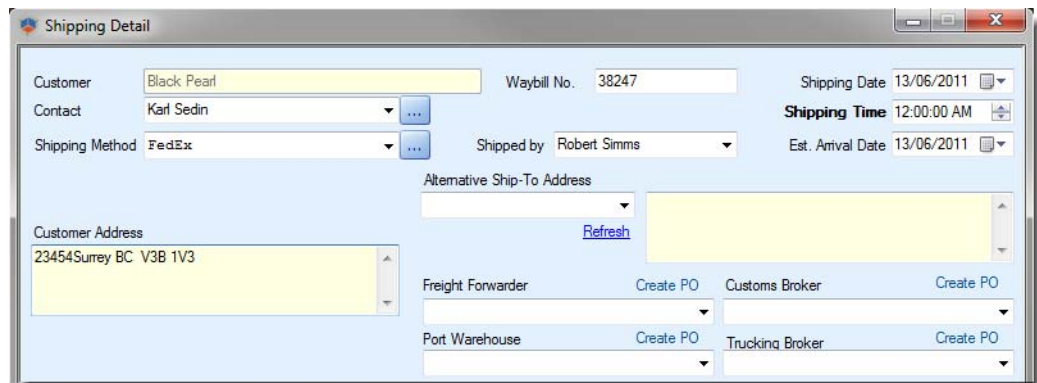


Figure 2: Entering your shipping order details in the Shipping Detail window.

3. In the **Contact** list, select your contact at this customer.
4. In the **Shipping Method** list, select a shipping method.
5. In the **Waybill No.** text box, type your shipment's waybill number.
6. In the **Shipped by** list, select the person responsible for shipping this order.

To appear in this list the Performs Shipping Duties check box must be selected in the User Manager

7. In the **Shipping Date** box, select a shipping date from the calendar.
8. In the **Shipping Time** box, set the time of day you want to ship your order.
9. In **Est. Arrival Date** box, select your shipment's arrival date.
10. If you want to enter a different ship-to address for your shipment, in the **Alternate Ship-To Address** list, select a ship-to address.

### **Create a Purchase Order for 3RD Party**

If you are purchasing services from a freight forwarder, customs broker, port warehouse, or trucking broker you can create your purchase order from the Shipping Detail window.

1. In one of the following lists: **Freight Forwarder, Customs Broker, Port Warehouse, or Trucking Broker** select a vendor.

For a vendor to appear in any of these lists, the vendor must be assigned the appropriate vendor type (Freight Forwarder, Customs Broker, Port Warehouse, or Trucking Broker) in the Vendor Manager.

2. Click the **Create PO** link, located above the list from which you selected your vendor.

The Purchase Order window opens.

3. Complete and save your purchase order.

### **Add Items Individually to a Shipping Order**

You can add your items individually to a shipping order. Choose this method if you want to ship only some of the items on a document (invoice, sales order, RMAOUT, and RTVOUT); edit the quantity of any of the items you are shipping; or assign more than one box label to your shipment.

A document that has only some of its items shipped, continues to appear in the list of your unshipped orders until all the items on the document are shipped. SIMMS removes from a document the items you have shipped, leaving only the items that you need to ship.

To add items individually to a shipping order do the following steps:

1. In the **Shipping Detail** window, under **Unshipped Items for**, click the **Plus** sign beside the document whose items you want to ship, and then click the **Items on Invoice** link.

A list of the items on your selected document appears.

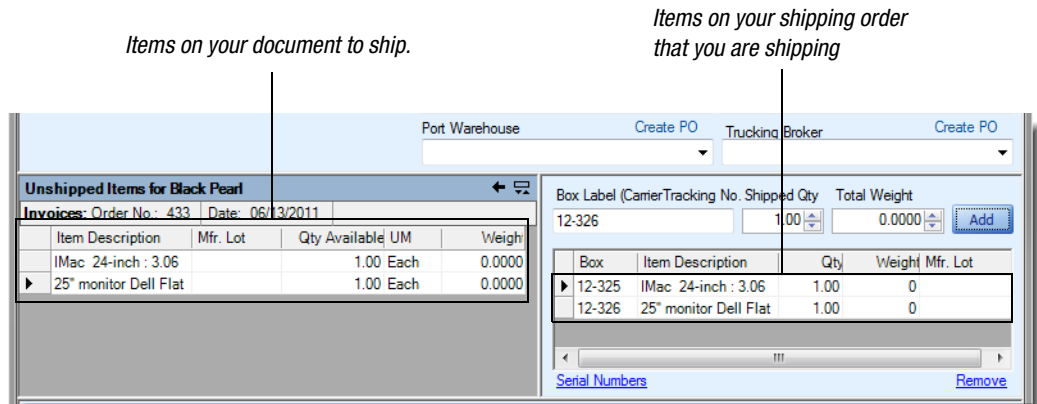


Figure 3: Adding items to a shipping order.

2. From the list, select the item you want to ship.
3. In the adjacent panel (right), in the **Box Label** text box, type your carrier's tracking number.

Your shipments can have more than one box label. For example, if you were shipping a computer monitor, keyboard, mouse, and cables, you might ship the keyboard, mouse, and cables in one box and the monitor in another box. You would then enter two different box labels for your shipping order one for each box.

4. By default, your shipped quantity is the same as the quantity of your item available on your document. To adjust this quantity, in the **Shipped Qty** box, type your item's new quantity.

You can only enter a quantity for an item that is equal to or less than what is available on your document.

5. In the **Total Weight** box, type your items weight.

If your item's weight is already entered as part of its profile in the Item Manager, SIMMS adds it to the Total Weight box.

6. Click **Add**.

### Add All the Items to a Shipping Order

You can add all your items to a shipping order at once. This can save you time. However, there are limitations. You cannot edit the quantities

of the items you are shipping or use more than one box label (carrier's tracking number) for the shipping order.

1. In the **Shipping Detail** window, under **Unshipped Items for**, select the document you want to ship.
2. In the adjacent panel (right), in the **Box Label** text box, type your carrier's tracking number, and then click **Add**.

All the items on your document are added to your shipping order.

## Remove an item from a Shipping Order

- ◆ In the **Shipping Detail** window, In the list of items you are shipping, select the item you want to remove, and then click the **Remove** link.

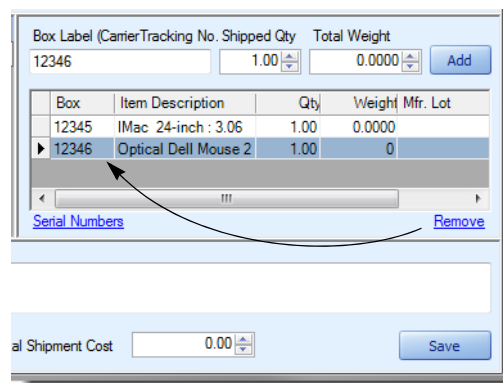


Figure 4: Removing an item from a shipping order.

## Assign Serial Numbers to an Item

You can assign serial numbers to items on a shipping order. If you previously assigned a serial number to your item, SIMMS transfers that serial number to your shipping order. For example, if you assigned a serial number to your item when you created an invoice and then you create a shipping order based on that invoice, SIMMS transfers the serial number used on the invoice to the shipping order.

To assign serial numbers to an item do the following steps:

1. From the list of items you are shipping, select the item you want to assign a serial number to, and then click the **Serial Numbers** link.

The Serial Numbers window opens.

2. Do one of the following steps:
  - Place your cursor in the **Scan S/N** text box, and then scan your items serial number.

SIMMS enters your item's serial number in the Scan S/N text box.

- In the **Scan S/N** text box, type your item's serial number.
- Under **Available Serial Numbers**, click the check box to select your item's serial number.

3. Click **Save**.

## Complete Your Shipping Order

At the bottom of the Shipping Detail window are some final details you can add to your shipping order, such as the cost of the shipment and the total weight of the shipment.

1. In the **Comments** text box, type a comment.

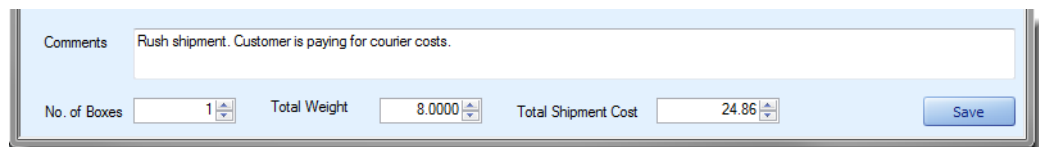
The screenshot shows a software window titled "Shipping Detail" with a light blue header. Below the header is a "Comments" text box containing the text "Rush shipment. Customer is paying for courier costs." Below the comments box are three input fields: "No. of Boxes" with a value of "1", "Total Weight" with a value of "8.0000", and "Total Shipment Cost" with a value of "24.86". Each input field has a small up/down arrow icon. To the right of these fields is a blue "Save" button.

Figure 5: Entering the final details of your shipping order in the Shipping Detail window.

Your comment appears on your packing slip and with the list of your shipped orders in the Shipping Manager.

2. If you want to edit the number of boxes which SIMMS calculated for your shipment, in the **No. of Boxes** text box, type the number of boxes.

SIMMS automatically calculates the number of boxes you use for your shipment based on the number of box labels you have entered. If you did not use any box labels for your shipment, SIMMS enters a box count of 1.

3. In the **Total Weight** text box, enter the total weight of your shipment.

If you have entered your item's weight as part of its profile in the Item Manager, SIMMS includes it in your shipping order.

4. In the **Total Shipment Cost** text box, type the cost of your shipment.

5. Click **Save**.

6. A prompt appears asking if you want to print a packing slip. Click **Yes**.

If you created a shipping order based on a sales order, SIMMS prompts you to create an invoice based on your sales order.

## Managing Shipping Orders

After saving your shipping order you can view, edit, and delete them. You can also print a packing slip for a shipping order.

### View Shipped Orders

- ◆ Open the **Shipping Manager**, and then click the **View Shipped Orders** link.

SIMMS lists your shipped orders in the Shipping Manager's window.

### Filter the List of Unshipped and Shipped Orders

When you open the Shipping Manager, SIMMS automatically lists your unshipped orders in the Shipping Manager's window. You can filter your list of unshipped orders. You can also filter your list of shipped orders in the same way.

To filter your list of unshipped and shipped orders do the following steps:

- ◆ Under **Filters**, select one or more of the filtering options (date, customer, or transaction type), and then click the **Refresh Shipments** link.

SIMMS lists only those orders (unshipped or shipped) that match your filtering options.

### Edit a Shipping Order

1. Open the **Shipping Manager**, click the **View Shipped Orders** link.

SIMMS lists your shipping orders in the Shipping Manager's window.

2. From the list, select the shipped order you want to **Edit**, and then click the **Edit Shipment** link.

Your shipping order opens in the Shipping Detail window.

3. Edit your shipping order, and then click **Save**.

### Delete a Shipping Order

1. Open the **Shipping Manager**, and then click the **View Shipped Orders** link.

SIMMS lists your shipped orders in the Shipping Manager's window.

2. From the list, select the shipping order you want to delete, and then click the **Delete Shipment** link.

3. SIMMS prompts you to confirm that you want to delete your selected shipping order. Click **Yes**.

Your shipping order is deleted and the items on your shipping order are returned to stock.

### **Print a Packing Slip**

1. Open the **Shipping Manager**, click the **View Shipped Orders** link.

SIMMS lists your shipping orders in the Shipping Manager's window.

2. From the list, select the shipping order whose packing slip you want to print, and then click the **Print Packing Slip** link.

The packing slip opens in the Report window.

3. Click the **Print**  icon.