priority

Customer Shipments Script

*HEADINGS ARE NOT MEANT TO BE READ ALOUD.

BEFORE YOU BEGIN:

DEFINE A CUSTOMER

DEFINE A SALES REP FOR THE CUSTOMER AND AT LEAST TWO CUSTOMER SITES

RECORD A FEW DETAILED SALES ORDERS FOR THE CUSTOMER (ONE OF WHICH WILL BE THE BASIS OF THE SHIPPING DOC)

PREPARE INVENTORY FOR THE PARTS IN THE ORDER ON WHICH THE DOC IS BASED, WHICH ARE DEMONSTRATED IN THE CLIP, PREFERABLY IN TWO WAREHOUSES.

PREPARE AT LEAST 3 FINAL PACKING SLIPS FOR THIS CUSTOMER FOR VARIOUS DATES, WHICH HAVE NOT YET BEEN LINKED TO A SHIPPING DOC.

DEFINE SET TEXT FOR CUSTOMER SHIPPING DOCS IN THE **SET TEXT FOR CUSTOMER SHIPMENTS** FORM: "Thank you for purchasing our product. In the unlikely event of defects in material or production, we will gladly replace it free of charge."

PREPARE DATA IN ADVANCE THAT WILL APPEAR IN THE **UNBILLED DOCS. BY CUSTOMER NAME** REPORT FOR THE DATE RANGE SHOWN IN THE CLIP. RUN THE REPORT IN ADVANCE SO THAT A SAVED REPORT CAN BE DISPLAYED DURING THE CLIP.

MAKE SURE THE **SONLYONELINE** LOGISTIC CONSTANT IS SET TO 1.

RUN THE **BPM FLOW CHART-SHIPPING DOCS** AND MAKE SURE THE FOLLOWING STATUSES ARE DEFINED FOR SHIPPING DOCS: DRAFT, AUTHORIZED, CANCELLED, FINAL, PAID. DEFINE LOGICAL PATHS BETWEEN THE STATUSES.

BEFORE RECORDING, OPEN THE **CUSTOMER SHIPMENTS** FORM AND MAKE SURE IT OPENS ON THE **GENERAL** TAB, THEN CLOSE (SO THAT NEXT TIME YOU OPEN THE FORM, IT OPENS THAT WAY).

Clip Link: http://www.priority-software.com/eshbel.com/Movie_Search/Customer_Shipments.htm

Note: Yellow highlights indicate action instructions.

Introduction (00:00-00:25)

Hi, I'm ____ from Priority Software.

This clip demonstrates how to record a customer shipping document based on a sales order in ***Priority***. You can also record a shipping document that is not based on a previous document, or base it on a customer return document or a previous shipping document. Customer shipments create an inventory transaction and are billed in multi-shipment invoices.

Recording a Shipping Document Based on a Sales Order (00:26-03:51)

Let's begin by opening the **Customer Shipments** form[MENU PATH: **Inventory > Inventory Transactions > Sales Inventory Transactions**]. Specify the number of the customer to which the goods are sent[IN THE **Customer No.** COLUMN. PRESS ENTER]. The system automatically assigns a document number[HIGHLIGHT]. The **Date**[HIGHLIGHT] is filled in with today's date, but can be revised. The **Sending Warehouse**[HIGHLIGHT] is filled in according to system definitions. If the goods are sent from several warehouses, you can specify them later, when itemizing the shipment. The **Status**[HIGHLIGHT] is also filled in with the default status defined for new shipping documents.

In the **Price** tab, the **Billable** column is flagged by default[HIGHLIGHT], so that the document will be billed to the customer. There are, however, certain instances in which this column is not flagged automatically. To learn more, right-click the **Customer Shipments** form in the menu and select **Online Help** to access a list of frequently asked questions regarding customer shipments, then click on the question: "Why isn't a given shipping document flagged as billable?"[SHOW THE FAQ FOR A FEW SECONDS. THEN CLOSE THE ONLINE HELP SCREEN].

In the **References** tab, the **Site** column displays the main customer site to which the goods are sent, but can be revised[OPEN THE CHOOSE LIST AND SHOW]. In the **Shipping Address** sub-level form, the customer address appears automatically, based on the defined site. This, too, can be revised per individual document[MOVE BACK TO UPPER-LEVEL FORM]. The **Sales Rep** and **Branch**[HIGHLIGHT] appear according to customer definitions. You can designate a specific **Price List**[HIGHLIGHT] for this document – for example, if special discount prices are in effect at this time. Use the **Rep's Doc. No.** [HIGHLIGHT] column to record the number of the shipping document recorded externally, such as by a sales rep, if there is one. If you record a number here, this document will be considered a copy.

You can also use this tab to define the sales order on which the document is based: open the Choose list in the **Order** column to select from among this customer's open orders. Alternatively, you can base the document on several orders using the **Sales Orders for Document** sub-level form, selecting one order[AGAIN, OPEN CHOOSE LIST IN **Order** COLUMN] on each line of the form. Another option is to base the shipment on individual line items in these orders, using the **Choose Order Items** sub-level form. Select the relevant lines by flagging the **Choose Item** column for each line, on the left-hand side of the form[HIGHLIGHT]. In this clip, I'll base the shipment on a single order, so I'll return to the **References** tab and select that order.[OPEN CHOOSE LIST AND SELECT] To move to the order itself, press **F6** from within the Choose list. After viewing order details, press **Esc** to return to the **Customer Shipments** form.

Note that you can link packing slips to this shipping document as well, thereby creating a bill of lading. Packing slips are issued in the system whenever merchandise is packed for a designated customer. In the **Link Packing Slips to Document** sub-level form, you can select slips that were prepared for this customer and have not yet been linked to a shipping document. Simply flag the **In Document** column[HIGHLIGHT] to include any of these slips in the current shipment. Once packing slips are linked to the shipping document, the **Bill of Lading** column is flagged in the upper-level form, in the **General** tab[SHOW].

You've seen how to open a new document, link it to a sales order, and record details such as the sales rep, customer site and shipping address. Let's move on to see the items listed in the shipment.

Itemizing the Document (03:52-07:00)

In the **Shipped Items** sub-level form, you can see a list of the parts recorded in the original sales order. If the value of the **SOnlyOneLine** constant is set to 1, one line will be opened for each item; but you can set the value to 0 if you want the number of lines opened for each item to depend on inventory levels. In the latter case, if the inventory balance in a given warehouse and bin is insufficient, an additional line will be opened for the remainder to ship, from a warehouse and bin that do contain enough inventory.

In the current example, one customer shipment line is opened for each line order item. In the **Balance to Ship** column[HIGHLIGHT], you can see the number of parts left to ship, according to the amounts defined in the original order. The **Warehouse Balance** column[HIGHLIGHT] shows the inventory level of this part in the warehouse defined in the upper-level form. If the warehouse balance is insufficient, you can move from this line to the **Inventory for Part** sub-level form to see other warehouses that stock the part and select a different one from which to ship, recording that warehouse in the **Warehouse** column[BACK IN THE **Shipped Items** SUB-LEVEL FORM].

If the warehouse balance is large enough, flag the **Approve** column to copy the **Balance to Ship** into the **Quantity** column[HIGHLIGHT]. If the warehouse balance is smaller, the **Quantity** column will be filled in with the amount stocked in the warehouse.

If you want, you can manually record the **Quantity** of the item shipped[IN THE NEXT LINE, RECORD A **Quantity** THAT IS LARGER THAN THE **Warehouse Balance**]. If the **Quantity** is larger than the warehouse balance, the system will alert you of a negative warehouse balance when you leave this line[SHOW. THEN CLOSE THE MESSAGE].

Note that the inventory balance of the part in the warehouse is updated as soon as the quantity is recorded.

The **Unit Price**[HIGHLIGHT] is filled in automatically according to the system's price hierarchy. Press **F1** in the column to read a detailed help text[SHOW]. The **Price Source** column is filled in accordingly[HIGHLIGHT]. The **Discount%** column[HIGHLIGHT] is filled in if a part discount is defined for the customer or order item, but can be revised.

The **Bar Code** column[HIGHLIGHT] is filled in with the bar code defined for the part in the **Part Catalogue** form. When you itemize the shipping document manually, you can scan the bar code, and the part number and description will be filled in.

The **Billable** column[HIGHLIGHT] is flagged automatically for all line items if it was flagged in the upper-level form; it can be cleared for any item which is exempt from payment. If the **Checking** column[HIGHLIGHT] is flagged, the customer cannot be billed for the item in question; this is useful when you need to resolve something about this item with the customer.

If serial numbers are maintained for this part, you can list them for each shipped item in a sub-level form[HIGHLIGHT **Serial Numbers in Transaction** AND **Auto Recording of Serial Nos** SUB-LEVEL FORMS]. You can also right-click a form name to receive more information about it, such as the **Latest Part Sales to Customer**[RIGHT-CLICK].

After itemizing the shipment, recording quantities, reviewing prices and discounts, ensuring sufficient inventory levels and recording serial numbers, return to the upper-level form to finalize and print the document.

Finalizing, Printing and Follow-Up (07:01-09:33)

Before printing the document, enter the **Remarks** sub-level form, where you will see either the set text defined for shipping documents in the **Set Text for Customer Shipments** form, or the text recorded in the sales order on which the shipment is based – depending on the value of the **SCopyOrdText** logistic constant. In any case, you can revise the remarks for this shipment. This text will appear on the printout.

In the **General** tab, change the status of the document to "Final". You can run the **BPM Flow Chart-Shipping Docs** from the list of Direct Activations to see the attributes of each status. You can then right-click a status to see a list of those properties and revise them[ONLY RIGHT-CLICK, DON'T SELECT **Properties**]. You can also use the flow chart to define permitted paths between statuses, to define tasks that will open automatically for specified users if certain conditions are met, to determine the user to which the document will be assigned automatically once it moves to a certain status, to define automated mail messages, and so on. Working with BPM flow charts is explained in detail in a separate clip[CLOSE]. In the document's **History of Statuses**[SUB-LEVEL FORM], you can see a record of the statuses and assigned users.

You can revise final shipping documents which have not yet been printed by running the **Reopen Document** program from the list of Direct Activations[HIGHLIGHT]. The program will revert the status back to "Draft". After making the necessary changes, change the status back to "Final".

Once the document has been printed, you can make certain changes to it via the **Revision of Final Shipping Doc** form[SHOW IN MENU]. If the customer returns the goods, you can record a **Customer Return**[SHOW IN MENU] based on this shipping document.

To print the document, select **Print Shipping Document** from the list of Direct Activations. Also choose the printing format[OPEN PRINT FORMAT CHOOSE LIST. DO NOT PRESS **OK** AT THIS POINT].

You can display the document on your screen by selecting **Display** or print it by selecting the **Print** option[HIGHLIGHT, BUT DO NOT SELECT], in which case the **Printed** column will be flagged in the document[HIGHLIGHT IN THE FORM, IN **General** TAB. NOW PRESS **OK**. SHOW THE PRINTOUT ON THE SCREEN, THEN CLOSE].

You can prepare a multi-shipment invoice for this document by running the **Prepare Invoice/Credit Memo** program from the list of Direct Activations[HIGHLIGHT]. To prepare an invoice for several shipping documents, run the **Prepare Invoices** program from the **Multi-Shipment Invoices** menu[MENU PATH: **Financials > Accounts Receivable > Customer Invoices > Multi-Shipment Invoices**. HIGHLIGHT PROGRAM NAME IN MENU. THEN RETURN TO **Customer Shipments** FORM]. After billing, the **Billed** column will be flagged in the **Price** tab[HIGHLIGHT].

Shipping Document Reports (09:34-10:47)

Once the shipping document is final and printed, you can run several reports that will help you keep track of this and other documents.

Back in the **Inventory > Inventory Transactions > Sales Inventory Transactions** menu, open the **Unbilled Shipmt/S. Call Reports** menu. Note the different options. For example, you can see a list of unbilled documents by customer name[RUN THE SAVED REPORT. SHOW, THEN CLOSE]. Note that you can use the **Search for Entity** window at any time, if you don't remember the menu in which the report is accessed. This window can be opened by clicking the magnifying glass in the main menu bar[HIGHLIGHT MAG GLASS] or select **Search for Entity** from the **Run** menu. Write part of the entity name [WRITE "unbilled". MAKE SURE **Ignore Case** IS FLAGGED] and press **Search For** to see a list of relevant entities[SHOW, AND CLOSE WINDOW].

[GO BACK ONE MENU, TO **Inventory Transactions**]From the **Inventory Transactions Reports > Detailed Transactions** menu, you can run several reports related to shipments made. For example, the **Customer Shipments** report[HIGHLIGHT IN MENU] displays a list of parts sent within a given date range.

This concludes our demonstration of how to record customer shipments in ***Priority***. For additional details, run the **Customer Shipment/Return Wizard**[SHOW IN MENU: **Inventory > Inventory Transactions > Inventory Transaction Wizards**].

Related Documentation

- Customer Shipment/Return Wizard
- Opening a Customer clip
- Opening a Sales Order Clip