ORDER PROCESSING/SHIPPING

An order is now in the system, but it still needs to be finalized through the Software and prepared for shipping. Finalizing an order includes invoicing, updating inventory records, posting financials and creating shipping documents. There are several different ways to accomplish this, depending on the ShippingVia method chosen on the Order sheet:

➔Quick Completion/Shp/Via Bill Only – No inventory verification.
➔Customer Pick-up (requires Bill of Lading-BOL)
➔Parcel – UPS, FedEx, USPS
➔Truck (BOL)
➔International

Many of the steps overlap, but there are specific requirements for each of these methods that must be taken into consideration.

Note: If the order has been generated from a webstore and loaded into the system for shipping, the shipping method will be determined in the webstore.

QUICK COMPLETION

This is the fastest, easiest option; however, it is not recommended because it will **by-pass** all checks and balances the software has for inventory records.

Once an order has been added, it appears in the Work With Order screen.

In the drop down box next to the order select **Option 7 = Comp**. **If the order was prepared for quick completion by using "Bill" for the shipping method (ShipVia),** the order will be finalized through the financial software and products will be deducted from Inventory. No Order Sheet aka 'pick ticket' will be produced and the delivery process is your choice, i.e. mail, UPS, hand delivery, etc.

➢**REMEMBER**: Choosing **Option 7 = Complete** in the drop-down menu will **by-pass ALL** inventory checks and balances set up in the Shipping System.

REMAINING METHODS

Parcel Shipping

There are different steps when using different shipping carriers. The three most common ship methods are:

- UPS
- ➔ PC Name required (see Daily Printer Routine)
- ➔ Hosted in System; a shipping label will automatically print.

- Fed Ex and USPS (Endicia)
- ➔ Enter their shipping system on their website:
- ➔ Select the Import Key
- ➔ Scan the **Pick Ticket Barcode** to import the information to their system.
- ➔ Put the box of items on the scale.
- ➔ Print shipping label.

> **Note**: Endicia (USPS) has dual software that works together. One program verifies the address to be shipped to and the other program calculates the weight of the boxes and generates the shipping label. Both Federal Express and Endicia require an information download from the Host computer. An Application Program Interface (API) zip file needs to be requested from your Conveyorware contact and loaded into your carrier's machine. No API is required for UPS.

All tracking numbers for parcel carriers will import back to Conveyorware so orders in history will have tracking detail. Also when an email address is provided, e-mails will be sent with tracking number detail.

The remaining methods have many steps that overlap, but there are specific requirements for each of these methods that must be taken into consideration. Each must start with an Order Sheet. Once an order has been entered into the system, an Order Sheet, aka a "Pick Ticket" must be **printed** in order to pull the order for shipping (also see Attachment A).
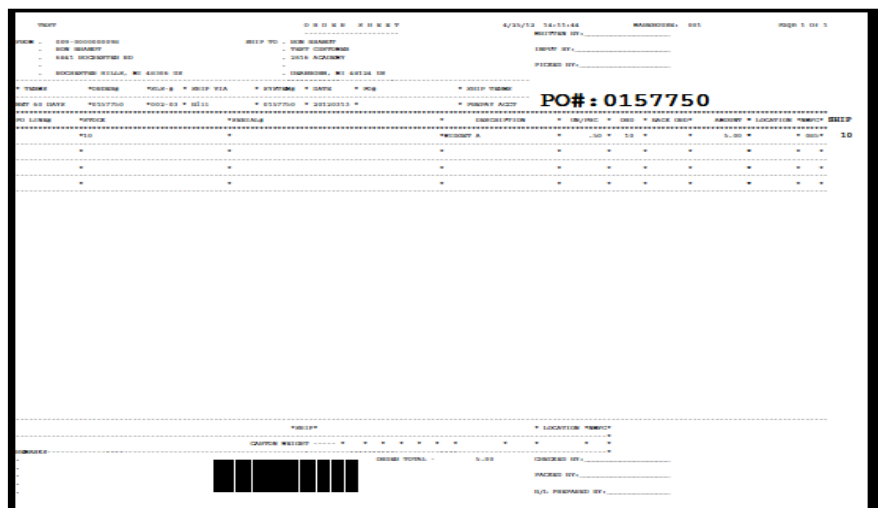
The Order Sheets have been programmed to print every 15 minutes to your designated HOD printer; however, they can be printed manually 'on demand'.

Select 1. Main Menu
   400. Orders, Fulfillment & Shipping
   411. Fulfillment & Shipping Menu

There are two options to print an Order Sheet manually:

Option 983 – Print On-Demand Order Sheet. Use this option to print a specific order using the System Order number.

➔ Insert the System number from the Order. **[Enter]**

Note: If you receive an error message as shown above and all noted issues are fine, check to see if the order is on Credit Hold status (CRD-HLD). Return to the order and choose #6 in the drop down to release hold.

The Order Sheet will print to the HOD printer selection in Option 999. Status is now ACT-WHSE.

Option 984 – Print Order Sheet by Company/Warehouse. Use this option to print all orders for a specific company **and** specific warehouse.

When the Order Sheet is received, the order can be pulled and completed (shipped).

PREPARE ORDER FOR COMPLETION (SHIPPING)

The order has been entered and picked, and is ready to be sent to the customer.

Select <u>411. Fulfillment and Shipping</u>
     <u>988. Order Scan/Verify BOXES</u>

Enter the system number found on the Order Sheet to begin the final processing of the order or, if you have a barcode scanner, scan the barcode on the Order Sheet and the system number will be inserted automatically. **[Enter]**

Information regarding shipping the order will be displayed. This screen works in two parts:

1) CREATE THE SHIPPING METHOD

➔ Choose the "Method" used for picking and packing inventory.

Blank = It is recommended to leave the method box blank. This option requires that each item be identified by scanning or keyed in for verification.
A = <u>One box. No stock checking</u>. Automatically completes order with no verification.
U = <u>No stock checking</u>. Select the stock from the ORDER as each item is packed with no verification.
Z = <u>Fill order with Reallocation of Stock</u> with no verification. This option allows last minute order changes.

➔ Choose the "Shipping ID" (Truck Id)

"Mail" displays for Parcel Carrier Ship-Via orders (USPS, FedEx, UPS). Otherwise, enter any Carrier name, PRO Number, etc. for freight orders. **Remember this Truck ID**. It is a **required** entry when retrieving and printing the Bill of Lading. (Option 336)

Once these two decisions have been made, [**Enter**].

2) ENTER STOCK INTO BOXES

Notice the **Method** field is gone and the **Truck Id** options are frozen. Also, **Number of Boxes** is "0" because there are no boxes completed for shipping at this time. This will automatically correct as this process is completed.

Box Dimensions: Enter all in Inches. Some parcel carriers calculate freight using "dimensional weight." Weight will be calculated from Inventory Records or displayed from system-installed Commercial scales.

Box Number: How many boxes will the order need for shipping? If two are required, change to 2. Labels will print 1 of 2, 2 of 2, etc.

Quantity: Number of products being released. i.e. If 5 of the same item: enter "5" and scan one or enter "1" and scan five.

Item ID: This is the most important field on this screen. Insert the UPC of the Unit, Inner Pack or Case Pack or the **Serial#** field of the Order Sheet (not the Stock number!)

➤**REMEMBER**: The system knows the unit quantity of an Inner Pack or Case Pack. If you scan a Case Pack UPC, enter only the number of Cases, not products within the case. (1 case vs. 12 pieces)

[**Enter**] The **Last Item #** and product **Description** will appear for the item. Notice **Number of Boxes** is now "1".

Continue adding items to the order. If a second box is required, before inputting the first item, change Box Number to 2 (adjust length and width if necessary) and continue inputting items into Item ID until the order is complete.

The **Function** field provides options for the status of this Order:

C = Cancel – Entire process will be cancelled.
B = Backorder – Completes the process even if there are missing items and puts those items on backorder.
E = Exit –Suspends process until ready for completion.

Once this order is complete, insert **Y** in the <u>Function</u> field and **[Enter].**

The order number and **"Order Shipped"** will appear at the bottom of the screen. The order is now ready to be processed for delivery. (Boxed, labeled, etc.) The Status changes to ACT-COMP and order moves to "Sales History" the next business day. (See Customer Order Flowchart on page 67.) The invoice will print at day end or can be printed immediately in Option 401 using #11 in the drop-down box.

If you are shipping by UPS the shipping label(s) will be printed and you are done.

If you are shipping USPS or FedEx, log into those systems, scan the barcode on the Order Sheet (type in if not using a scanner) and complete the parcel carrier printing options from their system. Also see Parcel Shipping section.

If shipping by Freight Carrier, see below.

> **REMEMBER:** Use <u>401 Work with Orders</u> at any time to see the status of Orders entered until they are completed. Once an order has been completed it will appear in <u>100 Accounts Receivable</u> menu <u>Option 109</u> **<u>Display Sales History</u>**.

Freight Carriers –Bill of Lading

A Bill of Lading "BOL" needs to be created for all orders that are shipped through a trucking company. This document is **your contract** with the carrier and **your receipt** for the shipment of the order. It is also a law that the trucker must be in possession of a BOL for every load they carry. (See Attachment B)

Select 1. Main Menu.
          300. Inventory Menu
          335. Barcode Inventory Menu
          336. Truck BOL & Manifest Report

> **Note**: If you know the Option number you can always enter the number in the "Command Line" on the bottom of any page to go directly to that Option.

Preliminary BOL

The system defaults to Y for a Preliminary BOL which leaves the order status as ACT-SHIP. A preliminary BOL can be created before the truck arrives and is helpful when:

- An order is being "built" and not all final details are known in advance.
- Orders need to be prepared and held until the truck arrives.

Only one copy of the preliminary BOL will print. A preliminary BOL can be voided without system consequences.

Final BOL

You must print a final BOL once the truck arrives.

- ➔ Insert the Company number and the Customer number
- ➔ Change Y to N for a **Final** BOL. The system defaults to a Preliminary BOL (see next page).
- ➔ Insert the name of the trucking company in Truck ID. (You may not have specific information for this field until the truck actually arrives.)
- ➔ Leave the Summarize field as **No** (Unless you require a detailed final BOL)
- ➔ Insert the **System Number** of the Order. If there are multiple orders on this BOL put a Y in the **More?** box and continue adding orders. Insert N when all order numbers are entered.
- ➔ Enter the total weight of the orders in **Wg** (Use whole pounds only.)
- ➔ Enter the number of pallets being shipped in **Pl**.
- ➔ Enter the number of pallets that are shrink-wrapped in **Sw**
- ➔ Enter the number of labels to print (one for each pallet) in **Pack ship label**.
- ➔ **[Enter].** Three copies of your BOL will print with One Manifest for the truck driver.

The system now recognizes the order as completed and changes the order status to **ACT-COMP**.

CUSTOMER PICK UP – CPU

When an order will not be shipped, but will be picked up by a customer, a Bill of Lading, "BOL" must be completed as a receipt for the customer to sign, and to change the system status of that order to **ACT-COMP**. Follow the same procedure except,

- ➔ Insert CPU in "Truck ID"

Use the printed documents as receipts for the customer and your permanent file.

INTERNATIONAL SHIPMENTS

All international shipments will require customs paperwork. The customs forms will automatically be completed by the carrier of your choice (UPS, USPS, FedEx, etc.) based on the address being shipped to, with details of the inventory from the Inventory file. (See Attachment C for an example of a UPS International Customs form.)