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Blue Moon Operations Core Shipment Inquiry

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Overview

SalesPad Shipment Inquiry is an integration with Blue Moon Operations Core's Shipment Inquiry functionality that allows users to view shipment and package information related to sales orders.

Usage

Sales Documents Operations Core Shipments

The Operations Core Shipments tab is accessed from the Sales Document entry screen and it lists all the shipments for the current sales order. The grid view displays general information such as shipment number, shipping location (warehouse), shipment date and time, carrier, etc.

Quick Report	FedEx Quote	Email Audit	Assemblies	Tracking Numbers	Interactions	Manufacturing Orders	Packages	Freight Calculator	Call Tracker Entries	Operations Core Shipments	4
Refresh											
Shipment Number	Ship Time	Ship Date	Warehouse Code	Carrier	Packages						
SHIPMENT 1	9:33:24 AM	2/23/2015	WAREHOUSE	Carrier	1						
SHIPMENT 2	9:33:24 AM	2/23/2015	WAREHOUSE	Carrier	1						

Note: the Sales Document Operations Core Shipments tab shows shipments only for orders. Quotes, invoices, and returns do not have any shipment data associated with them.

From this tab the user can click on the Shipment Number hyperlink to open the Shipment Inquiry card.

Shipment Inquiry Card

The Shipment Inquiry card contains more detailed information about the shipment. It includes data such as tracking numbers and all the sales orders and order IDs related to the shipment (shown on the header).

Note: One shipment may have more than one sales order. In this case the order numbers are listed in the separated by a comma.

The Shipment Inquiry card also has two tabs:

- Shipment Details: list of all the items of the shipment
- Box Details: list of all the items grouped by boxes/packages

Shipment (SHIPMENT 3) Close Refresh Shiplist

Shipment Properties

Shipment Number:	SHIPMENT 3	Ship Date:	2/23/2015	Facility:	WAREHOUSE
Order IDs:	STDORD	Ship Time:	9:33 AM	Carrier:	Carrier
Order Numbers:	ORDST2528	Tracking Numbers:	1ZE22F450393287517, 1ZE22F450393287518	Packages:	2

Shipment Details Box Details

Sales Doc Num	Sales Doc ID	Item Number	Item Description	Qty Shipped	UoM	Shipped Complete	Warehouse Code	Shipment Amount
ORDST2528	STDORD	HD-40	40 Gig hard drive	3	EACH	0	WAREHOUSE	0.00
ORDST2528	STDORD	HD-20	20 Gig Hard Drive	1	EACH	0	WAREHOUSE	0.00

Box Details

The Box Details tab displays information related to each box (Box Details section) and the items packed for each box (Items Packed section). Selecting a package on the left-hand grid view displays items that are packed on the right-hand grid view.

Shipment Details		Box Details								
Box Details							Items Packed			
Package Num	Pallet Num	Weight	Freight	Carrier	Tracking Nu...	Ship Date	Line Num	Item Number	Item Description	Qty Shipped
PACKAGE 1		5.40	8.30	Carrier	1ZE22F450...	2/23/2015	32,768	HD-40	40 Gig hard drive	3
PACKAGE 2		5.40	8.30	Carrier	1ZE22F450...	2/23/2015	16,384	HD-20	20 Gig Hard Drive	1

Note: Shipped items can be part of a package, a pallet, or neither of the two (not packed). If a shipped item is part of a package or a pallet, then package and package lines will show up in the Box Details tab, otherwise the tab will remain empty. In this scenario, the Shipment Details will still show all the items for the shipment.

Ship Documents

Clicking the Ship Documents button opens up the document(s) containing the packing slip, or any other document related to the shipment, that come from the warehouse:

The screenshot shows a window titled "Shipment (43764144)". Below the title bar are buttons for "Close", "Refresh", and "Ship Documents". A red arrow points to the "Ship Documents" button. Below these buttons is a section titled "Shipment Properties" containing three fields: "Shipment Number: 43764144", "Order IDs: STDORD", and "Order Numbers: ORDST1016".

Note: Security settings Ship Document File Mask and Ship Document Files Path must be set up according to the file naming convention used by the plant/warehouse (who should be responsible for creating and saving the documents).

Note: The button caption by default reads Sales Documents: this can be changed in Security *Ship Document Button Text*.

Tracking Numbers

The Shipment Inquiry card carries the Tracking Numbers for the shipment. They are shown in the Box Details tab, on each box/pallet:

Shipment Details

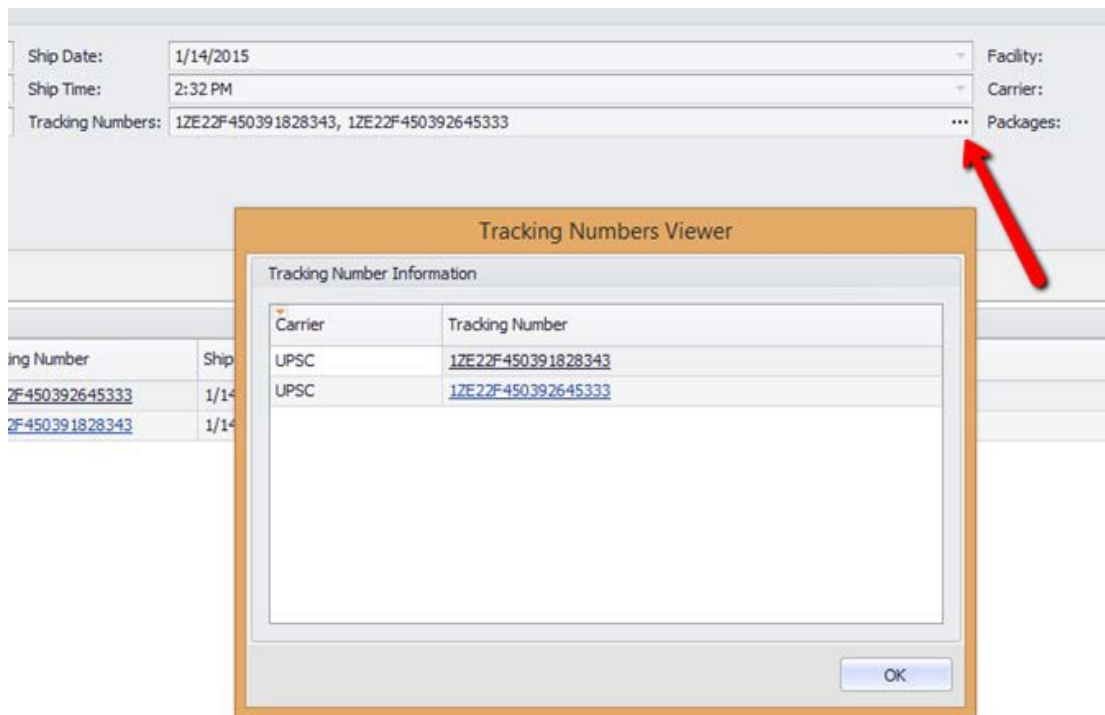
Box Details

Box Details

Package Num	Pallet Num	Weight	Freight	Carrier	Tracking Number	Ship Date
	130063995	0.00	0.00	HMES	10367126002	1/22/2015

Click on the hyperlink to open your default web browser and see the carrier's tracking information.

Tracking Numbers are also shown in the header. Click on the ellipsis (...) to open the Tracking Numbers Viewer screen:



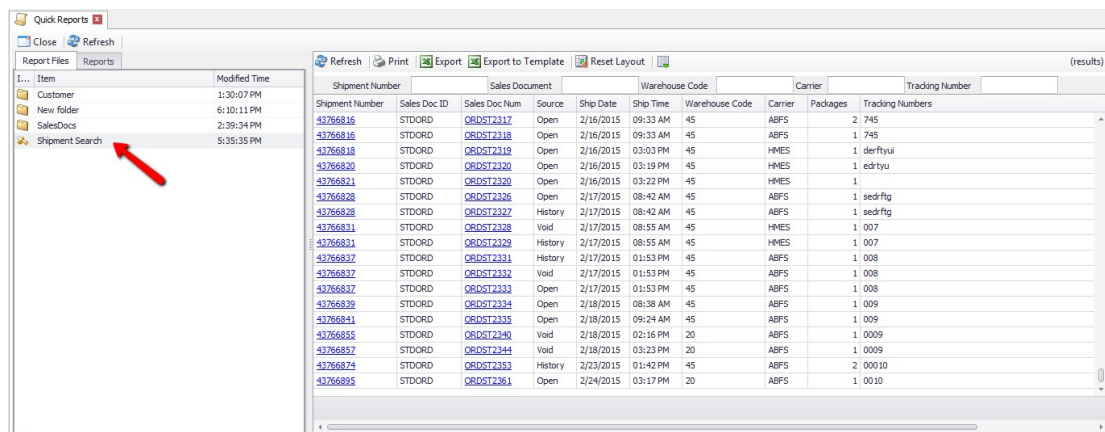
From the Tracking Numbers Viewer the user can click on a desired tracking number to track the shipment from the carrier's website.

Note: Some carriers' websites provide parameters in the URL to pass the tracking number; this means that the website will be opened with the tracking numbers already pasted in the page. Some carriers do not provide this; in this case, the tracking number will be copied to your clipboard and you will have to manually paste it into the carrier's web page as soon as it opens.

Shipment Search Quick Report (Optional)

Quick Report Shipment Search allows users to search existing shipments and their relative sales orders:

1. Open Quick Reports
2. Double-click on Shipment Search
3. Enter any search criteria in Shipment Number or Sales Document (optional)
4. Click **Refresh**



From this screen the user can click on the hyperlinks to open the Shipment Inquiry card or a Sales Document.

Settings & Security

Security

In order to use Shipment Inquiry you must enable the following plugins:



Blue Moon Operations Core Sales Documents Shipments
Blue Moon Operations Core Shipment Inquiry

- *Ship Document Button Text*: Sets the caption of the button that will be available in the Shipment card; defaults to Ship Documents
- *Ship Document File Mask*: Defines the mask for the ship document file. The mask must include the Shipment Number (denoted by the tag {shipNum}). You can use the wildcard '*'; Defaults to: Ship_Doc_{shipNum}
- *Ship Document Files Path*: Specifies the path where the ship document files are stored.