



SalesPad ShipCenter Guide

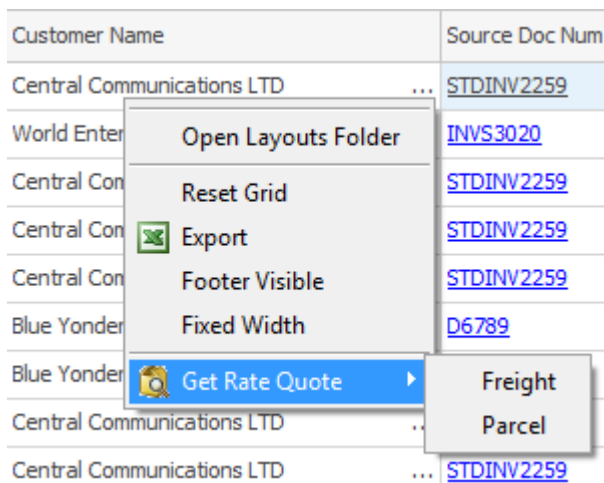
Megan De Freitas - 2024-11-22 - Miscellaneous

Shipments

The Shipments screen is used to view previous shipments and create new shipments without using a Source Document. Clicking **New Shipment** or **Edit Shipment** will start the Shipment Editor.

Shipment ID	Customer ID	Customer Name	Source Doc Num	Shipment Status	Ship To Address	Carrier Name	Carrier Type	Shipment Type
4333	CENTRAL0001	Central Communications LTD	... STDINV2259	Shipped		usps	UPS	Standard
4332	WORLDENT0001	World Enterprises	... INVS3020	Shipped		usps	UPS	Standard
4331	CENTRAL0001	Central Communications LTD	... STDINV2259	New		usps	R + L Carriers	Domestic
4330	CENTRAL0001	Central Communications LTD	... STDINV2259	New		usps	UPS	Standard
4329	CENTRAL0001	Central Communications LTD	... STDINV2259	Shipped		usps	UPS	Standard
4328	BLUEYOND0001	Blue Yonder Distribution	... D6789	Shipped		usps	UPS	Standard
4327	BLUEYOND0001	Blue Yonder Distribution	... D6789	Shipped		usps	UPS	Standard
4326	CENTRAL0001	Central Communications LTD	... STDINV2259	Rated		usps	R + L Carriers	Domestic
4325	CENTRAL0001	Central Communications LTD	... STDINV2259	New		usps	YRC Freight	Standard
4324	CENTRAL0001	Central Communications LTD	... STDINV2259	Rated		usps	R + L Carriers	Domestic
4323	CENTRAL0001	Central Communications LTD	... STDINV2259	New		usps	R + L Carriers	Domestic
4322	CENTRAL0001	Central Communications LTD	... STDINV2259	Rated		usps	R + L Carriers	Domestic
4321	CENTRAL0001	Central Communications LTD	... STDINV2259	New		usps	R + L Carriers	Domestic
4320	CENTRAL0001	Central Communications LTD	... STDINV2259	New				
4319	WORLDENT0001	World Enterprises	... INVS3020	New		usps	USF Holland	Domestic
4318	WORLDENT0001	World Enterprises	... INVS3020	Rated		usps	YRC Freight	Standard
4317	WORLDENT0001	World Enterprises	... INVS3020	Rated		usps	YRC Freight	Standard
4316	WORLDENT0001	World Enterprises	... INVS3020	Rated		usps	R + L Carriers	Domestic
4315	ATHORENE0001	Athore Retirement Center	... STDINV0018	Shipped		usps	R + L Carriers	Domestic
4314	HOLLINGC0001	Halling Communications Inc.	... 00332	New		FedEx Parcel	FedEx	FedEx Ground Service
4313	HOLLINGC0001	Halling Communications Inc.	... 00332	New		FedEx Parcel	FedEx	FedEx Ground Service
4312	HOLLINGC0001	Halling Communications Inc.	... 00332	New		FedEx Parcel	FedEx	FedEx Ground Service
4311	HOLLINGC0001	Halling Communications Inc.	... 00332	New		FedEx Parcel	FedEx	FedEx Ground Service
4310	HOLLINGC0001	Halling Communications Inc.	... 00332	New		FedEx Parcel	FedEx	FedEx Ground Service
4309	HOLLINGC0001	Halling Communications Inc.	... 00332	New		FedEx Parcel	FedEx	FedEx Ground Service
4308	HOLLINGC0001	Halling Communications Inc.	... 00332	New		FedEx Parcel	FedEx	FedEx Ground Service
4307	HOLLINGC0001	Halling Communications Inc.	... 00332	New		FedEx Parcel	FedEx	FedEx Ground Service
4306	SUPERFOOD0001	Super Foods Plus	... DC1283	Shipped		usps	UPS	Standard

Right-clicking on a shipment will present the user with a Get Rate Quote option that specifies either Freight or Parcel; this will load up the Rate Comparison screen, which can be used to generate new shipments.



Shipment Monitor

The Shipment Monitor screen is used to view Shipping Source Documents and generate shipments from them.

The left panel defines which Shipping Sources have Sales Documents ready to be shipped from them, while the right panel shows all documents.

Double-clicking on a line or clicking Generate Shipment will start up the Shipment Editor with all document information loaded in, including Ship To Address, default Shipping Method information (if the Shipping Method is set), and document line items to populate the shipment with.

Right-clicking on a shipment will present the user with a Get Rate Quote option that specifies either Freight or Parcel; this will load up the Rate Comparison screen, which can be used to generate new shipments.

Shipping Source Description	Document Count	Source Doc Num	Customer ID
DESCRIPTION	0	INVS3020	WORLDE0001
Brian	48	INVS3037	VISTATRA0001
		INVS3021	VANCOUVE0001
		INVS3046	STPATRIC0001
		INVS3045	STMARYHO0001
		INVS3023	ROSELLEN0001
		INVS3051	RIVERSID0001
		INVS3047	RIVERSID0001
		INVS3029	RIVERSID0001

Rate Comparison

The Rate Comparison screen, accessible from either right-clicking on a shipment from the Shipments screen, or by clicking Get Rate Quote from Shipment Editor, attempts to access all Carriers in a particular category and get a Rate Quote for all service types.

Once finished, double-clicking on any shipment option at the bottom will do one of two things:

1. If starting from Shipment Editor, double-clicking a shipment option will populate the given shipment with that carrier information and Rate Quote.
2. If starting from Shipments, double-clicking a shipment option will start a new shipment with all the properties of the previously selected shipment, including Shipment Lines.

The screenshot shows the 'Shipment Monitor' application with the following data:

Fields:

- Shipment Date: 6/6/2014
- Source Doc Key: STONV2259
- Source Doc Num: STONV2259
- Customer Name: Central Communications LTD
- Account Number:
- Tracking Number:

Ship To Address: Central Communications LTD, Mary West, 2012 Ashland St. West, Chicago, IL 60602-2333, USA

Shipment Lines:

Shipment Line ID	Package Description	Weight
5375		600

Shipment Rates:

Ship From Address	Carrier Type	Shipment Type	Shipment Service	Shipment Amount
SALESFAD, 2000 Eagle Park Dr. NE, Suite 100, Grand Rapids, MI 49525, United States	R - 4 L Carriers	Domestic	Standard Service	91.84
SALESFAD, 2000 Eagle Park Dr. NE, Suite 100, Grand Rapids, MI 49525, United States	R - 4 L Carriers	Domestic	Guaranteed Service	121.84
AMERICAN EAGLE FIREWORKS, 2066 RDH CR, LANDSC, MI 49506, United States of America	USP Holland	Domestic	STANDARD	129.13
SALESFAD, 2000 Eagle Park Dr. NE, Suite 100, Grand Rapids, MI 49525, United States	R - 4 L Carriers	Domestic	Guaranteed AM Service	156.84

Shipment Editor

The Shipment Editor is the primary application screen for ShipCenter operations. From Shipment Editor, an end user can get a rate for a shipment, generate labels for a shipment, generate return labels for a shipment, and void out a shipment.

The screenshot shows the 'Shipment - (New)' application with the following data:

Fields:

- Carrier ID: rand
- Shipment Type: Domestic
- Shipment Service: Standard Service
- Shipment Date: 6/6/2014
- Customer Name:
- Source Doc Num:
- Shipment Amount:
- Write Back Rate: Last
- Write Rate To Source

Package Type: Click to Edit

Weight: Weight: [input], Weight Unit: LBS, LTL Freight Class: HD CLASS

Package Options: Click to Edit

Shipment Amount: \$0.00

Reference Information:

- Reference 1: [input]
- Reference 2: [input]
- Commodity Code: [input]
- Commodity Description: [input]

Dimensions:

- Length: [input]
- Width: [input]
- Height: [input]
- Dimension Unit: Inch
- Is Large Package

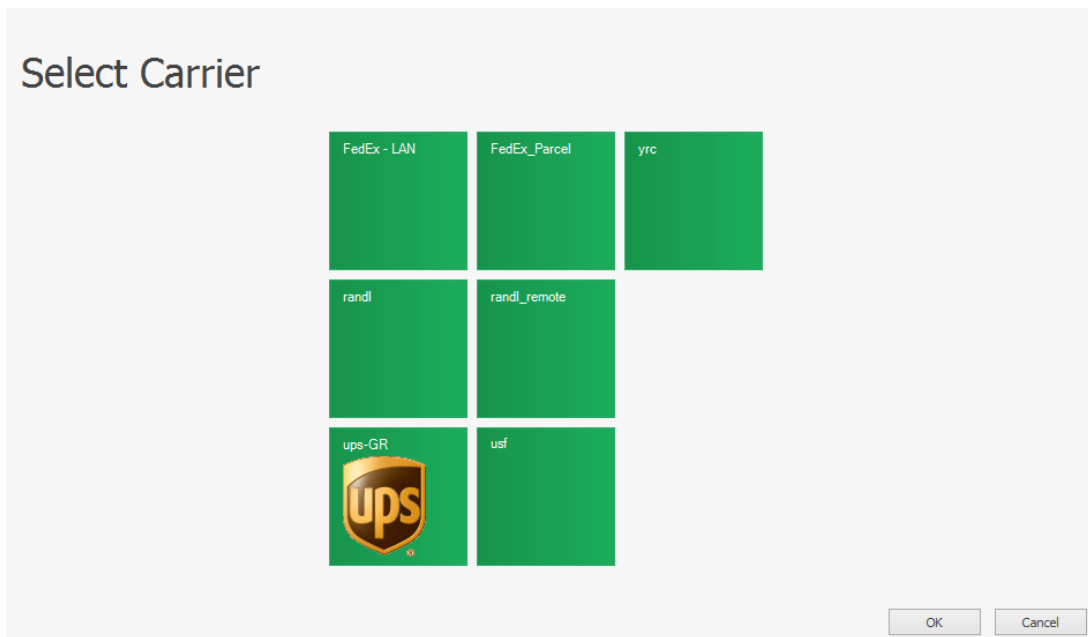
Ship To Address: [input] | **Ship From:** [input]

Buttons: Items..., Delete, Previous, Next, Finish Shipment

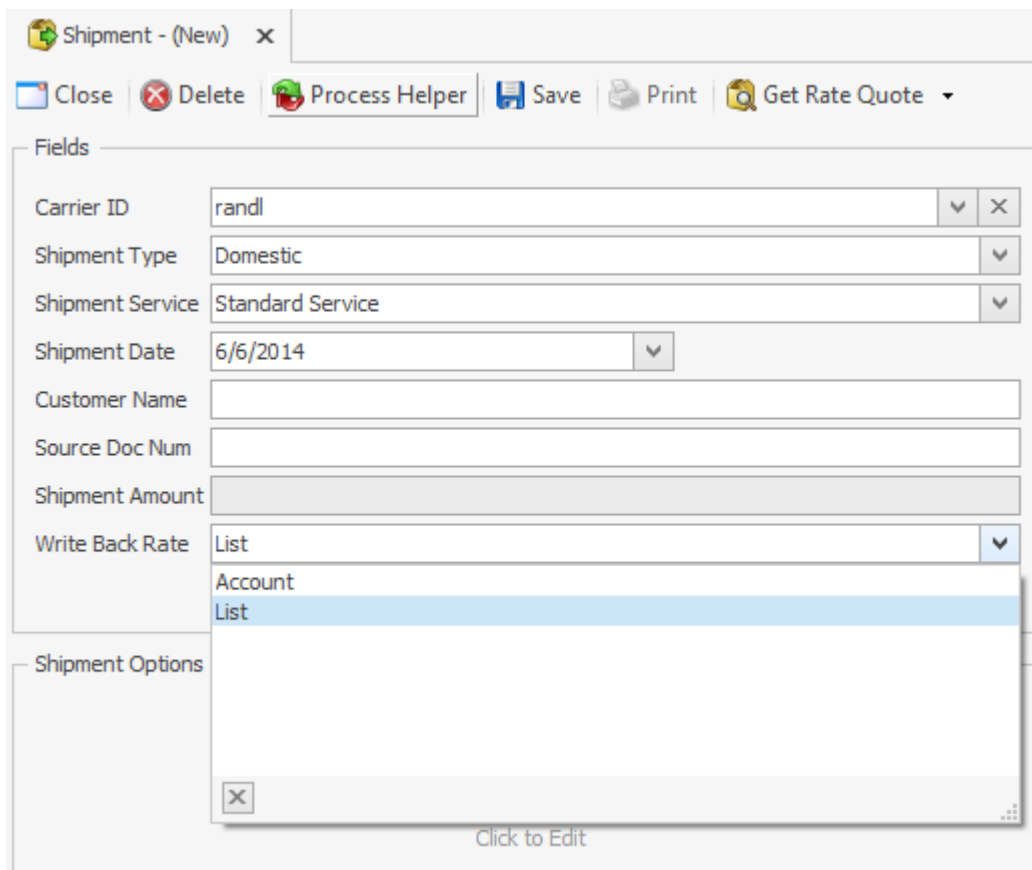
Selecting a Carrier from the Carrier ID dropdown in the top left will populate the Shipment Type and Shipment Service with their default values.

Alternatively, clicking the **Process Helper** button will show a wizard to the end user that will help choose the Carrier.

Select Carrier



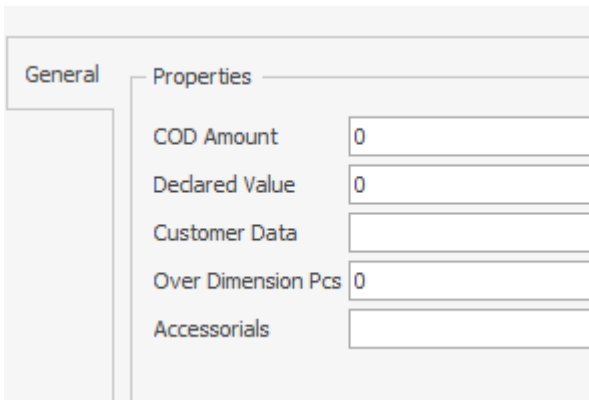
The Write Back Rate dropdown is set during Carrier Setup. It can be adjusted during a shipment to specify which rate - Account or List - should be written back to the Shipment Amount.



The **Write Rate to Source** check box changes how a Source Document is updated if the shipment was started from a Source Document using Shipment Monitor.

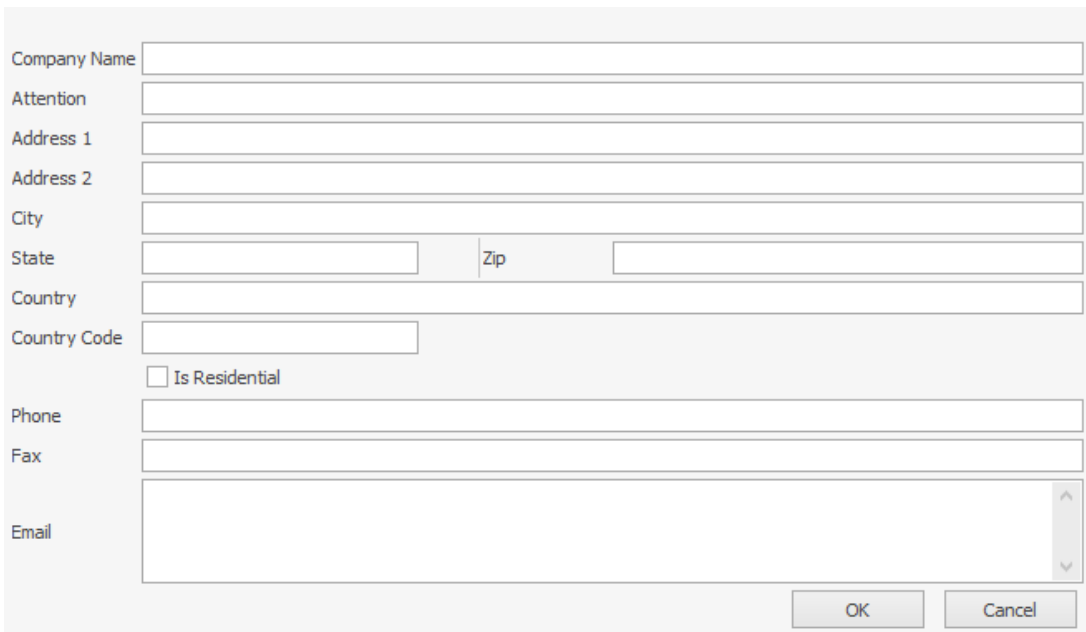
Once a Carrier ID and Shipment Type are specified, clicking either Shipment Options or Package Options will display a Shipment Type-specific list of options that are available to a

shipment. These options are documented in Carrier-specific documents available from SalesPad.



General	Properties
	COD Amount: 0
	Declared Value: 0
	Customer Data:
	Over Dimension Pcs: 0
	Accessorials:

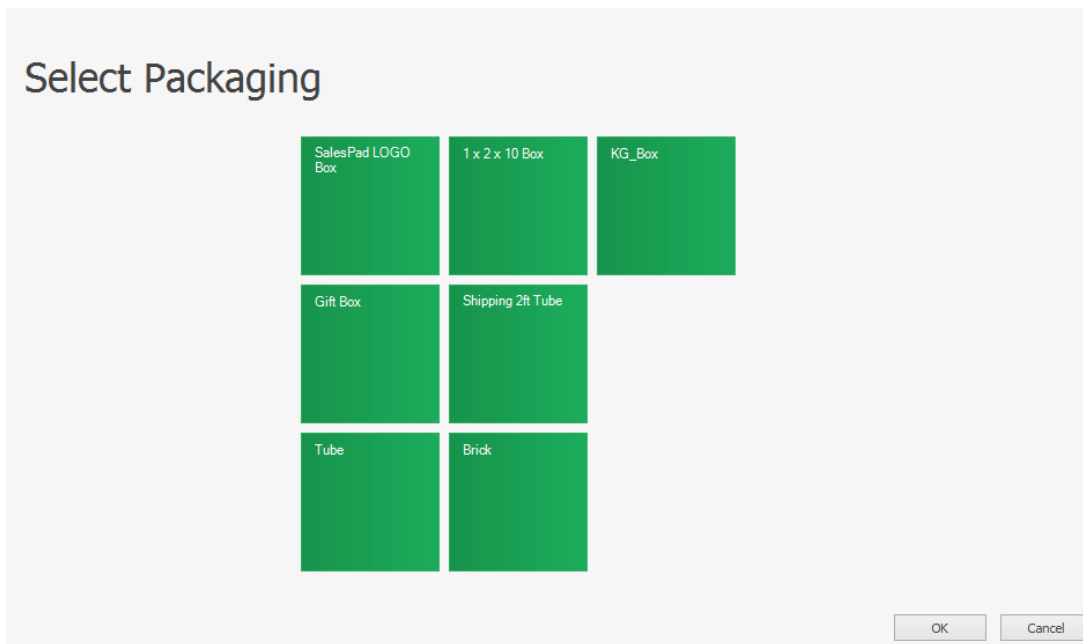
Clicking the blue portion of Ship To Address or the blue portion of Ship From Address will show the Address Editor. If a shipment is started from Shipment Monitor, then this should already be filled in.



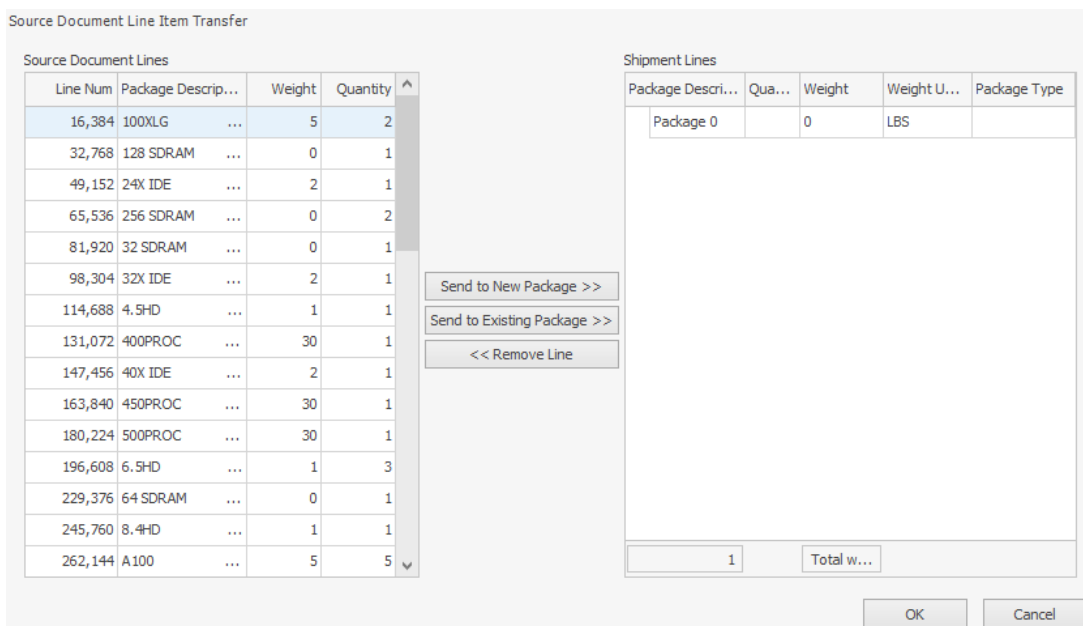
Company Name		
Attention		
Address 1		
Address 2		
City		
State	Zip	
Country		
Country Code		
	<input type="checkbox"/> Is Residential	
Phone		
Fax		
Email		
	OK	Cancel

Clicking the area below Package Type will pull up the "Select Packaging" window. This is populated with both Carrier-specific packaging and packaging defined in the Packaging card.

Select Packaging



If the Shipment was started from Shipment Monitor, then clicking the **Items** button near the bottom of the screen will show the “Source Document Line Item Transfer” window. This screen allows the end user to generate packages by dragging lines from the left to the right, or by selecting lines on either side and clicking the button in the center of the window. Clicking **OK** will update the shipment.



Each shipment line is required to have its weight defined. If a Carrier is specified, then either the LTL Freight Class or the Dimensions section needs to be filled out; otherwise, the Dimensions section alone needs to be completed.

Weight

Weight	<input type="text" value="600"/>	600
Weight UofM	<input type="text" value="LBS"/>	▼
LTL Freight Class	<input type="text" value="CLASS 055"/>	▼

Dimensions

Length	<input type="text" value="0"/>	0
Width	<input type="text" value="0"/>	0
Height	<input type="text" value="0"/>	0
Dimension UofM	<input type="text" value="Inch"/>	▼

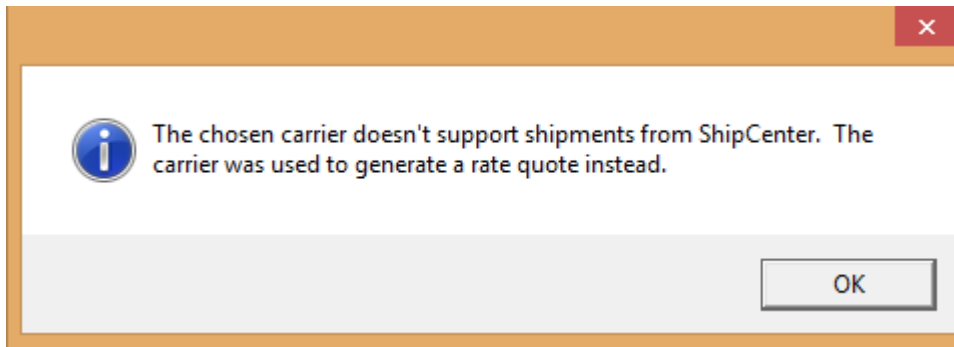
Is Large Package

Clicking on the blue amount underneath Shipment Amount will request a Rate Quote from the Carrier.

Shipment Amount

\$91.84

Clicking the **Finish** button will contact the Carrier and either retrieve a final Rate Quote (if the Carrier is a Freight Carrier) and write out the Rate Quote, or request a shipment be created and generate a shipping label.



The chosen carrier doesn't support shipments from ShipCenter. The carrier was used to generate a rate quote instead.

OK