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Shipping Review

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Overview

The Shipping Review module provides a convenient place for users to view and modify sales document lines and forward documents to the next workflow queue for shipping. This is the only place in SalesPad that you can set a document's actual ship date, after processing the document.

Usage

1. To open Shipping Review, go to Modules > Sales > Shipping Review

Sales Batch	Doc Type	Doc#	Customer Name	Cust ID	Req Ship Date	Doc Date	Ship
ORDER	ORDER	ORDST2493	Blue Yonder Airlines	BLUEYOND0001			GRO
ORDER	ORDER	ORDST2495	Aaron Fitz Electrical	AAROFIT0001	12/28/2011	12/28/2011	LOC
ORDER	ORDER	ORDST2496					
ORDER	ORDER	ORDST2497	Blue Yonder Airlines	BLUEYOND0001			
ORDER	ORDER	ORDST2498					
ORDER	ORDER	ORDST2499			12/29/2011	12/29/2011	GRO
ORDER	ORDER	ORDST2500	Peran's Hockey World	000003			
ORDER	ORDER	ORDST2503	Blue Yonder Airlines	BLUEYOND0001	1/3/2012	1/3/2012	
ORDER	ORDER	ORDST2504					

Item	Description	Qty	UOM	Price	Cost
100XLG	Green Phone	1	EACH	59.95	55.50
A100	Audio System	1	Each	39.95	36.00

2. Select a queue from the Batch Filter dropdown
3. Documents in the selected queue will appear in the upper grid. You can further narrow the results displayed using the [Auto-Filter Row](#).
4. Select/highlight a document. Line items on the document will display in the lower grid

Sales Batch	Doc Type	Doc#	Customer Name	Cust ID	Req Ship Date	Doc Date	Shipping Method
ORDER	ORDER	ORDST2492	Blue Yonder Airlines	BLUEYOND0001			
ORDER	ORDER	ORDST2498					
ORDER	ORDER	ORDST2499			12/29/2011	12/29/2011	
ORDER	ORDER	ORDST2500	Peran's Hockey World	000003			
ORDER	ORDER	ORDST2503					
ORDER	ORDER	ORDST2504	Blue Yonder Airlines	BLUEYOND0001			
ORDER	ORDER	ORDST2505					
ORDER	ORDER	ORDST2506	Karina Kalfleisch	KARSTNA	1/3/2012	1/3/2012	GROUND
ORDER	ORDER	ORDST2507	Blue Yonder Airlines	BLUEYOND0001			

Item	Description	Qty	UOM	Price	Cost	Ext Price	Req Ship
MCC100	Microphone	1	Each	20.00	4.00	20.00	1/3/2012
100XLG	Green Phone	1	EACH	59.95	55.50	59.95	1/3/2012
100XLG	Green Phone	0	EACH	59.95	55.50	0.00	1/3/2012

5. To make changes to the document before processing, double-click the document to enter Edit Mode.
6. With proper security, users can add, remove, or change line items (including quantity), add or modify Tracking Numbers, comments, and notes, and perform plugin actions, similarly to the steps for standard Sales Document Entry.

Shipping Review

Close Refresh Save Print Batch Filter: STDORD : ORDER Cancel Edit Process

You have Sales Document CRDST2504 locked. Press Cancel Edit or Process or Cancel to finish.

Sales Batch	Doc Type	Doc#	Customer Name	Cust ID	Req Ship Date	Doc Date	Shipping Method	Sales Person ID	Hold
ORDER	ORDER	CRDST2497	Blue Yonder Airlines	BLUEYOND0001	12/29/2011	12/29/2011		NANCY B.	
ORDER	ORDER	CRDST2498							
ORDER	ORDER	CRDST2499	Peran's Hockey World	000003				GREG E.	
ORDER	ORDER	CRDST2500							
ORDER	ORDER	CRDST2501					GROUND		
ORDER	ORDER	CRDST2504	Blue Yonder Airlines	BLUEYOND0001	1/3/2012	1/3/2012		NANCY B.	
ORDER	ORDER	CRDST2505							
ORDER	ORDER	CRDST2506	Karina Kalfesich	KARINA				FRANCINE B.	
ORDER	ORDER	CRDST2507	Blue Yonder Airlines	BLUEYOND0001				NANCY B.	

Tracking Number

Cust. Comment Add Comment Internal Notes Add Note

New Delete Insert Item Number Item Class Code UOM Schedule Available Onhand

Item	Description	Qty	UOM	Price	Cost	Ext Price	Req Ship	Qty BO	Comment
MIC100	Microphone	1	Each	20.00	4.00	20.00	1/3/2012	0	
100XLG	Green Phone	1	EACH	59.95	55.50	59.95	1/3/2012	1	

7. Click **Save** to save any changes
8. To forward the document to the next queue, click **Process**.
9. The "Process Shipment" pop-up will appear, where you can change the actual Ship Date. Make a change if needed, and click **OK**

Process Shipment

Accept or Change Ship Date:

3/13/2012

OK Cancel

This will move the document through workflow based on the Doc Type and Doc ID.

Note: You can undo changes or simply exit Edit Mode by clicking **Cancel Edit**.

Note: You can also open the sales document on the Sales Document Entry screen by clicking the Doc # hyperlink

Note: Aside from the Cancel Edit button being greyed out, there will be no indication on the Shipping Review screen that the document has been successfully forwarded; however, if the process is unsuccessful, you will see an Active Support error message.

Security

*Shipping Review** - Enables the Shipping Review Module for the Security Group that is selected.

*Sales Document Tracking Numbers** - Allows users to view the Tracking Numbers for a document.

*Add Sales Document Comment** - Allows users to add comments to a Sales Document

*Sales Document Notes** - Allows users to add Internal Notes to a document.