Shipping Sources

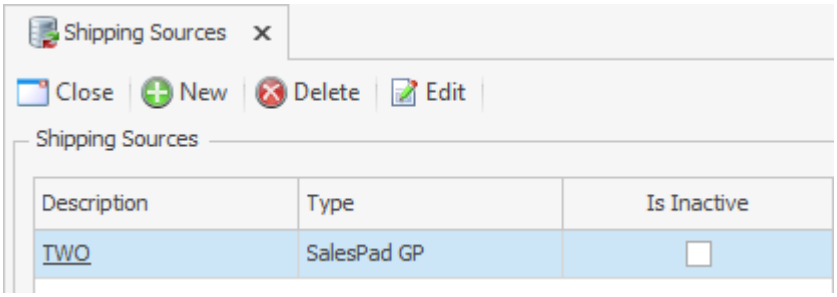
Cavallo Support - 2024-12-03 - Miscellaneous

Overview

From this module users can create, delete, and edit Shipping Sources. Shipping Sources can be set up for multiple company databases. Shipping Sources can be configured to filter which documents appear when creating shipments, and they can be set up to forward a document through workflow upon completion of a shipment. A batch can be specified for when shipments are voided, and SalesPad Desktop sales document fields can be mapped to ShipCenter fields. Additionally, Shipping Sources can be made to write to SalesPad Desktop fields when saving shipments.

Setup

To create a new Shipping Source, click the **New** button. If a Shipping Source has no pending shipments, it can be removed with the Delete button. Checking the Is Inactive box will mark the Shipping Source as inactive. The New and Edit buttons will open the Shipping Source Properties window.

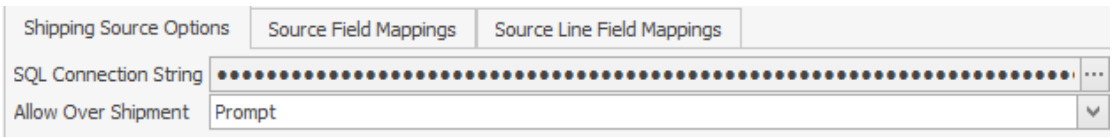


Shipping Source Properties

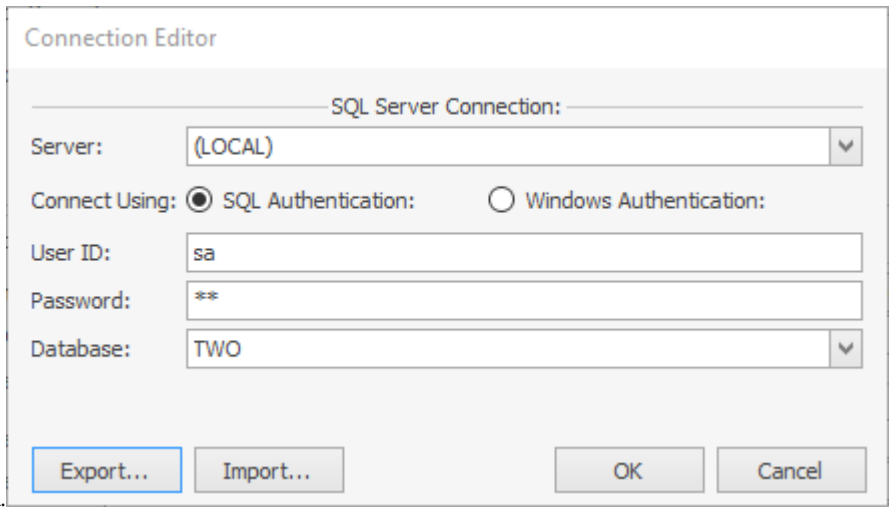
In the Shipping Source Editor window, select a Shipping Source Type and give the source a description. Sources can also be set as inactive using the Is Inactive checkbox.



Shipping Source Options



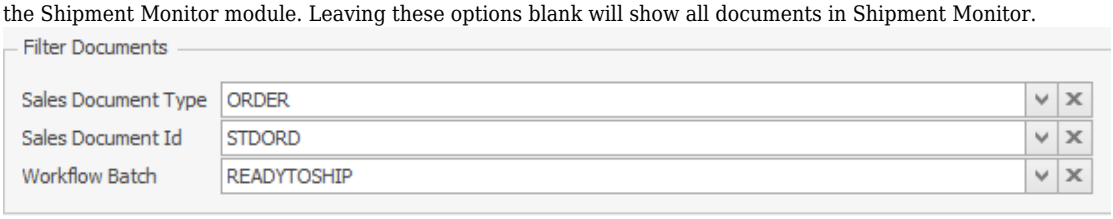
Click on the **ellipses** in the SQL Connection String field to enter connection information for the database the Shipping Source will be connecting to. Fill out the Connection Editor with the appropriate information, then



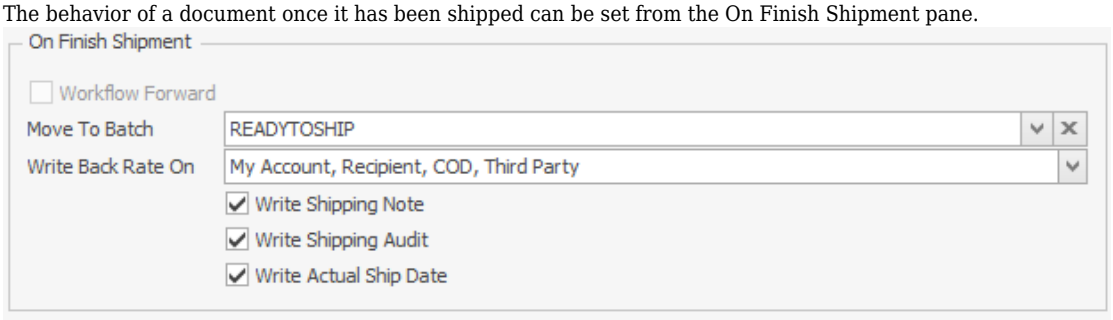
click **OK**.

Added in version 1.2.0.4, the Allow Over Shipment field determines the behavior of documents that have already been packed. If a document in Shipment Monitor has been fully packed and this setting is set to False, an error message will be displayed when attempting to create a new shipment. If it is set to Prompt, the user will be warned and asked if they would like create a new shipment anyway. This field defaults to Prompt.

The Filter Documents options determine which document types, document IDs, and batches will be displayed in the Shipment Monitor module. Leaving these options blank will show all documents in Shipment Monitor.



The behavior of a document once it has been shipped can be set from the On Finish Shipment pane.



Checking the Workflow Forward checkbox will move the sales document through SalesPad's workflow upon completion of the shipment.

Specifying a batch in the Move To Batch field will move documents to the selected batch when the shipment is completed.

The Write Back Rate On dropdown list allows you to define which account options will write the freight amount for. The checkboxes for Write Shipping Note, Write Shipping Audit, and Write Actual Ship Date determine if the respective fields are written back to the sales document.

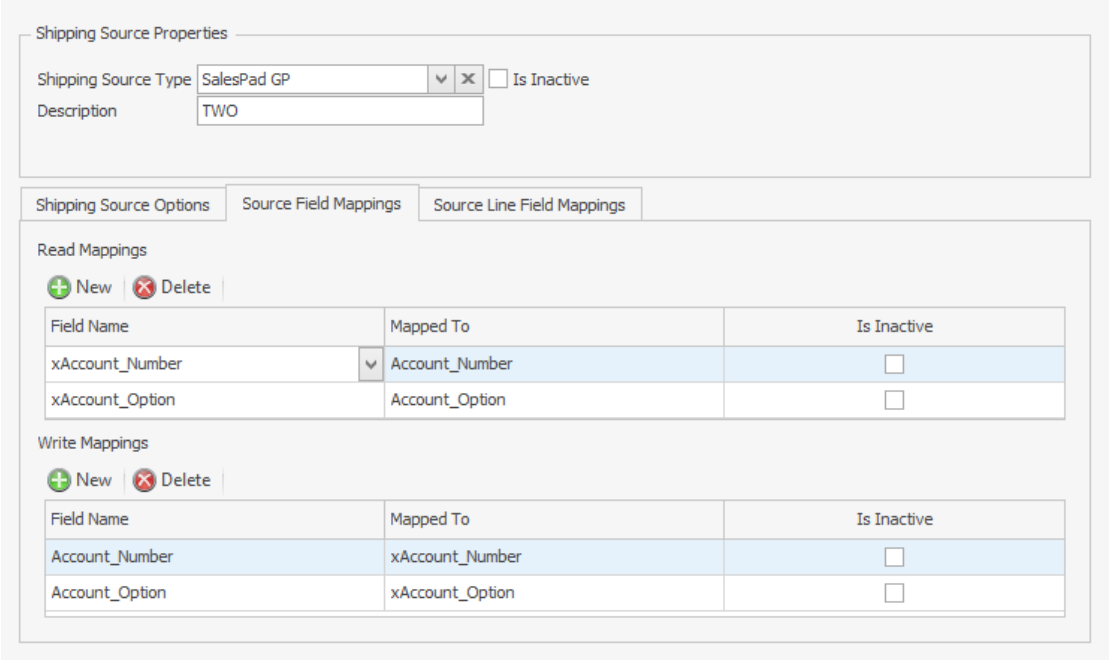
Note: If the Workflow Forward box is checked, you cannot have a value in the Move to Batch Field, and vice versa.

Shipment Void Batch under the Shipment Void Settings determines which batch a document is moved to when a shipment is voided. If checked, the box for Remove Tracking on Shipments will delete tracking information from a sales document when a shipment is voided.



Source Field Mappings

This tab allows the mapping of some SalesPad Desktop fields, including sales document user defined fields, to shipment fields in ShipCenter. ShipCenter can both read from and write to SalesPad Desktop user fields.



Read Mappings

Source Field Mappings configured in the Read Mappings section will load once upon creation of a new shipment.

To add a Read Mapping, click the **New** button. In the Field Name list, select the SalesPad Desktop field you would like ShipCenter to read from. In the Mapped To column, select the ShipCenter field you would like this value mapped to. Fields can be inactivated by checking the box for Is Inactive. To remove a Read Mapping, click the **Delete** button.

Write Mappings

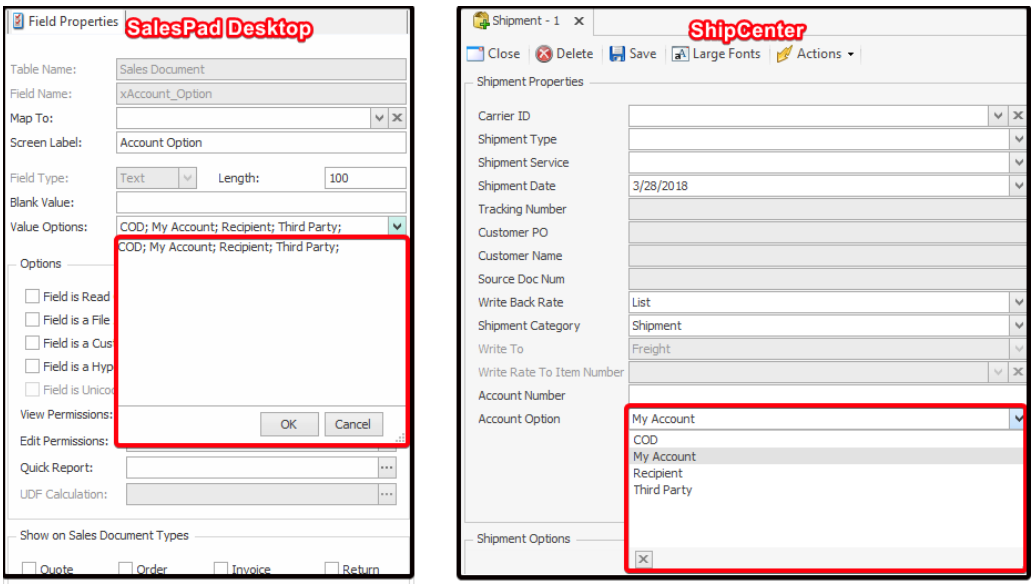
Write Mappings will update SalesPad Desktop sales document fields with the data stored in the selected ShipCenter shipment field. These fields are written each time the shipment is saved.

To add a new Write Mapping, click the **New** button. Select a ShipCenter field in the Field Name column. In the Mapped To column, select the SalesPad Desktop field that will be written to. Fields can be inactivated by checking the box for Is Inactive. To remove a Read Mapping, click the **Delete** button.

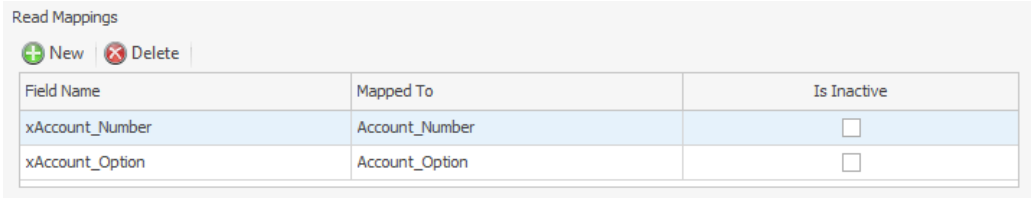
Configuring Account Options and Account Numbers with Source Field Mappings

Source Field Mappings can be configured to populate customer account options and account numbers from a sales document for a shipment. This setup requires SalesPad user defined fields on the sales document business object.

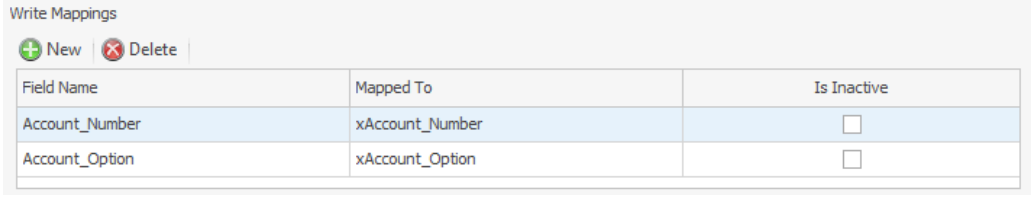
1. In SalesPad Desktop's User Field Editor, create two new user fields, one for Account Options and one for Account Number. User fields should be text type fields.
2. **For Account Options only**: The Value Options of the user field must match the available account options in ShipCenter *exactly*.



3. Click **Save**, then **Update Database Table.**
4. After logging back in to SalesPad, modify the sales document header layout to include the new user fields.
5. In the Shipping Sources module of ShipCenter, under Source Field Mappings, add two new Read Mappings, select the new user fields, and map them to the appropriate ShipCenter fields.

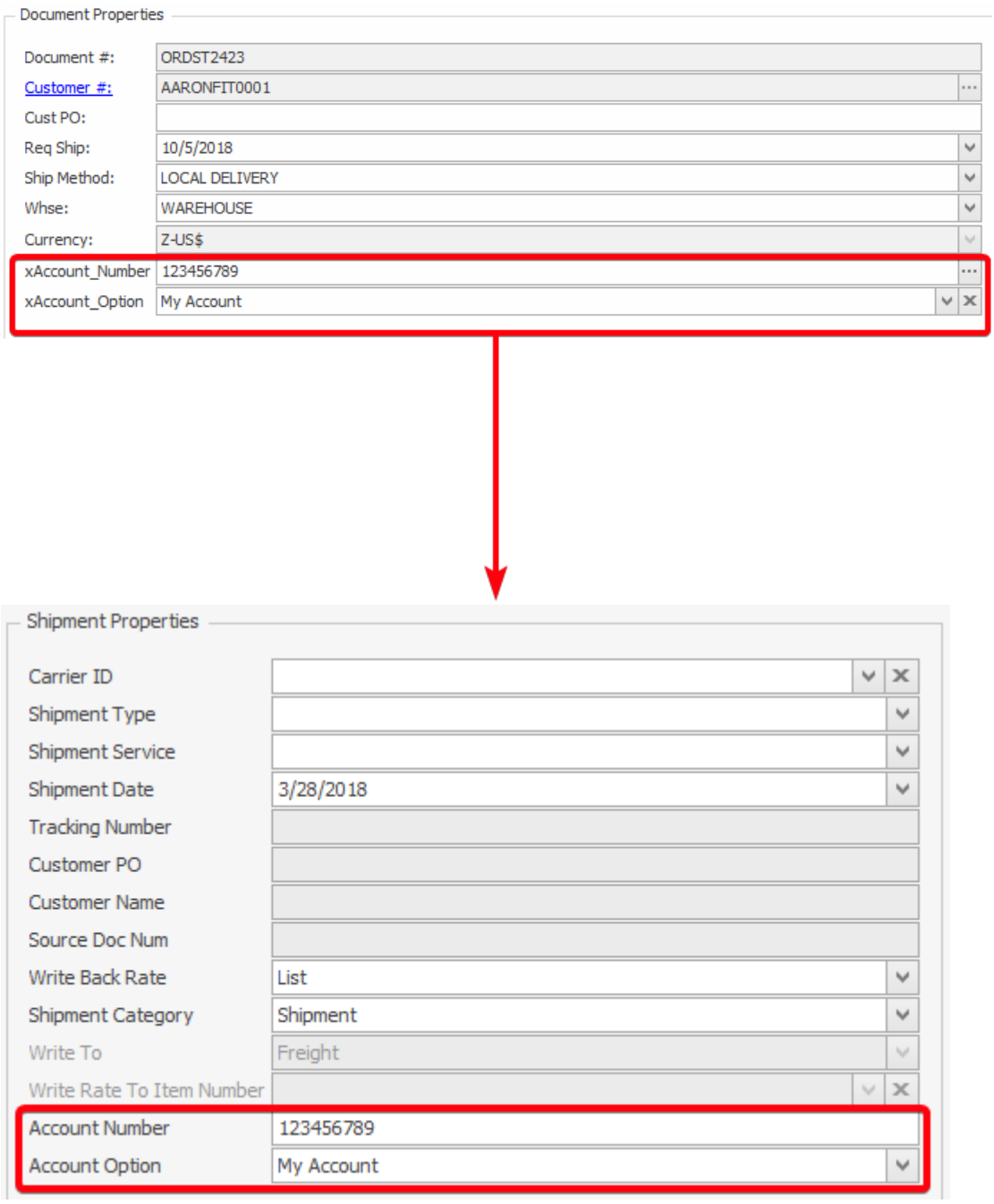


6. If desired, add two new Write Mappings. These are not required, but will write back to SalesPad any changes made to the account options or account number on the shipment in ShipCenter.



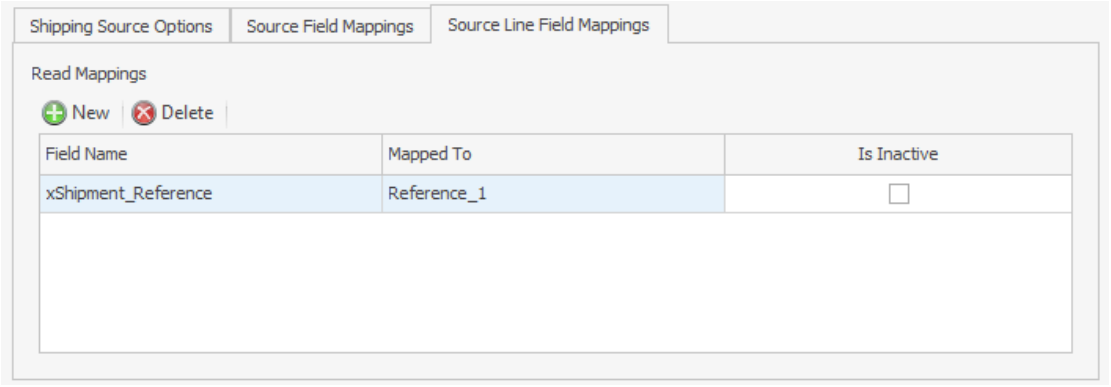
7. Click **OK** to save the changes.

With these mappings in place, any time the Account Option and Account Number are populated on the sales document in SalesPad, ShipCenter will use these values for the Account Number and Account Option fields on the shipment.



Source Line Field Mappings

Source Line Field Mappings map values from a source sales document to a reference field for a shipment's packages.



To add a Source Line Field Mapping, click **New**. In the Field Name column, select the sales document field to retrieve data from. The Mapped To column determines which reference field on the shipment the selected sales document field will populate in. To remove a Source Line Field Mapping, click the **Delete** button. When checked, the Is Inactive check box will inactivate the mapping.

Click **OK** to complete the Shipping Source setup.

Security

Shipping Sources - Grants access to the Shipping Sources module.

Settings

Default Country for Shipping Sources - This country code will be applied to all addresses that come from a shipping source if the country field isn't populated. Defaults to 'UNITED STATES (US, USA)'