ACHIEVE FREIGHT CONTROL

USER MANUAL
Version 6.5

PRESENTED BY
ACHIEVE IT SOLUTIONS

Achieve Freight Control is part of the Achieve One Suite, which has been certified by SAP as conforming to SAP's standards for Business One add-on solutions.

SAP® Certified
SAP Business One Integration

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Introduction

SAP Business One allows you to create Quotations, Sales Orders, Deliveries, and A/R Invoices. But along the way, orders have to be shipped. Many companies use separate computer systems or web services for UPS, FedEx, US Postal Service, and LTL carriers. Maintaining multiple databases for customer addresses, and entering information for each shipment is time-consuming and a likely source of errors.

The **Achieve Freight Control** module serves as a bridge between SAP Business One and the carrier shipping systems. All relevant information for each order is copied to a Shipping Request document. Operators may enter the quantity shipped and packaging information, and verify shipping charges. The data is transmitted to the carrier's system, and final charges and tracking numbers are returned. Finally, the Delivery document and/or Invoice may be automatically created from the Shipping Request.

In addition, **Achieve Freight Control** includes a Rate Shopping feature, which allows operators to view shipping rates by various carriers and shipping options, from within the Sales Order screen. This enables them to provide accurate estimates of shipping charges to customers at the time the order is placed.

Major features of **Achieve Freight Control** include:

Shipping Request

Create from Sales Order, Reserve Invoice, or Pick Ticket
May include items from multiple orders
Includes:

- Quantities Shipped
- Shipping Method
- Billing, Ship-To and Ship-From Addresses
- Billing Information
- Packaging
- Additional Charges

Automatically Create Deliveries and/or Invoices

Shipping Management

- Process groups of Shipping Requests together
- Change the status of Shipping Requests
- Create Delivery and/or Invoice documents

Rate Shopping

- Display on Sales Order Screen
- View Rates for multiple carriers and shipping methods
- Quote rates to customer
- Select desired carrier/method

Setup

There are a number of setups that must be entered before **Achieve Freight Control** can be used. These are located primarily under the *Administration > Achieve One > Achieve Freight Control menu*. They are described in detail in the following section.
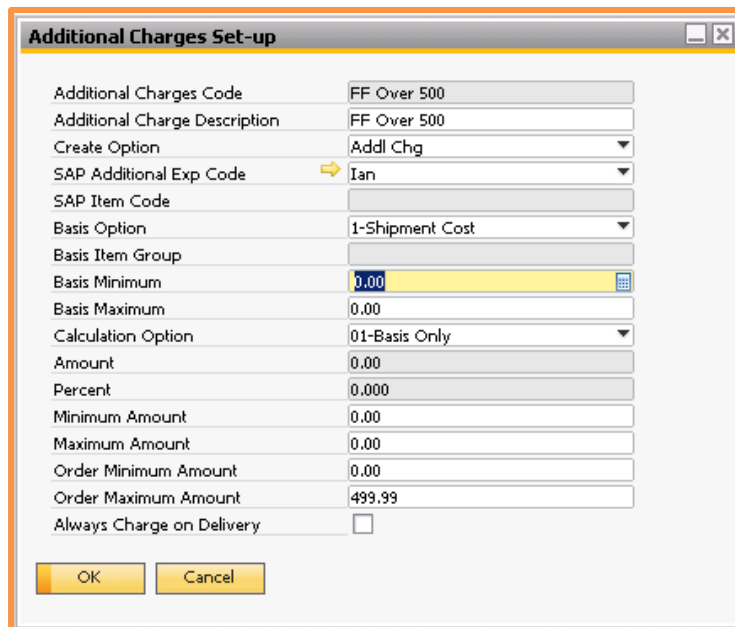
Please note that it is also necessary to make various mappings and other setup entries in the carrier software systems, such as UPS WorldShip®. *See the **Achieve One Freight Control Installation Guide** for instructions on these procedures*. Also consult with the carrier representatives for assistance with these entries.

Additional Charges Set-up

Administration > Achieve One > Achieve Freight Control > Additional Charges Set-up

This program is used to enter various charges that may be calculated before applying freight charges to a customer's invoice. You may select from several different methods of calculating these charges. Up to ten additional charges may be entered as system defaults, on shipping methods, and ultimately on individual shipments.

Note that the sum of all Additional Charges on a shipment will replace the actual amount charged by the carrier when applied to the customer's invoice. If there are no Additional Charges on a Shipping Request, then the actual amount charged will be applied.

Enter the following information:

Additional Charges Code	Enter the code for this type of charge (20 characters).
Additional Charges Description	Enter a description for the charge (50 characters).
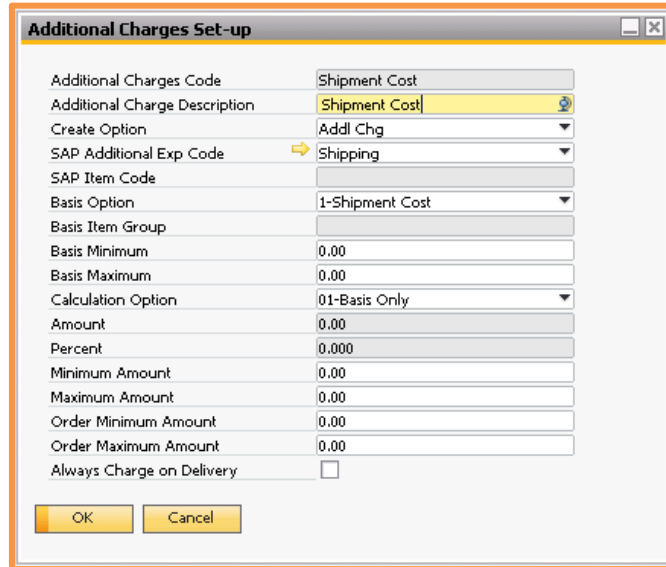
Create Option	Select the method of adding the charge: • Addl Chg – enter as a freight-type charge in the footer of the Business One document • Item – enter as a separate row in the body of the Business One document
SAP Additional Exp Code	If the Addl Chg option is selected above, select the Business One freight code to use for this charge.
SAP Item Code	If the Item option is selected above, enter the item code to use for the charge.
Basis Option	Select the basis for the calculation of this charge. This is the value that will be used in the calculation option selected below: • Shipment Cost • Shipment Value • Order Value • Number of Packages • Weight • Volume • Quantity • Sales Order • Rate Quote (This option is only available on older installations. If you quote a rate shop it will automatically set the additional charges on the Shipping Request as Rate Quote. There is no need to create an actual Additional Charge for Rate Quote) • Flat Fee on Basis Item Group
Basis Item Group	If the basis is Flat Free on Basis Item Group, this is the item group that it will trigger a charge.
Basis Minimum	Enter the minimum basis amount if needed. If the basis amount is less than this amount then the charge will not be incurred.
Basis Maximum	Enter the maximum basis amount if needed. If the basis amount is greater than this amount then the charge will not be incurred.

Calculation Option	Select the option for how to calculate the charge (***Note**: The * indicates multiplication*):
	• Basis Only
	• Stated Amount
	• Basis * Percentage
	• Basis * Amount
	• (Basis * Percentage) + Amount
	• Basis + Percentage
	• Basis + Amount
	• (Basis + Percentage) + Amount
Amount	If the calculation option requires an amount, enter the amount.
Percent	If the calculation option requires a percentage, enter the percentage.
Minimum Amount	If there is a minimum amount to be charged when calculating the additional charge amount, enter the minimum amount.
Maximum Amount	If there is a maximum amount to be charged when calculating the additional charge amount, enter the maximum amount.
Order Minimum Amount	Enter the minimum order amount if needed. If the order amount is less than this amount then the charge will not be incurred.
Order Maximum Amount	Enter the maximum order amount if needed. If the order amount is greater than this amount then the charge will not be incurred.
Always Charge on Delivery	If this box is checked then this additional charge will be used even when the Shipping Method or Shipping Spec is set to something other than "Bill Company" (this will be further explained later on in this document).

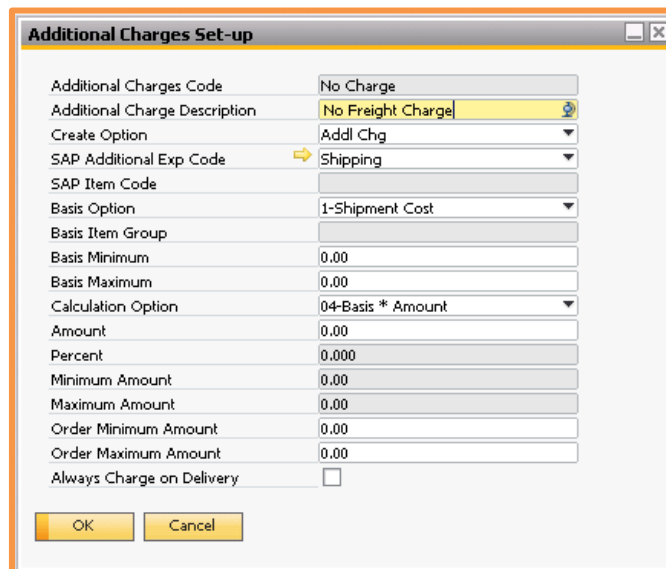**Examples of Additional Charge Setups**

Example 1: Actual Freight Charge

Additional Charges Set-up	
Additional Charges Code	Shipment Cost
Additional Charge Description	Shipment Cost
Create Option	Addl Chg
SAP Additional Exp Code	Shipping
SAP Item Code	
Basis Option	1-Shipment Cost
Basis Item Group	
Basis Minimum	0.00
Basis Maximum	0.00
Calculation Option	01-Basis Only
Amount	0.00
Percent	0.000
Minimum Amount	0.00
Maximum Amount	0.00
Order Minimum Amount	0.00
Order Maximum Amount	0.00
Always Charge on Delivery	☐

OK   Cancel

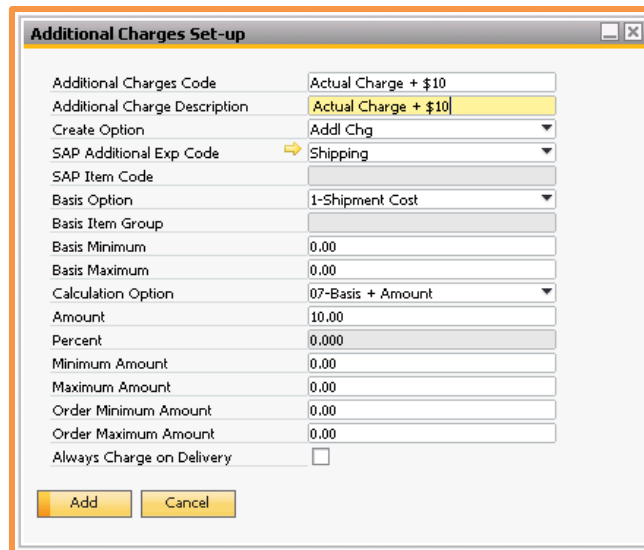Shipment Cost is the basis and the calculation is the basis only, so the charge will be the shipment cost.

Example 2: Free Freight

Additional Charges Set-up	
Additional Charges Code	No Charge
Additional Charge Description	No Freight Charge
Create Option	Addl Chg
SAP Additional Exp Code	Shipping
SAP Item Code	
Basis Option	1-Shipment Cost
Basis Item Group	
Basis Minimum	0.00
Basis Maximum	0.00
Calculation Option	04-Basis * Amount
Amount	0.00
Percent	0.000
Minimum Amount	0.00
Maximum Amount	0.00
Order Minimum Amount	0.00
Order Maximum Amount	0.00
Always Charge on Delivery	☐

OK   Cancel

Shipment Cost is the basis and the calculation is basis * amount with an amount of zero therefore the charge is zero.

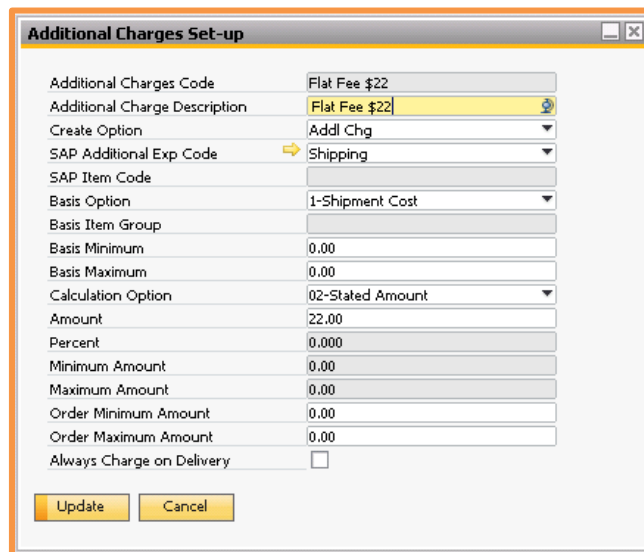## Example 3: Add $10.00 to the Actual Charge

Shipment Cost is the basis and the calculation is basis + amount with an amount of $10.00.

Example 4: Flat Rate
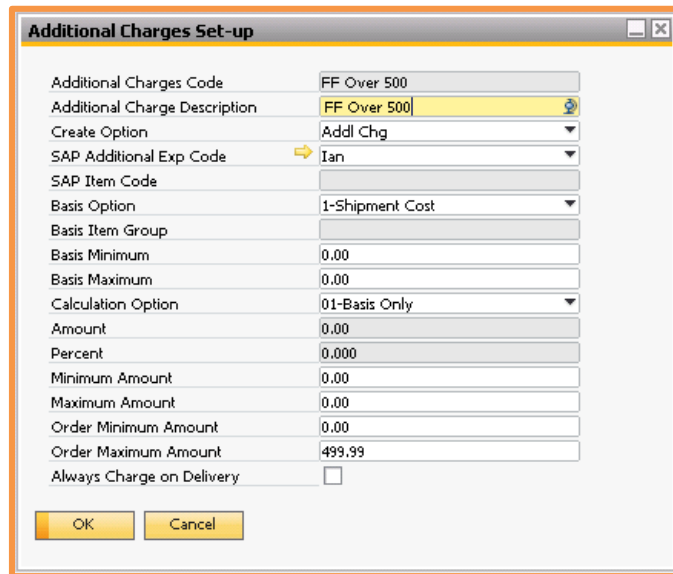
The basis is not relevant for this example because the calculation is a stated amount of $22.00 and there are no minimums or maximums.
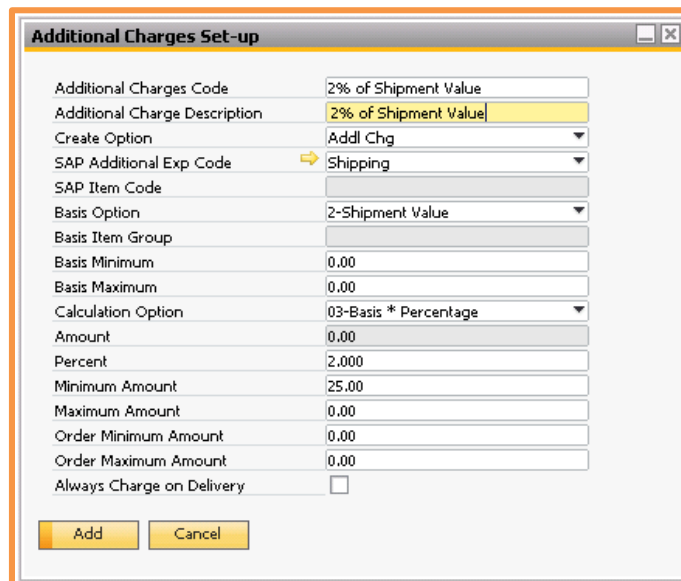
Example 5: Free Freight for Orders *over* $500.00

Shipment Cost is the basis, basis only is the calculation option, and the Order Maximum is $499.99. This code will only charge the shipping cost for Orders $499.99 and under.

Example 6: 2% of Shipment Value

Shipment value is the basis and the calculation is basis * percentage with a percent of 2%. There is also a $25.00 minimum charge on this setup.

Carrier Set-up

Administration > Achieve One > Achieve Freight Control > Carrier Set-up

This setup allows you to enter information about each carrier that will be used in ***Achieve Freight Contro**l*.

Enter the following information in the upper section of the screen:

Carrier Code	Enter a code for the carrier (10 characters).
Carrier Name	Enter the carrier's name (50 characters).
Account Number	Enter your company's account number for this carrier (50 characters).
Internal Carrier Code	Select the internal code for this carrier. These codes are preset in the system. Only carriers in this list may be selected. Choose from the following:

- None (no rate shopping is possible)
- UPS
- FEDEX
- DHL
- USPS
- ABF

Tracking URL	Enter the complete URL to be used when tracking a shipment from this carrier (254 characters)
Rate Shop URL	Enter the complete URL to be used when checking rates from this carrier if rate shopping is to be used (254 characters)
Rate Shop License	Enter your rate shopping license from this carrier (50 characters)
Rate Shop User ID	Enter the user ID for rate shopping from this carrier (50 characters)
Rate Shop Password	Enter the password for rate shopping from this carrier (50 characters)
Rate Shop Max Weight	Enter the maximum weight per package that is allowed for rate shopping from this carrier
Auto Print Delivery	If Freight Control is set to Enable Carrier Setup Auto Print Delivery (found in the Freight Control Configuration) check this box to have delivery documents automatically print for this carrier

In the lower section of the screen, enter a list of the service level codes used by this carrier. Service levels represent different types of delivery service and rates that are offered. For example, a carrier may offer Ground, Next Day Air, Second-Day Air, and so on. The service level code should correspond to the carrier's own code for the type of service. Although it is in your best interest to make them match, the codes do not need to be identical. However there should be a direct relationship between service levels and the carrier's delivery service options. You do not need to enter all possible codes, just the ones that your company will be using.

Note: Again, although you may use any codes you wish for the various service levels, integration with the carrier's shipping system (for example, UPS WorldShip®) will be easier if you use the same codes as the carrier.

Do not include payment options such as COD or Third-party billing, as these do not represent types of delivery service.

If you are going to use Rate Shop make sure you select the corresponding Rate Shop Codes from the drop down.
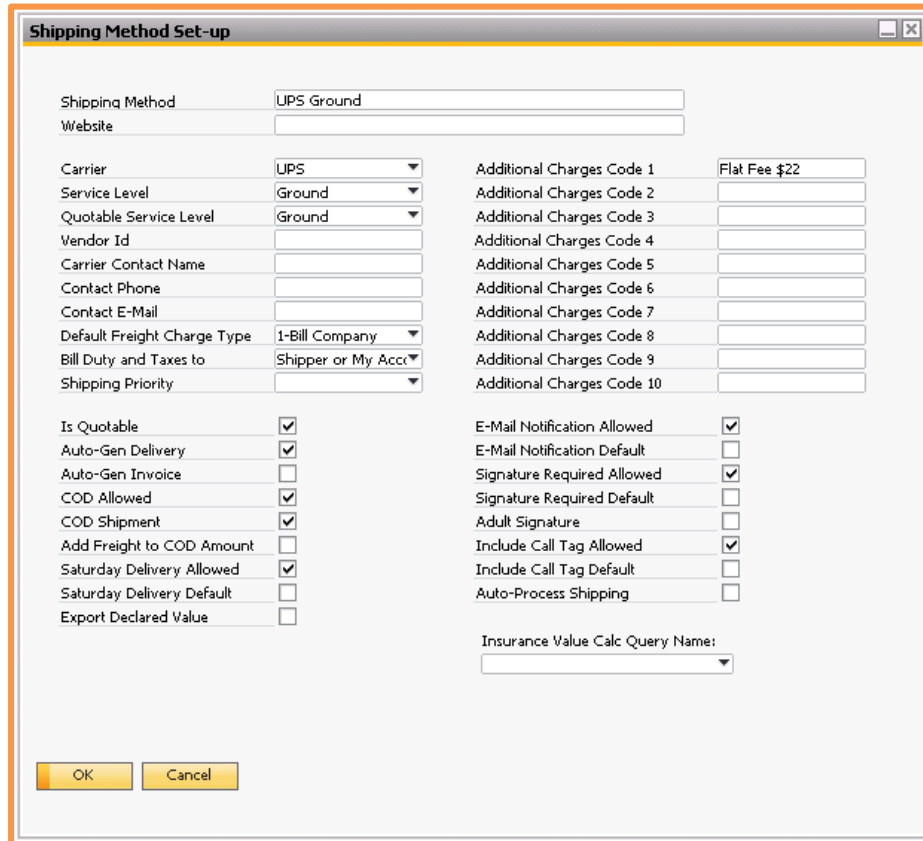
You should also add a Service Level Description so that the service level codes are easier to recognize when populating drop down lists.

Shipping Method Set-up

Administration > Achieve One > Achieve Freight Control > Shipping Method Set-up

This program allows you to enter various parameters and conditions for the Shipping Methods that are used with **Achieve Freight Control**.

Note: The Shipping Methods should have been previously entered in the standard Business One Shipping Types setup, found in Administration > Setup > Inventory > Shipping Types.

If the code already exists use the Find option to pull it up. If it does not then enter a code for the new shipping method. The new code will be added to the Business One Shipping Types.

Enter the following information:

Website   Enter the shipper's website address.

Carrier   Select a carrier code from the drop-down list.

Service Level   Select a service level. The drop-down list displays the service levels that have been established for this carrier.

Quotable Service Level   Select a service level that will be used for quoting when using rate shopping. It is not required to be the same as the actual service level used; for example, you can rate shop as if the order is going to ship ground and have the service level be Next Day Air. This would indicate that you would charge Ground rates for Next Day Air delivery.

Vendor ID	Enter the Business Partner code for the carrier's Vendor record if needed.
Carrier Contact Name	Enter the name of the person who is your contact at the carrier company.
Contact Phone	Enter the contact's phone number.
Contact Email	Enter the contact's email address.
Default Freight Charge Type	Select the default charge type for this shipping method. This indicates who the shipping company will bill for the freight charges. Choose from:

Bill Company	Gets billing address from Company Details, and account number from carrier setup.
Bill Customer	Gets billing address from sales order customer, and account number from the BP Master.
Bill Ship-To	Gets billing address from sales order ship-to, and account number from ship-to address on BP Master.
Bill Consignee	Consignee billing address and account number must be entered on Shipping Request.
Bill Third Party	Third Party billing address and account number can come from Shipping Specification or must be entered on Shipping Request.

Bill Duty and Taxes To	Select the default type of billing for duty and taxes. Choose from:

- SHP – Shipper or My Account (shipper number)
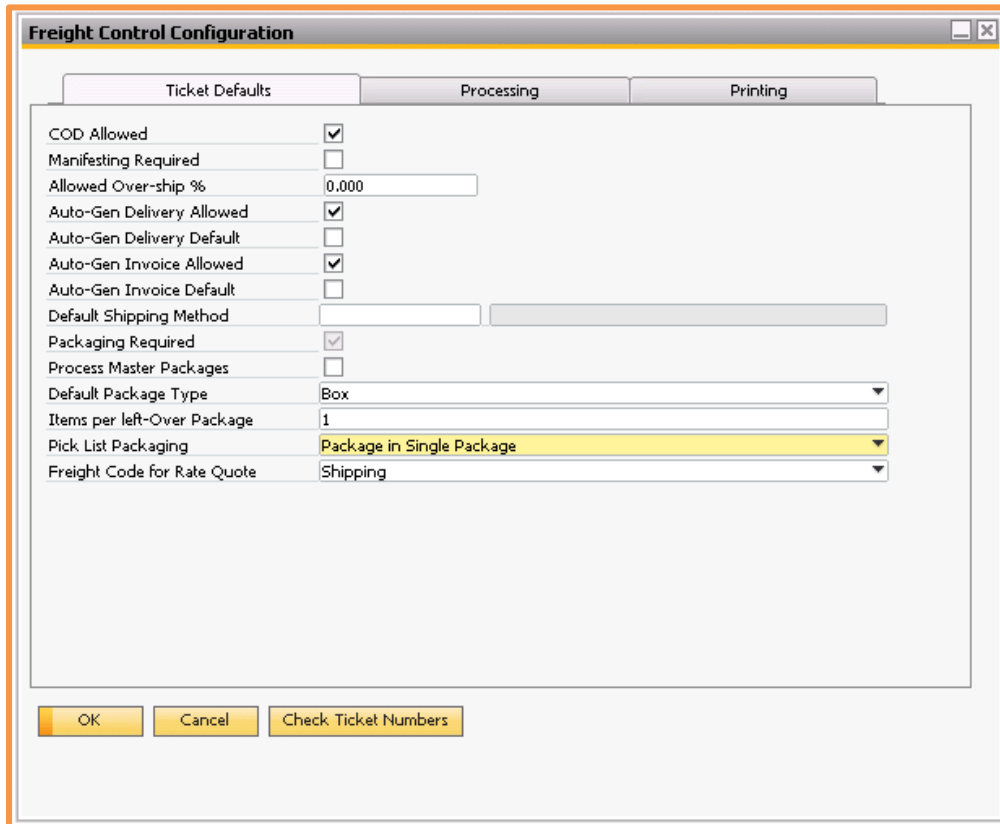- REC – Receiver
- TP – Third Party
- CB – Consignee Billed

Shipping Priority	If desired, set a priority level for this Shipping Method. The list of priority codes may be entered in the Shipping Types Setup (*Administration > Setup > Inventory)*. The priority code can be used as a selection criterion in the Warehouse Logistics Manager, if using **Achieve Warehouse Management**.
Is Quotable	Check if this shipping method should appear in the Rate Shopping list for the carrier.
Auto-Gen Delivery	Check if Delivery documents are to be automatically generated during the shipping process.
Auto-Gen Invoice	Check if Invoice documents are to be automatically generated during the shipping process.
COD Allowed	Check if COD deliveries are permitted with this shipping method.
COD Shipment	Check if the shipment should be marked COD. This can only be checked if COD is allowed.
Add Freight to COD Amount	Check if the freight charges should be added to the shipment amount for the COD total amount. This can only be checked if COD is allowed.
Saturday Delivery Allowed	Check if Saturday delivery is permitted with this shipping method.
Saturday Delivery Default	Check if Saturday delivery is the default option for this shipping method. This can only be checked if Saturday delivery is allowed.
Export Declared Value	Check if you want to export the declared value from the shipping request.
Email Notification Allowed	Check if email notification is allowed for this shipping method.
Email Notification Default	Check if email notification is the default option for this shipping method. This can only be checked if email notification is allowed.
Signature Required Allowed	Check if the signature required option is allowed for this shipping method.

Signature Required Default

Check if signature required is the default option for this shipping method. This can only be checked if Signature Required Allowed is checked.

Adult Signature

Check if an adult signature is required. This can only be checked if Signature Required Allowed is checked.

Include Call Tag Allowed

Check if Call Tags are allowed to be generated with this shipping method.

Include Call Tag Default

Check if generating Call Tags is the default option for this shipping method. This can only be checked if Include Call Tags Allowed is checked.

Auto-Process Shipping

Check if you want shipping requests to automatically be changed to Shipment Info Received status automatically after packing. This is usually not used with Carrier integration shipping methods since those will do this automatically during the Carrier software export process.

Additional Charges (1 through 10)

Select one or more additional charges to be computed with this shipping method if needed.

Insurance Value Calc Query Name

Select a query from the dropdown list of User Queries that indicates how the value for insurance should be calculated for an order if needed. This query will run and populate the Insurance Amount field for the shipping request.

Freight Control Configuration

Administration > Achieve One > Achieve Freight Control > Freight Control Configuration

This program allows you to enter general defaults for the use of the Freight Control system. It consists of three tabs.
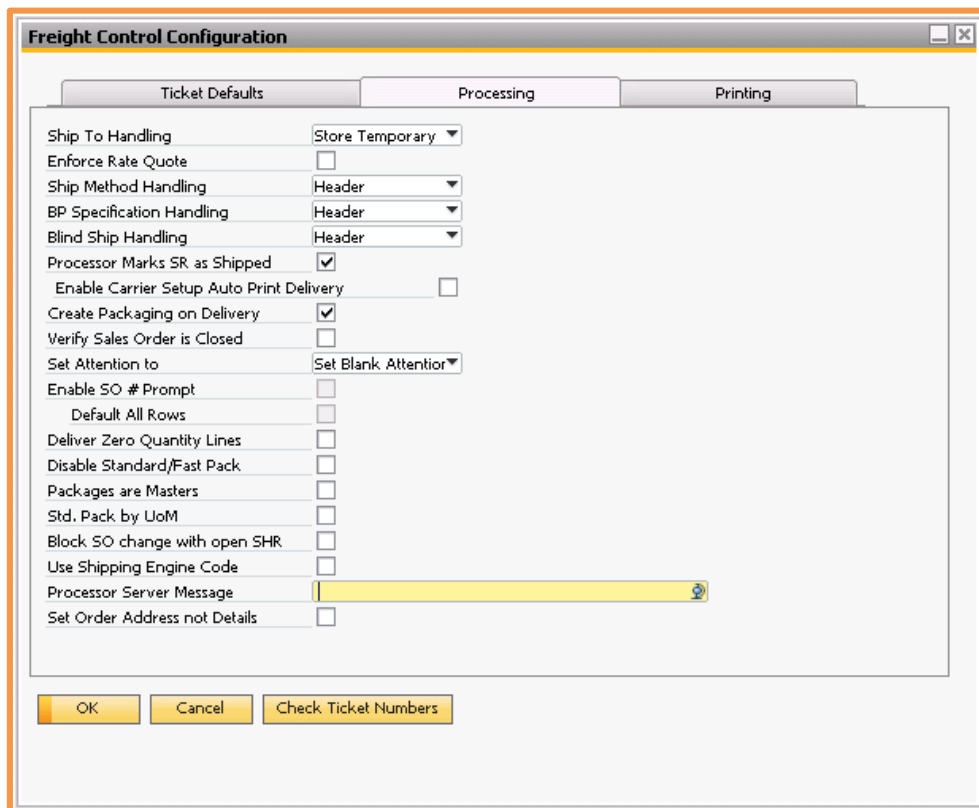

Ticket Defaults Tab

COD Allowed	Check if COD shipments may be entered.
Manifesting Required	Check if a manifest is required for every shipment. In this case, the system will not create Deliveries or change the status to Completed until the shipping requests are manifested.
Allowed Over-ship %	Enter the percentage of over shipment that is allowed, if any.

Auto-Gen Delivery Allowed	Check if the system can automatically generate Delivery documents from the Shipping Request**.**
Auto-Gen Delivery Default	Check if the system should default the auto-generate delivery checkbox as checked when creating a new shipping method.
Auto-Gen Invoice Allowed	Check if the system can automatically generate Invoice documents.
Auto-Gen Invoice Default	Check if the system should default the auto-generate invoice checkbox as checked when creating a new shipping method.
Default Shipping Method	Select the default Shipping Method from the list of methods entered in Business One.
Packaging Required	Check if package designations are required for every shipment. In this case, detailed packaging is required for all items to identify what contents are in which package. If the box is not checked, the system assumes everything is in one package (Package 0) for shipping purposes.
Process Master Packages	Check if you will be processing master packages, which contain smaller packages.
Default Package Type	Select the default Package Type from the list of SAP package types.
Items per left-over package	Indicates how many loose items can be placed into a box after consuming full standard pack quantities. This is for the purpose of calculating a planned number of boxes when rate shopping.
Pick List Packaging	When using the SAP Pick/Pack Manager select how the items should be packed by default when a Shipping Request is created: • No Packaging • Package in Single Package • Package using Standard Packaging
Freight Code for Rate Quote	Select the freight code to be used for the rates quoted. Select from the list of Business One freight codes. Note that this code will also be used when applying actual shipping charges to an invoice if no Additional Charges exist on the Shipping Request.

On the bottom of the screen is a button labeled Check Ticket Numbers. Although rare, sometimes the shipping request numbers can become out of sync in the database tables. If this happens, you can use this button to make sure that all the Shipping Request document numbers are matched up correctly in all of the Shipping Request tables.

Processing Tab

Ship To Handling   Select the method for handling new ship-to addresses:
- Create New – Creates a new address in the BP Master
- Store Temporary – Address is saved for this document only
- None – Do not allow new addresses
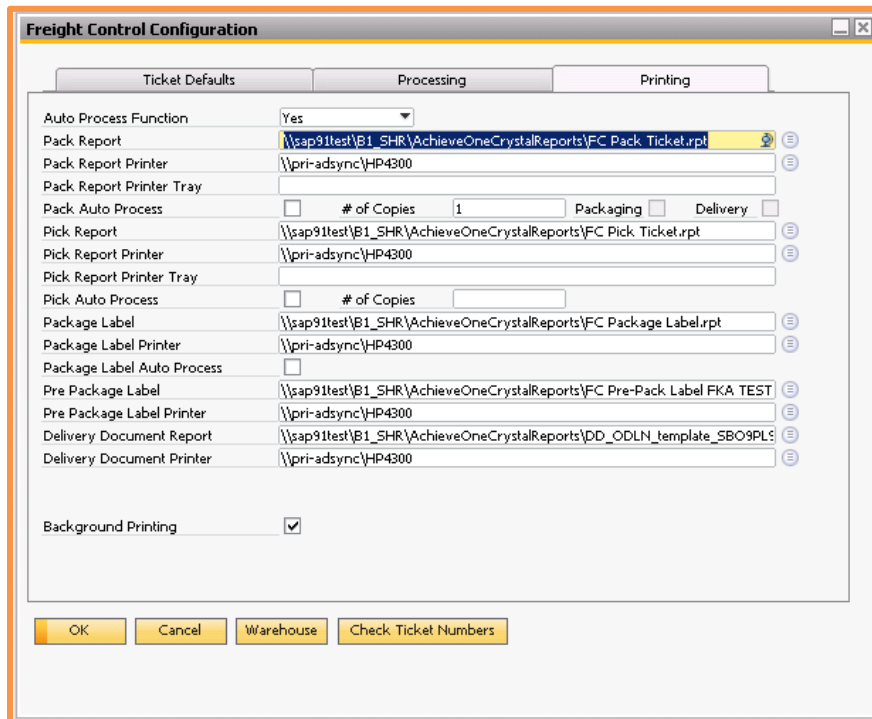
Enforce Rate Quote   Check if users are required to use the Rate Shopping function for all Sales Orders.

Ship Method Handling	Select the way in which the Freight Control program will process the shipping method: • Header: use the shipping method in the Sales Order header (Logistics tab) • Line: use the shipping method on each row of the Sales Order (e.g., different items may have different shipping methods). If the lines differ this will result in multiple shipping requests per Sales Order
BP Specification Handling	Select the way in which the Freight Control program will process the BP Specification: • Header: use the BP Spec in the Sales Order header (Logistics tab) • Line: use the BP Spec on each row of the Sales Order (e.g., different items may have different BP Specifications). If the lines differ this will result in multiple shipping requests per Sales Order
Blind Ship Handling	Select the way in which the Freight Control program will select the blind ship recipient, in the case of double-blind shipments: • Header: use the blind ship recipient found in the Ship-to Information in the customer's BP Master • Line: use the blind ship recipient on each row of the Sales Order (e.g., different items may have different recipients). If the lines differ this will result in multiple shipping requests per Sales Order
Processor Marks SR as Shipped	Check if the Achieve One Server Processor should change Shipping Requests to the Shipped status automatically once they are in the Shipment Info Received status.
Enable Carrier Setup Auto Print Delivery	Check this box if you want to allow the option to automatically print delivery documents per carrier.
Create Packaging on Delivery	Check if you wish the system to create standard SAP Packaging information when Deliveries are added.
Verify Sales Order is Closed	Check if you wish the system to close Sales Orders when all lines have been copied to Deliveries even if a freight charge remains on the Sales Order.
Set Attention To	Select how you would like to set the Attention To field when transmitting information to the carrier computer: • Set Blank Attention to Address Code • Do Not Set

- BP Default Contact
- Sales Order Contact

Enable SO # Prompt This will add an SO# field to the Shipping Request screen. Users can then enter a Sales Order number into that field and hit tab to automatically bring that Sales Order up on the Select Copy From screen.

Default All Rows When the Enable SO # Prompt is checked and you enter in a Sales Order, when the Select Copy From screen opens up all rows will automatically default as selected if this box is checked.

Deliver Zero Quantity Lines Check this box if you want zero quantity lines on the Shipping Request to be added to the Delivery document.

Disable Standard/Fast Pack Disables the Standard Pack and Fast Pack buttons on the Shipping Request screen.

Packages are Masters If you enable Master Packaging, check this option if you want regular packages to be considered Master Packages as well.

Std. Pack by UoM Check this box if you want to use the Standard SAP UoM and Package Types screen on the Item Master to determine standard packaging instead of the Achieve One created fields on the Item Master.

Block SO change with open SHR Blocks any changes to a Sales Order that has an open Shipping Request linked to it.

Use Shipping Engine Code This is for future functionality.

Processor Server Message This field will indicate which function is creating shipping requests when you have Achieve Warehouse Management. It will be filled in as shipping request are created so that there are not duplicates.

Set Order Address not Details Check this box if you will not be using the standard SAP RDR12 table fields for addresses. It will instead only use the Achieve One Freight Control address fields which can prevent certain errors when the addresses are not in sync.

Printing Tab

Auto Process Function   Select the method for handling forms which are designated for auto-processing:
- Yes – Automatically prints forms
- View – Displays forms on the screen
- Save – Saves each form as a pdf file but does not print or display
- No – Do not allow auto-processing

Pack Report   Enter the path for the report definition of the Shipping Request Pack Report.

Pack Report Printer   Select the printer for Pack Report. The printer definition must exist on the Business One server.

Pack Report Printer Tray   Enter the printer tray for the Shipping Request Pack Report.
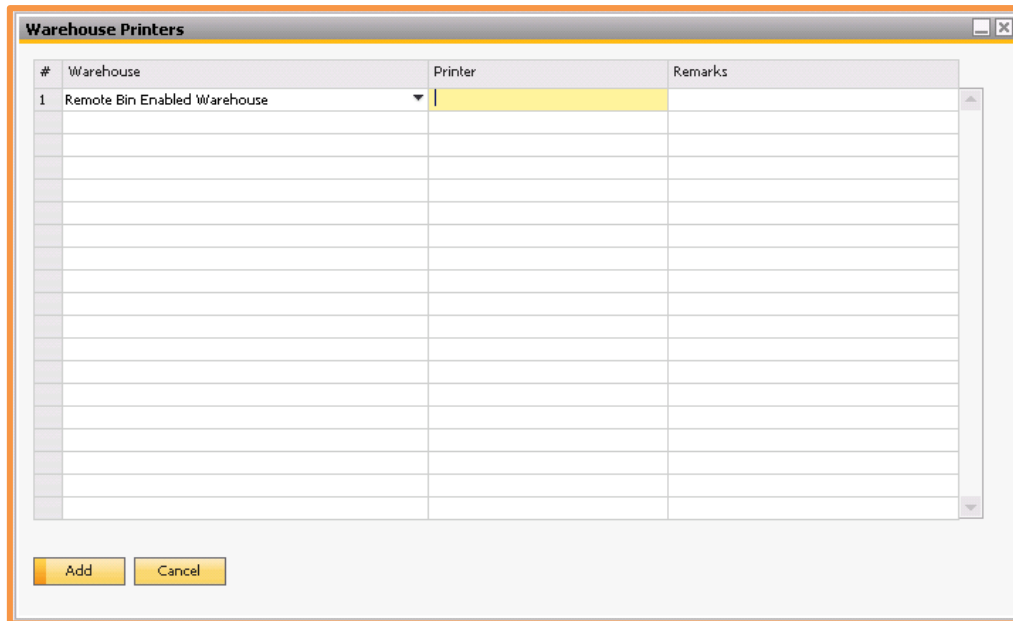
Pack Auto Process   Check this box if you wish the system to automatically print the Pack Report and enter the # of copies to print. If you want it to print once packaging is completed then check the Packaging

box. If you would rather have it print when the delivery is created then check the Delivery box.

Pick Report   Enter the path for the report definition of the Shipping Request Pick Report.

Pick Report Printer   Select the printer for Pick Report. The printer definition must exist on the Business One server.

Pick Report Printer Tray   Enter the printer tray for the Shipping Request Pick Report.

Pick Auto Process   Check this box if you wish the system to automatically print the Pick Report and enter the # of copies to print.

Package Label   Enter the path for the report definition of the Package Label.

Package Label Printer   Select the printer for Package Labels. The printer definition must exist on the Business One server.

Package Label Auto-Process   Check this box if you wish the system to automatically print the Package Label as each package is scanned.

Pre Package Label   Enter the path for the report definition of the Pre Package Label. This label would be printed before packing an order. A window will open and ask the user how many labels to print. Note: generally a company will use either Package Labels or Pre Package Labels, not both.

Pre Package Label Printer Select the printer for Pre Package Labels. The printer definition must exist on the Business One server.

Delivery Document Report   Enter the path for the report definition of the Delivery Ticket. This is the report that will be printed if you are using the Carrier Auto Print Delivery option that was mentioned earlier.

Delivery Document Printer Select the printer for the Delivery Ticket. The printer definition must exist on the Business One Server.

Background Printing   Check if you wish the print processing to take place in the background, so that you can continue to work while the printing is taking place.

Note: If the fields for printers are left blank in the selections above, then the system will print to each user's default printer.

There is also a Warehouse button on the bottom of the screen that will allow you to set the default printer per Warehouse location.
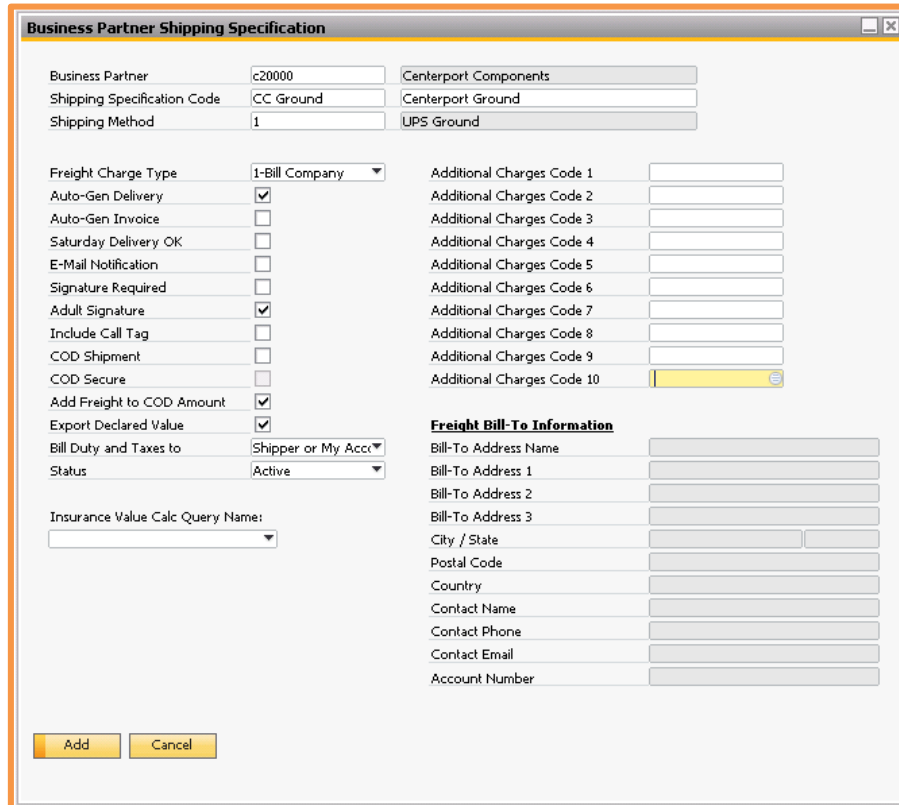

BP Shipping Specifications

Administration > Achieve One > Achieve Freight Control > BP Shipping Specification

This program may be used to enter unique specifications for a particular customer when using a particular shipping method. You may wish to enter these specifications as a result of contract agreements with certain customers, credit issues, or other reasons.

The BP Specification will override the normal settings for the indicated shipping method; it is not necessary except in cases where exceptions from the defaults are desired.

Note: The BP Specifications may be assigned to a Business Partner record, in which case it will apply to all Ship-to addresses for that BP, or it may be applied to specific individual Ship-to addresses. BP Specifications applied to Ship-to addresses will override the BP Specification on the BP Master.

Enter the following information:

Business Partner   Enter the BP code for the customer

                              Note: It is not necessary to enter a BP code in the Shipping Specification. You may wish to attach the same specification to multiple customers.

Shipping Specification   Enter a code and description for this specification (30 characters
Code and Description   for the code, 100 characters for the description).

Shipping Method   Select the shipping method for this specification.

Freight Charge Type   Select the charge type:
                              • Bill Company
                              • Bill Customer
                              • Bill Ship-To
                              • Bill Consignee
                              • Bill Third Party

Auto-Gen Delivery	Check if Delivery documents are to be automatically generated during the Shipping process.
Auto-Gen Invoice	Check if Invoice documents are to be automatically generated during the Shipping process.
Saturday Delivery OK	Check if the Saturday delivery is permitted for this specification.
Email Notification	Check if the email notification is to be provided for this specification.
Signature Required	Check if a signature is required for this specification.
Adult Signature	Check if an adult signature is required for this specification.
Include Call Tag	Check if call tags are to be generated for this specification.
COD Shipment	Check if shipments under this specification are to be sent COD.
COD Secure	If the COD Shipment is selected, check if the COD shipment is secure.
Add Freight to COD Amount	Check if you wish to add the freight charge to the COD amount, so the recipient will pay both together on delivery.
Export Declared Value	Check if you want to export the declared value from the shipping request.
Bill Duty and Taxes To	Select the method for billing Duty and taxes on international shipments: • Shipper or My Account (shipper number) • Receiver • Third Party • Consignee Billed
Status	Select the current status of this specification: • Active • Disabled
Insurance Value Calc Query Name	Select a query from the dropdown list of User Queries that indicates how the value for insurance should be calculated for an order. This query will run and populate the Insurance Amount field for the shipping request.

Additional Charges 1 through 10	Select one or more Additional Charges to be calculated with this shipping specification. If no Additional Charges are specified, the carrier's actual freight charge will be used.
Freight Bill-To Information	In the case that the Freight Charge Type is set to "Third Party" these fields will be available. Enter all information regarding the third party individual or company that will be billed for the freight charges.

Business Partner Master Setups

Business Partners > Business Partner Master Data

Achieve Freight Control adds a number of fields to the Business Partner Master. The fields may be seen on the User-Defined Fields panel, and also in the Addresses tab for Ship-To Addresses.
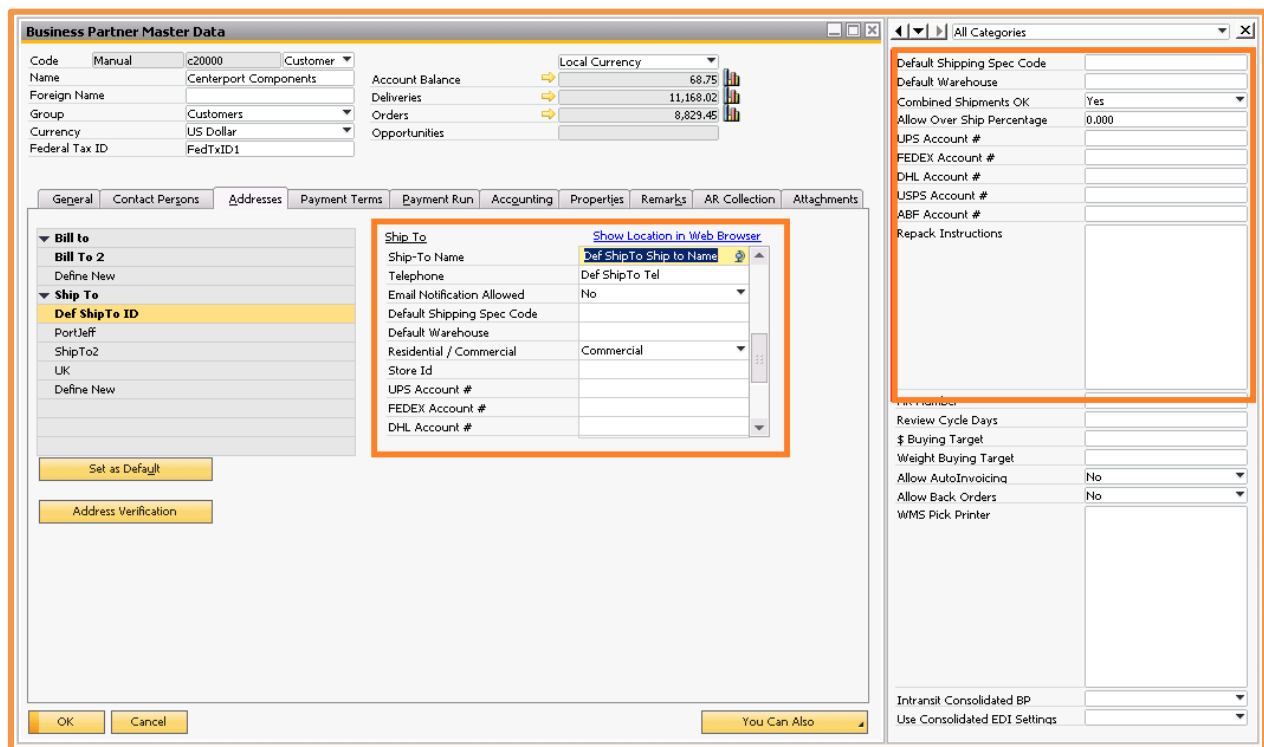
User-Defined Fields panel

Enter the following in the Business Partner User-defined Fields panel:

Default Shipping Spec Code	Enter the BP Shipping Specification for this customer if applicable.
Default Warehouse	Enter the default warehouse for this customer.
Combined Shipments OK	Select "Yes" or "No" to indicate whether it is permitted to combine multiple Sales Orders into a single shipping request for this customer.
Allow Over Ship Percent	Enter the percentage of over ship to allow or leave blank to accept the system default.
UPS Account #	Enter the customer's UPS account number. This will be used when billing UPS charges to the customer.
FEDEX Account #	Enter the customer's FedEx account number. This will be used when billing FedEx charges to the customer.
DHL Account #	Enter the customer's DHL account number. This will be used when billing DHL charges to the customer.
USPS Account #	Enter the customer's US Postal Service account number. This will be used when billing USPS charges to the customer.
ABF Account #	Enter the customer's ABF account number. This will be used when billing ABF charges to the customer.
Repack Instructions	Enter text in here if you would like it to pop up when repacking in the Shipping Request.

Ship-To Addresses

Enter the following information in the Ship-To addresses.
Note: In cases where the same fields exist in both the Business Partner and Ship-To areas, the Ship-To fields will be checked first. If data is found there, it will be used. If the field is blank then the data from the Business Partner will be used.

Ship-To Name	This will be entered into the Ship-To Address Name field when a Shipping Request is created.
Telephone	If there is no default telephone number on the BP then this will be entered into the Contact Phone field when a Shipping Request is created.
Email Notification Allowed	If marked No, then email notifications will not be allowed for this Ship To. If marked Yes then email notifications will be allowed for this Ship To. Note, an email may still not be sent depending on the settings on the Shipping Method and/or Shipping Spec.
Default Shipping Spec Code	Enter the BP Shipping Specification for this Ship-To if applicable.
Default Warehouse	Enter the default warehouse for this Ship-to.
Residential/Commercial	Select "Residential" or "Commercial" for this address.
Store ID	Can be used to identify locations when using Third Party Integrations such as Webstores, etc.
UPS Account #	Enter the address's UPS account number. This will be used when billing UPS charges to the ship-to.
FEDEX Account #	Enter the address's FedEx account number. This will be used when billing FedEx charges to the ship-to.
DHL Account #	Enter the address's DHL account number. This will be used when billing DHL charges to the ship-to.
USPS Account #	Enter the address's US Postal Service account number. This will be used when billing USPS charges to the ship-to.
ABF Account #	Enter the address's ABF account number. This will be used when billing ABF charges to the ship-to
Blind Ship Level	Select the appropriate level for blind shipping. This setting controls what the recipient will see as the Ship-From address:

> *Null* No blind shipping is used; the recipient will see the shipping company's name and address.

Blind		The recipient will see the customer's name and address rather than the shipping company.
Double Blind		The recipient will see a third-party's name and address rather than the shipping company or the customer.

Blind Parent Address   Enter the address to use in the case of a double blind shipment. This must be the code for a different ship-to address from the business partner.
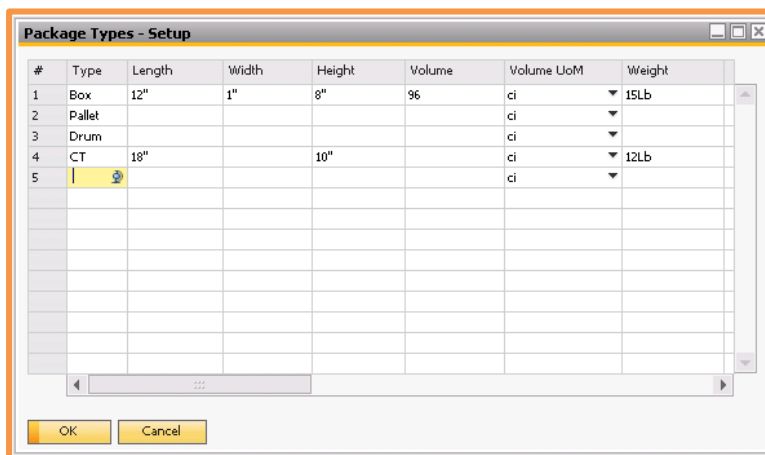
Send PO Number to SR   Select "Yes" or "No" to indicate whether to include the customer's PO number as the Address 3 line on the shipping request.

Email Address   Enter the appropriate email address for this Ship-To. This will be used for email notifications.

Package Code Setup

Administration > Setup > Inventory > Package Types

Achieve Freight Control uses the standard SAP Packages. These codes will be used to create standard packaging and for the packaging features within the Shipping Request.

Package Types - Setup

#	Type	Length	Width	Height	Volume	Volume UoM	Weight
1	Box	12"	1"	8"	96	ci	15Lb
2	Pallet					ci	
3	Drum					ci	
4	CT	18"		10"		ci	12Lb
5						ci	

OK   Cancel

Item Master Setups

Inventory > Item Master Data

Achieve Freight Control adds several fields to the Item Master that have to do with packaging. The fields may be seen on the User-Defined Fields panel or on the Sales Data tab.

In addition to these fields, it is important to enter the item's dimensions and weight in the Sales Data tab. This information is used in Rate Shopping and other aspects of the Freight Control system. Note that if even one item on an order does not have weight, Rate Shopping cannot be completed for that order.

Enter the following information:

Standard Pack Quantity	Enter the number of units per standard pack for this item.
Standard Pack Allowed	Select "Yes" or "No" to indicate whether the system should use standard packs in calculating the number of boxes in a shipment.
Package Type Code	Select the package type code for this item.
Master Pack Type	Select the master package type code for this item
Master Pack Quantity	Enter the number of standard packs per master pack for this item.
Master Pack Consolidation	Select "yes" or "No" to indicate whether the system should consolidate this item into the same master package as other like items that have the same Master Pack Type and Quantity when packing.

Note: Depending on your settings in the Freight Control configuration screen for "Std. Pack by UoM" you may use the standard SAP UoM and Package Type screen instead of the Achieve One fields for Standard packing. However, regardless of how that option is set you can still use the Achieve One fields for Master Packaging.

Procedures

The following sections describe the procedures used in Achieve Freight Control.

Summary of Procedures

The following is a summary of the Business One and Freight Control procedures. Each element is discussed in detail in the remaining sections of this manual.
Note: *Procedures would be somewhat different if you are using **Achieve Warehouse Management** in conjunction with **Achieve Freight Control.***

- Enter a Sales Order

- (Optional) Use Rate Shopping to estimate freight charges

- (Optional) Copy the Sales Order to a Reserve Invoice if payment is required in advance

- (Optional) Use Pick & Pack Manager to create and print pick ticket

- Create the Shipping Request

- Create from button on Sales Order, Reserve Invoice, or Pick Ticket screen

        OR

- Create from Shipping Request screen by copying from Sales Order, Reserve Invoice, or Pick Ticket

- (Optional) Print pick ticket from Shipping Request. This may occur automatically based on system settings.

- Pick and pack the order

- Enter package information in Shipping Request

- Scan items as packed

        OR

- Use options on Shipping Request Packages tab

- Use the carrier's system to weigh and label the packages, and create the manifest
- (Optional) Print packing list from Shipping Request. This may occur automatically based on system settings.

- From the Shipping Request, create the Delivery and/or Invoice

- Mark the Shipping Request complete

Options on Business One Documents
Business One Sales Orders, Reserve Invoices, and Pick Tickets have additional options when using *Achieve Freight Control*.

"Ship" and "Rate Shop" Buttons

Sales Order and A/R Reserve Invoice

"Ship" and "Rate Shop" buttons appear on the screen.

Note: If rows have different warehouses, delivery dates, shipping methods, shipping specs or ship-to's then multiple Shipping Requests may be created.

Pick Ticket

"Copy to Shipping" button appears on the screen.

Note: If multiple orders are included on the Pick List, the system will create multiple Shipping Requests. Orders may be combined if they have the same customer, warehouse, delivery date, shipping method, shipping spec and ship-to.

Ship-To Addresses

As always, it is very important to include the correct Ship-To address on Sales Order documents. Standard SAP procedures allow you to set the Ship-To on the Logistics tab in several ways:

- The customer's default Ship-To automatically appears on the document
- Select an alternate Ship-To from the drop-down list
- Use the 3-dot button to enter a new Ship-To address

While in the Address Details screen you will see a button labeled Address Verification. You can click this button to have the system connect to the carriers behind the scenes and verify the address. If it finds a better alternate address it will suggest it. Note, this requires Rate Shop credentials to be entered in the Carrier Set-up like we saw earlier.

Achieve Freight Control provides several enhancements to this procedure.

First, based on the options in the Freight Control Configuration, you may choose to automatically save a new Ship-To address as a permanent record in the Business Partner or you may choose to save it only temporarily on this Sales Order.

The User-Defined Fields panel shows that there are many UDF's that have been added to the Sales Order for use by the Freight Control system. The fields relating to the "Temporary" address are used to store whatever address is to be used for shipping purposes. The system will automatically copy the selected or edited address selections from the Logistics tab into these fields.

Note: The "Temporary Ship-to Attention" field may be used to provide the Attention-To name that is transmitted to the shipping carrier system. You may use this field even if there is no change in the Ship-To address on the order.

Additional Fields on Sales Orders

UDF Panel
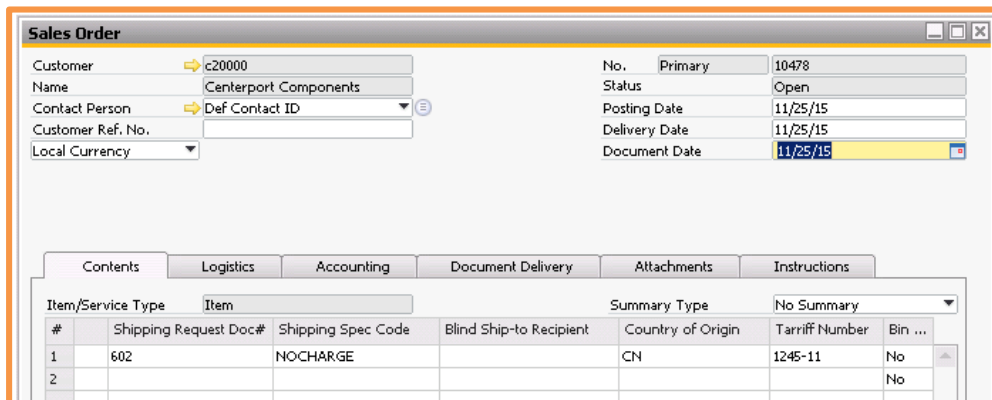
A number of fields in the UDF panel will display data that is derived from the Ship-To address on the BP Master; for example the Shipping Spec Code, Warehouse, and Blind-ship information. If desired, you may edit these fields to override the default information if a variation is required for this particular order.

Similarly, the Third-Party information is derived from the BP Shipping Specification, but may be added, removed or changed as needed for the particular order.

Logistics Tab

The Logistics tab includes a field for the BP Specification. This will default from the BP Master or the Ship-To record if available. It may be changed for this order if necessary.

Sales Order Rows

Sales Order rows contain fields for the Blind Ship-To Recipient and the Shipping Spec Code. Depending on the settings in the Company Defaults these fields may be used to provide alternative information relative to the specific line items on the order instead of the document-wide settings on the Logistics tab and UDF panel.

After a Shipping Request has been created, the SR Document Number will be displayed on the Sales Order row.

Rate Shopping

The Rate Shopping feature allows you to view possible freight charges for various shipping methods. You can see all methods for a carrier and compare the rates for a specific shipment. This feature is particularly useful for companies where orders are placed while a customer is on the telephone with the operator, so that you can quote and compare estimated freight charges for the order and allow the customer to select the shipping method.

Note: Rate Shopping is a service offered by the carrier and you must subscribe to their service. The Rate Shop license, user ID, and other information must be entered in the Carrier Setup as we saw above.

Once an order is entered, you may click on the Rate Shop button. The system determines the carrier for the shipping type entered on the order. If Rate Shopping is enabled for that carrier a list of the available shipping methods for that carrier is displayed. The charge for each method is shown for the items on the order as it would be delivered to the ship-to address. If Rate Shopping is also available for an alternate carrier you may select it by means of the carrier buttons at the bottom of the screen.

UPS Freight Quote

Select	ShippingMethod	QuotedServiceLevel	BaseCharge	TotalCharge	DaysToDelivery
☐	UPS Ground	Ground	25.08	22.22	N/A
☑	UPS Next Day Air	Next Day Air	164.43	164.43	1
☐	3rd Party UPS Ground	Ground	25.08	3.95	N/A
☐	UPS Ground IW Rate Shop	Ground	25.08	0.00	N/A
☐	UPS Ground Decalred Value	Ground	25.08	22.22	N/A
☐	EVERYTHING SHIP METH	Ground	25.08	0.00	N/A
☐	UPS Ground Free Freight	Ground	25.08	25.08	N/A

Package Information

Package 1 1 lbs, Package 2 1 lbs, Package 3 1 lbs

Select   Quote   Cancel   UPS   FedEx

Note: The screen displays both the base carrier charge and also the total charge that will be billed to the customer as calculated using the applicable freight control additional charges.
To accept one of the shipping methods shown, click on the checkbox for that method then click either "Select" or "Quote". If you choose "Select" the shipping type on the order will be changed to match the new shipping method; if you choose "Quote" the shipping type will be changed and also the freight charge will be added to the order.

Note: *The use of this feature requires that all items have weights entered in the Item Master. If any of the items do not have a weight you will see a message that freight charges cannot be calculated. Similarly if the combined weight of the items on the order is greater than the maximum weight allowed by the carrier, a message to that effect will be displayed and Rate Shopping cannot be completed.*

Partial Shipments

Business One provides the ability to allow or refuse partial shipments based on options in the Business Partner Master data and/or the Sales Order.

The Payment Terms tab of the business partner master record may designate whether to allow partial deliveries of entire sales orders or of individual line items on the sales order.

The Logistics tab of the Sales Order indicates whether partial delivery is allowed for the entire order (e.g., only ship some items if others are backordered) or if the order must be shipped complete. The field defaults from the customer master but may be changed by the user

Each row of the Sales Order contains a checkbox to indicate if partial delivery is allowed for the row (e.g., only ship the available quantity of the item if the full amount is not in stock). The field defaults from the customer master but may be changed by the user.

Achieve Freight Control follows the requirements of the system regarding partial deliveries. Regardless of the method of creating the Shipping Request, the system will not do so for an order if the Logistics tab is not marked "Allow Partial Delivery" and all line items and quantities are not selected and if the full quantity of all items is not available in the warehouse.

Similarly, the system will not permit an item to be included on a Shipping Request if the row does not have the Partial Delivery box checked and all quantities are not selected and if there is not sufficient quantity of the item to ship the full amount.

If any of these situations occur, you will receive a message indicating that the order or row is not allowed for partial delivery and that the Shipping Request cannot be created. In the case of a row that must be shipped complete you can choose to create the Shipping Request without that row if necessary.
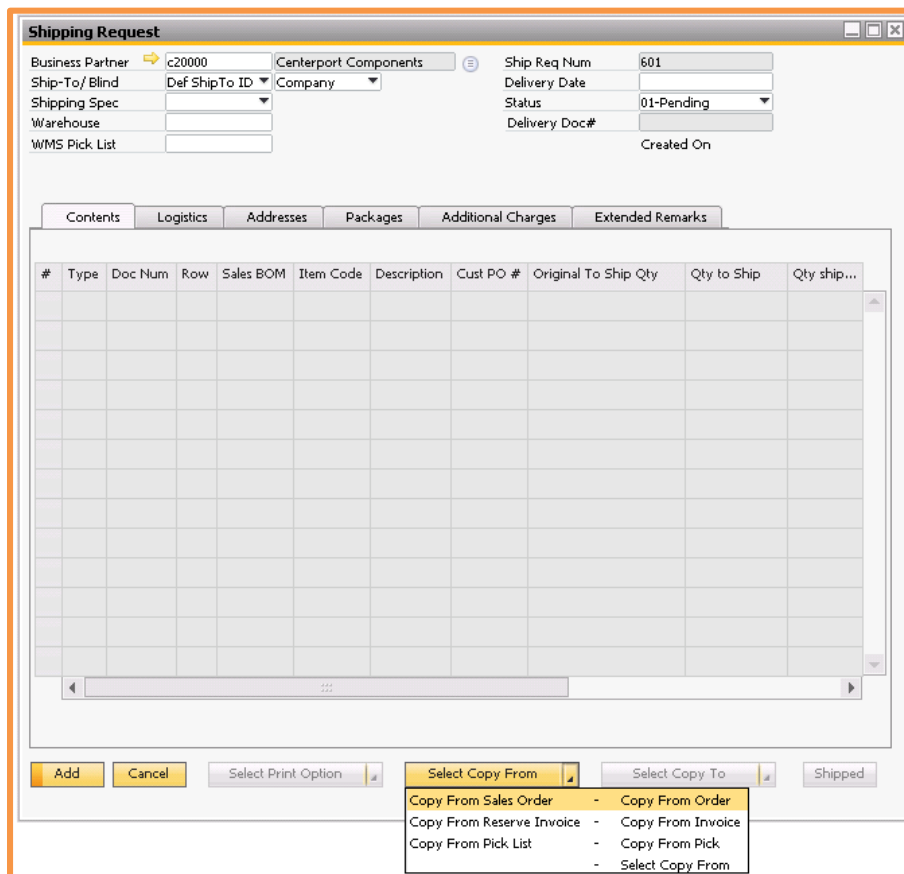
Shipping Request

Achieve One > Achieve Freight Control > Shipping Request

The Shipping Request screen is the main focus of the Freight Control system. It contains all information about each shipment. It may be created from Sales Orders, Reserve Invoices, or Business One Pick Tickets, and it can be used to create Deliveries or A/R Invoices. It may also be used to communicate with a carrier's shipping system for complete control and information about each shipment.

Entering a Shipping Request
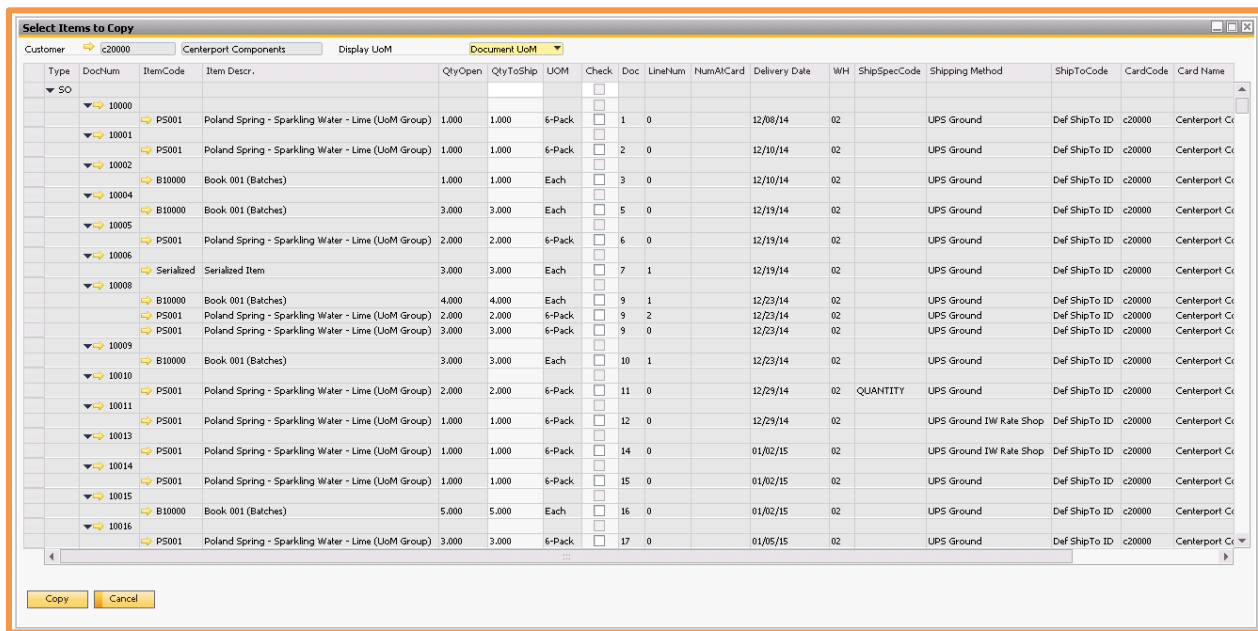
You may create a Shipping Request by using the "Ship" or "Copy to Shipping" button on the Sales Order, A/R Reserve Invoice, or Pick Ticket screen. Alternatively you may open the Shipping Request document screen directly to create a Shipping Request.

Start by entering a customer code in the Business Partner field. You then are able to copy from either a Sales Order, Reserve Invoice, or an SAP Business One Pick List. Click on the "Select Copy From" button, and choose the appropriate document type to display the available documents to copy.

A screen will open and display a list of documents of the type selected from the customer that was entered in the Shipping Request. The list includes detail of the items on each document including the ordered quantity and shipping method. There is also an option at the top to see the quantities in either the Document UoM or the Inventory UoM.

Indicate which items are to be shipped by clicking on the checkbox in the center of the row. Please note the following:

- You may select items from multiple documents provided that the warehouse, ship-to code, delivery date, shipping spec and shipping method are the same (the system will warn you if they do not match)

- Click the checkbox on the row with the document number if you want to select all items from that document

- You may change the quantity to ship of any item to reflect the quantity that will is be shipped on this Shipping Request

When all selections are complete, click on "Copy". The items are then copied to the Contents tab of the Shipping Request.

Note: *Some of the header fields are copied from the original document or default from the Business Partner record.*

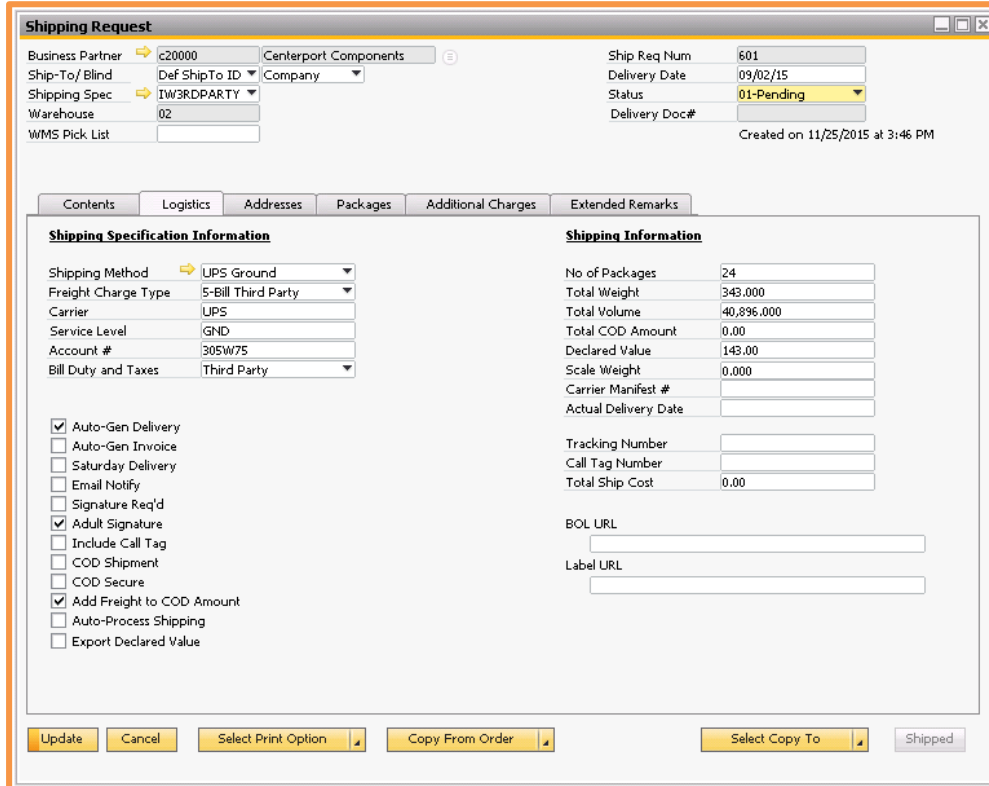The document status is automatically set to "Pending". Click on "Add" to create the Shipping Request.

Contents Tab

While we are on the Contents tab let's take a quick look at the columns:

Shipping Request Document Row number.

Type   Document Type for this row that was copied to the Shipping Request.

Doc Num   Document Number for this row that was copied to the Shipping Request.

Row   Line number for this row of the document that was copied to the Shipping Request.

Sales BOM   In the case of a Sales BOM item, the parent item code is shown.

Item Code   The item code for this line.

Description   The item description for this line.

Cust PO #   The Customer PO number for this row that was copied to the Shipping Request (if available).

Original Qty to Ship   The quantity of this row that was originally copied to the Shipping Request.

Qty to Ship   The quantity of this row that is to be packed and shipped for the Shipping Request. This field is editable and may be changed if necessary.

Qty Shipped   The quantity of this row that is actually shipped upon completion of the Shipping Request based on packaging.

UoM Code   The UoM code for the item on this row as it was copied to the Shipping Request.

UoM Conversion   The conversion quantity to convert the displayed UoM to the Inventory UoM. If the UoM code for the item on this row is the same as the inventory UoM then the value will be 1.

Inv Qty to Ship   The quantity to ship field displayed in the Inventory UoM.

Inv Qty Shipped   The quantity shipped field displayed in the Inventory UoM.

Logistics Tab

The Logistics tab contains information about the shipping specifications and other shipment information. All of the fields on the left side of the screen default from the shipping specification, shipping method or freight control configuration defaults. The fields on the right are derived from the items on the shipment or from the carrier system.

The following information is included on this tab:

Shipping Method	The shipping method indicates the carrier, service level, and other elements of the shipment.
Freight Charge Type	The freight charge type indicates how the freight charges will be billed by the carrier:

- Bill Company – the carrier bills the shipping company
- Bill Customer – the carrier bills the customer who placed the order
- Bill Ship-To – the carrier bills the destination ship-to
- Bill Consignee – the carrier bills a stated consignee

	• Bill Third Party – the carrier bills a different company as indicated in the Shipping Specification
Carrier/Service Level	These fields are entered automatically based on the Shipping Method of the base document.

Account #	The account number of the company that will be billed is entered. This is the carrier's account number for that company based on the Freight Charge Type setting:
	  • Bill Company – use account number in the carrier setup
	  • Bill Customer – use account number in the BP Master
	  • Bill Ship-To – use account number in the BP Ship-To address
	  • Bill Consignee – manually enter the account number
	  • Bill Third Party – use account number in the Shipping Specification

Bill Duty and Taxes	Select the default type of billing for duty and taxes. Choose from:
	  • SHP – Shipper or My Account (shipper number)
	  • REC – Receiver
	  • TP – Third Party
	  • CB – Consignee Billed

Checkboxes	See descriptions of these checkboxes in the Shipping Method setup section. They may be changed as needed for this shipment.
No. of Packages	The number of packages is entered after packing is completed.
Total Weight	The total weight is calculated as the total of the item weights based on information in the Item Master plus the tare weight of the packages.
Total Volume	The total volume is calculated as the total of item volumes based on information in the Item Master.
Total COD Amount	The system adds the prices of the items plus additional charges (if the option for Add Freight to COD is checked) for the total COD amount.
Declared Value	The declared value is calculated from the total selling price of the items on the Shipping Request or from the Insurance Value query set in the Shipping Spec/Shipping Method.
Scale Weight	The scale weight is entered from the carrier shipping system after all of the packages are weighed on a scale.
Carrier Manifest #	The carrier's manifest number is entered from the carrier shipping system. Note that manifesting is not required by *Achieve Freight Control*.

Actual Delivery Date	The system will enter the date when the Delivery document is created.
Tracking Number	The master tracking number is entered from the carrier shipping system. Note that individual package tracking numbers can also be entered on the Packages tab.
Call Tag Number	The call tag number is entered from the carrier shipping system.
Total Ship Cost	The total shipping cost is entered from the carrier shipping system. This is the amount the carrier will bill.
BOL URL	For ABF only: A URL supplied by ABF which can be used to print the Bill of Lading for the shipment.
Label URL	For ABF only: A URL supplied by ABF which can be used to print the labels for the shipment.

Addresses Tab

The Addresses tab contains the ship-to, ship-from and billing addresses. The information will appear automatically but may be edited by the user.

Ship-To Information – this is the ship-to address from the sales order. You can also click on the Address Verification button like we saw earlier, to verify the address.

Ship-From Information – this is the information that the recipient will see indicating who the shipper is. It is determined as follows:

- If the "blind ship level" on the ship-to record is "Null", the Ship-From information will be the Shipping Request Warehouse's name, address, contact, and telephone number taken from the Warehouse setup and Company Details in SAP.

- If the "blind ship level" on the ship-to record is "Blind", the Ship-From information will be the customer's name, bill-to address, default contact, and telephone number taken from the customer on the sales order.

- If the "blind ship level" on the ship-to record is "Double-Blind", the Ship-From information will be the name and address of the ship-to address listed as the "Blind Parent" on the ship-to record.
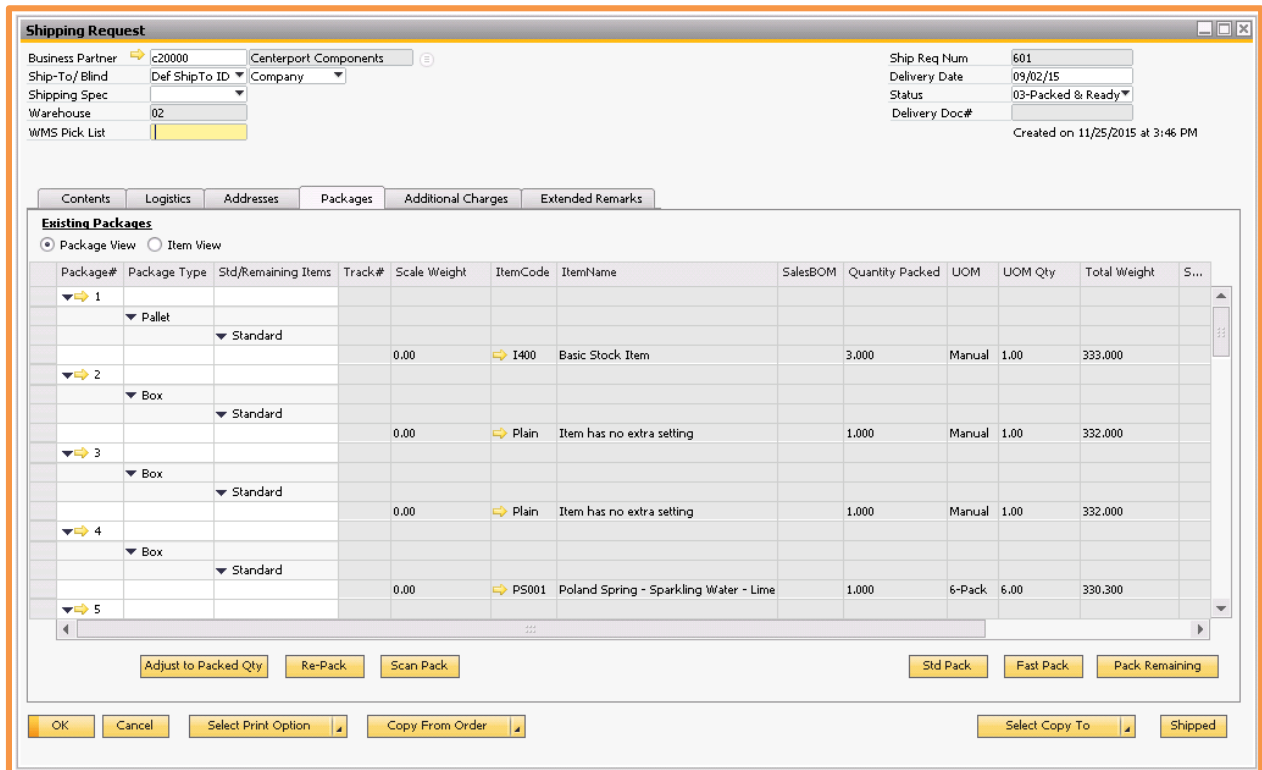
Bill-To Information – this is the name and address of the company that will be billed by the carrier for the freight charges on the shipment. It is determined by the setting on the Shipping Method or Shipping Specification.

- Bill Company – The name and address of your company will be shown.

- Bill Customer – The name and address of the customer will be shown.

- Bill Ship-To – The name and address of the ship-to will be shown.

- Bill Consignee – The name and address of the consignee must be entered manually by the user.

- Bill Third Party – The name and address of the third-party entity who will pay for shipping is taken from the Shipping Specification.

Packages Tab

The Packages tab of the Shipping Request is used to review and manage the packages used in the shipment. You may view previously packed items either by package or by item.

This tab is also used to manage the packing process. Several options exist to create packages including Standard Packing, Fast Packing and Scan Packing.

If packaging is not required, the shipment is automatically "Fast Packed" when it is added, with all items "packed" in a single package (package 0). If this is not the desired packaging for your Shipping Request or if for any reason you need to pack the shipment again, you can click on "Re-Pack".

If packaging is required, the system does not automatically assign any packages. You may use one of the packaging options on this tab to assign items to packages.

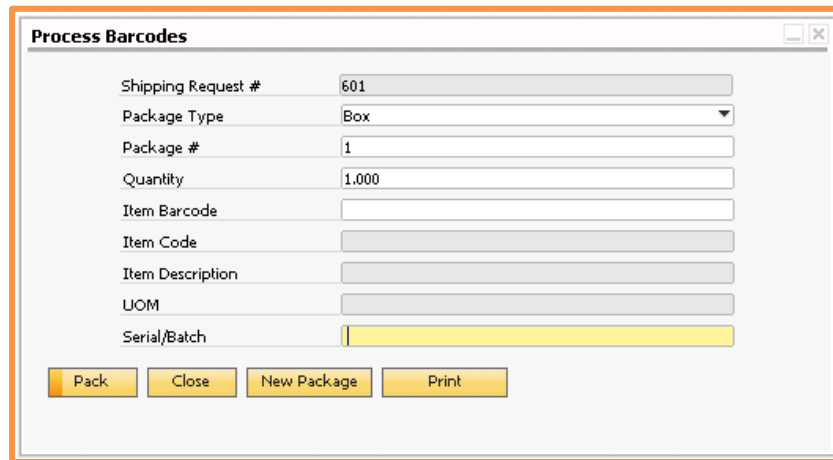**The following process is used with the *Fast Pack* option:**

- The system checks each item to determine whether it is set to use standard packs and what the pack quantity and package code are. Packages will be assigned accordingly.

- Each package will contain the maximum quantity of the item specified in the item master up to the quantity of the item in the shipment. Remaining quantities will be considered "items remaining". For example, if the package quantity for an item is four but the shipped quantity is 10, the system will create two packages of four each with two items remaining.

- Items that do not use standard packaging, cannot be standard packed or do not have the pack size and codes entered, will be included in the "items remaining" group.

- When the system is done packing all "items remaining" will be packed into a single left-over package.

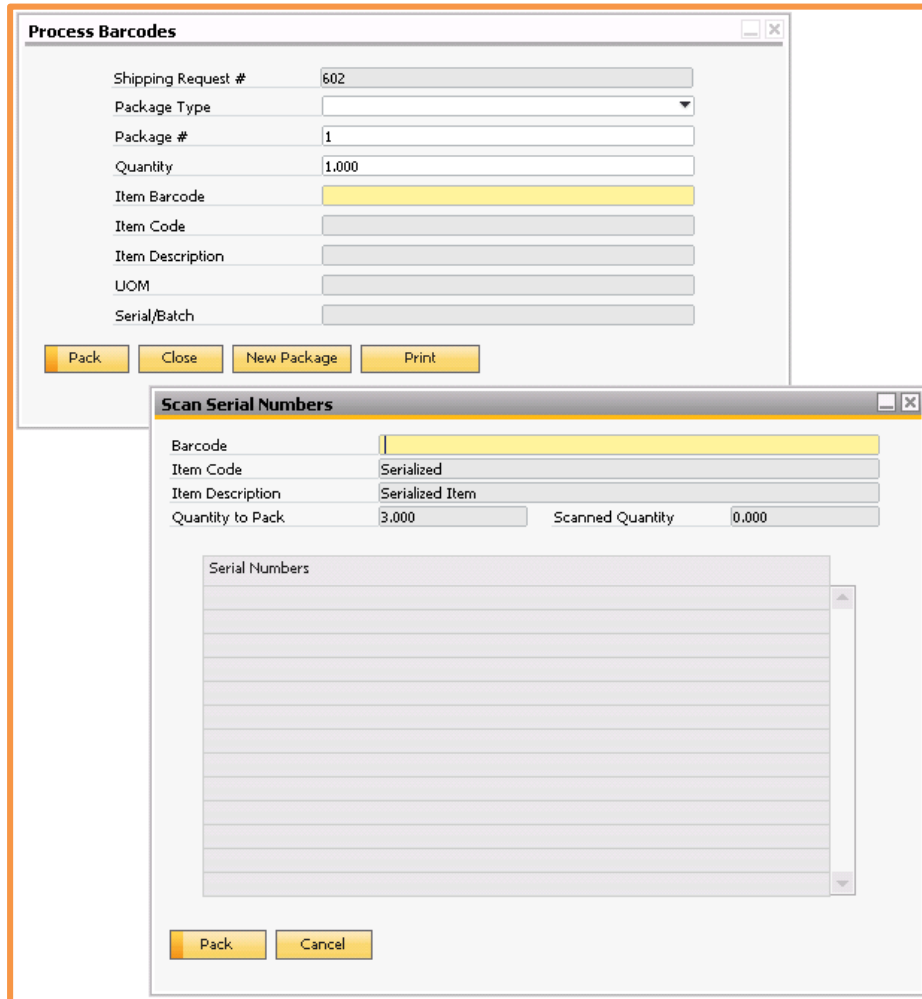**The following process is used with the *Standard Pack* option:**

- The system checks each item to determine whether it is set to use standard packs and what the pack quantity and package code are. Packages will be assigned accordingly.

- Each package will contain the maximum quantity of the item specified in the item master up to the quantity of the item in the shipment. Remaining quantities will be considered "items remaining". For example, if the package quantity for an item is four but the shipped quantity is 10, the system will create two packages of four each with two items remaining.

- Items that do not use standard packaging, cannot be standard packed or do not have the pack size and codes entered, will be included in the "items remaining" group.

- When the system is done packing, all "items remaining" will be left un-packed for the user to manually complete packaging.

The following procedure is used in the *Scan Pack* process:

- The "Process Barcodes" screen is displayed. Although entries may be made by means of the keyboard, it is more common to use a scanner to enter the data for each field.

- Select the Package type for the first package.

- Enter the quantity of the first item and then the barcode and click on "Pack".

  o For batch items, enter in the quantity of the first batch that you want to pack into this package then enter the batch number in the last field. If there is more than one batch of the same item, enter the quantity of the second batch and its batch number; continue until all of the batches have been entered for this packages.

  o For serial items, if the total quantity of the item is one, then enter that serial number in the last field. If the total quantity of the item is greater than one then you have two options. The first is to enter each serial number with a quantity of 1. The second is to enter the total quantity and click on "Pack". That will open a new window to scan multiple serial numbers at once. Enter all of the serial numbers for the item then return to the "Process Barcodes" screen.
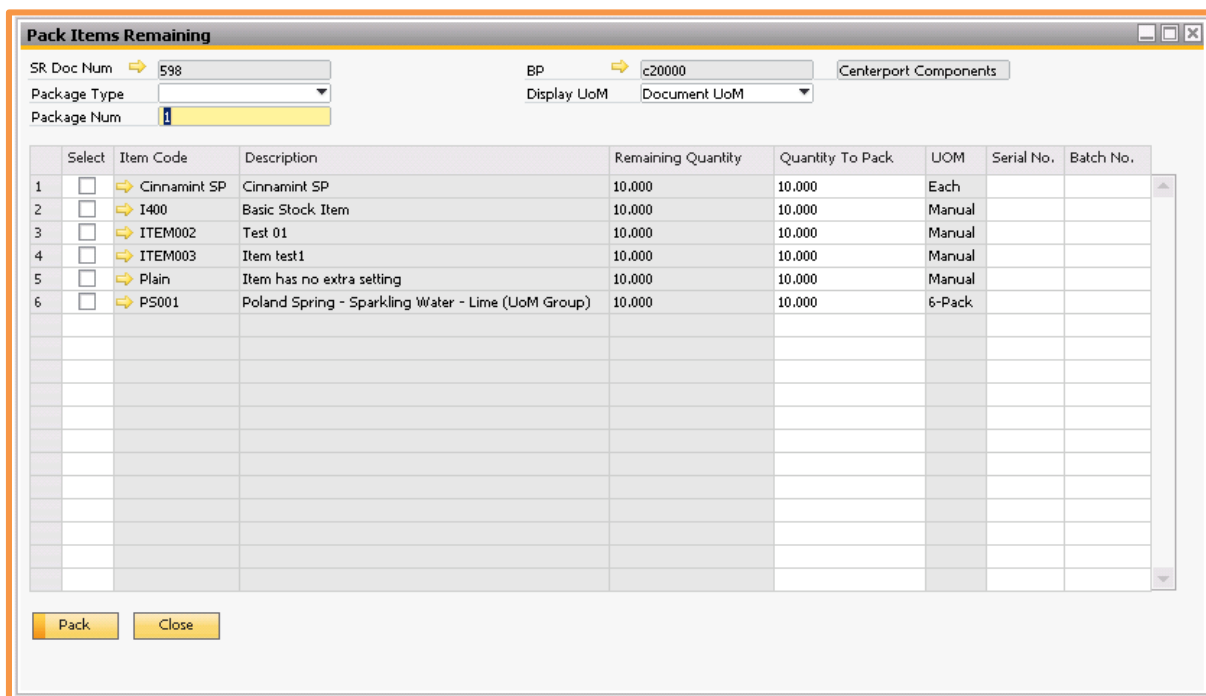
- Continue entering items until the first package is completed. Then click on "New Package" and enter the information for the next package.

- Continue until all items in the shipment have been packed.

The following procedure is used in the *Pack Remaining* process:

- Enter in the package type and number.

- Choose with UoM to display the quantities in, Document or Inventory.

- Check the boxes of the items to pack in this current package.

- Enter the quantity to pack for each item selected.

- If the item is serialized or batched enter in the serial/batch numbers to pack.

- When all items for this package have been packed click on the Pack button.

- If there are items still remaining to pack it will increment the package number and allow you to continue packing.

- If there are no items remaining to pack it will give you a message saying so and close the pack remaining screen.

There are also other buttons at the bottom of the Packages tab that perform the following functions:

Adjust to Packed Qty	The system will adjust the qty to ship of the items on the Contents tab to match the total of the packed quantity of each item.
Re-Pack	Deletes all previously entered packaging information for the shipping request.

Scan Pack	Opens the Package Barcodes form to allow the creation of packages by scanning items as they are packed as described above.
Std Pack	Performs the packaging functions described above.
Fast Pack	Performs the packaging functions described above.
Pack Remaining	Opens the Pack Remaining screen to allow for manual packing of all items that have not been packed yet as described above.

There are two different views for the packages tab; Package View and Item View. The following information is included in the Package View:

Master Package	If Master Packages are enabled, the master package number is shown. This is a sequential number and is not related to any actual number on the shipment.
Master Package Type	The code for the Master Package type is shown.
Package #	The package number is shown. This is a sequential number and is not related to any actual number on the shipment.
Package Type	The code for the package type is shown.
Std/Remaining Items	This field indicates whether this package was packed using standard packaging or consists of remaining items.
Track #	The package tracking number is entered by the carrier system after processing.
Item Code	The item code is shown.
Item Name	The item description is shown.
Sales BOM	In the case of a Sales BOM item the parent item code is shown.
Quantity Packed	The quantity of the item in the package is shown.
UOM	The unit of measure for the packed item is shown.
UOM Qty	The quantity to convert the displayed UoM to the Inventory UoM is shown.
Total Weight	The total weight for the package including the tare weight is shown.
Serial #/Batch #	The serial or batch number(s) for the items in the package are shown if applicable.
Carrier ID	This is a field that you may manually enter data in by drilling into the Package Master Data. If using **Achieve Warehouse Management** this field may be entered on the Handheld while packing.
Seal	This is a field that you may manually enter data in by drilling into the Package Master Data. If using **Achieve Warehouse**

Management this field may be entered on the Handheld while packing.

Inspection Seal
This is a field that you may manually enter data in by drilling into the Package Master Data. If using **Achieve Warehouse Management** this field may be entered on the Handheld while packing.

The Item View shows the same information arranged by item with the addition of two extra fields:

Qty Remaining to Ship
The total quantity of the item that is remaining to ship (pack) is shown.

Qty Shipped
The total quantity of the item that has been shipped (packed) is shown.

Note: You may also click on the gold drill-down arrow next to a package number to see the package details.

Additional Charges Tab

The Additional Charges tab allows you to view or change the shipping charges that will be added to the delivery and/or invoice. The information defaults from the shipping specification or shipping method.

Note: All fields may be edited and lines may be added or deleted by means of right-click options. If any changes are made, click on "Calculate Charges" to recalculate the charges.
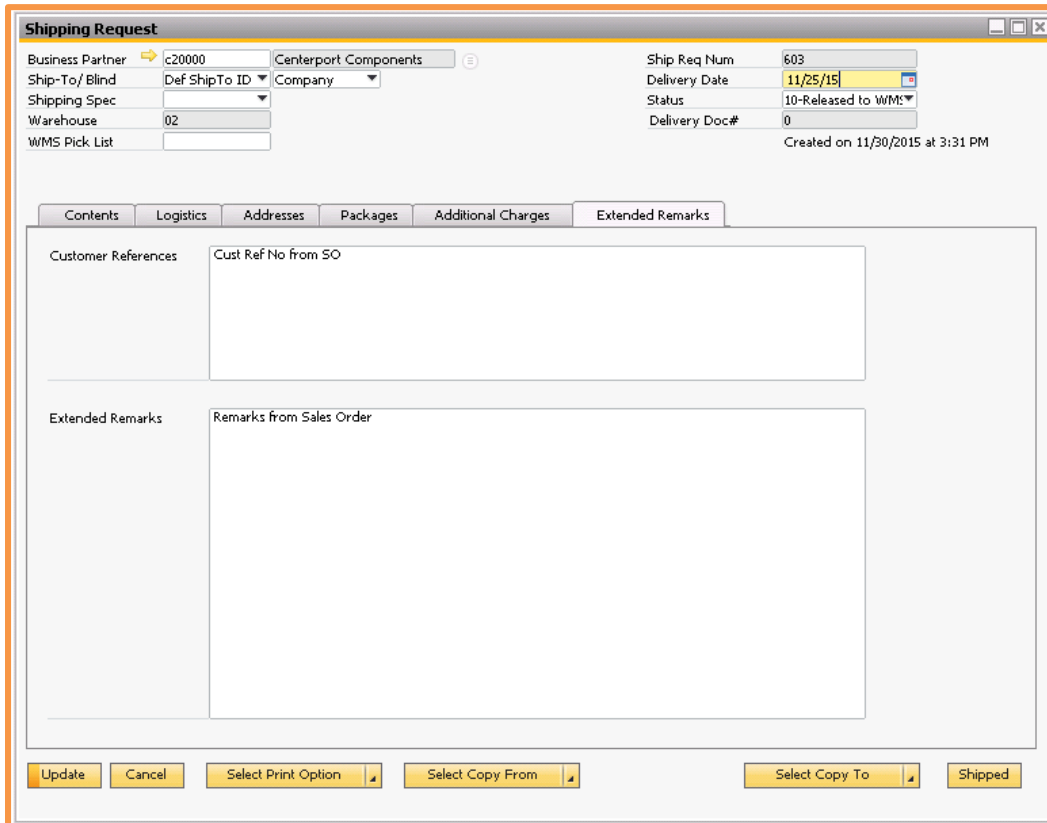
Note: If a particular Additional Charge is based on a value that has not yet been determined (such as shipping cost prior to getting that amount from the carrier), the calculated amount will be set to zero.

When the items have been shipped and the Delivery and/or Invoice has been created, the total of the Additional Charges will be copied to the documents as the freight charge. If there are no Additional Charges, then the actual shipping charge from the carrier will be used.

Note: In cases where the Freight Charge Type is Bill Customer, Bill Ship-To, Bill Consignee, or Bill Third Party, no freight charges will be copied to the Delivery and/or Invoice because the carrier will bill the freight charges directly with those options. The only exception is when the Additional Charges shown are set to "Always Charge on Delivery". In those cases freight will still be copied to the Delivery and/or Invoice.

Extended Remarks Tab

The Extended Remarks tab will bring information in from the base document, and will also allow you to enter whatever instructions or details that may be needed for the shipment.

The "Customer Reference" section will contain the customer reference number from the base document if applicable.

The "Extended Remarks" section will contain the remarks from the base document if applicable.

You may edit or add to these fields if desired with information such as shipping instructions or details desired for the processing of the shipment.

Status Codes

There are 10 possible status codes for the Shipping Request document. In some instances, the code is changed automatically by the program. In others, it is necessary to change it manually or by means of the Shipping Management program.

Note: *It is not necessary to use all status codes with every shipment.*
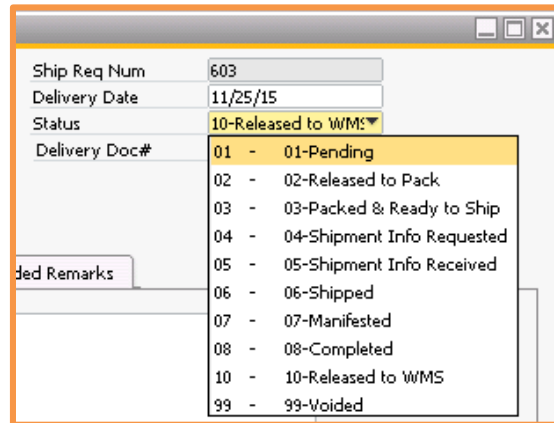
Pending	This is the default status for new Shipping Requests. It indicates that no action has been taken yet.
Released to Pack	The Shipping Request is ready for packing. If the pick ticket has not yet been printed it may be printed at this point.
Packed & Ready to Ship	The packages are ready to ship. This code will be set automatically when scanning or other packaging is complete. If the packing slip has not yet been printed it may be printed at this point.
Shipment Info Requested	Information is needed from the carrier's system.
Shipment Info Received	Information has been received from the carrier's system. This code will be set automatically when shipping costs, scale weights and tracking numbers are received from the carrier system.
Shipped	The shipment has been sent out of the warehouse. The Delivery document and/or Invoice may be created at this point. You may set this status by clicking on the "Shipped" button at the bottom right of the shipping request screen.
Manifested	If manifesting is enabled this status indicates that the shipment has been included in a manifest to the carrier company.

Completed	The shipping request is complete. No further action is needed. No changes are allowed once the shipment is marked Completed.
Released to WMS	When using ***Achieve Warehouse Management*** and picking by Shipping Request this is the status of the Shipping Request when the Logistics Manager creates it. It will stay in this status until it is picked on the Handheld.
Voided	The shipping request is cancelled. No changes are allowed once the shipment is marked Voided. If using ***Achieve Warehouse Management*** and the Shipping Request was already picked, the items will be moved to a designated return bin.

Printing

Four forms may be printed from the Shipping Request screen; Pick List, Pack List, Packaging Label and Pre-Packaging Label.

The Freight Control Configuration provides the option to automatically print any of these forms. If any of the options are set to auto print then the forms will print automatically throughout the Shipping Request process. If auto printing is not selected or if you wish to reprint a document at a later time, you may use the "Select Print Option" button at the bottom of the screen to print any of the defined forms on demand.

Note: *If you are using the Pick and Pack Manager, you may also print the Pick Ticket from the Pick List screen.*

If the any reports are set up in the Achieve One Report Launcher you may also print or view them by using the right-click option. You may also be able to print or view the Shipping Request itself.

If **Achieve Document Delivery** is also installed, you may use the right-click option to Deliver any Crystal Reports form to any recipient by means of printing, email or fax.

Serial and Batch Numbers

Items that are managed by serial or batch numbers must have the serial or batch selection entered as part of the packing process. Deliveries for these items cannot be completed without a complete selection of serials or batches.

The Fast Pack and Standard Pack methods do not let the users enter in serial or batch numbers so they cannot be used for these types of items. To pack these items it is necessary to use the Pack Remaining or Scan Pack features since they allow the entry of serial and batch numbers. See detailed instructions in the section above regarding the Shipping Request document Packaging tab.

Note: *If you are systematically picking the orders by way of the SAP Pick/Pack Manager or Achieve Warehouse Management then you may be able to fast pack or standard pack serial and batch items. This is because during the picking you are already selecting the serial and batch numbers to be packed. There are however only a few scenarios where this can work however:*

Serialized Items
- Can be Fast Packed into a single package using the Fast Pack button.
- Can be auto packed into Package 0 when packaging is not required as per Freight Control Configuration.
- Can be auto packed when Freight Control is configured to have Pick List Packaging set as "Package in Single Package".
- Can be auto packed when using **Achieve Warehouse Management** and WMS is configured to Package in Single Package.

Those are the only scenarios for serialized items.

Batched Items
- Can be Fast Packed into a single package using the Fast Pack button.
- Can be auto packed into Package 0 when packaging is not required as per Freight Control Configuration.
- Can be auto packed when Freight Control is configured to have Pick List Packaging set as "Package in Single Package".
- Can be auto packed when using **Achieve Warehouse Management** and WMS is configured to Package in Single Package.
- Can be Standard Packed as long as all of the batches for a specific item are the same, meaning that it will not matter which batch you put into which package since there is only one batch for that item.

Those are the only scenarios for batches items.

Creating Deliveries and Invoices

Delivery and A/R Invoice documents may be created in several different ways, depending on the options selected in the system. Regardless of the method of creation, the Delivery document number will be shown in the Shipping Request header.

<u>Automatic Creation</u>

The Freight Control Configuration screen contains options as to whether to allow automatic creation of Deliveries and Invoices.

If automatic creation ("Auto Gen") is allowed it may or may not be set as the default on a shipping method or shipping spec.

The default setting may be changed on the Logistics tab of the Shipping Request if necessary.
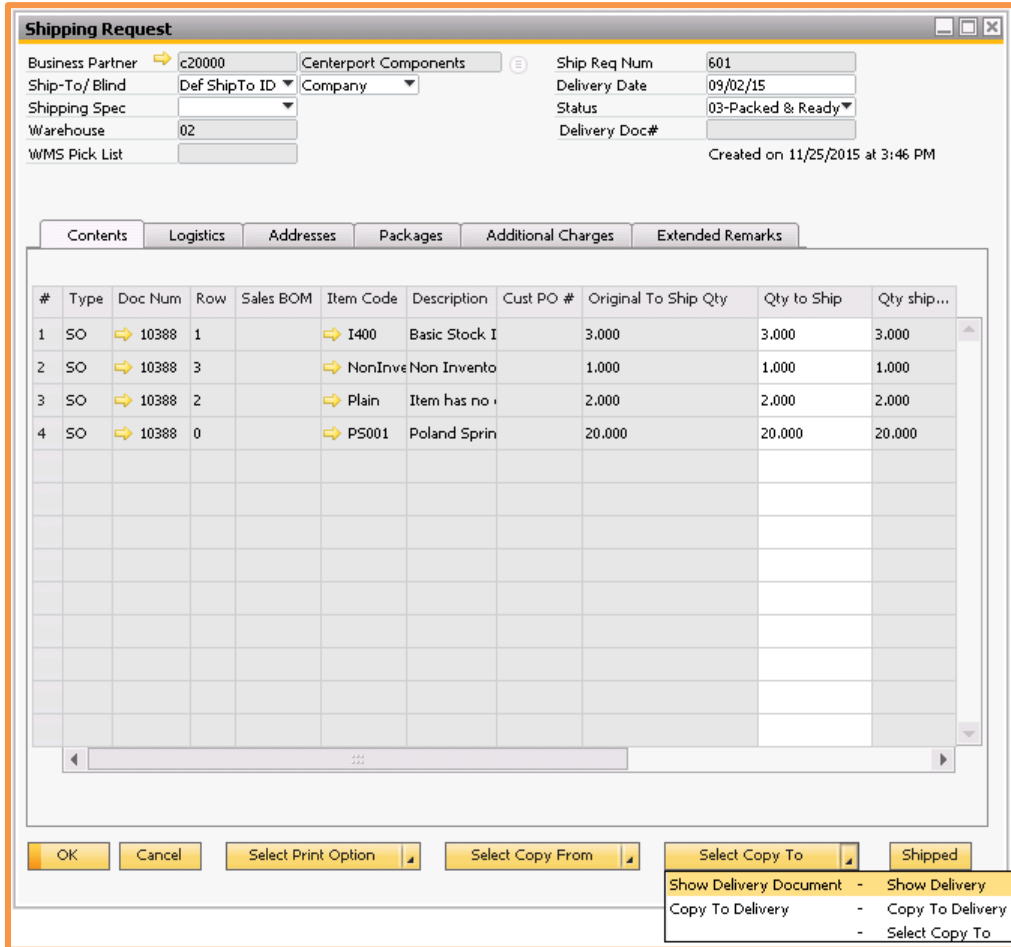
The Delivery document will be created by the system when the Shipping Request status code is changed to "Shipped" or "Manifested".

The A/R Invoice will be created by the system immediately after the Delivery is created.

If Deliveries are not used, the A/R Invoice document will be created by the system when the Shipping Request status code is changed to "Shipped" or "Manifested".

Manual Creation

If automatic creation is not used, then you must create Delivery and/or Invoice documents manually.

You may create the Delivery by clicking on the "Select Copy To" button and then choosing either "Copy to Delivery" or "Show Delivery".

Note that the status code must be "Shipment Info Received" or subsequent.

"Copy to Delivery" will create the Delivery document directly from the Shipping Request without any further input from the user.

"Show Delivery" will open the standard SAP Delivery document screen. It will first populate the customer code then select the "Copy From" option automatically and select the appropriate Sales Orders or Reserve Invoices document. The system will then populate the
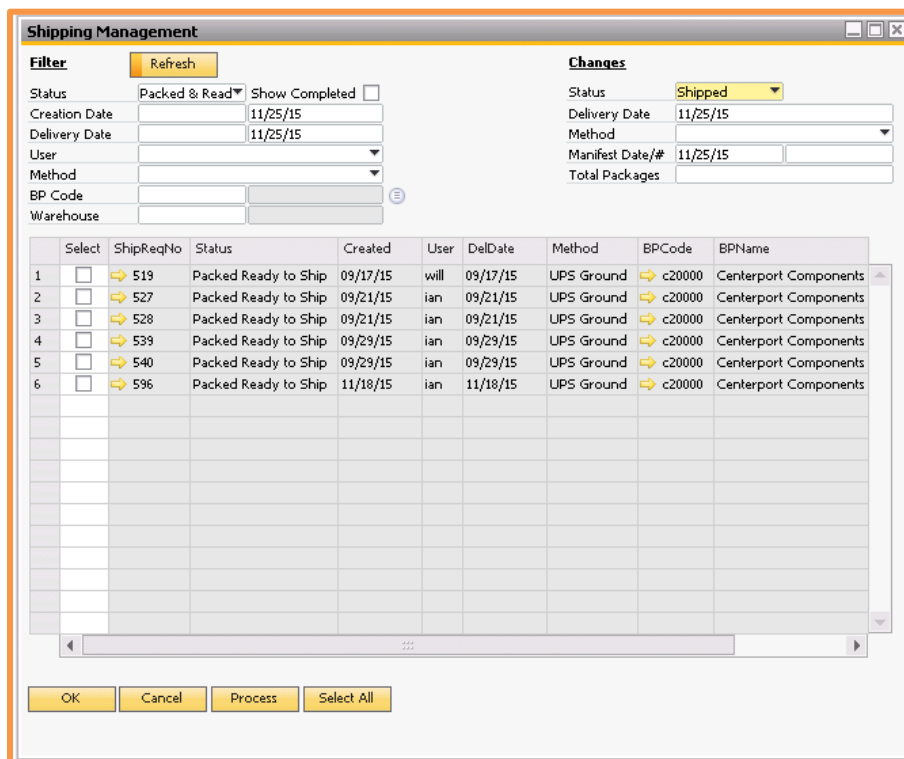
rows from the Shipping Request. The user must click on "Add" to complete the entry. This allows the user to make changes to the Delivery before it is added if necessary.

The user may need to select the bin locations and batch/serial numbers depending on your warehouse and item settings.

If automatic invoice creation is not selected the A/R Invoice must be created with the standard SAP process of using "Copy From", "Copy To", or the Document Generation Wizard.

Shipping Management

The Shipping Management program is used to change the status (as well as some other fields) on groups of Shipping Requests at the same time. This is a very useful feature since it allows users to proceed from one function to the next without having to change each document individually.

On the left side of the header enter the criteria for which Shipping Requests to display. In the example above we are trying to see all Packed & Ready to Ship shipping requests with a creation and delivery date through 11/25/2015. Other criteria options might be to select all

shipping requests that are pending with a particular shipping method or all documents from a particular customer.

Note: *The "Show Completed" checkbox will also show Completed shipping requests that match the criteria in addition to the shipping requests that match the status selected from the drop down.*

On the right side of the header, enter the new values that are desired for the selected Shipping Requests. Most commonly this would be a new status code as in the example above. A manifest date might also be included as appropriate.

When the criteria and changes are complete, click on "Refresh". The lower portion of the screen will then display all Shipping Requests that meet the selection criteria. Check the "Select" box to confirm each one that should be changed or use the "Select All" button if you want to change all of the ones displayed.

When you have checked all the selection boxes of the shipping requests you want to change click on "Process". The selected shipping requests will then be changed in accordance with the specifications on the screen. Note that if documents are changed to status "Shipped" or "Manifested" and Freight Control is set to automatically create deliveries, a delivery for each Shipping Request will be created as part of this procedure.

Fast Scan and Pack

The Fast Scan and Pack screen is used to record the scanning that takes place in the warehouse after items are picked and brought to the shipping area. Although it is possible to make entries with the keyboard, it is assumed that most of the time a wedge scanner will be used.

To begin, enter the command for the function to be performed. You can create barcode labels to scan for each of the commands. The commands are shown to the right of the header fields. If using the keyboard, you must type the slash marks (//) before the command. Press TAB after typing the command word.

You can then enter boxes, items, serial/batch numbers, and quantities as needed. Note that in the case of serialized items, you may scan the serial number alone and the system will determine the item code. It assumes a quantity of one for each serial number.