



ACTIVANT®

Warehouse Shipping Manifests

Release 8.6.4 (Eterm)

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Activant® Eclipse™ 8.6.4 (Eterm) Online Help System

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Publication Date: October 3, 2008

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Manual Warehouse Management Overview

The Warehouse Management program tracks inventory from receiving to shipping, along with the equipment used to perform these processes. Use Warehouse Management to do the following:

- Receive and put away material from vendors and other branches.
- Cross dock material.
- Pick and ship material to customers and other branches.
- Work with shipping manifests to aid in shipment delivery.
- Count inventory both to collect a baseline of your inventory and to then ensure that your inventory stays accurate and up-to-date in the system.
- Make inventory adjustments to keep inventory accurate.
- Define and maintain product and warehouse locations.
- Track equipment usage, profits, and costs.
- Control inventory you monitor closely for quality.
- Print bar code labels, ship tickets, and user-defined forms and labels.

Shipping Manifest Queue Overview

Use the Shipping Manifest Queue to track all orders being shipped out of your warehouse on a specific ship via, such as a company truck or commercial carrier, from a specific branch.

Shipping manifests include the following information:

- Delivery times.
- Ship-to addresses.
- Order numbers.
- Totals information.

The Shipping Manifest also has screen views that display the following information:

- Shipping packages.
- Expected and actual delivery times.
- Dates.
- Monetary amounts.
- Weight and load factors.

If your warehouse is an RF environment, see [Using Shipping Manifests with RF](#).

Tracking Deliveries

Use the Shipping Manifest Queue program to track deliveries as follows:

1. Add orders automatically through the system or manually to a shipping manifest.
Note: When you add an order to a shipping manifest, the system logs the costs associated with the Activity Based Cost delivery cost in the ABC log.
2. Print the Shipping Manifest Report and give it to the driver making the deliveries.
3. Drivers take the pick ticket, the ship ticket, and the manifest with them to note any problems with the deliveries. The driver makes the deliveries listed on the report and returns to the warehouse, perhaps with undelivered orders.
4. Review the Shipping Manifest Report to verify deliveries and, if necessary, to move undelivered orders to a new manifest for later delivery.
5. Close the manifest.

In addition, use the following reports to help manage shipping manifests:

- Shipping Manifest Report – Use to run a report about shipments from multiple branches.
- Bills of Lading Report – Use to create a list of items being shipped.
- HAZMAT Truck Manifest Report – Use to produce a hazardous materials manifest.

Scheduling or Creating Manifests

To create a shipping manifest, do either of the following:

- Configure your system to auto schedule sales orders on a manifest by ship via, date, branch, and customer.
- Manually enter each transaction ticket on a manifest.

After a manifest is created, you can add tickets to it or remove tickets from it, as well as lock a manifest so that no more orders are added to it before delivery. Lock a manifest if a truck is full, or ready to leave for delivery, to ensure that all the orders on the manifest are on the truck.

If you have authorization, you can also edit closed orders for instances where a delivery was recorded incorrectly. For example, if some orders on a manifest were not delivered, yet the manifest is closed and indicates that all the orders were delivered, reopen the closed manifest and remove the undelivered orders from it.

Use the Open Order Delivery Queue to help you schedule deliveries if your warehouse does not use set delivery routes.

Viewing Shipping Manifest Details

Use the following shipping manifest views to track packages, loading, time, and monetary information for all manifests:

- Shipping Packages View.
- Expected Time View.
- Actual Time View.
- Expected Time - Display Max Lines View.
- Dollars, Load Factor, and Weight View.
- Expected Time / Actual Time View.
- Stage Location and Hold Picks View.

Shipping Packages View

The Shipping Packages view is the default. Use this view to indicate the types and numbers of packages on the manifest for delivery personnel. The delivery person then knows what kind of packages and how many of each they need to deliver on each order.

Note: In the Valid Package Types control maintenance record, define up to four package types, such as **Boxes**, **Bags**, **Cartons**, and **Pallets**, to display in the Shipping Manifest Queue screen.

►To indicate types and amounts of shipping packages:

1. From the **Whse Mgt > Warehouse Queues** menu, select **Shipping Manifest Queue** to display the Shipping Manifest Queue screen.
2. In the **Manifest #** field, enter the manifest to view.

Leave this field blank to search for an existing manifest based on any combination of entries in the **Ship Via**, **Ship Date**, and **Ship Branch** fields.

3. Under each package column header, enter the number of the packages for each order.

For example, stop one on the shipping manifest may be a delivery of four boxes to a customer, and stop two may be a delivery of one carton to a different customer. Under each package column, enter the number of packages for each order to help the delivery personnel deliver the right material.

The system displays the totals for the package types at the bottom of the screen.

Expected Time View

The Expected Time view shows the expected delivery time entered in the Order Entry Status screen's **Delv Time** field (Delivery Times view), but only if this time was manually changed. If the **Delv Time** field on the Order Entry Status screen was not edited, the Expected Time view does not display a time.

Use this view to re-sequence delivery stops, if necessary.

►To view a manifest in the Expected Time view:

1. From the **Whse Mgt > Warehouse Queues** menu, select **Shipping Manifest Queue** to display the Shipping Manifest Queue screen.
2. In the **Manifest #** field, type the number of the manifest that contains the undelivered orders.

Leave this field blank to search for an existing manifest based on any combination of entries in the **Ship Via**, **Ship Date**, and **Ship Branch** fields.

3. Use the **View** hot key and select **Expected Time** from the list.
4. View the following information in the Expected Time view's columns:

Column	Description
Expected	The time your warehouse normally delivers to this customer, as defined on the Miscellaneous Customer Information screen.
Diff	The difference between the time in the DelTime column and the Expected column.

Actual Time View

Use the Actual Time view to track delivery times. This view displays and lets you enter the actual time an order was delivered.

- If your delivery personnel use Palm Pilots to get customer signatures upon delivery, the system is set up to record the date and time of that signature. That time is then entered on the manifest.
- If your delivery personnel do not use Palm Pilots for delivery purposes, they can write down the actual delivery time on the manifest. After the delivery, a manager can then enter the actual delivery times recorded on the manifest on the Shipping Manifest Queue screen.

►To view and edit a manifest in the Actual Time view:

1. From the **Whse Mgt > Warehouse Queues** menu, select **Shipping Manifest Queue** to display the Shipping Manifest Queue screen.
2. In the **Manifest #** field, type the number of the manifest that contains the undelivered orders.

Leave this field blank to search for an existing manifest based on any combination of entries in the **Ship Via**, **Ship Date**, and **Ship Branch** fields.

3. Use the **View** hot key and select **Actual Time** from the list.
4. View and edit the following information in the Actual Time view's columns:

Column	Description
Actual Tm	The time the delivery was actually made. If necessary, enter the time in this column.
Diff	The difference between the time in the DelTime column and the Actual Tm column. If the actual delivery time is later than the scheduled delivery time, the Diff field displays negative minutes. If the delivery is early, the Diff field displays positive minutes. Upon closing the manifest, the actual time entered on the manifest is supplied to the Actual Tm field on the Sales Order Entry Status (Delivery Times view) associated with the order.

Expected Time - Display Max Lines View

The Expected Time - Display Max Lines view is the same as the Expected Time view, except that the Expected Time - Display Max Lines view displays only the first line of each order. This view maximizes the number of entries on the Shipping Manifest Queue screen so you can scan the entire manifest.

►To view a manifest in the Expected Time - Display Max Lines view:

1. From the **Whse Mgt > Warehouse Queues** menu, select **Shipping Manifest Queue** to display the Shipping Manifest Queue screen.
2. In the **Manifest #** field, type the number of the manifest that contains the undelivered orders.

Leave this field blank to search for an existing manifest based on any combination of entries in the **Ship Via**, **Ship Date**, and **Ship Branch** fields.

3. Use the **View** hot key and select **Expected Time - Display Max Lines** from the list.

Dollars, Load Factor, and Weight View

The Dollars, Load Factor, and Weight view displays each order's totals for sales price, load factor, and weight. This view is view-only. Use it to verify the total monetary, load factor, and weight for the manifest. These totals are displayed at the bottom of the screen.

►To view a manifest in the Dollars, Load Factor and Weight view:

1. From the **Whse Mgt > Warehouse Queues** menu, select **Shipping Manifest Queue** to display the Shipping Manifest Queue screen.
2. In the **Manifest #** field, type the number of the manifest that contains the undelivered orders.

Leave this field blank to search for an existing manifest based on any combination of entries in the **Ship Via**, **Ship Date**, and **Ship Branch** fields.

- Use the **View** hot key and select **Dollars, Load Factor and Weight** from the list.

The system populates each field as follows:

Column	Description
Dollars	The sales price total for the matching order. The system takes this information from the transaction.
Load	The total space the order takes up on the truck. The system calculates this information from the Product Maintenance screen for each product on the order.
Wght	The total weight of the order, rounded to the nearest whole increment of the weight unit of measure. For example, if an order's weight is 4.3 pounds, the Wght field displays 4 pounds. If an order's weight is 4.6 pounds, the Wght field displays 5 pounds. The system calculates this information from Product Maintenance for each product on the order.

Expected Time / Actual Time View

Use this view to track delivery times. The Expected Time / Actual Time view shows both the expected delivery time and the actual delivery time for each order. Like the Actual Time view, you can enter actual delivery times in this view.

►To view and edit a manifest in the Expected Time / Actual Time view:

- From the **Whse Mgt > Warehouse Queues** menu, select **Shipping Manifest Queue** to display the Shipping Manifest Queue screen.
- In the **Manifest #** field, type the number of the manifest that contains the undelivered orders.

Leave this field blank to search for an existing manifest based on any combination of entries in the **Ship Via**, **Ship Date**, and **Ship Branch** fields.

- Use the **View** hot key and select **Expected Time / Actual Time** from the list.
- View and edit the following information in the Expected Time / Actual Time view's columns:

Column	Description
Expec Tm	The time your warehouse normally delivers to this customer, as defined on the Miscellaneous Customer Information screen.
Actual Tm	The time the delivery was actually made. If necessary, enter the time in this column.
Diff	The difference between the time in the Expec Tm column and the Actual Tm column.

Stage Location and Hold Picks View

The Stage Location and Hold Picks view shows the staging location in the warehouse for the order and indicates whether there were any picks not made for the order.

► **To view and edit a manifest in the Stage Location and Hold Picks view:**

1. From the **Whse Mgt > Warehouse Queues** menu, select **Shipping Manifest Queue** to display the Shipping Manifest Queue screen.
2. In the **Manifest #** field, enter the number of the manifest that you want to view.

Leave this field blank to search for an existing manifest based on any combination of entries in the **Ship Via**, **Ship Date**, and **Ship Branch** fields.

3. Use the **View** hot key and select **Stage Location and Hold Picks** from the list.
4. View and edit the following information:

Column	Description
Stage Location	The location in your warehouse where the order is staged, waiting to be shipped.
Hld	Indicates if there are any additional picks to be made for the order.

Scheduling Shipping Manifests Using Auto Scheduling

If you have your system set up for Auto Manifest Load and Scheduling when you create shipping manifests, the system schedules and sorts all orders by their defined ship vias and expected delivery times. If you do not have the Auto Manifest Load utility set, then manually schedule all deliveries.

Note: If your system is set up for Auto Manifest Load and a user has a manifest open when the Print Batch Transfer Order process runs, the system loads the transfers for the ship via of the open manifest on to a new manifest.

Through Auto Manifest Load, create manifests by selecting orders based on their invoice dates. Manually create manifests by entering transaction tickets on the manifest.

You can also edit open manifests and do the following:

- Add new orders
- Remove orders
- Reschedule delivery times
- Reassign drivers

You can recall open manifests by entering the manifest number or by entering the ship via, ship date, and ship branch and then selecting a matching manifest from a displayed list.

To attach a signature to a manifest, see Attaching Images to Eclipse Records.

▶ To create a manifest using Auto Manifest Load and Scheduling:

1. From the **Whse Mgt > Warehouse Queues** menu, select **Shipping Manifest Queue** to display the Shipping Manifest Queue screen.
2. In the **Manifest #** field, enter **New** to create a new manifest.
Leave this field blank to search for an existing manifest based on any combination of entries in the **Ship Via**, **Ship Date**, and **Ship Branch** fields.
3. In the **Ship Via** field, press **F10** and select a shipping method from the displayed list.
4. In the **Ship Date** field, enter the date the shipment is leaving the warehouse.
5. In the **Ship Branch** field, enter the branch from where the delivery originates.
6. In the **Driver** field, enter the user's ID who is making the delivery.

If this manifest is for a common carrier, enter the user's ID who is creating the manifest in the **Driver** field.

The system populates the following fields with the defaults defined on the Ship Via Delivery Route Information screen. See Defining Auto Scheduling Parameters for Shipping Manifests.

Field	Description
Start Time	The time the truck is scheduled to leave the warehouse. If this manifest is for a common carrier, enter the time the carrier is scheduled to arrive at the warehouse. If a delivery start time is defined for the ship via in the Ship Via Delivery Route Information screen, that time displays. Update the time for this manifest, if necessary.
First Delivery	The time the truck is scheduled to arrive at the first stop. If a first delivery time is defined for the ship via in the Ship Via Delivery Route Information screen, that time displays. Update the time for this manifest, if necessary.
Delivery Interval	The average time between delivery stops. If a delivery interval is defined for the ship via in the Ship Via Delivery Route Information screen, that interval is used between stops. If no interval is defined, the system defaults to 15 minutes between each stop. Update the interval if necessary.

7. In the **Ticket No** field, do one of the following to enter an order:

- Type the sales order, transfer delivery, or purchase order pick up ticket number you want to place on the manifest.

You can load open transfers and purchase order generations as a stop on the manifest to indicate products the driver needs to pick up. Before you can close a manifest with pickups, you must complete a receipt of a purchase order or transfer, enter the closed generation number, and remove the open generation number.

- Use the **Select Tks** hot key to select tickets based on selected criteria.

The system populates the Shipping Manifest Queue screen with the following information:

Field	Description
Stp	The order of stops on the entire delivery, with 1 being first. The system combines tickets for delivery to the same ship-to address in the same stop number. To combine deliveries using the stop number, position the cursor on the stop number you want to combine with another delivery and enter the number of the stop with which to combine it. The system places the orders in the same stop.
Customer Name/Address	The customer name and address on the order. This field is view-only. Note: If the order for this customer is COD and the Manifest COD Message control maintenancerecord contains a defined COD message, the system enters the message and the COD amount in this field as well.

Field	Description
Del Time	<p>The delivery time assigned to the order, starting with the first delivery time entered in the First Delivery field, and changing for each subsequent stop according to the number of minutes in the Delivery Interval field.</p> <p>You can change the order of deliveries by changing the time assigned to a ticket. The system resequences the stops accordingly.</p> <p>You can also enter the same delivery time for multiple addresses. For example, if you deliver to one customer with multiple ship-to addresses and each ship-to is a delivery truck at the same site, you can change the delivery times to be the same.</p> <p>This field is in all views, except for the Expected Time / Actual Time view.</p>

8. Complete the rest of the fields, as necessary, for the view you are using.
9. Repeat steps **7** and **8** for all tickets you want to add to this manifest.
10. Use the **Lock** hot key to prevent adding any additional tickets to the manifest.

If you need to add an order after locking a manifest, use the **Unlock** hot key and then relock the manifest after adding the order.

If Manifest Lock activity triggers are set for customers whose orders are on the manifest, the system might prompt you to print labels or advanced shipping notifications (ASN), or prompt you to send the ASNs using EDI, FTP, or email. For more information about the Manifest Lock activity trigger options for customers, see Assigning Activity Triggers.

Note: Use the **RelPk** hot key to release picks to the RF Picking Queue. For more information, see Releasing Manifests to the Picking Queue. The system warns you if you try to release a manifest before locking it.

11. Press **Esc** to save the manifest and clear the screen so that you can enter a new manifest.

If the Set Print Status When Order Placed On Manifest control maintenance record is set, the system updates an order's print status to the setting in the record when you place the order on a manifest. If you already printed the order, or the order's print status is **M**, the system does not update the order's print status.

Scheduling Shipping Manifests Manually

If you do not set up your system for Auto Manifest Scheduling, manually add tickets and schedule all delivery times for a manifest. On the Shipping Manifest Queue screen, edit open manifests and do the following:

- Add new orders by entering order numbers or scanning order bar codes from a shipping ticket.
- Remove orders.
- Reschedule delivery times.
- Reassign drivers.

When manually entering or scanning orders to the manifest, sort the paper shipping tickets in the order you want to add them to the manifest to avoid having to resort from the Shipping Manifest Queue. Recall open manifests by entering the manifest number or by entering the ship via, ship date, and ship branch and then selecting a matching manifest from a displayed list.

If a manifest is locked, and the Do Not Allow Editing Of A Locked Manifest control maintenance record is set to **Yes**, you cannot add or delete tickets from the manifest. If the Set Print Status When Order Placed On Manifest control maintenance record is set, the system updates an order's print status to the setting in the record when you place the order on a manifest. If you already printed the order, or the order's print status is **M**, the system does not update the order's print status.

To attach a signature to a manifest, see Attaching Images to Eclipse Records.

▶ To schedule a shipping manifest manually:

1. From the **Whse Mgt > Warehouse Queues** menu, select **Shipping Manifest Queue** to display the Shipping Manifest Queue screen.
2. In the **Manifest #** field, enter **New** to create a new manifest.
Leave this field blank to search for an existing manifest based on any combination of entries in the **Ship Via**, **Ship Date**, and **Ship Branch** fields.
3. In the **Ship Via** field, press **F10** and select a shipping method from the displayed list.
4. In the **Ship Date** field, enter the date the deliveries are leaving the warehouse.
5. In the **Ship Branch** field, enter the branch from where the delivery originates.
6. In the **Driver** field, enter the user's ID who is making this delivery.

If this manifest is for a common carrier, enter the user's ID who is creating the manifest in the **Driver** field.

The system populates the following fields with the defaults defined on the Ship Via Delivery Route Information screen. See Defining Auto Scheduling Parameters for Shipping Manifests.

Field	Description
Start Time	The time the truck is scheduled to leave the warehouse. If this manifest is for a common carrier, enter the time the carrier is scheduled to arrive at the warehouse. If a delivery start time is defined for the ship via in the Ship Via Delivery Route Information screen, that time displays. Update the time for this manifest, if necessary.
First Delivery	The time the truck is scheduled to arrive at the first stop. If a first delivery time is defined for the ship via in the Ship Via Delivery Route Information screen, that time displays. Update the time for this manifest, if necessary.
Delivery Interval	The average time between delivery stops. If a delivery interval is defined for the ship via in the Ship Via Delivery Route Information screen, that interval is used between stops. If no interval is defined, the system defaults to 15 minutes between each stop. Update the interval if necessary.

7. Use the **AutoSched** hot key to enable or disable the automatic scheduling of tickets that are manually added to the manifest.
 - If set to **On** and you add a ticket to the manifest, the system calculates the delivery time and stop number for the ticket.
 - If set to **Off**, you must schedule all delivery stops manually. When you add a ticket to the manifest, the system adds the ticket where the cursor is positioned on the manifest, and creates a new stop if the ship-to address does not match that of the prior order on the manifest.
8. Complete the manifest as you would a system-scheduled manifest.

Note: Use the **RelPk** hot key to release picks to the RF Picking Queue. The system warns you if you try to release a manifest before locking it.

Handling Special Shipping Manifest Deliveries

You can add purchase orders to a shipping manifest if your driver picks material up from a vendor along a delivery route. You can also add return sales orders to the manifest if your driver picks up material from a customer for return to your warehouse.

You can add orders to a manifest for the following situations:

- Picking up material on the way from a vendor for delivery.
- Picking up material from a vendor for the warehouse.
- Picking up material from a customer for return to the warehouse.

Picking Up Material from a Vendor for Delivery

You may have a vendor that you use who is on the route to one of your customers. At times, you may arrange for your driver to pick up material to fill an order on the way to deliver that order to a customer. Add the purchase order for the material from the vendor and the sales order for delivery to the customer on the shipping manifest for the appropriate ship via.

▶ To pick up material from a vendor for delivery:

1. From the **Purch** menu, select **Purchase Order Entry** to display the Purchase Order Entry screen.
2. Create a purchase order for the material from the vendor.
3. From the purchase order's Status screen, change the status from Open to Received.
4. Save and exit the purchase order.
5. From the **Orders** menu, select **Sales Order Entry** to display the Sales Order Entry screen.
6. Open the sales order for the material for the customer.
7. From the sales order's Status screen, change the status to Invoice.
8. Save and exit the sales order.
9. Print the invoice for the customer.
10. From the **Whse Mgt > Warehouse Queues** menu, select **Shipping Manifest Queue** to display the Shipping Manifest Queue screen, and display the manifest.
11. Add the purchase order and the sales order to the manifest in the appropriate delivery stop order.

Picking Up Material from a Vendor for the Warehouse

You may have a vendor that you use who is on your delivery route. At times, you may arrange for your driver to pick up material to bring back to the warehouse. Add the purchase order for the vendor to the manifest for the appropriate ship via.

►To pick up material from a vendor for the warehouse:

1. From the **Purch** menu, select **Purchase Order Entry** to display the Purchase Order Entry screen.
2. Create a purchase order for the material from the vendor.
3. From the **Whse Mgt > Warehouse Queues** menu, select **Shipping Manifest Queue** to display the Shipping Manifest Queue screen.
4. Open the shipping manifest to which you want to add the purchase order.
5. Add the purchase order to the manifest in the appropriate stop order.
6. When the driver returns with the material, close the manifest.
7. Receive the material on the purchase order.

Picking Up Material from a Customer for Return

Due to delivery errors, miscalculations, or damaged material, you may have a customer on a typical delivery route who has material to return to your warehouse. Add the returned goods sales order to the shipping manifest for the appropriate ship via.

►To pick up material from a customer for return:

1. From the **Orders** menu, select **Sales Order Entry** to display the Sales Order Entry screen.
2. Create a returned goods sales order for the customer with the ship via for the delivery route.
3. From the **Whse Mgt > Warehouse Queues** menu, select **Shipping Manifest Queue** to display the Shipping Manifest Queue screen, and display the manifest.
4. Add the sales order to the manifest in the appropriate delivery stop order.
5. When the driver returns with the material, close the manifest.

The sales order status remains open until you check in the material. Credit is typically issued from the Returned Goods Queue.

Merging Shipping Manifests

When creating a shipping manifest, you can merge multiple manifests together into one manifest. For example, if you have a manifest for Truck 1 and Truck 1 unexpectedly needs maintenance and is unable to make deliveries, you can merge the items on Truck 1's manifest with that of Truck 2.

In addition, the system automatically merges a customer's orders going to the same shipping address into a single stop. This process enhances the delivery and lead time for products coming to your warehouse.

► To merge shipping manifests:

1. From the **Whse Mgt > Warehouse Queues** menu, select **Shipping Manifest Queue** to display the Shipping Manifest Queue screen.
2. In the **Manifest #** field, enter the manifest that you want to fill with orders.
Leave this field blank to search for an existing manifest based on any combination of entries in the **Ship Via**, **Ship Date**, and **Ship Branch** fields.
3. Use the **Select Tks** hot key to display the Shipping Manifest Select Tickets screen.
4. Use the **Merge From Another Manifest** hot key to display the Shipping Manifest Merge Manifests screen.
5. In the **From Manifest #** field, enter the manifest ID for the manifest with which you want to merge the current manifest.
The system enters the branch, ship via, ship date, and number of tickets for the manifest you entered.
6. Use the **Begin** hot key to select the tickets on that manifest.
7. Press **Esc** twice to merge the two manifests.

Selecting Tickets for Shipping Manifests

When creating a shipping manifest, select tickets for a manifest based on an order's branch, ship via, date, and customer or vendor. The system searches for all transactions that meet the defined criteria, and lists the number of transaction tickets that match the criteria.

If a manifest is locked, and the Do Not Allow Editing Of A Locked Manifest control maintenance record is set to **Yes**, you cannot add tickets using the Shipping Manifest Select Tickets screen.

► To select tickets for a shipping manifest:

1. From the **Whse Mgt > Warehouse Queues** menu, select Shipping Manifest Queue to display the Shipping Manifest Queue screen.
2. In the **Manifest #** field, enter the manifest that you want to fill with orders.
Leave this field blank to search for an existing manifest based on any combination of entries in the **Ship Via**, **Ship Date**, and **Ship Branch** fields.
3. Use the **Select Tks** hot key to display the Shipping Manifest Select Tickets screen.
4. Enter the selection criteria that you want to use in the following fields:

Field	Selection Criteria
Ticket	The ticket number that you want to add. If you know the ticket number, enter it in this field.
Branch	The branch for all orders you want to include on the manifest.
Ship Via	The ship via defined for the orders you want to enter. The system populates this field with the ship via entered on the Shipping Manifest Queue screen.
Start Date	The earliest ship date for the orders that you want to include on the manifest.
End Date	The latest ship date for the orders that you want to include on the manifest.
Cust/Vend	The customer or vendor whose orders you want to include on the manifest.

5. Use the **Begin** hot key to start the selection.
The system indicates how many tickets it located based on the search.
6. Press **Esc** to enter all the orders on the manifest. If a customer has multiple orders going to the same ship-to address, the orders are combined into one stop on the manifest.

Rescheduling Undelivered Orders

If you have the appropriate authorization level, you can edit existing manifests to reschedule undelivered orders to a new shipping manifest.

Complete the following tasks to reschedule undelivered orders to a new manifest:

- Change the ship date for undelivered orders.
- Remove the undelivered orders from the shipping manifest.
- Add the order to a new shipping manifest.

If your warehouse is an RF environment, see *Updating Manifests During RF Picking Guidelines* for additional information about re-sequencing and removing stops for manifest picking.

► To change the ship date for undelivered orders:

1. From the **Whse Mgt > Warehouse Queues** menu, select **Shipping Manifest Queue** to display the Shipping Management Queue screen.
2. In the **Manifest #** field, type the number of the manifest that contains the undelivered orders.

Leave this field blank to search for an existing manifest based on any combination of entries in the **Ship Via**, **Ship Date**, and **Ship Branch** fields.
3. Use the **Unlock** hot key to unlock the manifest, if necessary.
Note: If the manifest is closed, use the **Open** hot key. You cannot change the ship date of an order on a closed manifest.
4. Move the cursor to the ticket number for the order that was not delivered and use the **Edit** hot key to display the sales order for that ticket.
5. Press **Esc** until you reach the Sales Order Entry Status screen.
6. In the **Ship Date** field, change the date to reflect the new delivery date for the order.
7. Press **Esc** until you return to the Shipping Manifest Queue screen.
8. Repeat steps 4 to 7 for any additional undelivered orders on the manifest.
9. Remove the undelivered orders from the manifest.
10. Press **Esc** to save changes and exit the manifest.

► To remove undelivered orders from a manifest:

1. From the **Whse Mgt > Warehouse Queues** menu, select **Shipping Manifest Queue** to display the Shipping Management Queue screen.
2. In the **Manifest #** field, type the number of the manifest that contains the undelivered orders.

Leave this field blank to search for an existing manifest based on any combination of entries in the **Ship Via**, **Ship Date**, and **Ship Branch** fields.

3. Remove all the undelivered orders from a manifest by selecting the ticket with the cursor and pressing **Alt Delete**.
4. Use the **Lock** hot key to lock the manifest to prevent any additional orders from being added.
5. Press **Esc** to save changes and exit the manifest.

▶ **To add an undelivered order to a new shipping manifest:**

1. From the **Whse Mgt > Warehouse Queues** menu, select **Warehouse Confirmation Queue** to display the Warehouse Picking Confirmation screen.
2. In the **Order #** field, enter the order number that you removed from the original shipping manifest.

Leave this field blank to search for an existing manifest based on any combination of entries in the **Ship Via**, **Ship Date**, and **Ship Branch** fields.

3. Use the **Ready to Manifest** hot key to display the Ready to Manifest screen.

If the **Verify Ship Date/Ship Via For Ready To Manifest** control maintenance record is enabled, the Ready to Manifest screen allows you to change the ship date and ship via on the ticket. Update the date and ship via if necessary.

If the control maintenance record is disabled, the system places the order on the appropriate manifest.

Note: If Auto Scheduling is not enabled, you need to manually add the order to a new manifest.

4. Press **Esc** to save changes and exit the manifest.

Blocking Out Time on Shipping Manifests

Use the Shipping Manifest Delivery Block Out Time screen to block the system from scheduling deliveries during indicated times, such as for lunch breaks or other breaks during the day. For example, you may want to block out 12:00 p.m. to 1:00 p.m. on all manifests to give your delivery personnel a scheduled lunch break.

► To block out time on a shipping manifest:

1. From the **Whse Mgt > Warehouse Queues** menu, select **Shipping Manifest Queue** to display the Shipping Manifest Queue screen.
2. In the **Manifest #** field, type the number of the manifest for which you want to block out time.

Leave this field blank to search for an existing manifest based on any combination of entries in the **Ship Via**, **Ship Date**, and **Ship Branch** fields.
3. Use the **Block Out Time** hot key to display the Shipping Manifest Delivery Block Out Time screen.
4. In the **Start Time** column, enter the time to begin the block out.
5. In the **End Time** column, enter the time to end the block out.
6. In the **Reason for Delivery Suspension** column, enter an explanation for the time.
7. Press **Esc** to apply the block out to the manifest.

The system displays the time blocked out on the manifest.

Printing Shipping Manifests

You can print the following shipping manifest types:

- Full Manifest Reports
- Pre-Load Manifest Reports
- Palm Pilot EManifest Downloads

When printing shipping manifests, keep the following in mind:

- If you are printing a common carrier manifest, print two copies, one for your records and one for the carrier.
- If you are printing a shipping manifest to a Hold file, the first 14 lines of the header and four lines of the detail display on the same page. Scroll down in the Hold file to view the rest of the detail lines.
- When you print a shipping manifest with shipping tickets, the system checks the product file for the products contained in the orders on the manifest. The system prints a Hazardous Materials Shipping Document for each order that contains products with hazard information defined in the product file. The document contains an emergency response number, and the quantity, hazard code, item description, and total weight for each item on the order.

Note: To print a Shipping Manifest Report for multiple branches grouped by customer, see Running the Shipping Manifest Report.

Printing Full Manifest Reports

A full manifest report contains the following information:

- Manifest ID
- Ship via
- Driver ID
- Delivery date
- Shipping branch
- Stop order number
- Order, delivery, and shipping information
- Delivery time information
- Signature and date fields

You can print the following types of Full Manifest Reports:

Type	Description
Full Manifest w/ BC & Ship Tickets	<p>Prints a full manifest report with a signature line and bar code for each order or for each delivery stop, depending on the setting in the Number Of Signatures/Barcodes Required On A Manifest control maintenance record setting. Also prints each order's shipping ticket to give to the customer.</p> <p>Use the bar codes to match customer signatures with orders when you are closing the manifest.</p> <p>If the Print Package Quantities On Manifest control maintenance record is set to Yes for the branch, the report includes the package quantities for each stop with total package quantities at the end of the manifest. If there is a return item on the manifest, only the order ID prints, not the order generation ID for that item.</p> <p>Use this report when you have the Forms Modification and Manifest Processing Software companion products.</p>
Full Manifest w/ BC	<p>Prints a full manifest report with a signature line and bar code for each order or for each delivery stop, depending on the setting in the Number Of Signatures/Barcodes Required On A Manifest control maintenance record setting.</p> <p>Use the bar codes to match customer signatures with orders when you are closing out the manifest.</p> <p>If the Print Package Quantities On Manifest control maintenance record is set to Yes for the branch, the report includes the package quantities for each stop with total package quantities at the end of the manifest. If there is a return item on the manifest, only the order ID prints, not the order generation ID for that item.</p> <p>Use this report when you have the Forms Modification and Manifest Processing Software companion products.</p>
Full Manifest & Ship Tickets	<p>Prints a full manifest report, including signature lines, and each order's shipping ticket to give to the customer.</p>
Full Manifest Report	<p>Prints a full manifest report and signature lines for each order or for each delivery stop, depending on the setting in the Number Of Signatures/Barcodes Required On A Manifest control maintenance record setting.</p>

Use the following procedure to run each of the full manifest report types.

► **To print a full manifest report:**

1. From the **Whse Mgt > Warehouse Queues** menu, select **Shipping Manifest Queue** to display the Shipping Manifest Queue screen.
2. In the **Manifest #** field, enter the number of the manifest you want to print and press **Enter**.

Leave this field blank to search for an existing manifest based on any combination of entries in the **Ship Via**, **Ship Date**, and **Ship Branch** fields.
3. Use the **Print** hot key to display the Shipping Manifest Report screen.

4. In the **Report Type** field, press **F10** and select one of the full manifest report types described above.

The report type defaults to the report defined in the Default Manifest Report Type control maintenance record.

5. In the **Show Address** field, enter **Y** or **N** to indicate if you want the report to include the shipping address.

If you are printing a manifest with bar codes, you cannot change this field to **N**.

6. In the **Show Shipping Instructions** field, enter **Y** or **N** to indicate if you want the report to include the shipping instructions for each order.

7. Set options, if needed, and generate the report.

Printing a Pre-Load Manifest Report

Pre-Load Manifest Reports show the following for a manifest:

- Each order.
- Each order's customer.
- Each order's items, along with each item's location and weight or load factor.
- Each order's buy line table if requested.

Use this report to help you load the truck in the most efficient manner. Before using this report, define a sorting method to use as a default in the Default Pre-Load Manifest Report Sort Option control maintenance record.

Also use this report if there are items that should not be pulled from the warehouse until you load the truck, for example, large pieces of pipe.

Complete the following steps to run a Pre-Load Manifest Report:

- Set up the report.
- Run the report.

▶ To set up the Pre-Load Manifest Report:

1. From the **System > System Files** menu, select **Control Maintenance** to display the Control Maintenance screen.
2. In the **Keyword** field, enter **Default Pre-Load Manifest Report Sort** to display the Default Pre-Load Manifest Report Sort Option screen.

- For each branch, define the sorting method to use when running the Pre-Load Manifest Report:

Sorting Method	Sorts By...
Product	Grouping all of the same products together, regardless to which order they belong. For example, if there are three 8lb Sledge Hammers on the manifest, but all three belong to different orders, the manifest lists all three hammers together and breaks up the orders.
Ticket	Ticket number, in numerical order from first to last.
Select Code	Select code. Use the Select Codes hot key to enter several select codes to use for sorting the manifest.
Zone/PickGrp/Product	Zone, then pick group, then product. Use this sorting method to help you locate and load product.
Zone/Stop#/PkGrp/Product	Zone, then stop number, then pick group, then product. Use this sorting method to help you locate and load product.

- Press **Esc** to save your settings and close the screen.

►To print the Pre-Load Manifest Report:

- From the **Whse Mgt > Warehouse Queues** menu, select **Shipping Manifest Queue** to display the Shipping Manifest Queue screen.
- In the **Manifest #** field, enter the number of the manifest you want to print and press **Enter**.

Leave this field blank to search for an existing manifest based on any combination of entries in the **Ship Via**, **Ship Date**, and **Ship Branch** fields.

- Use the **Print** hot key to display the Shipping Manifest Report screen.
- In the **Report Type** field, press **F10** and select **Pre-Load Manifest Report**.
- In the **Show Address** field, enter **Y** or **N** to indicate if you want the shipping address displayed on the report.
- In the **Show Shipping Instructions** field, enter **Y** or **N** to indicate if you want shipping instructions printed on the report.
- Set options, if needed, and generate the report.

The Pre-Load Manifest Report screen displays.

- In the **Sort Items by** field, press **F10** and select a sorting method as described in the above procedure.
- In the **Prt Wght/Loadfctr** field, press **F10** and select **Weight** to print the weight of each product on the report or select **Load Factor** to print the load factor of each product on the report.

10. In the **Buy Line Table** field, press **F10** and select a buy line table to print for the manifest.

Use the **Buy Lines** hot key to enter several buy lines to print for the manifest.

11. Press **Esc** to run the report.

Printing Palm Pilot EManifest Downloads

Use the Palm Pilot EManifest Download Report to download a full manifest report to a Palm Pilot using the EManifest software. Use this report if you use EManifest software to make deliveries. For information about how to complete the download, see Downloading EManifests to Palm Devices.

How the System Determines Printer Location for Shipping Manifest Reports

When you print shipping manifest reports, the system determines the printer location using the following hierarchy:

What the System Checks	Where Identified
1. The printer location override defined for the ship via within a branch.	PickTicketPtrLoc field in Ship Via Branch Overrides/Auto Scheduling. For more information, see Assigning Ship Vias to Branches.
2. The printer location assigned to the shipping branch.	Ship Ticket Branch field in Printer Location Maintenance. For more information, see Defining Printer Locations.
3. The user's currently assigned location.	Slave Printer field in Slave Printer Assignment. For more information, see Assigning Slave Printers to Terminals.

Closing Shipping Manifests

Close a manifest when the delivery driver returns to the warehouse, or you receive confirmation of delivery from a third party vendor. When you close a manifest, the system prints the invoice for each transaction on the manifest. Closing a manifest changes the order's **Prt** flag from **M** to **P**, and updates the ship date and ship via on all orders on the manifest to match the dates on the manifest if the Do Not Change Ship Date Or Ship Via On Manifest Close control maintenance record is set to **N**. The **Review Queue Status** in the Warehouse Picking Confirmation Queue also changes to **Closed**.

Note: If a manifest's ship ticket is in a closed accounting period and has a different ship date or ship via than the manifest, the system will not update the ship ticket with the different ship date or ship via when you close the manifest.

Use the Activity Based Costing Log to verify delivery costs associated with adding an order to a manifest after you close the manifest. If the Log ABC Delivery Charge control maintenance record is set to **Manifest Close**, no activity-based cost is logged for the delivery charges since the customer pays the cost of the delivery.

To re-open closed manifests, you must be assigned the SOE.MANIFEST.EDIT authorization key with a level 2 authorization.

▶ To close a shipping manifest:

1. From the **Whse Mgt > Warehouse Queues** menu, select **Shipping Manifest Queue** to display the Shipping Manifest Queue screen.
2. In the **Manifest #** field, enter the manifest that you want to close.
Leave this field blank to search for an existing manifest based on any combination of entries in the **Ship Via**, **Ship Date**, and **Ship Branch** fields.
3. Use the **Close** hot key.
4. At the **Are you SURE you want to CLOSE this manifest (Y/N)** prompt, enter **Y** and press **Enter** to close the manifest.
5. Press **Esc** to save changes and exit the manifest.

Running the Shipping Manifest Report

Use the Shipping Manifest Report to create a list of orders being shipped to multiple customers from multiple branches, using one or more ship vias. The report content is grouped by customer and lists the orders being shipped and the terms of delivery. The report serves as an acknowledgement, or a receipt of orders for shipping.

Unlike a bill of lading, the shipping manifest does not specify the individual products being shipped, nor does it include hazard class information. To track all shipments for a specific ship via and to print a manifest for a single ship via, such as a company truck or a commercial carrier, use the Shipping Manifest Queue.

For a description of the report, see What the Report Shows at the end of the topic.

►To run the Shipping Manifest Report:

1. From the **Orders > Reports > Delivery Reports** menu, select **Shipping Manifest** to display the Shipping Manifest Report screen.
2. In the **Br/Tr/ALL** field, enter the branches and territories you want to include in the report.

Separate multiple branches or territories by commas. Type **All** to include all branches and territories in the report.

3. In the **Start Date** field, enter the first date in the range you want to include in the report.
4. In the **End Date** field, enter the last date in the range you want to include in the report.

For example, if you want the report to include all shipments in December 2005, enter **12/01/2005** in the **Start Date** field and **12/31/05** in the **End Date** field.

5. In the **Customer** field, enter a customer name to limit the report to include only shipments made to that customer.

Leave the **Customer** field blank to include shipments to all customers.

6. In the **Ship Via** field, enter a shipping method to limit the report to show only shipments made using that method.

Leave the **Ship Via** field blank to include all shipping methods.

7. In the **Select Order Status** field, enter an order in process status, such as **Picked** or **Manifest** to limit the report to include only orders with a particular status. Press **F10** and select a status.

Leave the **Select Order Status** field blank to include all statuses.

8. In the **Change Order Status** field, enter the in-process status you want the orders included in the report changed to after you run the report.

Leave the **Change Order Status** field blank to leave the status for the orders in the report unchanged.

9. Use the **Slct** hot key to display the Additional Selection Input screen.
10. Enter **Y** next to each additional information type you want to include in the report, such as batch ID, credit card type, and currency.
11. Press **Esc** to return to the Shipping Manifest Report screen.
12. Set options, if needed, and generate the report.

What the Report Shows

The Shipping Manifest Report shows the following information for each order on the manifest:

Field/Column	Description
Ship to	Recipient's name and address.
Ship Via	Ship via being used.
Ship Date	Shipping date.
Phone	Recipient's phone number.
Order #	Order number.
PO #	Customer purchase order number, if applicable.
Boxes / Crates / Pallets	Number of boxes, crates, or pallets that complete the order.
Signature	Signature line for recipient to acknowledge receipt.
Date	Date line for recipient to acknowledge receipt.

Running the Bills of Lading Report

Run the Bills of Lading Report to create a list of items being shipped. A bill of lading, or waybill, lists the items being shipped and the terms of delivery. It serves as an acknowledgment, or a receipt of goods accepted for transportation by a carrier or shipper.

Unlike a shipping manifest, the bill of lading does not include lines for a signature and date for each order shipment. It does, however, list the individual products and the hazard class information, which the shipping manifest does not contain.

For a description of the report, see What the Report Shows at the end of the topic.

▶ To run the Bills of Lading Report:

1. From the **Orders > Reports > Delivery Reports** menu, select **Bills of Lading** to display the Bills of Lading screen.
2. In the **Branch** field, enter the branches and territories you want to include in the report. Enter **All** to include all branches and territories in the report.
3. In the **Start Date** field, enter the starting date of the calendar date range you want to include in the report.
4. In the **End Date** field, enter the last date of the calendar date range you want to include in the report.

For example, if you want to create a report for December 2002, enter **12/01/02** in the **Start Date** field and **12/31/02** in the **End Date** field.

5. In the **Customer** field, enter a customer name to limit the report to include only shipments made to that customer.
Leave the Customer field blank to include shipments to all customers.
6. In the **Ship Via** field, enter a shipping method to limit the report to show only shipments made using that method.
Leave the Ship Via field blank to include all shipping methods.
7. Set options, if needed, and generate the report.

What the Report Shows

The Bills of Lading Report shows the following information:

Field/Column	Description
Ship to	Recipient's name and address.
Ship Via	Ship via being used.
Ship Date	Shipping Date
Phone	Recipient's phone number.
# Pcs	Number of pieces for each line item on the bill of lading.

Field/Column	Description
Hazard Class Description	Hazard class description for line item, if any.
Class	Hazard class for line item, if any.
ID Number	Hazard ID for line item, if any.
Description	Product description for line item.
Weight Ext	Extended weight of line item.
Grand Totals	Totals for bill of lading.

Running the HAZMAT Truck Manifest Report

Use the HAZMAT Truck Manifest Report, which works with the Material Safety Data Sheets (MSDS) program, to produce a hazardous materials manifest.

After invoices are billed and printed, the system looks for products on the indicated invoices that are flagged in the Product file as being hazardous. The system groups these products together by ID numbers and calculates the following:

- Extended weight (Product Weight * Ship Quantity) of the grouped products.
- Total weight of all products on the manifest.

You can run this report for only one branch and one ship via at a time.

For a description of the report, see What the Report Shows at the end of the topic.

► To run the HAZMAT Truck Manifest Report:

1. From the **Whse Mgt > Reports** menu, select **Hazardous Material Truck Manifest Report** to display the HAZMAT Truck Manifest Report screen.
2. In the **Branch** field, enter the shipping branch to include in this report.
3. In the **Start Date** field, enter the starting date of the invoices to query for hazardous products.

The current date displays. Edit the date or press **F10** to select a date using the calendar.

4. In the **End Date** field, enter the ending date of the invoices to query for hazardous products.

For example, if you want to view hazardous product invoices from December 2002, enter **12/01/02** in the **Start Date** field and **12/31/02** in the **End Date** field.

5. In the **Ship Via** branch, enter the ship via code for which to run the report.
6. In the **Include Transfers (Incl/Excl/Only)** field, press **F10** and indicate if you want to include or exclude transfers from the report.

Select **Only** to include only transfers in the report and exclude all invoices.

7. Set options, if needed, and generate the report.

What the Report Shows

The HAZMAT Truck Manifest Report shows the following information:

Field/Column	Description
Truck	Ship via for which the report was run.
Hazardous Description	Hazard description.
Hazard Class	Hazard class.

Field/Column	Description
ID#	Hazard ID.
Group	Hazard group.
Qty Shipped	Quantity shipped of the hazardous product.
Product Description	Product description of the hazardous product.
Weight	Weight of hazardous product on order.
Order#	Order containing the hazardous product.
Totals For Class	Totals of hazard class.
Truck Totals	Totals for entire truck.

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