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Kinetic Shipping And Receiving User Guide

Version 2025.1

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Setup

This section describes the primary records you need to create for the Shipping and Receiving module. These apps are contained within the Setup folder for this module; only the primary records are described here. Some areas within the Operations section may also document setup records if they are required for a specific workflow.

You may also need to set up some parameters within Company Configuration. Some modules have global settings you define through this administration app. For more information, review the application help for this module; the Configuration topic details the options you define within the Company Configuration app.

Establishing Carrier Codes
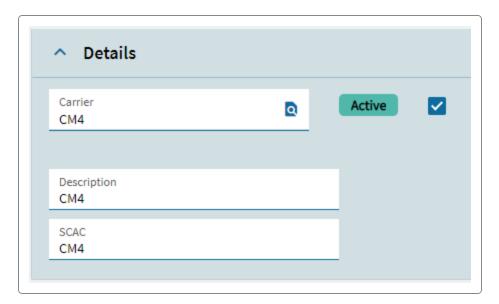
Establish codes for each carrier you use to ship goods to your customers (for example, UPS, USPS, FedEx, Consolidated) in **Carrier Maintenance**.

You can associate a Standard Carrier Alpha Code (SCAC) code with each carrier. It is an internationally accepted two-to-four digit number used in the transportation industry to identify freight carriers used in Electronic Data Interchange (EDI) transactions and shipping documents (such as Bill of Lading, Freight Bill, Packing List, and Purchase Order). These codes are commonly used by the automobile, petroleum, forest products, and chemical industries, as well as suppliers to retail businesses, carriers engaged in railroad piggyback trailers.

Use the landing page of the application to view existing carrier codes or create a new one.

In this article, we will cover creating a new carrier code.

1. From the main menu, go to **Material Management** > **Shipping/Receiving** > **Setup** > **Carrier**.

2. Select the **New** icon ⊕ to create a new carrier code.

3. Enter code and description for the carrier code.

4. In the **SCAC** field, enter the Standard Carrier Alpha Code associated with the carrier.

5. Select **Save**. 💾

Creating Ship Via Codes

Enter shipping methods, or ship via codes, for transporting products to customers and subcontractors in **Ship Via Maintenance**.

Use the landing pag of the application to view existing ship via codes or to enter a new one.

In this article, we will cover:

- [Creating ship via codes](#)

- [Deactivating records](#)

Creating Ship Via Codes

1. Go to **Financial Management > Accounts Receivable > Setup > Ship Via**.

2. Select **New** ⊕ to add a new ship via code.

3. In the **Code** field, enter a unique identifier for a method of shipping, such as UPS for UPS Ground.

4. In the **Description** field, enter more information about the shipping method. Other users will use the description to select a shipping method on orders, packing slips, and invoices. The description is also printed on documents like packing slips.

5. If necessary, in the **Web Description** field, enter a description of the shipping method as it should display in **Customer Connect**.

6. Use the **Carrier** dropdown to select the carrier (for example, **UPS** or **FedEX**) that is associated with this ship via code. The dropdown holds the carrier codes entered through Carrier Maintenance.

7. If needed, enter the associated Standard Alpha Code in the **SCAC** field. The field will default to the SCAC code defined for the selected carrier code in Carrier Maintenance.

   The SCAC is an internationally accepted two-to-four digit number used in the transportation industry to identify freight carriers used in Electronic Data Interchange (EDI) transactions and shipping documents (such as Bill of Lading, Freight Bill, Packing List, and Purchase Order). These codes are commonly used by the automobile, petroleum, forest products, and chemical industries, as well as suppliers to retail businesses, carriers engaged in railroad piggyback trailers, and ocean container drayage.Enter the free form text that denotes the SCAC code. If you associate a SCAC code with the shipment method, it displays on sales order acknowledgements, the packing slips for customer shipments, miscellaneous shipments,

master packs, transfer orders, purchase orders, EDI 855s (Outbound PO Acknowledgments), and EDI 856s (Advance Shipment Notices).

8. If your company uses the Internationalization Configuration:

   - Specify an **Intrastat Code** for this method of shipping. The Intrastat ship via code you enter into this field is included in the transaction details when you post an invoice.

   - Select **Bordercrossing Required** if a country entry or exit point should be entered with this ship via is used. The information is used for Intrastat reporting.

Intrastat is the system used for collecting statistics on the trade of goods between the member states of the EU. Organizations that are VAT-registered and trade in goods with other EU member states are required to provide details of these transactions. This includes the shipping and receiving of goods for the purpose of secondary processing and Return Material Authorizations (RMAs).

If you trade with any of the other EU member states, you have a responsibility to report the trade to HM Revenue and Customs. You generate the required Intrastat data, generate the Intrastat report and output file which can be submitted the data electronically to HM Revenue and Customs (HMRC).

HMRC uses specific terminology to describe the movements of goods between EU member states: arrivals, or acquisitions; and dispatches, or removals (rather than imports or exports as these terms instead define trade with countries that do not belong to the EU).

9. In the **Tracking Website** card, enter a Placeholder and a URL. The Placeholder specifies the portion of the URL replaced with an actual tracking number, once the shipment is processed. Enter a placeholder value in this field; a variable name that makes the tracking URL more readable. The URL holds the web address where shipments using this shipment method are

tracked. Enter the applicable URL in this field, including the placeholder variable.

If you enter a URL into this field, the segment of the URL that represents the placeholder (in the example, <TrackingNumber>) must match the placeholder value defined into the Placeholder field. The Kinetic application replaces this value with the tracking number recorded at time of shipment.

Federal Express is one of the Ship Via methods, and the applicable web address for their shipments would be defined as follows:

```
http://www.fedex.com/Tracking?tracknumbers=<TrackingNumber>&cntry_
code=us UPS is another Ship Via method.
```

The applicable web address for their shipments would be entered asfollows:

```
http://wwwapps.ups.com/etracking/tracking.cgi?&TypeOfInquiryNumber=T
&InquiryNumber1=<TrackingNumber>
```

In both cases, **<TrackingNumber>** is the placeholder value, which you define in the **Placeholder** field. When a shipment is processed in the Kinetic application, it replaces this placeholder value with the actual tracking number for the package.
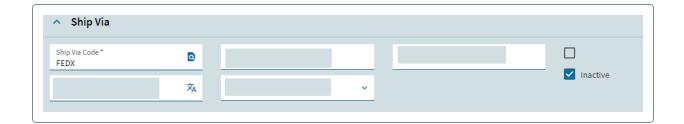
10. Save the changes.

Deactivating Records

Select the **Inactive** check box on the **Ship Via** card if you want to deactivate this ship via code. You may need this if it's an old record, and is no longer in use. This removes the record from available active options and searches in other apps.

More info on deactivating ship via codes here

You routinely add new ship via codes that are active, but over time may get retired and replaced with new ones. In order to prevent you from choosing an invalid option that is no longer applicable, Kinetic enables you to mark a ship via inactive. The deactivating option prevents you from unknowingly use the old retired data on an order or during shipment. That saves your time, and allows you ship your products without delay.

Depending on the app you use, you will see an **Inactive Ship Via** status alerting you to the inactive data (like in **Purchase Order Entry**, **Quote Entry**, **Demand Contract Entry**).

Sometimes, you may see the **Ship Via** field displays no data. This happens when, for example, you create a sales order from a quote with an inactive ship via code, or you create a duplicate from the PO that has the ship via code deactivated.

In some cases, you will see an error message alerting you to the inactive code.

> ℹ️ To learn more about the deactivating function, refer to the Deactivating Record article.

Defining Package Codes

You can define package codes that denote various kinds of shipping containers (for example, 8 x 10 Container, Multi-Unit Box) in the **Package Code Maintenance** app.

For each package code, you can specify the volume, weight and internal/external dimensional measurements (Width, Height and Length). For each type of measurement, you also specify if a user can override the standard measurement values at the time of shipment.

A package code is not required for shipping of items, but you can use it for reference if necessary. You can designate a package code as Returnable or Expendable. Returnable packages are shipping containers your recipients can send back to your facilities for refill or reuse; package codes designated as Expendable are those that are non-returnable and non-refillable.
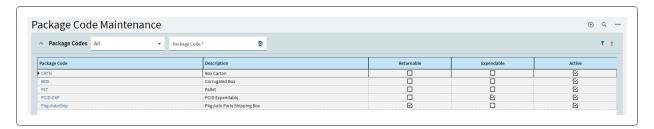
In this article, we will cover:

- [Adding Package Codes](#)

- [Associating Package Codes with Specific Sites and Internal Part Numbers](#)

- [Assigning Package Codes to Specific Customer Ship to Cross References](#)

Adding Package Codes

1. Open the **Package Code Maintenance** app.
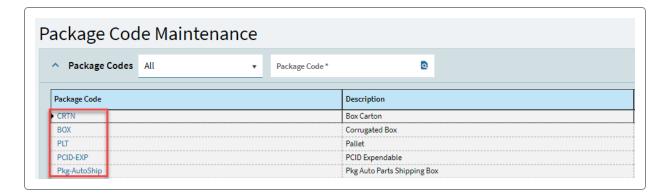
   The Landing page displays. The page displays all te existing package code records.

2. To select an existing record, select the package code link inside the grid.
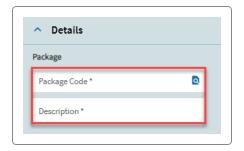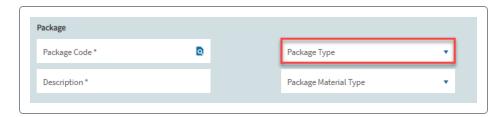
3. To add a new package code, select **New** . ⊕

   The **Details** card displays.

4. Enter the **Package Code ID** and **Description**.

5. Select the **Package Type** for the record you are creating.

   This denotes the type or general category of packaging materials to which this package code belongs.

   ℹ️ To learn more about package types, review the Creating Package Types article.

6. Select the **Package Material Type** (if any) you are assigning to this package code.

   ℹ️ To learn more about package material types, review the Creating Package Material Types article.

7. Enter the **Maximum Stack** for the package code.

Specifies the maximum number of packages of this type that can be stacked upon one another.

8. Enter the **Extension Digit** for the package code.
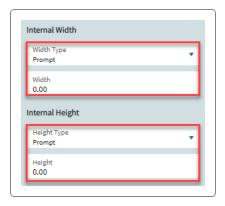
This value overrides the default value generated by the SSCC code and is used as the first digit of the SSCC code when you ship this package type.

9. Enter the **Dimension** and **Internal Length** values.

- Length Type

    - **Prompt** - Designates whether users can enter a different internal length at time of shipment than what is specified for the package code. Select Prompt if you wish to allow user entry or override of the internal package length at time of shipment. You can (optionally) enter a predefined internal package length in the unlabeled field to the right.

    - **Set Value** - Designates whether the internal package length is a predefined set value. Select Set Value and enter the predefined internal package length into the unlabeled field to the right to prevent users from overriding this dimensional value at time of shipment.

- **Length** - Specifies the internal length dimension for this package code. Enter the appropriate dimension information, expressed in the unit of measure selected in the Dimensions UOM field. You must enter a whole numeric or decimal value.

10. Define the **Internal Width** and **Internal Height** values.
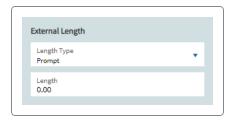
> ℹ️ The fields definitions are the same as for the 'Internal Length', but you are setting values for 'Width' and 'Height'.

11. Enter **External Length** values.

- Length Type
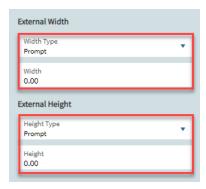
    - **Prompt** - Designates whether users can enter a different external length at time of shipment than what is specified for the package code. Select Prompt if you wish to allow user entry or override of the external package length at time of shipment. You can (optionally) enter a predefined external package width in the unlabeled field to the right.

    - **Set Value** - Designates whether the external package length is a predefined set value. Select Set Value and enter the predefined external package length into the unlabeled field to the right to prevent users from overriding this dimensional value at time of shipment.

- **Length** - Specifies the predefined external package length dimension for this package. Enter the appropriate dimension information, expressed in the unit of measure selected in the Dimensions UOM field. You must enter a whole numeric or decimal value.

12. Define the **External Width** and **External Height** values.

> **ℹ** The fields definitions are the same as for the 'External Length', but you are setting values for 'Width' and 'Height'.

13. Define the **Weight** values.
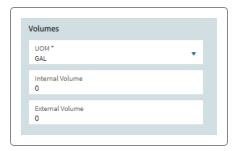
- **Weight UOM** - Specifies the UOM code that denotes the unit of measure (for example, pounds, kilograms, tons) in which the maximum gross and tare weights are expressed for this package code.

- **Tare Weight Prompt** - Designates whether users can enter a different tare weight at time of shipment than what is specified for the package code. Select Prompt if you wish to allow user entry or override of the package tare weight at time of shipment. You can (optionally) enter a predefined tare weight in the unlabeled field to the right.

- **Tare Weight Set Value** - Designates whether the package tare weight is a predefined set value. Select Set Value and enter the predefined package tare weight into the unlabeled field to the right to prevent users from overriding this dimensional value at time of shipment.

- **Tare Weight** - Specifies the predefined tare weight for this package. Enter the appropriate weight information, expressed in the unit of measure selected in the Weights UOM field. You must enter a whole numeric or decimal value.

- **Max. Gross Weight** - Specifies the maximum gross weight for the package. This is the weight that should not be exceeded for both the package and its contents. Enter the appropriate weight information, expressed in the unit of measure selected in the Weights UOM field. You must enter a whole numeric or decimal value.

14. Define the **Volumes** values.

- **Volume UOM** - Specifies the UOM code that denotes the unit of measure (for example, fluid ounces, cubic feat, liters) in which internal and external measurements are expressed for this package code.

- **Internal Volume** - Specifies the predefined internal volume of the package. Enter the appropriate volume information, expressed in the unit of measure selected in the Volumes UOM field. You must enter a whole numeric or decimal value.

- **External Volume** - Specifies the predefined external volume for the package. Enter the appropriate volume information, expressed in the unit of measure selected in the Volumes UOM field. You must enter a whole numeric or decimal value.

15. Select the **Expendable** check box if the shipping container/package is expendable and cannot be returned to you by the recipient for reuse.

> ℹ️ If you select this check box, the 'Returnable' check box is disabled.

16. Select the **Returnable** check box if the shipping container/package can be returned by the recipient so you can reuse or refill it for future shipping transactions.

> ℹ️ If you select this check box, the 'Expendable' check box is disabled.

17. Select **Save**. 💾

Associating Package Codes with Specific Sites and Internal Part Numbers

Use the **Internal Part by Site** card to associate package codes to specific internal part numbers for a specific site.

To associate the package code with specific sites and internal part numbers:

1. Expand the **Internal Part by Site** card.

2. Select **New**. ⊕

3. Select the **Site** to which you are associating the package code.

4. Enter the **Internal Part** to which you are associating the package code.

   The following rules apply. You set these rules in the 'Part' app:

   - The part can not be 'Lot Tracked'.

   - The part can not be 'Serial Number Tracked'.

   - The part can not be a 'Sales Kit' part.

   - The part must be marked as 'Quantity Bearing'.

5. If necessary, select the **Track Returnable** check box.

   Designates if returns of this shipping container/package by recipients should be tracked for the specified site and internal part. You can mark a package code as 'Returnable' or 'Expendable', but not both. This check box is enabled only if you selected the 'Returnable' check box on the 'Details' card.

6. If necessary, select the **Track Expandable** check box.

   Designates if the shipping container/package is considered expendable should be tracked for the specified site and internal part. Expendable packages are those that discarded by recipients and cannot be returned for reuse and refill. You can mark a package code as 'Returnable' or 'Expendable', but not both. This check box is enabled only if you selected the 'Expandable' check box on the 'Details' card.
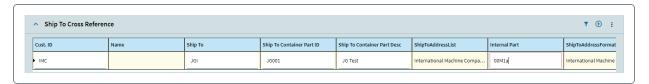
7. If applicable, select the **Reason Code In** and **Reason Code Out**.

- **Reason Code In** - Specifies the reason code used for tracking of receipts of this shipping container/package type (for the specified site and internal part number) when they are returned to your facilities.

  > ℹ️ You would select the reason code is you selected the 'Track Returnable' check box.

- **Reason Code Out** - Specifies the reason code used for tracking of shipments of this shipping container/package type (for the specified site and internal part number) from your facilities.

  > ℹ️ You would select the reason code is you selected the 'Track Expandable' check box.

8. Select **Save**. 💾

Assigning Package Codes to Specific Customer Ship to Cross References

On the **Ship To Cross Reference** card, you can assign the package code to specific customer ship to cross references, and to part numbers used by ship-to-customers to identify types of shipping containers (if any). The Electronic Data Interchange (EDI) and Labeling functions use these package code-customer ship-to-cross references when processing inbound EDI demand records and converting them to orders and shipments.

1. Expand the **Ship To Cross Reference** card.

2. Select **New**. ⊕

Ship To Cross Reference							
Cust. ID	Name	Ship To	Ship To Container Part ID	Ship To Container Part Desc	ShipToAddressList	Internal Part	ShipToAddressFormat
IMC		JGI	JG001	JG Test	International Machine Compa...	00M1a	International Machine

3. Enter the **Customer** to which you are assigning the package code.

4. Enter the **Ship To** to which you are assigning the package code.

5. Enter the **Ship To Container Part ID** and **Description**. This is the part number and description (if any) used by the ship to customer to identify this type of shipping container.

6. Enter an **Internal Part** .

   The following rules apply. You set these rules in the 'Part' app:

   - The part can not be 'Lot Tracked'.

   - The part can not be 'Serial Number Tracked'.

   - The part must be marked as 'Quantity Bearing'.

7. Select **Save**.

Using Legal Numbers

Some countries require you use legal numbers with company transactions. Legal numbers improve tracking and auditing because they make sure business documents and transactions have unique sequential numbers. For example, you can indicate within Company Configuration that legal numbers are required on all customer printed invoice and credit documents.

Legal numbers have two categories:

- Legal document numbers - These numbers are assigned to external documents like packing slips, sales invoices, and credit memos. The number assignment occurs when the documents are posted or printed.
- Legal transaction numbers - These numbers are assigned when documents are created that do not require printing, for example, manual journals and cash receipts.

You can generate legal numbers for financial, supply chain and manufacturing transaction documents throughout the application. To generate legal numbers for a transaction, the following information is required:

- At least one of the required transaction type defined in Transaction Document Type Maintenance. One must have a selected Default for System Transaction check box.
- At least one legal number configuration for the transaction type defined in Legal Number Maintenance. The transaction document type must be selected.

You use Transaction Document Type to associate transaction document types to system transactions. You then use Legal Number Maintenance to define the prefixes, formats, masks, sequences, and legal text. You link number legal number configurations to specific transaction document types.

If your Kinetic application is integrated with another financial application, legal numbers can also be generated through this external system and then returned to the Kinetic application. You may then view the legal number through various tracking programs.

You can view legal numbers in various programs, trackers, logs and reports. When you print tags, generated legal numbers associated with the transaction print on the tag.

Use the landing pag of the application to view existing legal numbers or to enter a new one.

In this article, we will cover:

- [Creating a new legal number](#)
- [Setting the format of the legal numbers](#)
- [Setting up default sequences](#)
- [Creating alternate prefixes and sequences](#)
- [Linking legal numbers to document types](#)

Creating a New Legal Number

1. From the main menu, navigate to **Financial Management > General Ledger > Setup > Legal Number**.

2. Select **New** ⊕ to add a new legal number.

3. Enter the legal number identifier you use to locate the legal number sequence and a concise explanation of the legal number purpose.

4. Select the system transaction to which the legal number is linked from the **Number Type** drop-down list. Specific transaction document types are defined in the Transaction Document Type.

5. Select the **Enable Change History** check box if you want to record the history of all changes made to the legal number configuration. If a warning window appears, select **Yes** to confirm that you want to log all changes to the legal number configuration.

6. Use the fields in the **Generation Type** section to define how the legal number is generated. You can select either an Automatic or Manual generation type. You can also select the **Generate SSCC** check box to indicate a Serial Shipping Container Code number should also be generated for this legal number. For more information about how to use SSCC numbers, review the Shipping and Receiving articles.

7. In the **Generate On** field, select at what point during the transaction to generate the legal number.

   For Automatic Generation Types

   - **Save** - The legal number generates when the document is saved and after the validations to save the document are complete.

   - **Print** - The legal number generates when the document prints and after the validations to print the document are complete.

   - **Post** - For financial transactions. The legal number generates when you click Submit to post the document.

   - **Close** - For shipping transactions. The legal number generates when the shipment has a status of Closed, Staged or Shipped.

   - **Received** - For receipt transactions. The legal number generates when you receive a line on the packing slip.

   For Manual Generation Types

   - **Assign** - The legal number generates when you manually assign it to the document, using the Actions >Legal Numbers > Assign Legal Numbers, menu option.

   - **Save** - When you save the document, a prompt appears where you can enter the legal number for the document.

> ⚠️ Based on the Number Type selection, some Generate On options might not be available.

8. Leverage the fields available within the **Prefix Type** section to define how the prefixes generate for this legal number. You can create user-defined or journal code prefixes. If you select the journal code type, you must select the journal you need from the Journal Code drop-down list.

9. Use one or more of the following check boxes within the **Number Options** section to determine how the legal numbers display to the user after generation.

   - Select the **Display Number After Generation** check box if you want the legal number to display to the user after generation.

   - Select the **Use Pre Numbered Formats** check box if you want to print the transaction and the legal number using an installed numbering format. This check box is available when you select Automatic from the Generation Type drop-down list.

   - Use one or more of the following check boxes to determine if you want sequences assigned by sites, warehouses and/or by users:

     - **Allow Prefixes By Sites** - indicates you want sequences assigned by sites codes.

     - **Allow Prefixes by Warehouse** - indicates you want sequences assigned by warehouses.

     - **Allow Prefixes by Users** - indicates you want sequences assigned by users.

   - Select the **Allow change after printed** check box to indicate documents can be changed after printed with an assigned Legal Number. If this check box is clear, you cannot change the document once is printed, your only options is to void the Legal Number, change the document, and assign a new Legal Number.

   - Select the **Allow change after printed** check box to indicate documents can be changed after printed with an assigned Legal Number. If this check box is clear, you cannot change the document once is printed, your only options is to void the Legal Number, change the document, and assign a new Legal Number.

10. Define the number of lines that can be printed using a pre-numbered format in the **Detail Lines in Format** field. This field is active when the **Use Pre Numbered Formats** check box is selected.

11. Indicate the user can change the prefix on the legal number using the **Overrideable Prefix** check box.

> ℹ️ This check box is available if the **Type** field is set to the **Manual** option.

When you activate the Overrideable Prefix check box, you can create alternate prefixes and alternate prefix sequences for this legal number.

This functionality is explored in the Alternate Prefixes and Sequences section later in this aticle

12. Use the **Number Option** drop-down list to define how numbers generate for this legal number method.

> ℹ️ This check box is available if the **Type** field is set to the **Manual** option.

Available options:

- **Sequence entered manually** – The user must directly enter the number.
- **Sequence system generated** – The application automatically generates a number.

13. Select a **Calendar** to define the fiscal calendar for this legal number.

14. In the **Voiding Option** section, use the **Automatic Void** check box to determine if legal number are voided automatically when the transaction is deleted. You can also enter a predefined voiding reason that displays in transaction logs and in reports.

> ℹ️ Based on the number type, different fields in this section may be view only:
>
> - If automatic voiding is not available for the number type, the section is disabled.
> - If only automatic voiding is available for the number type, the **Automatic Voiding** check box is selected and view only. You can update the **Voiding Reason** field with a custom reason.

15. Select **Save**. 💾

Setting the Format of the Legal Numbers

Define the format of the legal number.

A legal number is composed of mandatory and selected optional elements. In the Format card, you can select which elements to include in the legal number format and in what order the elements should appear. You can also select to divide the different elements by standard and conditional separators. When the legal number using the legal number configuration generates, the legal number uses the format defined in this sheet.

You can also define additional formatting information, including sequence length, separator symbols, date format options and the free text element text.

1. In the **Available Elements** pane, review the elements you can select to include in the legal number configuration and select an element.

The following elements are available for selection:

- Conditional Separator - Alternate or conditional separator used to separate elements of the legal number. Typically, this is used to separate the fiscal year suffix.
- Day - The date the document was created
- Fiscal Year - The fiscal year of the document date, based on the fiscal calendar
- Fiscal Year Suffix - The suffix of the fiscal year of the document date, based on the fiscal calendar
- Fiscal Period - The fiscal period of the document date, based on the fiscal calendar
- Free Text - Free text to be used in legal numbers. This text can be up to 12 characters in length. This text is defined in the Free Text field.
- Legal Number ID - The current legal number configuration
- Prefix - The main, alternative or fiscal period-specific prefix . This element is mandatory.
- Quarter - The fiscal quarter of the document date, based on the fiscal calendar. A fiscal quarter is a number of full or not full three month ranges starting from the Fiscal Year start date.
- Separator (1,2,3,...) - Specifies the character used to separate different elements of a legal number. The default value is the hyphen "-".
- Sequence -A unique numeric sequence for the legal number prefix. The element length defaults to 8 digits but you can change it. This element is mandatory.
- Site - Site associated with the document. If the document is not associated with a specific site, the current site is used.
- Transaction Document Type - The transaction document type associated with the document.

2. If you want to move an element from the Selected Elements list to the Available Elements list, use drag and drop.

> ℹ️ To include separators in the legal number, move the separator elements in the Available Elements list to the Selected Elements list and place them where you want the separators to appear. Separators display in the Formatted Legal Number Sample field.

3. Enter the **Sequence Length** to define the length of the sequence number. Valid entries are 1-10.

4. Divide sequences within the legal numbers using the **Separator Symbol**.

5. Enter the **Alternative/Conditional Separator** typically used to divide the fiscal year suffix.

6. Add the text to display in the selected Free Text element.

7. In the **Fiscal Year Format** field, select whether the fiscal year element should display in 2 or 4 digits.

8. Now, specify whether the fiscal period displays with one, two or three digits. The fiscal period ends with leading zeros.

9. Select the **Add Leading Zero to 1-digit day** check box if the Day element should always display in two digits. If the day is one digit, a leading zero is added. If clear, the Day value is displays without leading zeros.

10. Review a sample of the formatted legal number and the estimated character length of the formatted legal number. The maximum number of characters is 30.
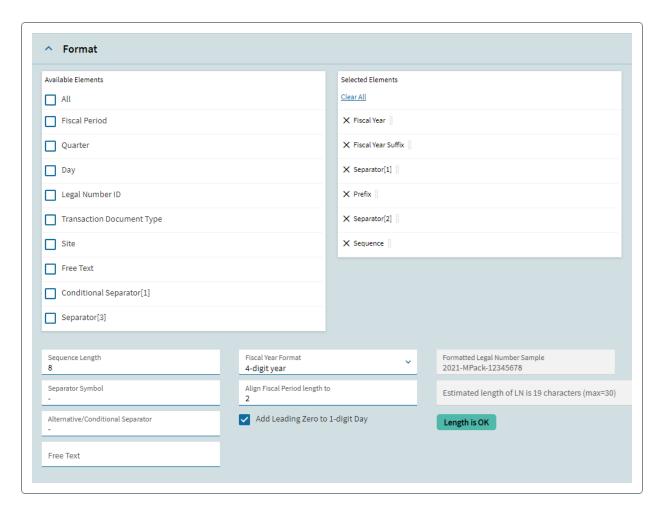
    An indicator shows if the length is within 30 characters or if it exceeds 30 characters.

    - If the legal number is under 30 characters, a green **Length is OK** indicator appears.
    - If the legal number exceeds 30 characters, a red **Length exceeds maximum** indicator appears.

    > **i** If the Generate SSCC check box on the Detail sheet is selected, legal number format is ExtensionDigit-Prefix-Sequence-AutogeneratedNumber (The - separator does not appear).
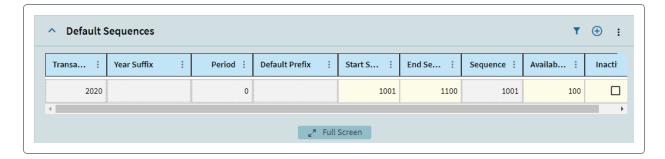
11. Select **Save**.

Setting Up Default Sequences

Default sequences define the typical sequences through which the current legal number generates. You can set up these sequences for each fiscal year, or for each period in the fiscal year. You can also indicate when this default sequence is no longer available.

To add a default sequence, on the Default Sequences card, select ⊕ . In a new row that appears on the grid, enter the **Transaction Year** and fiscal **Period** (optional) during which you want this default legal number sequence to be used.
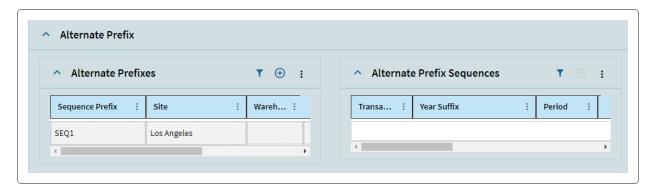
If you need, define the **Start Sequence** and **End Sequence** for the current legal number. These values determine the first and last numbers available for this sequence.

In the **Available** field, enter the number of pre-printed forms are present to use with this default sequence.

When you finish, save the sequence.

Creating Alternate Prefixes and Sequences

You can create alternate prefixes and sequences for the current legal number. You can add alternate options on the Alternate Prefix card when the **Overrideable Prefix**, **Allow Prefixes by Site**, **Allow Prefixes by Warehouse**, or **Allow Prefixes by Users** check boxes are selected. Users then select these alternate legal number options as needed.
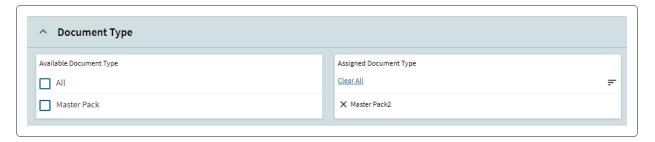
Linking Legal Numbers to Document Types

Use the **Document Type** card to link the legal number with selected transaction document types. You can associate multiple sequences with the document types selected in Customer Maintenance and AR Invoice Entry.

The available document types must not be assigned to another legal number. They must also be both active and restricted to the legal number's system transaction.

To link a transaction document type to a legal number, select the transaction document type in the **Available Document Type** panel. The transaction document type will appear on the **Assigned Document Type** list.

Continue to add the transaction document types you need. When you finish, save the legal number.

Creating a Transaction Document Type

Create AP and AR transaction document types in **Transaction Document Type Maintenance**. These document types are government mandated. You need to set them up so they follow with the statutory document types and represent a document type assigned to a legal number. For example, you can create document types for AR invoices, promissory notes, withholding tax certificates, shipments, tax receipts, and other transactions.

All AR and AP general ledger transactions must have a document type. The system uses them to drive the correct legal numbering for the transaction as each document type has its own numbering set.

You must link each document type to the applicable legal number format and number sequence. Use **Serial Number Maintenance** to create serial numbers with the appropriate conditions.

> ℹ️ If the same document type applies to both Accounts Receivable and Accounts Payable, you must manually set up a document type for each module.

Use the landing page of the application to view the existing transaction document types or create a new one.
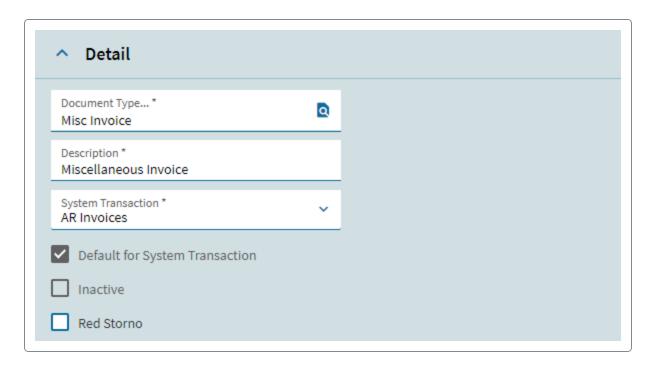
In this article, we will cover:

- [Creating a transaction document type](#)
- [Adding authorized users to a transaction document type](#)

Creating a Transaction Document Type

1. From the main menu, go to **Financial Management > Cash Management > Setup > Transaction Document Type**.

2. Select **New** ⊕ to create a new transaction document type.

3. Enter the name of the new document type in the **Document Type** field and add its description.

4. From the **System Transaction** drop-down, select the system transaction type that the system assigns to this document type.

5. Select the **Default for System Transaction** check box if you want to make this document type the default one for all system transactions of this type you enter.

> ℹ️ You must mark a document type as a system transaction default if it is the only entry of the selected transaction.

6. Select **Save**. 💾
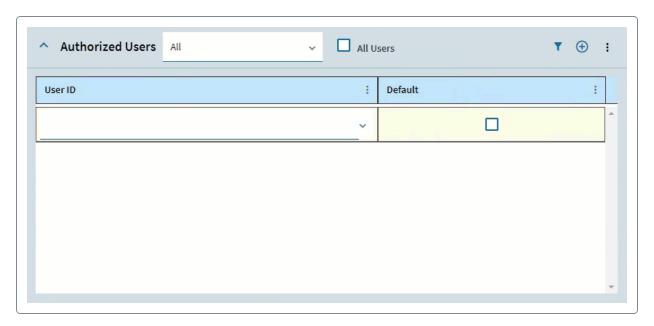
Adding Authorized Users to a Transaction Document Type

In some territories, such as Romania, you need to assign authorized users to transaction document types - specifically to the **AR Invoices** and **Credit Memos** types. These users will be authorized issuers of legal numbers the system uses for the selected document type. You can then track who created these transactions in the database. To add an authorized user:

1. Expand the **Authorized Users** card.

2. Clear the **All Users** check box.

> ℹ️ You can't clear this check box for a transaction type you defined as **Default for System Transaction**.

3. Select **New** ⊕ to add a new authorized user.

4. In the **User ID** column, select the blank space in the line and enter the user's name or select it from the drop-down.

If you need to delete an authorized user, select their line in the grid and select **Delete Authorized User** from the grid Overflow menu ⋮ .

5. If necessary, select the **Default** check box for the user to make this document type the default one for when the user creates the relevant system transaction.

6. Continue to add the authorized users you need. When you finish, select **Save** 💾.

If you want to go on and set up a transaction document type for e-invoicing, refer to the **Adding a Document Type for E-Invoice Transactions** article.

Setting Up Shipment Classes

You can combine common supplier shipments into a class. Within a class, you set up characteristics of common containers being shipped, including volume and default cost information. All this you can do in **Supplier Shipment Class Maintenance**.

You need shipment classes when you add container shipments in **Container Landed Cost Entry**. Specific information associated with the supplier shipment class code becomes the defaults for the corresponding fields in **Container Landed Cost Entry**. However, you can override these defaults for specific container shipments. For more info, go to the Combining Shipments of Suppliers article.

Use the landing pag of the application to view existing supplier shipment classes, or to enter a new one.
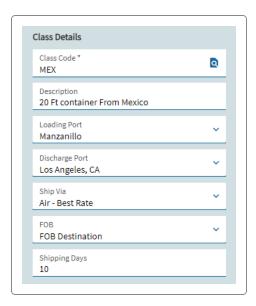
In this article, we will cover:

- [Creating a shipment class](#)

- [Adding an indirect cost](#)
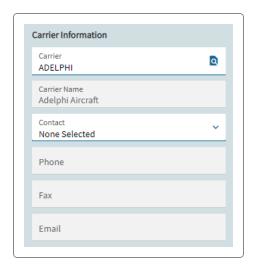
Creating a Shipment Class

1. From the main menu, go to **Material Management > Shipping / Receiving > Setup > Supplier Shipment Class**.

2. Select **New** ⊕ to add a new shipment class.

3. In the **Class Code** field, enter a short code that will help you identify this shipment class later.

4. Add additional information to describe the shipment class in the **Description** field.

5. Specify the **Loading Port** and **Discharge Port**.

6. In the **Ship Via** field, select a shipping method.

7. In the **FOB** field, specify how the supplier pays the shipping charges.

8. Enter the number of **Shipping Days** it takes for the container to reach the destination.

Class Details

Class Code *
MEX

Description
20 Ft container From Mexico

Loading Port
Manzanillo

Discharge Port
Los Angeles, CA

Ship Via
Air - Best Rate

FOB
FOB Destination

Shipping Days
10
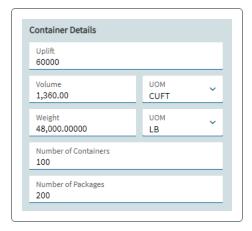
9. In the **Carrier Information** group box, enter the carrier details.

Carrier Information

Carrier
ADELPHI

Carrier Name
Adelphi Aircraft

Contact
None Selected

Phone

Fax

Email

10. In the **Container Details** group box, define the container characteristics.

Container Details

Uplift
60000

Volume | **UOM**
1,360.00 | CUFT

Weight | **UOM**
48,000.00000 | LB

Number of Containers
100

Number of Packages
200
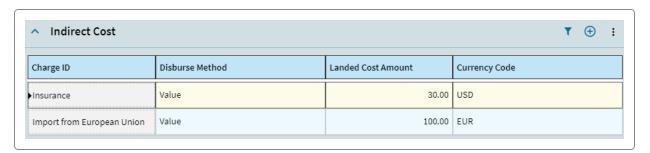
11. Select **Save**. 💾

Adding an Indirect Cost

Once you created a supplier shipment class, you can now link an indirect cost to it.

1. On the **Indirect Cost** card, select **New** ⊕ to add a new indirect code to the class.

2. From the **Charge ID** drop-down, select the code for your indirect charge.

3. Review the **Landed Cost Amount** associated with this charge code.

Charge ID	Disburse Method	Landed Cost Amount	Currency Code
▶ Insurance	Value	30.00	USD
Import from European Union	Value	100.00	EUR

4. Select **Save**. 💾

Setting Up Workstations

You can use the **Workstation Maintenance** app to establish information for the workstation, including the station ID, the warehouse and bin of the workstation, and the method of getting weight.

You can integrate a workstation manifest web URL by enabling the manifest details. Additionally, you can establish the scale devices or printers that are attached to a specific workstation and you can further specify the default printer or device for a workstation. There is also the option to specify a length of time that the client waits for a response from a weight service for each workstation.
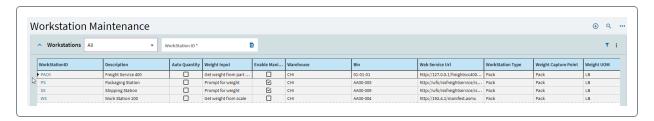
In this article, we will cover:

- Creating a new workstation
- Adding devices to workstations

Creating a New Workstation
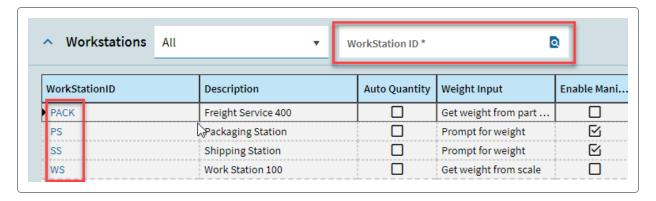
1. Open the **Workstation Maintenance** app.

   The Landing page displays. The page displays a list of existing workstations.

2. To select an existing workstation, select the **WorkStationID** link inside the grid.
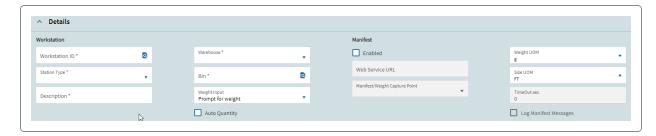
   You can also search for a specific workstation on the 'Workstation ID' field.
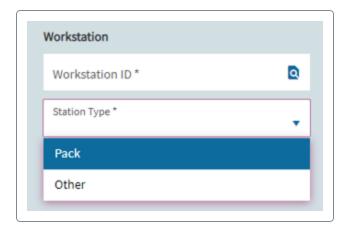
3. To add a new record, select **New**. ⊕
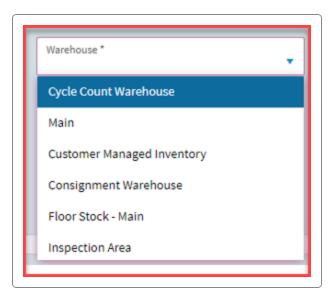
   The Details card displays.
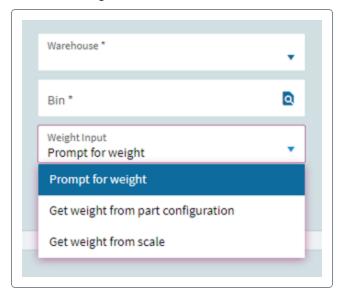
4. Enter a new **Workstation ID** you will use to represent the workstation.

5. Select the station type from the drop-down list.

6. In the Description field, enter further information to describe the workstation.

7. Select the warehouse in which the workstation is located.

8. Specify the bin in which the workstation is located.

9. Use the **Weight Input** field to enter the basis by which weight is determined:

   - **Prompt for Weight** - An input box displays prompting for the weight of each 'Pack ID'.
   - **Get weight from part configuration** - The weight of the 'Pack ID' is automatically calculated from the weight of each part that is packed.
   - **Get weight from scale** - The scale is connected with the configuration from the 'Devices' card. The weight comes in from the scale.
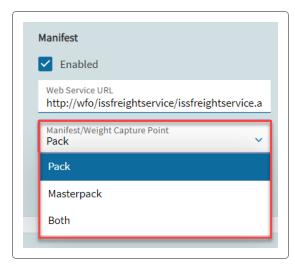
10. Select the **Auto Quantity** check box if the pack station should enter **1** for the quantity.

    When you select this check box, you cannot scan the 'Quantity' field.
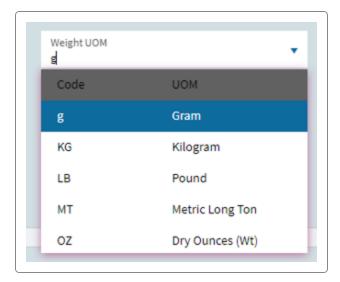
11. Select the **Enabled** check box if you want to use the Manifest fields.

12. Specify the URL (web site) for the Pack Out manifest information.

13. Use **Manifest / Weight Capture Point** to enter the basis by which weight is acquired:

    - **Pack ID** - The weight is acquired for each Pack ID, and each Pack ID is considered separately. If you select this option then you can freight a pack using the 'Customer Shipment Entry', 'Miscellaneous Shipment Entry', 'Subcontract Shipment Entry', and 'Transfer Order Shipment' apps. You cannot freight a master pack.

    - **Master Pack** - The weight is acquired for the master pack, and only the master pack is manifested. If you select this option then you can freight a master pack using the 'Master Pack Shipment Entry' app. However, you are not able to freight a pack using the 'Customer Shipment Entry', 'Miscellaneous Shipment Entry', 'Subcontract Shipment Entry', and 'Transfer Order Shipment' apps.

    - **Both** - The weight is acquired for each Pack ID and master pack. If you select this option then you can freight a pack or master pack using the apps mentioned in the points above.
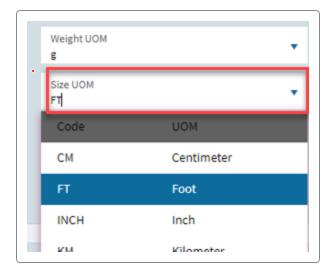
14. Select the unit of measure for weight.
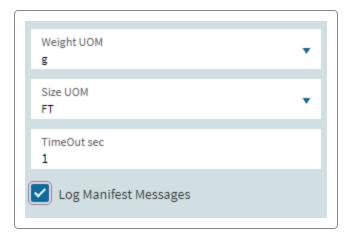
15. Select the unit of measure for size.

16. Enter the **TimeOut sec** value.
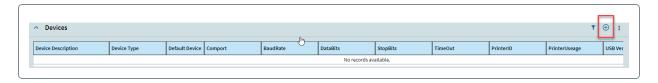
17. **Log Manifest Messages** indicates if the workstation stores the freight request and response data, in the XML file format, in the server log for the current company. Select this flag to enable the storing of the freight request and response data. Clear this flag to indicate that you do not want to store this data.

18. Select **Save**.
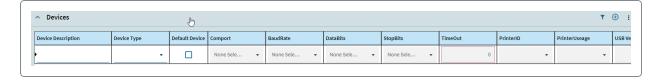
Adding Devices to Workstations

You can also define a default device at the workstation level, for example, a default printer or digital scales.

1. Expand the **Devices** card.

2. Select **New** .

3. Enter a description for the device.

4. In the **Type** field, select the correct type.

   Available options include:
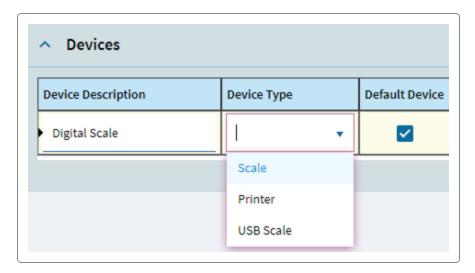
- **Printer** - When a user logs into this workstation, this default printer is automatically used for both regular printing and auto-printing. If a report does not have a rule that defines a network printer path, this default workstation printer is used for any reports, forms, or labels printed from this workstation.
- **Scale** - When a user logs into this workstation, this default scale is automatically selected.
- **USB Scale** - Select if the added device is a 'USB Scale' device.

> ⓘ To learn about how to use the 'USB Scale' feature, review the Working with USB Scale article.

5. Select the **Default Device** check box.

6. Fill in the respective required fields that get enabled depending on the type of device you select.

7. Select **Save**. 💾

Operations

This section details the operations available in the Shipping and Receiving module. Each operation is described as a workflow to help guide you through the process from start to finish. These apps are primarily found within the General Operations folder of this module. If a unique setup record is required to run the operation, this record is also described in this section.

Generating the Scheduled Shipments Report

Run the **Scheduled Shipments Report** to display outstanding order releases quantities.

The standard version of the report, does not show Bin Locations for the Part Numbers. The user would need to two reports or track each Shipment individually to identify where these parts are located.

Fortunately, SSRS reports can be customized to include additional fields and information. A table - table relation can be added in the Report Data Definition and thus, allow the addition of new fields to the report. This allows you to include the following fields:

- Warehouse
- Bin Location
- On Hand Quantity

Once you deploy the modified version of the SSRS report, you can continue running the report the same way it has been executed before. When deploying the custom version, you can also choose to either replace the existing version of the report, or create a new Report Style so you can run both versions.

The outstanding order release quantity is calculated by subtracting both the Shipped Quantity and the Shipped from Stock Quantity from the Order Release Quantity. If this value is negative, the outstanding quantity is set to zero.

> ℹ️ Outstanding Quantity = Order Release Quantity - (Shipped Quantity + Shipped from Stock Quantity)

> ℹ️ The report only displays quantities marked as Shipped on a packing slip.

The **Selection** parameters include:

- **Due On or Before** - The cutoff date for the report. Only open order releases that are dated on or before this date are printed on the report.
- **Include Site to Site Shipments** - Select if you want the report to include shipments made from one internal site to another internal site.
- **Sort By** - Gives you the option to sort out the report by Due Date/Customer, Customer/Part/Due Date, Due Date/Part, and Part/Due Date.
- **Report Style** - Select the report style option you want to use to run this report.
- **Schedule** - Indicates when you want to print the report. If you select something other than Now, the Recurring check box is available.
- **Archive Period** - Time period you want to keep the report in the System Monitor. The default is 0 Days, meaning that the report will be deleted from the monitor shortly after being printed.

After the Archive Period passes, the report is purged from the system. When a report is exactly purged is determined by a combination of the date/time the report generates, the number of days set in the report's Archive Period, and the Report Purge Frequency setting. The Report Purge Frequency is defined in the System Agent within its Task Agent Purge Settings.

- **User Description** - Describes a specific report run. The entered description displays in the System Monitor.

- **Recurring** - Select this check box if you want the report to run on a repeating basis. This check box is only available if you select a schedule other than Now.

To generate the report:

1. From the main menu, go to **Material Management > Shipping / Receiving > Reports > Scheduled Shipments**.

2. Select the parameters depending on what you want the report to display.

3. Select **Print Preview**. 🖨

Generating the Sales Order Pick List Report

Run the **Sales Order Pick List Report** to display open sales order releases due within the specified date range.

> ⚠️ The report only displays quantities that are not shipped.

The **Selection** parameters include:
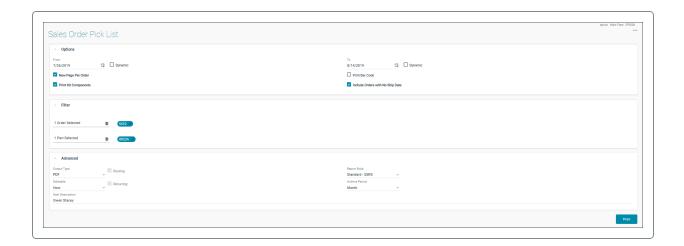
- **Dates** - Select the beginning and end dates for the report.
- **Next Page Per Report** - Select for the report to display a new page per sales order.
- **Print Bar Codes** - Select for the report to display bar codes.
- **Print Kit Components** - Select for the report to display details of the kit components on the pick list, including the component item number, description, quantity per kit, and extended quantity.
- **Include Orders with No Ship Date** - Select for the report to display order that don't include ship dates.
- **Filter** - Informs you whether you used filters or not. After you select a specific filter option, the fields located in this pane display values depending on whether you filtered (Some Selected) or you did not (All Selected).
- **Report Style** - Select the report style option you want to use to run this report.
- **Schedule** - Indicates when you want to print the report. If you select something other than Now, the Recurring check box is available.
- **Archive Period** - Time period you want to keep the report in the System Monitor. The default is 0 Days, meaning that the report will be deleted from the monitor shortly after being printed.

  After the Archive Period passes, the report is purged from the system. When a report is exactly purged is determined by a combination of the date/time the report generates, the number of days set in the report's Archive Period, and the Report Purge Frequency setting. The Report Purge Frequency is defined in the System Agent within its Task Agent Purge Settings.

- **User Description** - Describes a specific report run. The entered description displays in the System Monitor.
- **Recurring** - Select this check box if you want the report to run on a repeating basis. This check box is only available if you select a schedule other than Now.

To generate the report:

1. From the main menu, go to **Sales Management > Order Management > Reports > Sales Order Pick List**.
2. Select the parameters depending on what you want the report to display.
3. Select **Print Preview**. 🖨

Sales Order Pick List

▲   **Options**

From
7/26/2019   ☐ Dynamic

To
8/14/2019   ☐ Dynamic

☑ New Page Per Order
☑ Print Kit Components

☐ Print Bar Code
☑ Include Orders with No Ship Date

▲   **Filter**

1 Order Selected   📄   [5410]

1 Part Selected   📄   [00C2A]

▲   **Advanced**

Output Type
PDF ⌄

☐ Routing

Report Style
Standard - SSRS ⌄

Schedule
Now ⌄

☐ Recurring

Archive Period
Month ⌄

User Description
Gwen Stacey

[Print]

Entering Customer Shipments

When trading with a customer, a shipment of the products is one of your main responsibilities. The 'Customer Shipment Entry' app helps you process shipments to the customers. It allows you enter shipments and define shipped items using a single program. You can specify the packs, carrier options, status, serial numbers, billing and invoice information, and other shipment details.

In this article, we will cover:

- Specifying Shipment Details
- Creating Pack Lines
- Setting Up Delivery Details
- Adding Miscellaneous Charges
- Reviewing Shipment Activities
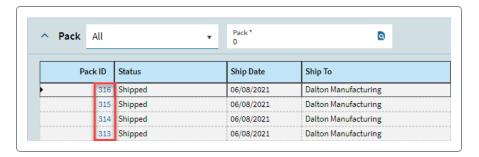
Specifying Shipment Details

First, define details for your shipment.

To enter a pack record:

1. Open the **Customer Shipment Entry** app.

   The Landing page displays. The page lists all the existing packs. To select an existing pack, select a pack link inside the grid line.

2. To add a new pack, select **New Pack**. ⊕
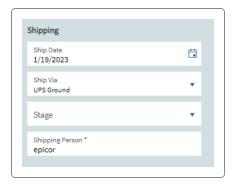
   The Header Details card displays.

3. Search for and select a order you are going to ship.

> **i** You create sales orders using the 'Order Entry' app.

4. If the ordered items are linked to a PCID, search for and select a relevant PCID number.

5. Define shipping information.

6. Select **Save**. 🖫

Kinetic generates a new pack number.

> **i** The number in the screen shot is just an example.

> **i** When the shipment is closed and freighted, information entered in the Label Comment field and the selected is transferred to Quick Ship for inclusion on the return service carrier label.
>
> Information from the Label Comment field is also transferred to Quick Ship when using

Creating Pack Lines

A pack record can contain one or more detail lines that define the shipping quantities sent out with each pack record. On the Pack Lines cards, you can create lines, change the country of origins, warranty codes, identify the final destination of the goods, and so on.

In this section, we will cover:

- [Adding Pack Lines](#)
- [Changing Country of Origins](#)
- [Setting Up Tax Details](#)
- [Identifying Final Destination Of the Goods](#)
- [Changing Warranty Codes](#)
- [Adding Shipment Component Issues](#)

Adding Pack Lines

To create a pack line:
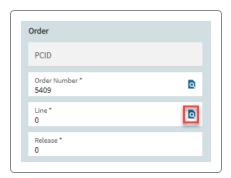
1. In the Nav tree, select the **Shipment Lines / Line Details** node.

   The Line Detail card displays.
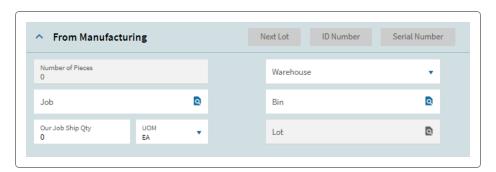
2. To add a new line, select **New Line**. ⊕

3. In the Order Number field, search for and select an order line.

4. Enter a release number in the Release field and press **Tab**.

5. Review the From Inventory card.
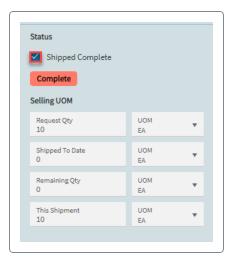
ⓘ   In this case, we are shipping '10' units of part 'DCD-100-SP'.

6. If you are shipping from production, review the **From Manufacturing** card.

ⓘ   This would be the case for non-stock parts.

7. Verify the **Shipped Complete** check box is selected.

8. The line status **Complete** if the full quantity is shipped on the pack line.

9. Select **Save**.

Editing Country of Origins

Expand the **Country of Origins** card to change or override country of origin information for a shipped part. This information denotes the countries in which the item was manufactured, produced or grown, and the percentage makeup based on quantity or value of the raw materials. The default information comes from the country of origin information defined for the shipped part in the 'Part' app.

Some European countries require reporting of the specific countries of origin and relative content/value percentage breakdowns per country when parts arrive from other 'European Union' (EU) countries. The rules determining the country of origin vary greatly, depending on the industry and country to which or from the product is being shipping. The content and value percentage breakdown is a labeling requirement for some industries. This information can be overridden for specific shipments throughout the application.

To change the country of origins:

1. In the Nav tree, select the **Shipment Lines / Country of Origins / Country of Origin Detail** node.

    The Country of Origin Detail card displays.
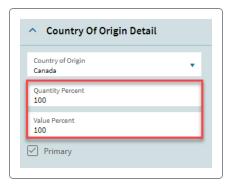
2. To add a new country, select **New Country of Origin**. ⊕

3. Select the country of origin.
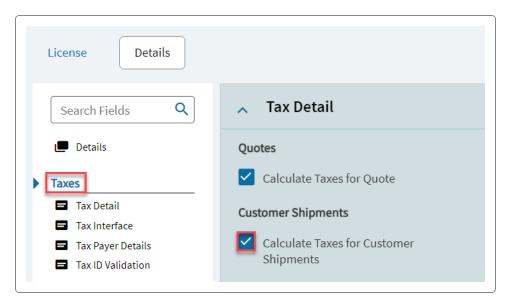
4. Specify the relative 'Quantity' and 'Value' percentage of the shipped product that originates in the selected country.

5. Select **Save**. 🖫
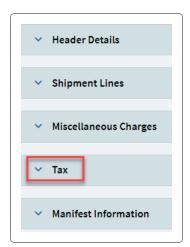
Setting Up Tax Details

If you select the 'Calculate Taxes for Customer Shipments' check box in the 'Company Configuration' app, Kinetic calculates tax amounts for customer shipments when a pack (or master pack) is shipped or closed, and then stores it internally for use when printing the associated packing slips.

To review taxes:

1. In the Nav tree, select the **Details** node.

> ℹ️ This is the very top node in the Nav tree.

2. Scroll down to locate the **Tax** card and expand it.

3. Review the tax information for the shipment and its line.

4. Select **Save**. 💾

Identifying Final Destination Of the Goods

Use the **Mark For** card to identify the final destination of the goods for the sales order.

You would typically use this card when you ship an item to a distribution center instead of directly to a customer, and the distribution center requests that the item be marked with a name and address for reshipment to one of their customers.
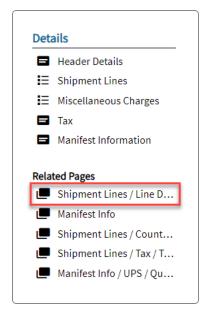
- In this case, the 'Ship To' is the distribution center, and the Mark For is the final destination address of the package.
- If the 'Allow One Time Ship To' check box has been selected on the 'Customer Maintenance > Customer > Detail' card, you can select the 'One Time Ship To' check box to manually enter a one time ship to address. The 'Mark For' information prints on shipping labels and packing slips.

If the sales order was created from a quote and you have the 'Dealer Network Management' license installed, Kinetic retrieves the information from the 'Line > Dealer Info' card in the 'Opportunity/Quote Entry' app and uses it to identify the final destination of the goods.

To locate the 'Mark For' card:

1. In the Nav tree, select the **Shipment Lines / Line Details** node.

   The Line Detail card displays. Minimize the card upon launch.
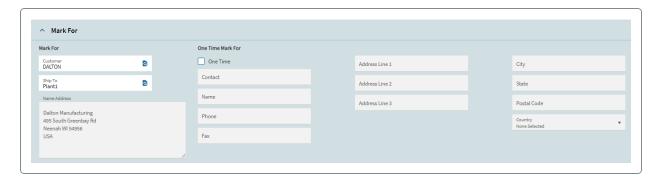
2. Scroll down to locate the **Mark For** card and expand it.

3. Review the card.

ℹ️ In this example, we are shipping to the 'Dalton' customer.

Changing Warranty Codes

You can change a warranty code for the shipment line on the **Warranty** card.
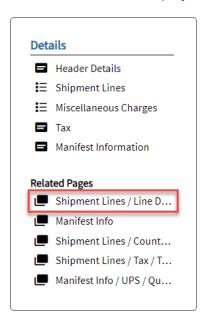
Once you add a line to your packing slip you can change the existing warranty code tied to the shipped item via **Part Maintenance** and **Product Group** or add a new one, if the shipped item is not linked to a warranty code. To add a new code, select and search for a warranty code.

To locate the 'Warranty' card:

1. In the Nav tree, select the **Shipment Lines / Line Details** node.

   The Line Detail card displays. Minimize the card upon launch.
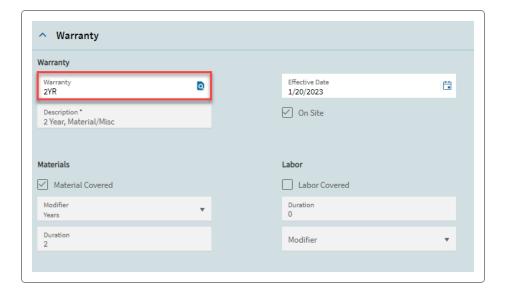
2. Scroll down to locate the **Warranty** card and expand it.

3. In the Warranty field, search for and select a warranty.

4. Select **Save** . 💾

Adding Shipment Component Issues

Use the **Sales Kit Component Issue** card to ship parts that are components of a sales kit.

You must ship kit components complete. This means components must be shipped together at one time. Kit components are not set for backflush. This means that you must pull each component part individually from stock. You need to enter the location from which kit components were picked, and cannot change the quantity of the components.
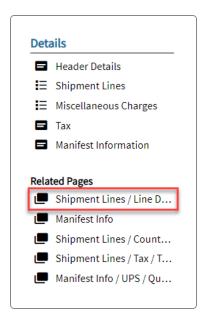
This card enables you to enter the locations from which the components were picked. You can also use it to assign serial numbers to component parts.

To locate the **Sales Kit Component Issue** card:

1. In the Nav tree, select the **Shipment Lines / Line Details** node.

   The Line Detail card displays. Minimize the card upon launch.

2. Scroll down to locate the **Sales Kit Component Issue** card and expand it.

3. Select new and add details if the part you are shipping is a sales kit card. ⊕

Setting Up Delivery Details

Expand the cards on the **Customer Shipment Entry > Manifest Info** card to set up carrier options for the 'Pack ID', billing options for the order, or to enter freight information settings for 'Fedex' or 'UPS'.

You can also use these cards to establish a pack as a 'Phantom Pack', or to track manifest information.

In this section, we will cover:

- [Establishing General Carrier Options](#)
- [Establishing Carrier Options for International Shipments](#)
- [Setting Billing Options](#)
- [Entering Freight FedEx Information](#)
- [Entering Freight UPS Information](#)
- [Setting Packs As Phantom Packs](#)
- [Tracking Manifest Information](#)
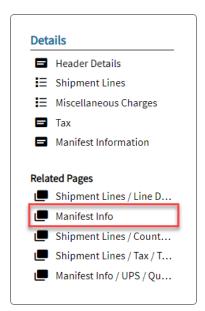
Establishing General Carrier Options

Locate the **Manifest Info > General** card to specify carrier options for a 'Pack ID'. The options default from the customer/ship to record for the first order that is packed, but you can change them here. This information is sent to the manifest system where the Pack ID is freighted.

To locate the General card, select the **Manifest Info** node in the Nav tree.

Here is more information about the following fields in this card:

- **COD** - Select this check box if a COD is required. The default comes from the first sales order added to the pack. If the shipment has a defaulted value, it is not recalculated when it is closed.

- **Bill of Lading** - Select this button to launch the 'Quick Ship Bill of Lading' form. For the 'Bill of Lading' launch button to activate, you must select the 'Bill of Lading' check box located on the 'Company Configuration > Materials > Shipping and Receiving' card.

- **International** - Select this button to launch the 'Quick Ship International Shipments' form. For the 'International' launch button to activate, you must select the 'International Shipments c' box located on the 'Company Configuration > Materials > Shipping and Receiving' card.
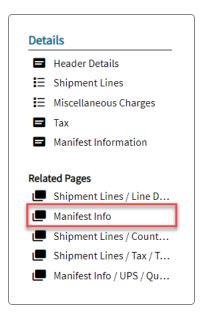
Establishing Carrier Options for International Shipments

Use the **Manifest Info > General International** card to establish carrier options for international shipments for the 'Pack ID'. The options on this card default from the customer/ship to record for the first order that is packed, but they can be changed here. This information is sent to the manifest system where the 'Pack ID' is freighted.

To locate the 'General International' card:

1. In the Nav tree, select the **Manifest Info** node.
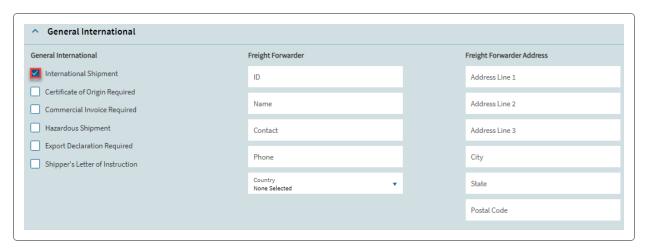
2. Scroll down to locate the **General International** card and expand it.

3. Select the **International Shipment** check box and define the rest of values.

Setting Billing Options
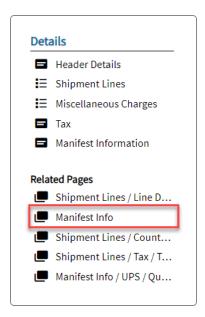
Set up billing options for the order on the **Billing** card.

To locate the 'Billing' card:

1. In the Nav tree, select the **Manifest Info** node.
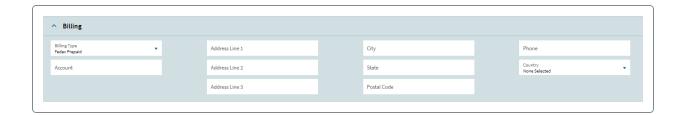
2. Scroll down to locate the **Billing** card and expand it.
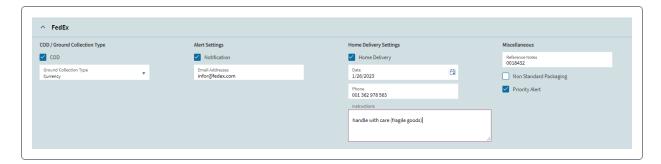
3. Define the values on the card.

Entering Freight FedEx Information

Expand the **FedEx** card to enter freight information settings for FedEx. It is useful if FedEx is the shipping service with which you send shipments.

Entering Freight UPS Information

The **UPS** card helps you enter freight information settings for UPS. It is useful if UPS is the shipping service with which you send shipments.

Setting Packs As Phantom Packs

You can establish a pack as a Phantom Pack using the **Phantom Details** card.

A phantom pack is a pack whose contents are not necessary to know at an item level. In other words, a case is being sent, and the ID, weight, and recipient are important, but the contents are unimportant.
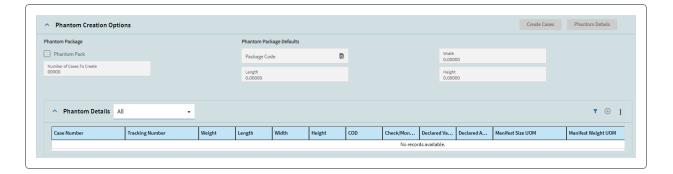
> To establish this pack as Phantom, the status of the pack must be **Closed**. In addition, you cannot enter a pack as master packs, or assign it to current master packs. Phantom

> ℹ️ pack shipments do not sent order or part information to the freight web service. Once a pack is freighted, no further changes can be made to it. For more information about phantom packs, see **Phantom Pack Logic**.

Tracking Manifest Information

Using the **Manifest Response** card, you can track manifest information such as published freight, discounted freight, and tracking number for the manifest. The information on this tab is sent to the manifest system, and received back when the pack ID is freighted. These fields are then updated with the results from the manifest system.
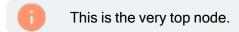
Adding Miscellaneous Charges

Enter miscellaneous charges for freight or other charges that will be printed on the pack using the **Misc Charges** card. These charges will be available for A/R invoicing.
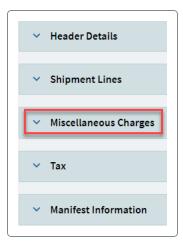
To add a charge:

1. Select the **Details** node in the Nav tree.

   > ℹ️ This is the very top node.
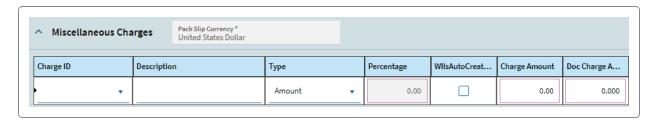
2. Expand the **Miscellaneous Charges** card.

3. Select **New** . ⊕

4. Specify **Charge ID**, **Description, Type**, **Percentage**, and **Charge** values.

5. Select **Save** . 💾

Reviewing Shipment Activities

Using the **Activity** page review information relevant to your shipment.

> ℹ️   You cannot modify information on the Activity page.

You can review information about:
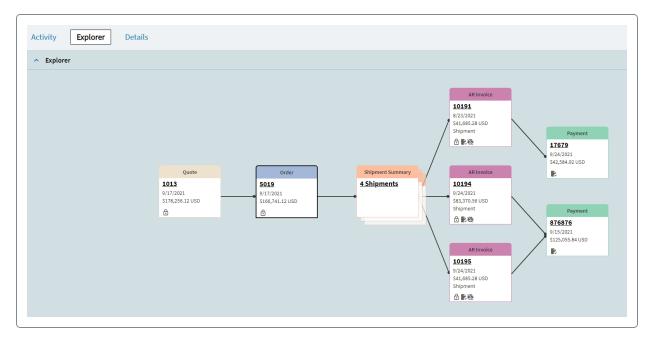
- **Quotes** - If the shipment has been quoted, review this card.
- **Sales Order** - Review the sales order information relevant to the shipment.
- **Invoices** - If an AR invoice exists for this shipment, review this card.

- **Cash Receipts** - Displays a cash receipt information if the customer who ordered the items paid for the shipped items.

- **Serial Numbers** - If the shipped items were serial numbers tracked, review this card.

- **PCIDs** - If the shipped items were part of a PCID(s), review this card. Items in Kinetic can belong to a PCID identificator. To understand the PCID concept, think of an IKEA example. You order a couple of items and you hand pick them from two separate shelves. Both shelves hold a different quantities of the ordered items. In this example, the shelves would your PCIDs.

Open the **Explorer** tab to see a graphical representation of relationships between related quotes, orders, shipments, AR invoices and payments – providing a detailed overview of the quote to cash cycle:
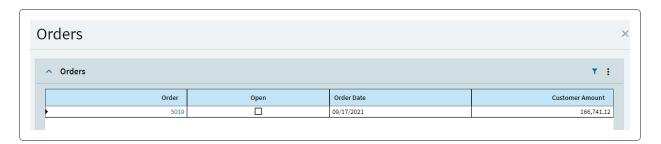
This relationship "map" consists of five card groups:

1. Quote
2. Order
3. Shipment
4. AR Invoice
5. Payment
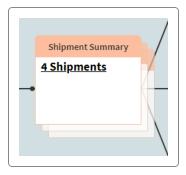
Each card contains a basic overview and an underlined link (the **Quote/Order/Shipment/Invoice/Payment Number** field), which opens a panel with detailed information:
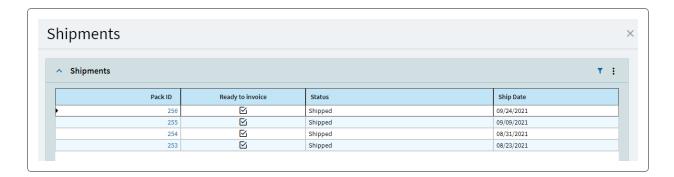
When there are four or more cards in a group, a collapsed version of the cards displays:

You can select the underlined link on the collapsed cards to view a panel with all the records listed:

Shipments ×

⌃ Shipments   ▼ ⋮

Pack ID	Ready to invoice	Status	Ship Date
256	☑	Shipped	09/24/2021
255	☑	Shipped	09/09/2021
254	☑	Shipped	08/31/2021
253	☑	Shipped	08/23/2021

ⓘ   More details can be added to the grid using the **Personalize Columns** option in the panel's **Overflow menu**. You can also select the record to access it.

Combining Shipments of Suppliers

Combine shipments of one or more suppliers using **Container Landed Cost Entry**. The combined shipment may then be shipped into one or more containers.

You can specify a supplier shipment class code (previously defined in **Supplier Shipment Class Maintenance**) for the container shipment. Specific information associated with the supplier shipment class code becomes the defaults for the corresponding fields when it is used in **Container Landed Cost Entry**, but can be overridden for specific container shipments.

When a container is shipped from a supplier, a notification is received with the actual shipment date, estimated arrival date, and volume specification of the shipped goods. Based on this information, the related purchase order releases can be updated with new due dates and quantities. Define landed costs (for example, duties, indirect costs, and uplift percentages) for each shipment. When the parts are received, the application applies landed costs to the part unit cost. The Status field displays the current status of the container shipment, based on transactions already processed in **Container Landed Cost Entry**.

In this article, we will cover:
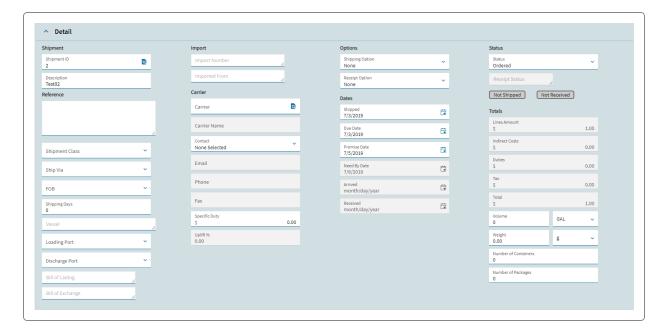
- [Creating Combined Shipments](#)
- [Creating Shipment Lines](#)
- [Entering Indirect and Landed Costs](#)
- [Using Overflow Menu](#)

Creating Combined Shipments

To create a combined shipment using landed costs:

1. From the main menu, go to **Material Management > Shipping / Receiving > General Operations > Container Landed Cost Entry**.

2. Select **New** ⊕ to add a new combined shipment.

3. Enter your shipment information, including the description, shipment class.

4. In **Shipping Days**, enter the number days it takes for this container shipment to reach its destination; the default comes from the shipping class you selected.

5. Enter the date the container was shipped. The application adds the number of shipping days to calculate a **Due Date** for the container shipment.

6. Enter your **Volume** and **Weight** unit of measures.
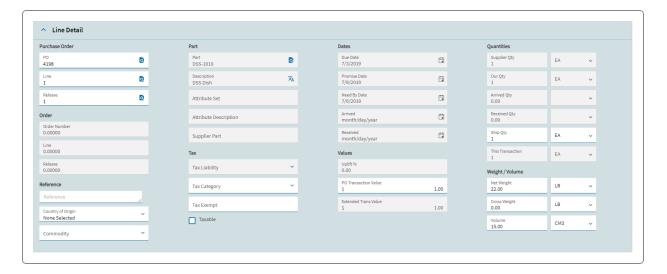
7. Select **Save**. 💾

Creating Shipment Lines

Use the Lines card to enter or modify the container landed cost line information, including duty information for the container shipment.
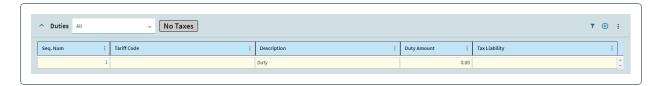
To add the line information:

1. Select **New Shipment Line** ⊕ on the **Lines** card for each shipment you wish to combine.

2. Search for or enter a **Purchase Order** and select the Lines you wish to combine into the shipment.

3. Use the **Duties** card to apply tariff codes to container lines.

   The duty amount calculations are based on the tariff codes linked to the commodity codes for each shipment item. The duties are passed on the preference scheme linked to the country of origin of the part. One or more tariff codes can be added to each shipment line. For each specified tariff code, the application makes a calculation based on the tariff formula and the purchase order item value, and summarizes, per shipment line, the result for each tariff calculation.
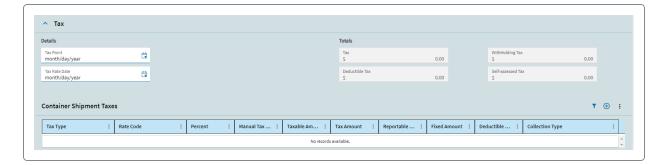
4. On the **Tax** card, add shipment line taxes, select tax calculation parameters and view total tax amounts for the container shipment line.

   You can add the taxes on the **Tax**> **Container Shipment Taxes** card of the **Details** page.

5. Select **Save**. 💾

> ℹ️ Use the **Add Multiple Shipment Lines** feature of the Overflow menu to add several lines to the shipment.
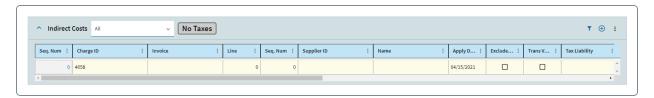
Entering Indirect and Landed Costs

On the **Indirect Costs** card, apply any miscellaneous charges or credits to the shipment, if necessary. With the **Landed Costs** card, enter landed cost information and related comment text for the container shipment.

To apply the costs:
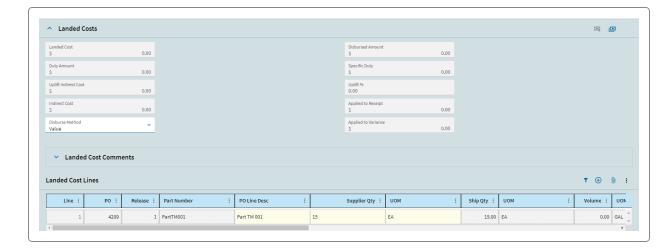
1. On the **Indirect Costs** card, card select ⊕ to add costs.

2. Specify the sequence number, charge id, and other information as required.

3. Save the changes.

4. Navigate to the **Landed Costs** card to enter landed cost information for the shipment. Landed costs - including duties, indirect costs, and uplift costs - can be defined for each shipment and are applied to the part unit cost when the shipment is received.

5. Select a **Disburse Method**, including indirect cost method, quantity, value, volume, weight, and manual.
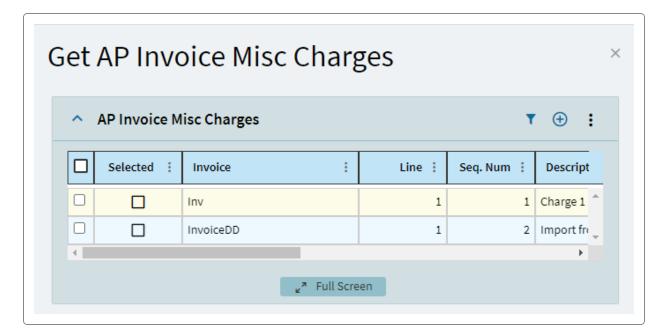
6. After entering your values, select the **Disburse Indirect Cost** 📠 icon.

Using Overflow Menu
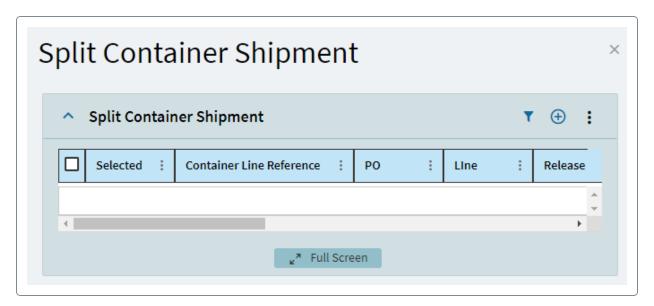
To apply charges to the total landed cost:

1. From the Overflow menu, select **Get AP Invoice Misc Charges**. The AP Invoice Misc Charge window displays with a grid of AP invoices already assigned to the Shipment ID.

2. From the **AP Invoice Misc Charges** window, select the purchase orders you want to add, and select **OK**.
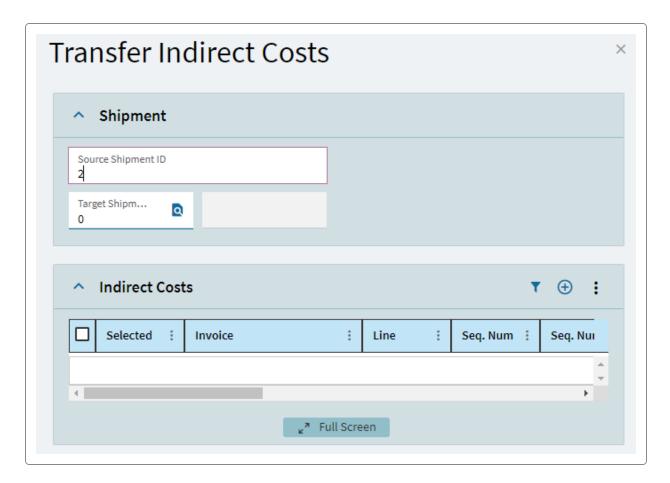
To copy Items from one container to another container:

1. From the Overflow menu, select **Split Container Shipment**. The AP Invoice Misc Charge window displays with a grid of AP invoices already assigned to the Shipment ID.

2. From the **Split Container Shipment** window, select the Selected check-box of the container details you wish to copy.

To transfer indirect charges to a shipment:

1. From the Overflow menu, select **Transfer Indirect Costs**. The Transfer Indirect Costs menu displays with a list of indirect cost records on a grid for the shipment.

2. Enter or select **TargetShipmentID** to search for the container shipment where you want to transfer the indirect costs.

3. Select **OK**.

Transfer Indirect Costs ✕

∧ Shipment

Source Shipment ID
2

Target Shipm... 🔍
0

∧ Indirect Costs   ▼ ⊕ ⋮

☐	Selected ⋮	Invoice ⋮	Line ⋮	Seq. Num ⋮	Seq. Nur

◢ Full Screen

This action is only available if the **Calculate Taxes for Receipts** check box is selected in **Company Configuration**. If the check box is clear, this action is disabled.

1. On the **Detail** card, search for and select a Shipment ID.

2. From the Overflow menu, select **Calculate All Taxes**. All taxes are calculated for the container.

Entering Shipments to Subcontractor Suppliers

Subcontractor Shipment Entry allows you to enter shipments to subcontractor suppliers for Work in Process (WIP) parts that require outside processing. By creating the shipment record, you can process the part movement when they are outside your site and track the material shipped to subcontractors.

Use the landing page of the application to view existing shipments to enter a new one.

In this article, we will cover:

- [Specifying Subcontractor Shipment Details](#)
- [Creating Pack Lines](#)
- [Setting Up Delivery Details](#)
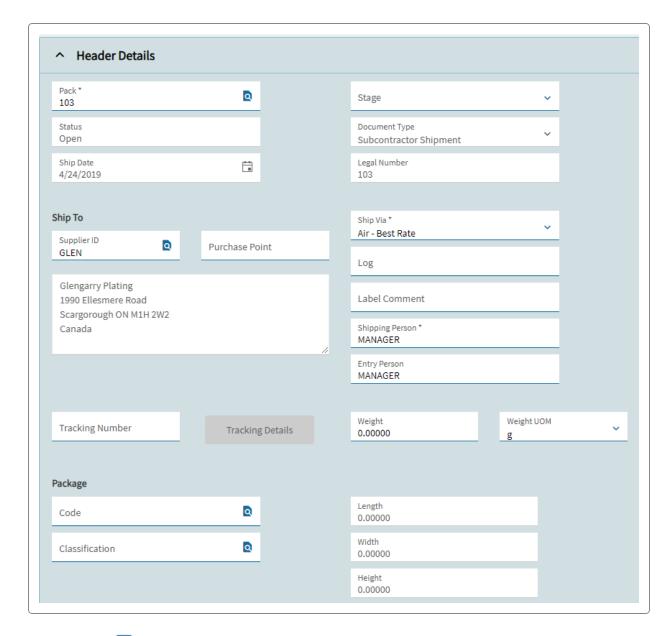
Specifying Subcontractor Shipment Details

You can ship WIP parts directly from a job to a subcontract supplier. For example, you send out parts to be painted by your supplier. To do this, you create pack records. Enter packing slip heading information on the **Header Details** card. This information includes the pack number, the supplier name and address, and the method of shipment.

1. From the main menu, navigate to **Material Management / Shipping / Receiving / General Operations**.

2. Select **New** ⊕ to add a new shipment.

3. Enter or search for the **Supplier ID** to whom you are shipping the materials.

4. Select a **Ship Via** code.

5. Select **Save**. 💾

Creating Pack Lines

A pack record can contain one or more detail lines that define the shipping quantities sent out with each pack record. On the **Pack Lines** cards, you can create lines, change the country of origins, warranty codes, identify the final destination of the goods, and so on.

In this section, we will cover:

- Adding Pack Lines
- Changing Country of Origins
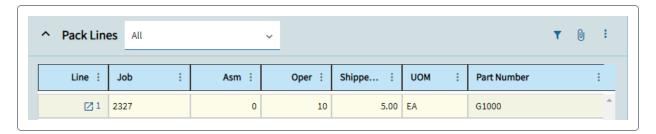
1. Select **New** ⊕ to add a new line in the **Shipment Lines** card.

2. If you select the line number, the **Line Detail** page opens. You can also open it by selecting the **Line Details** node in the navigation tree. Here you can specify some more details on the line, if necessary. For more information of the fields there, you can use the field help available in the

   Help and Support panel ❓ of the application.

3. Search for and select the sales order in the **Job Number** field.

4. Select the **Assembly**.

5. Specify the shipment quantity.

Line	Job	Asm	Oper	Shippe...	UOM	Part Number
⬈ 1	2327	0	10	5.00	EA	G1000

Pack Lines — All

6. If you need to delete a line:

   1. In the **Lines** card, select a line you want to delete so it highlights in yellow.

   2. From the grid Overflow menu ⋮ , select **Delete Line**. If a confirmation message appears, select **Yes**.

7. If you set up **Get Weight from Scale** option in **Work Station Maintenance**, use the **Get Weight** option to initiate the connection to the scale and retrieve the weight.

8. Select **Save**. 💾

Changing Country of Origins

Expand the **Country of Origins** card to change or overrride country of origin information for a shipped part. This information denotes the countries in which the item was manufactured, produced or grown, and the percentage makeup based on quantity or value of the raw materials. The default information comes from the country of origin information defined for the shipped part in the **Part Maintenance > Reporting > Country of Origin** card.
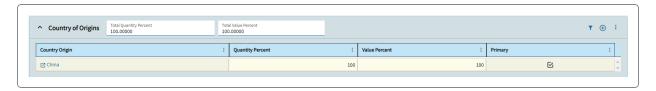
Some European countries require reporting of the specific countries of origin and relative content/value percentage breakdowns per country when parts arrive from other European Union

(EU) countries. The rules determining the country of origin vary greatly, depending on the industry and country to which or from the product is being shipping. The content and value percentage breakdown is a labeling requirement for some industries. This information can be overridden for specific shipments throughout the application.

To change the country of origins:

1. Select **New** ⊕ to add a new country.

2. Select the country of origin.

3. Specify the relative quantity and value percentage of the shipped product that originates in this country.

4. Select the **Primary** check box if this is the primary country of origin for this shipped part.

5. Select **Save**. 💾

Setting Up Delivery Details

Expand the cards on the **Manifest Info** page to set up carrier options for the Pack ID, billing options for the order, or to enter freight information settings for Fedex or UPS.

In this section, we will cover:
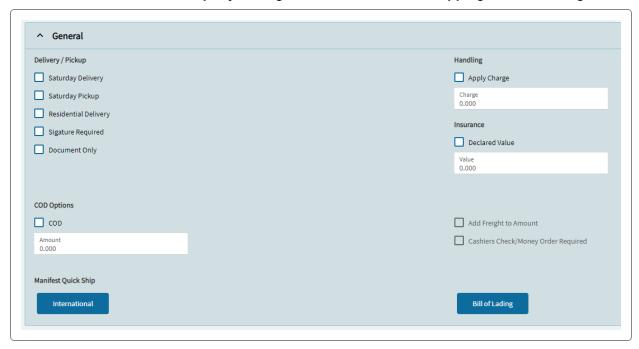
- Establishing General Carrier Options
- Establishing Carrier Options for International Shipments
- Setting Billing Options
- Entering Freight FedEx Information
- Entering Freight UPS Information
- Tracking Manifest Information

Go to the **Manifest Info > General** card to specify carrier options for the Pack ID. Here you can specify default carrier settings for subcontractor shipments. These settings include delivery and pickup, handling, insurance, and cash on delivery (COD) options. The information is then sent to the manifest system where the Pack ID is freighted.

Here is more information about the following fields in this card:

- **COD** - Select this check box if a COD is required. The default comes from the first sales order added to the pack. If the shipment has a defaulted value, it is not recalculated when it is closed.
- **Bill of Lading** - Select this button to launch the Quick Ship Bill of Lading form. For the Bill of Lading launch button to activate, you must select the Bill of Lading check box located on the **Company Configuration > Materials > Shipping and Receiving** card.
- **International** - Select this button to launch the Quick Ship International Shipments form. For the International launch button to activate, you must select the International Shipments check box located on the **Company Configuration > Materials > Shipping and Receiving** sheet.

Establishing Carrier Options for International Shipments

Use the **Manifest Info > General Intl** card to establish carrier options for international shipments for the Pack ID. The options on this card default from the customer/ship to record for the first order that is packed, but they can be changed here. This information is sent to the manifest system where the Pack ID is freighted.

Setting Billing Options

Set up billing options for the order on the **Billing** card.

Entering Freight FedEx Information

Expand the **FedEx** card to enter freight information settings for FedEx. It is useful if FedEx is the shipping service with which you send shipments.

Entering Freight UPS Information

The **UPS** card helps you enter freight information settings for UPS. It is useful if UPS is the shipping service with which you send shipments.

Tracking Manifest Information

Using the **Manifest Response** card, you can track manifest information such as published freight, discounted freight, and tracking number for the manifest. The information on this tab is sent to the manifest system, and received back when the pack ID is freighted. These fields are then updated with the results from the manifest system.

Manifest Response

Shipment ID

Tracking Number
12

Tracking Details

Published Freight
0.000

Discounted Freight
0.000

Other Amt
0.000

Dim Weight
0.00000

Waybill Number

Freighted Ship Via Code

Entering Packs for Miscellaneous Material

Miscellaneous shipments are shipments that are sent for non-billable material. Using the **Miscellaneous Shipment Entry** app, you can enter packs for miscellaneous material and print packs for the return of discrepant parts to a supplier from a Discrepant Material Report (DMR) record. Packs entered in this app are not invoiced, but you can track in the 'Miscellaneous Shipments Tracker' app. You can also insert references to orders, jobs, or projects.

Use the landing page of the application to view existing shipments or to enter a new one.

In this article, we will cover:

- [Entering Details for Miscellaneous Pack](#)

- [Specifying Line Details](#)

- [Setting Up Delivery Details](#)

Entering Details for Miscellaneous Packs

1. Open the **Miscellaneous Shipments** app.
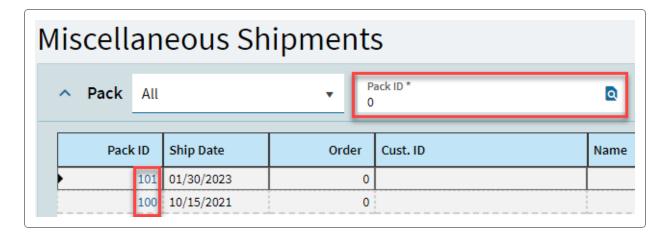
   The Landing page displays. The page displays a list of existing packs.
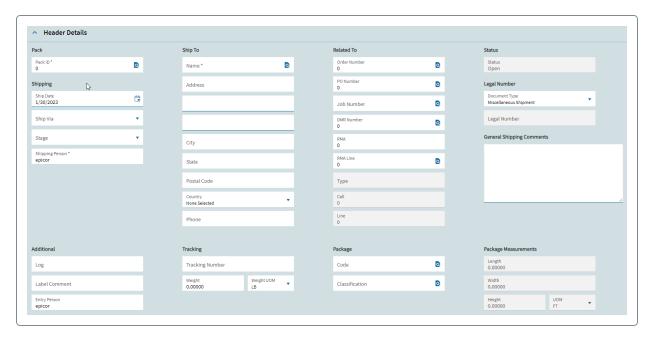
2. To select an existing pack, select the **Pack ID** link inside the grid. You can also search for a specific pack on the 'Pack ID' field.
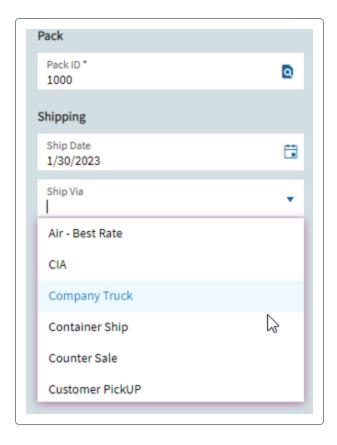
3. To add a new record, select **New**. ⊕

   The Header Details card displays.

4. Enter a new **Pack ID** you will use to represent this pack.

5. Specify the shipping date.

6. Choose the shipping method from the drop-down list.

7. Enter the stage number associated with the miscellaneous shipment.

8. Mention the name of the shipping person.

9. Enter a log number or reference code that you want to assign this shipment.

10. Enter the comment that needs to be printed on the shipment labels.
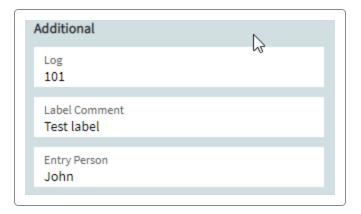
> **i** When the shipment is closed and freighted, information entered in the Label Comment field and the selected RMA/Line information is transferred to Quick Ship, for inclusion on the return service carrier label.
>
> Information from the Label Comment field is also transferred to Quick Ship when using the Customer Shipment Entry, Subcontractor Shipment Entry, or Master Pack Shipment Entry app.
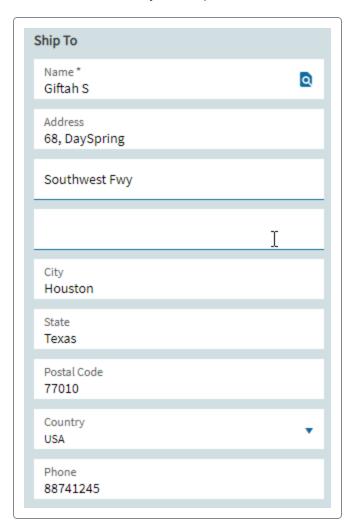
11. Provide the name of the person making the entry.

Additional

Log
101

Label Comment
Test label

Entry Person
John
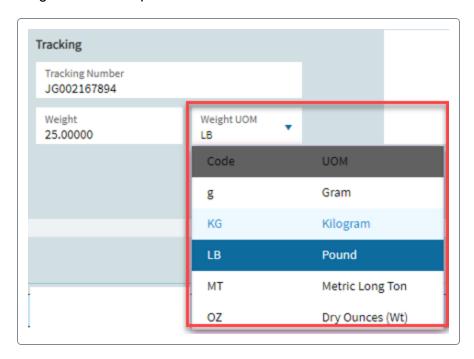
12. Specify the name of the customer to whom you send the shipment.

13. Enter the address, city, state, postal code, and country for the shipment.

Ship To

Name *
Giftah S

Address
68, DaySpring

Southwest Fwy

City
Houston

State
Texas

Postal Code
77010

Country
USA

Phone
88741245
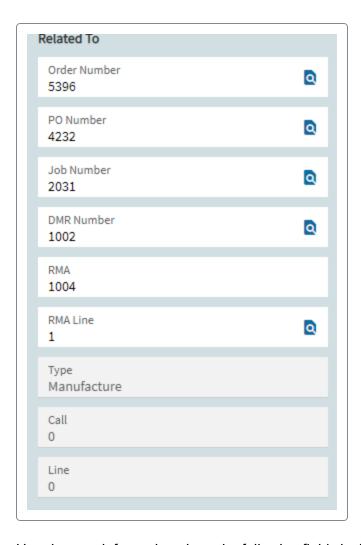
14. Specify the tracking number and weight of the shipment and select the unit of measure of the weight from the drop-down list.

15. Enter the Order Number, PO Number, Job Number, DMR Number, RMA and RMA line.
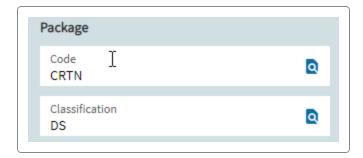
The Type, Call and Line fields will automatically get populated based on your RMA Line.

Related To

Order Number
5396

PO Number
4232

Job Number
2031

DMR Number
1002

RMA
1004

RMA Line
1

Type
Manufacture

Call
0

Line
0

Here is more information about the following fields in this card:
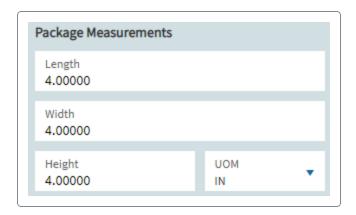
- **Order Number** - Refers to the sales order number associated with the shipment.
- **PO Number** - Refers to the purchase order number associated with the shipment.
- **Job Number** - Refers to the production job number associated with the shipment.
- **DMR Number** - Refers to the number of a discrepant material report.
- **RMA** - Refers to the RMA number tied to this customer.
- **RMA Line** - Refers to the RMA line tied to this customer.
- **Type** - Refers to the Job Type description for which the shipment is related.
- **Call** - Refers to the Service Call number related to a job which is associated to the shipment.
- **Line** - Refers to the Service Call line that is related to a job for the shipment.

16. Specify the package code and classification.

Here is more information about the following fields in this card:
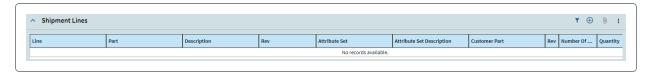
- **Code** - Refers to the packaging type record.
- **Classification** - Refers to an existing classification record.

17. Enter the package measurements along with its unit of measure.

18. Enter your comments in the **General Shipping Comments** field.

19. Select **Save**. 💾

Specifying Line Details
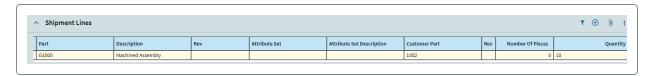
1. Expand the **Shipment Lines** card.
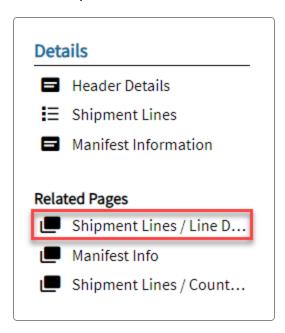
2. Select **New**. ⊕

3. Specify the part number for this miscellaneous shipment line.

4. Enter a description for the part.

5. If needed, enter the Attribute Set and Customer Part.

6. Mention the quantity.

7. Select **Save**.

8. Select **Shipment Lines / Line Details** from the navigation tree.

9. Reconfirm the line details which you had previously entered and add shipping comments if required.
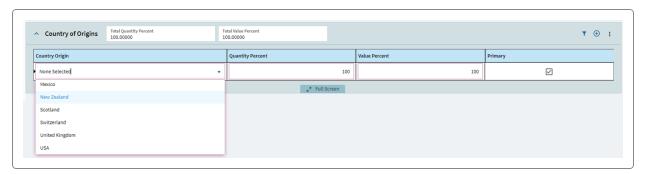
10. If required, you can edit or add a country of origin for a shipped part on a Country of Origins card.

    Specify the quantity percentage and value percentage.

    This information denotes the countries in which the item was manufactured, produced or grown, and the percentage makeup based on quantity or value of the raw materials. The default information comes from the country of origin information defined for the shipped part in the Part Maintenance > Reporting > Origin card.

    Some European countries require reporting of the specific countries of origin and relative content / value percentage breakdowns per country when parts arrive from other European Union (EU) countries. The rules determining the country of origin vary greatly, depending on the industry and country to which or from the product is being shipping. The content and value percentage breakdown is a labeling requirement for some industries.

11. You can reconfirm the details by selecting **Country of Origins / Country Of Origin Detail** in the navigation tree.

12. Select **Save**. 💾

Setting Up Delivery Details

Select **Details** and then the**Manifest Info** node from the navigation tree and expand the cards on the page to set up carrier options for the Pack ID, billing options for the order, or to enter freight information settings for Fedex or UPS. You can also use these cards to establish a pack as a Phantom Pack, or to track manifest information.

In this section, we will cover:

- [Establishing General Carrier Options](#)
- [Establishing Carrier Options for International Shipments](#)
- [Setting Billing Options](#)
- [Entering Freight FedEx Information](#)
- [Entering Freight UPS Information](#)
- [Setting Packs As Phantom Packs](#)
- [Tracking Manifest Information](#)

Establishing General Carrier Options

Go to the **General** card to specify carrier options for the Pack ID. The options default from the customer/ship to record for the first order that is packed, but you can change them here. This information is sent to the manifest system where the Pack ID is freighted.

1. Select the delivery / pickup check boxes that are appropriate for you.

2. If you charge a handling fee, select the **Apply Charge** check box.

   Enter the cost in the **Charge** field.

3. If you have an insurance for the shipment, select the **Declared Value** check box and enter the value.

4. If you provide cash on delivery for the shipment, select the **COD** checkbox and enter the amount.

5. Select the 'Add Freight to Amount' and 'Cashiers Check/Money Order Required' check boxes as per your requirement.

6. Select **Save**.

Establishing Carrier Options for International Shipments

Use the **General International** card to establish carrier options for international shipments for the Pack ID. The options on this card default from the customer/ship to record for the first order that is packed, but they can be changed here. This information is sent to the manifest system where the Pack ID is freighted.

1. Select the **International Shipment** check box to activate the other fields.

2. Select all the check boxes applicable for you.

3. Enter the details of the freight forwarder like ID, name, contact, phone and address.
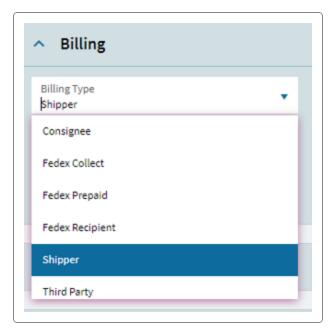
4. Select **Save**.

Setting Billing Options
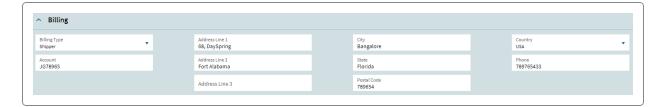
Set up billing options for the order on the **Billing** card.

1. Select the billing type from the drop-down list.

2. Enter the account number.

3. Enter the phone number and the mailing address.
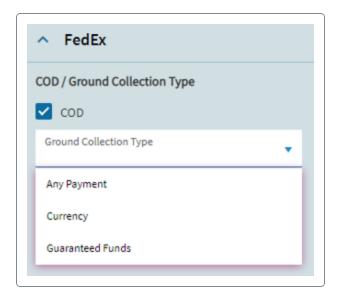
4. Select **Save**.

Entering Freight FedEx Information
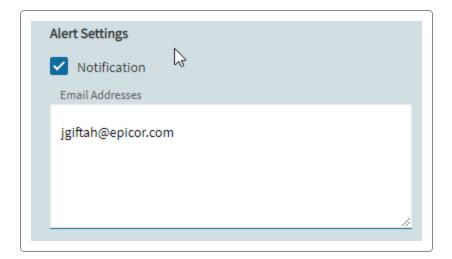
Expand the **FedEx** card to enter freight information settings for FedEx. It is useful if FedEx is the shipping service with which you send shipments.

1. Select the **COD** check box and the Ground Collection Type.
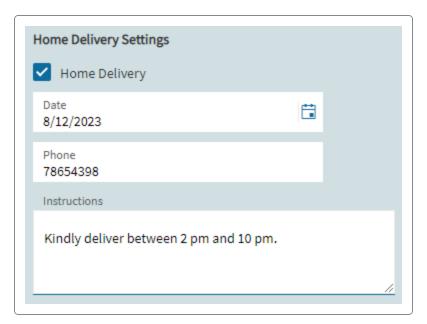
2. If you want to receive an alert, select the **Notification** check box and enter your email address.
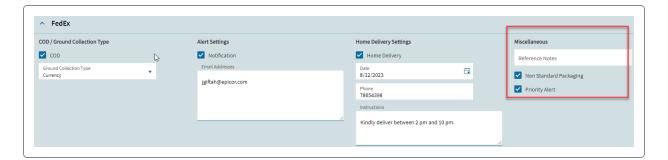
3. If the shipment needs to be delivered home, select the **Home Delivery** check box and specify the date, phone number and include any required instructions.

4. If needed, you can enter reference notes.

5. You can also select the non-standard packing and priority alert check boxes.
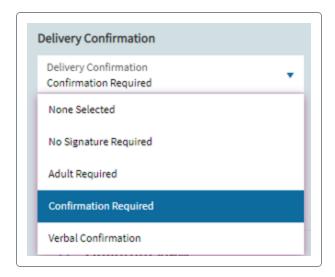
6. Select **Save**. 💾

Entering Freight UPS Information

The **UPS** card helps you enter freight information settings for UPS. It is useful if UPS is the shipping service with which you send shipments.
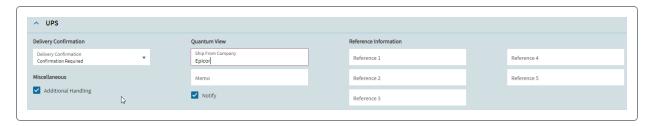
1. Select the delivery confirmation type from the drop-down list.

2. If required, select the additional handling check box.

3. If you need to be notified, select the **Notify** check box and enter the 'ship from company' and memo.

4. Enter your reference information.
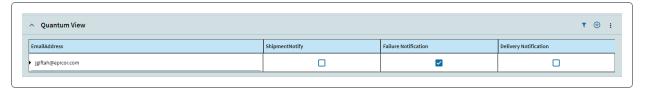
The **Quantum View** card allows you to add e-mail address for the delivery.

To add the e-mail:

1. Select the **Notify** check box.

2. Select **New** ⊕ on the Quantum View List card.

3. Enter your email address.

4. Specify shipment, failure or delivery notification(s).

    Here is more information about the following fields in this card:

    - **Delivery Notification** - Select to send a notification of shipment delivery.
    - **Failure Notification** - Select if the email address is being notified of a failed shipment.
    - **Shipment Notification** - Select to send a notification of shipment.

5. Select **Save**. 💾

Tracking Manifest Information

Using the **Manifest Response** card, you can track manifest information such as published freight, discounted freight, and tracking number for the manifest. The information on this tab is sent to the manifest system, and received back when the pack ID is freighted. These fields are then updated with the results from the manifest system.

Creating Packs for Shipments
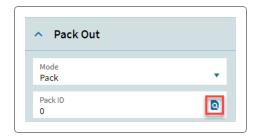
With the **PackOut Entry** app, create, pack, and unpack Pack IDs using a bar code scanner. Fields are automatically enabled and disabled for ease of scanning with minimal mouse usage. The search functions for each field are progressively restrictive based on entries in previous fields. For example, if 'Part A' is entered in the 'Part' field, searches in the Line field will yield only the lines that hold 'Part A' as a quantity available to pack or unpack. This sheet is available only if you have the Package Management license installed. You can enter data directly by keying it in, or via barcode entry if the hardware is installed to do so.
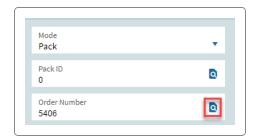
> ⓘ To disable the 'PackOut' card, select the **Disable Pack Out** check box located in the **Modules > Shipping Receiving > General** card in the **Site Configuration Control** app.

To pack a Pack ID:

1. Open the **Packout Entry** app.

2. To search for existing records, use the Pack ID field.
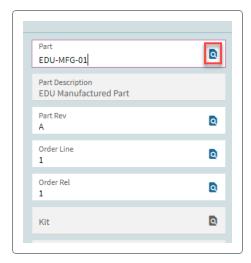
3. To create a new pack out, select **New Pack**. ⊕

4. Search for and select a sales order.

5. Search for and select a part for the shipment.
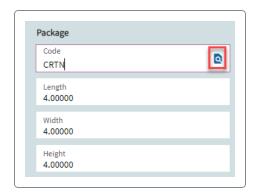
Notice the **Match Found** icon displays.

6. Search for and select a package code for the shipment.

7. Enter the shipment quantity.

8. Select **Save** .

   Kinetic generates a new pack ID.

Mode
Pack

Pack ID
317

Combining Separate Pack IDs Into One Master Pack Group

In **Master Pack Shipment**, combine separate pack IDs (master packs) into one master pack group to ship as one shipment. You can select the shipment type for the master pack, but the pack is then restricted to only shipments of that type.

Use the landing page of the application to view existing master packs or to enter a new one.

In this article, we will cover:

- [Creating a New Master Pack](#)

- [Adding Packs](#)

- [Establishing Manifest Options for the Pack](#)

Creating a New Master Pack

1. Open the **Master Pack Shipment Entry** app.

   The Landing page displays.

2. Use the Pack field to search for and select an existing pack.

   You can also click the Master Pack number in the Landing page's grid.

3. To create a new master pack, select **New Master Pack**. ⊕

   The Header Detail card displays.

4. In the Shipment Type field, select one of the master pack options.

   For example, if you are shipping a transfer order then select the 'Transfer' option. You can also select the 'Sales Order', 'Subcontract', and 'Miscellaneous'.

5. Define a Ship Via value for your pack using the Ship Via field.

6. Use the Log field if you need to specify the reference number for the shipment.

7. Select the **Freight Pack IDs Individually** check box if you want to send information about each pack as a separate container to QuickShip. If you clear this check box then you send all the packs as a one container.

You can select this option for any of the available shipment types (Sales Order, Transfer, Subcontract, Miscellaneous).

To freight a pack use the Overflow•••menu.

8. Select **Stage** option for the master pack.

    Stages are useful for sorting one Pack ID shipment into several stages in the staging area.

    > ℹ️ You then use the **Stage Ship Confirm** program to confirm shipments of staged pack IDs or master packs.

9. To print the master packing slip and labels, select **Print** from the Overflow•••menu .

    If you need to delete a pack, select **Delete Master Pack** from the Overflow•••menu.

10. Select **Save**. 💾

    Kinetic generates a master pack number.

11. Remain in the Master Pack Shipment app.

Adding Packs

Next, add a pack to your master pack record.

1. In the Nav tree, select the **Details > Master Pack Line List > Line Details** node.

    The Line Detail card displays.

2. Select **New Pack**. ⊕

3. In the Pack ID field, search for and select a pack you want to add.

    > ℹ️
    > - You cannot add 'Phantom Packs' to your master pack. To learn about the phantom pack shipments, review the [Shipping Phantom Packs](#) article.
    > - The pack you want to add must be closed.

4. Select **Save**. 💾

5. You can add more packs to your master pack by selecting **New Pack**. ⊕

6. The pack you add will be listed on the Pack detail card.

7. Remain in the Master Pack Shipment app.

Establishing Manifest Options for the Pack

Go to the **Manifest Info > General** card to specify carrier options for the Pack ID. The options default from the customer/ship to record for the first order that is packed, but you can change them here. This information is sent to the manifest system where the Pack ID is freighted.

In this section, we will cover:
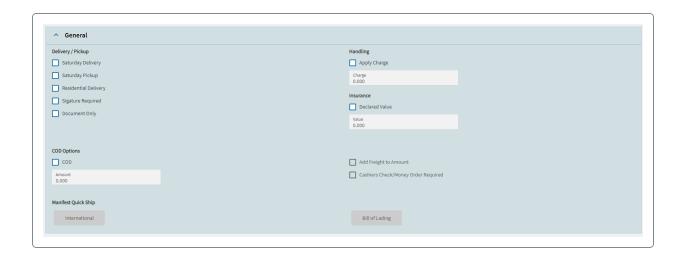
- [Establishing General Carrier Options](#)
- [Establishing Carrier Options for International Shipments](#)
- [Setting Billing Options](#)
- [Entering Freight FedEx Information](#)
- [Entering Freight UPS Information](#)
- [Tracking Manifest Information](#)

Establishing General Carrier Options

Here is more information about the following fields in this card:

- **COD** - Select this check box if a COD is required. The default comes from the first sales order added to the pack. If the shipment has a defaulted value, it is not recalculated when it is closed.

- **Bill of Lading** - Select this button to launch the Quick Ship Bill of Lading form. For the Bill of Lading launch button to activate, you must select the Bill of Lading check box located on the **Company Configuration > Materials > Shipping and Receiving** card.

- **International** - Select this button to launch the Quick Ship International Shipments form. For the International launch button to activate, you must select the International Shipments check box located on the **Company Configuration > Materials > Shipping and Receiving** card.

Establishing Carrier Options for International Shipments

Use the **Manifest Info > General Intl** card to establish carrier options for international shipments for the Pack ID. The options on this card default from the customer/ship to record for the first order that is packed, but they can be changed here. This information is sent to the manifest system where the Pack ID is freighted.

Setting Billing Options

Set up billing options for the order on the **Billing** card.

Entering Freight FedEx Information

Expand the **FedEx** card to enter freight information settings for FedEx. It is useful if FedEx is the shipping service with which you send shipments.

Entering Freight UPS Information

The **UPS** card helps you enter freight information settings for UPS. It is useful if UPS is the shipping service with which you send shipments.

The **Quantum View** card allows you to add e-mail address for the delivery.
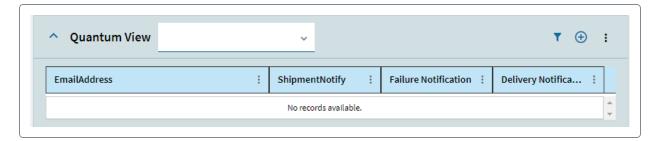
To add the e-mail:

1. Select **New** ⊕ on the **Quantum View** card.

2. Specify email, shipment notification, or failure notification.

   Here is more information about the following fields in this card:
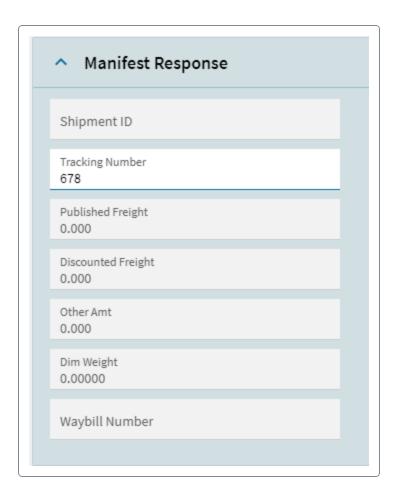
- **Delivery Notify** - Select if an electronic notification of delivery is being sent.
- **Failure Notify** - Select if the email address is being notified of a failed shipment.
- **Shipment Notify** - Select to send a notification of shipment.

3. Select **Save**. 💾

Tracking Manifest Information

Using the **Manifest Response** card, you can track manifest information such as published freight, discounted freight, and tracking number for the manifest. The information on this tab is sent to the manifest system, and received back when the pack ID is freighted. These fields are then updated with the results from the manifest system.

Manifest Response

Shipment ID

Tracking Number
678

Published Freight
0.000

Discounted Freight
0.000

Other Amt
0.000

Dim Weight
0.00000

Waybill Number

epicor

Confirming Shipments

In **Stage Ship Confirm Entry**, confirm shipments of staged pack IDs or master packs. The Stage process allows you to group Pack IDs, intended to be shipped together into stages. Once you move Pack IDs into position for shipment, have a stage assigned, and their status is set to Staged, they are available in **Stage Ship Confirm Entry**. In **Stage Ship Confirm Entry**, you can select a group of Pack IDs and mark them as shipped all at once. You can then filter these staged pack IDs by stage number, shipping status, shipment type, and ship via method. Lastly, you can confirm the selected stage of each pack ID.
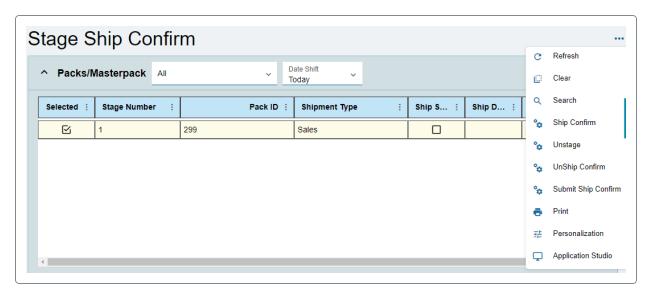
> ℹ️ To learn more about master packs, refer to the **Master Pack Shipment Entry** article of the Application Help.

In this article, we will cover:

- [Confirming Shipments](#)
- [Viewing Errors](#)

Confirming Shipments

1. From the main menu, navigate to **Material Management > Shipping/Receiving > General Operations > Stage Ship Confirm Entry**.

2. Use the filter to select the master packs (Today, Less 1 day, Less 2 days, Less 3 days).

3. In the **Selected** column, select the master pack.
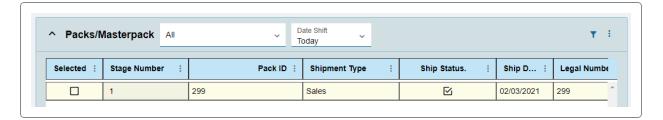
4. From the Overflow menu •••, select **Ship Confirm**.

> **ⓘ** To remove the Ship Confirm designation from the Pack ID, from the Overflow menu ⋯, select the **Unship Confirm**. You can also unstage the pack ID or master pack of the selected record by selecting the **Unstage** in the menu.

5. The **Ship Status** check box is selected indicating the package has been shipped.

^ Packs/Masterpack	All ⌄	Date Shift Today ⌄				▼ ⋮

Selected ⋮	Stage Number ⋮	Pack ID ⋮	Shipment Type ⋮	Ship Status. ⋮	Ship D... ⋮	Legal Numbe
☐	1	299	Sales	☑	02/03/2021	299

6. Select **Save**. 💾

Viewing Errors

Expand the **Processing Errors** card to view any errors generated from a background process that is marking selected Pack IDs as shipped.

Here you can look up any errors generated while the batch process attempts to ship the selected Pack IDs. Errors will remain in the log until you select the **Unstage** from the Overlow menu for the Pack IDs in error, or they are successfully marked as shipped in the **Ship Status** field.

^ Processing Errors			▼ ⋮

Stage Number ⋮	Pack ID ⋮	Shipment Type ⋮	Process Error ⋮
		No records available.	
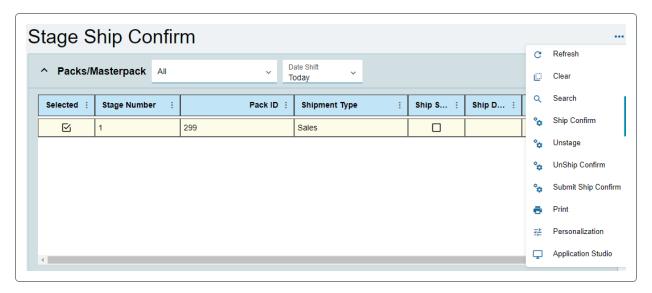
Submitting Shipment Confirms

Execute a background process to handle a high volume of shipments, using the **Submit Ship Confirm** option. It allows you to close the **Stage Ship Confirm Entry** and work in other programs while the background process is running. You can periodically check the **Processing Errors** card to see if any Pack IDs resulted in errors.

To run a process:

1. From the main menu, go to **Material Management > Shipping/Receiving > General Operations > Stage Ship Confirm Entry**.

2. Use the filter to select the master packs (Today, Less 1 day, Less 2 days, Less 3 days).

3. In the **Selected** column, select the master pack.

4. From the Overflow menu ⋯, select **Submit Ship Confirm**. The **Ship Confirm** window displays.

5. From the Overflow menu ⋯, select **Process** ⚙ to start the batch process. The **Process Submitted** window displays.

6. Close the **Ship Confirm** window. You can now exit **Stage Ship Confirm** and work in other programs while the batch process runs.

7. When you wish, open **Stage Ship Confirm** and go to the **Processing Errors** card to check for any errors.

Shipping Phantom Packs

The Phantom Pack functionality provides the ability to ship all items on an order, or multiple orders, under a single Pack ID. When you create a Pack ID, the number of cartons you need is determined. Any cartons with tracking numbers, size and weight, and freighted costs are sent to the shipping manifest process. Required shipping labels are then generated for each physical box.

You can ship the Phantom Pack using the following apps. The logic is the same for each app you use:

- Customer Shipment Entry
- Miscellaneous Shipment Entry
- Subcontract Shipment Entry
- Transfer Order Shipment Entry

> ℹ️ When you freight a Phantom Pack then the information is included in the 'FreightServiceRequest' sent to Quick Ship.

> ℹ️ The example below uses the 'Customer Shipment Entry' app. However, the same logic applies to all the apps listed above.

In this article, we will:

- [Verify workstation details](#)
- [Create a pack](#)
- [Enter a pack line](#)
- [Create phantom details](#)
- [Complete the shipment](#)

Verifying Workstation Details

First, you need to verify whether

1. Open the **Workstation** app.

   The Landing page displays.

2. In the Workstation ID field, search for and select the workstation you are signed into.

   The Details card displays.
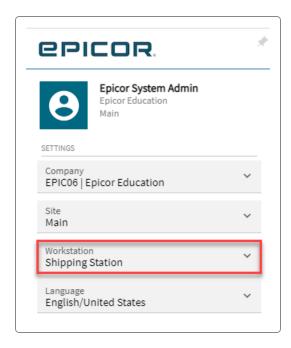
1. To verify what workstation you are signed into, on the Menu bar, select the **User** icon.

    The Epicor System Admin panel opens.
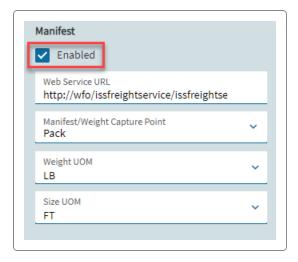
2. Inside the panel, verify the verify the workstation in the Workstation field.

    The workstation in the screen shot is just an example. Your workstation will be different.

3. Close the Epicor System Admin panel.

3. In the Manifest group box, select the **Enabled** check box.

4. Define the **Web Service URL**, **Manifest/Weight Capture Point**, **Weight UOM**, and **Size UOM** values.

> ℹ️ To learn about 'Workstation', review the Setting Up Workstations article.

5. Exit the Workstation app.

Creating a Pack

First, create a new pack.

> ℹ️ As already mentioned, the steps below use the Customer Shipment app to ship a phantom pack. Using the example below, you ship a sales order that includes a single line.

1. Open the **Customer Shipment Entry** app.

   The Landing page displays.

2. Select **New Pack**. ⊕

   The Header Detail card displays.

3. In the Order Number field, enter a sales order number and press **Tab**.

4. Select **Save**. 💾

5. In the Package group box, in the Code field, search for and select a package code.

   The Package Measurements group box displays the 'Length', 'Width', and 'Height' values.

6. In the Tracking group box, enter a tracking number in the Tracking Number field.

7. In the Tracking group box, enter a weight value in the Weight field together with the Weight unit of measure.

8. Select **Save**. 💾

9. Remain in the Customer Shipment Entry app.

Entering a Pack Line

Next, enter a pack line.

1. In the Nav tree, select the **Details > Shipment Lines > Line Details** node.

2. Select **New Line**. ⊕

3. In the Line field, enter **1** and press **Tab**.

4. In the Release field, enter **1** and press **Tab**.

5. Scroll down to locate the From Inventory card and verify the warehouse and bin values are selected.

    If the part on the sales order line has the primary bin defined in the Part app, then the bin value defaults and you don't have to select it.

6. Select **Save**. 💾

7. Remain in the Customer Shipment Entry app.

Creating Phantom Details

Now create cases and freight a phantom pack.

1. From the Overflow ⋯ menu, select **Close**.

    You must close a pack to freight it.

2. In the Nav tree, select the **Phantom Creation Options** node.

    The node is located at the very bottom of the Nav tree.

    The Phantom Creation Options card displays.

3. In the Phantom Pack group box, select the **Phantom Pack** check box.

4. In the Number of Cases To Create field, enter **5** and press **Tab**.

    Number five is just an example, you can enter any number if required.

5. In the Phantom Package Defaults group box, search for and select a package code in the Package Code field.

6. Select **Create Cases**.

    This is the blue button located in the top right-hand corner of the app.

    The Phantom Details card's grind displays '5' lines. Each line holds the case number, tracking number, weight, length, width, and height values.

7. Select **Save**.

8. If you want to freight the pack, select **Freight** from the Overflow ••• menu.

    The same applies if you want to unfreight the pack.

9. Remain in the Customer Shipment Entry app.

Completing the Shipment

Finally, complete the shipment.

1. In the Nav tree, select the **Detail** node.

    This is the very top node.

    The Header Detail card displays.

2. Select the **Shipped** check box.

3. Select **Save**.

4. Select Tracking Details.

    This is the blue button located in the top right-hand corner of the app.

    The website of the shipping company displays. For example, if you select 'UPS Ground' in the 'Ship Via' field, the 'UPS' website would display with the 'Tracking' page in focus.

5. Exit the Customer Shipment Entry app.

Recording Receipts

Record a physical receipt of purchased materials to stock inventory, directly to a job, to a job subcontract operation, or to manually enter the receipt of non-inventory parts such as office supplies using the **Receipt Entry** app.

Receipt line items are either 'Purchase Order' receipts or 'Miscellaneous' receipts. Receipt information updates the purchase order and creates transactions to update inventory or job quantities and costs.

> ℹ️ To add 'Certificate of Compliance' documents to the receipt line, install the 'Document Management' module.

Save receipt entries to generate accounts payable invoice entries. Use the **Accounts Payable** card in the 'Company Configuration' app to indicate whether you want to save receipt entries for accounts payable. Enable the **Quality Assurance** module in your environment to receive parts for inspection using the 'Receipt Entry' app. To complete this process, use 'Inspection Processing' in the 'Quality Assurance' module after inspecting the parts you received.

You can't use the 'Receipt Entry' app to receive purchased items tied to a sales order release and designated for drop shipment to the customer. An error message displays if you attempt to obtain a drop ship release in the 'Stock Detail' card. Use the 'Drop Shipment Entry' app to mark a drop shipped release as 'Received'.

Use the 'RMA Processing' app to receive parts returned by the customer.
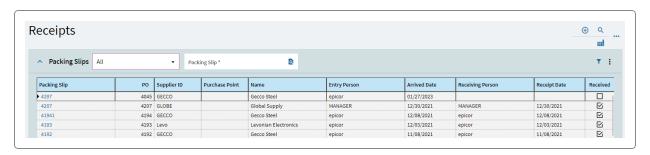
In this article, we will cover:

- Adding a New Receipt
- Adding Receipt Lines
- Using Line Details
- Adding Duties Details
- Adding Indirect Costs
- Selecting Taxes
- Adding Receipt Taxes
- Adding Landed Costs
- Adding Landed Costs Details
- Reviewing Receipt Activities
- Using Additional Receipt Options
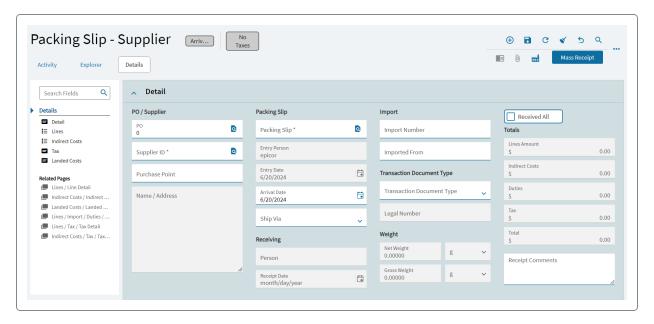
Adding a New Receipt
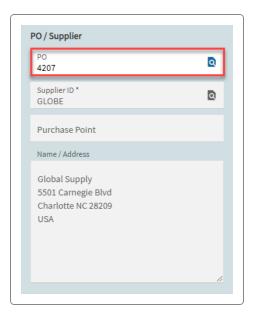
1. Open the **Receipt Entry** app.
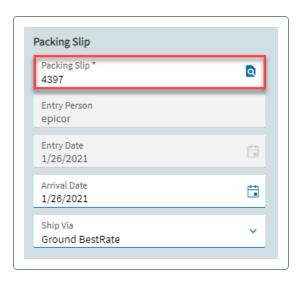
2. Select **New** ⊕ to add a new receipt.

3. Enter the purchase order number or search for it in the PO field.

4. Enter the supplier packing slip number that accompanied the received goods or search for it in the Packing Slip field.

5. Enter the date the shipment arrived on in the Arrival Date field.

6. Select a ship via method for the receipt in the Ship Via field.

7. Select the **Received All** check box to indicate that you received all lines on the entire receipt
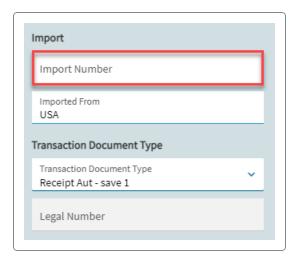
and review the totals.

8. Enter the User ID information in the Person field.

9. Enter the date when you created the receipt in the Receipt Date field.

10. If necessary, enter the number of the import document associated with this receipt in the Import Number field.

11. Select the transaction document type for the transaction from the Transaction Document Type drop-down.

12. Review other fields if necessary.

- **Supplier ID** - Identifier of the supplier of the purchase order you receive.
- **Purchase Point** - Supplier's purchase point.
- **Entry Person** - User ID of the person who is entering the receipt.
- **Entry Date** - Date on which you are entering the receipt transaction.
- **Import Number** - Number of the import document associated with this receipt.
- **Imported From** - Location or name of the country from which the material was imported.
- **Legal Number** - Legal number you are assigning to packing slip.
- **Net Weight** - Combined net weight of all receipt line items.
- **Gross Weight** - Combined gross weight of all receipt lines in the receipt.
- **Lines Amount** - Total part amount of all lines in the receipt.
- **Indirect Costs** - Total indirect costs for the receipt.
- **Duties** - Total duties for the receipt.
- **Tax** - Total tax amount for the receipt.
- **Total** - Total amount for the receipt.

13. Select **Save**.

> Starting from the Kinetic 2024.1 release, you can search existing receipts based on the Supplier ID and Purchase Point field as well.

Adding Receipt Lines

Record the physical receipt of materials on specified purchase releases to stock inventory, directly to a job, to a subcontract operation on a job, or to enter the receipt of non-inventory parts such as office supplies in the 'Receipt Line' card.

1. Select **New** to create a new line.

2. Select a receipt type from the Receipt Type drop-down.

After you select the purchase order, line and release number you are receiving, the **Receipt Type** field displays **Purchased** to indicate this a purchase order receipt, and the **Transaction Type** field indicates the type of material purchase transaction. Depending on the transaction type displayed, the system accordingly enables (or disables) specific fields for entry of the appropriate receipt information.

Expand the **Detail** card to define and view general information for the receipt line, such as unit cost, number of labels, tax settings and weight and import data.

Depending on the transaction type, you enter or view information specific to that transaction type in one of two tabs: **Stock** or **Job**.

- **Inventory** - Material you purchased for receipt to stock inventory. You can indicate the warehouse and bin location to which you receive the materials. Go to **Detail > Stock** to view the pertinent information about the linked sales order releases for received items that you marked as **Buy To Order (BTO)** items on the source purchase order release. This allows for receipt in the same manner as a regular stock receipt lines.

- **Job Material** - Go to **Detail >Job** to specify material you purchased for receipt to the job material sequence.

- **Job Subtract** - Go to **Detail >Job** to specify material you purchased for receipt to the job subcontract sequence.

Select **Miscellaneous** in the **Receipt Type** field to manually create a receipt line that the system doesn't associate with a purchase release. Then specify that you are manually create an inventory, job material, job subcontract or other (non-inventory) material purchase receipt in the **Transaction Type** field. You don't need to enter a purchase order number into the **Receipt Entry** field; you can manually create receipt lines for non-inventory miscellaneous items (such as office supplies) if necessary.

The **Totals** card displays totals information for all of the lines in the receipt.

3. Enter part number, quantities, and UOM in the appropriate fields.

> ℹ️ You can enter this information manually or you can go to the full version of the line details by selecting Line Detail in the navigation tree. On the **Line Detail** card, you can search for parts and other required details.

4. Review other line details if necessary.
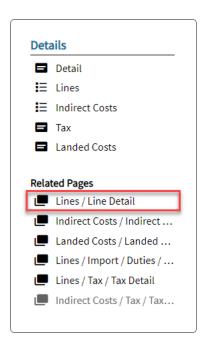
- **Received** - Total quantity you received to date for this purchase release.
- **Received UOM** - UOM code that represents the inventory unit of measure in which the corresponding received quantity is expressed.
- **PO** - If the Receipt Type is set to Purchase Order, enter the purchase order that contains the release the part you are receiving.
- **Line** - If you select the **Buy To Order** check box for the associated purchase release in the Purchase Order Entry > Releases > Detail sheet, this field displays the identifier for the sales order line number to which the item is tied.
- **Rel** - Release you are receiving or editing for the purchase order selected in the PO field.
- **Part Number** - Part number associated with the specified job number.
- **Quantity Option** - Type of quantity.
    - Select **Our Qty** to access the Quantity field to enter the receipt quantity, expressed in your stocking (inventory) unit of measure.
    - Select **Supplier Qty** to access the Supplier Qty field to enter the receipt quantity, expressed in the supplier's purchase unit of measure.
- **UOM** - UOM code that represents the inventory unit of measure in which the corresponding received quantity is expressed.
- **Override** - If you select this check box, you can directly enter a quantity into the Supplier Quantity field.
- **Gross Weight** - Gross weight of the item received for the receipt line, converted to the base unit of measure.
- **Gross Weight UOM** - UOM code that represents the unit of measure in which the corresponding quantity in the Gross Weight field is expressed.
- **Job** - Manufacturing job you are updating with this receipt.
- **Asm** - Job assembly.

5. Select the **Generate PCID** button to generate one or more PCIDs for the receipt line.

6. Select **Save.**

Using Line Details
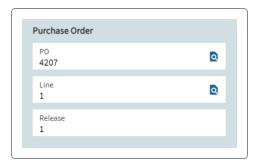
View transactions that record the physical receipt of materials to stock inventory, directly to a job, to a job subcontract operation, or receipts of non-inventory parts such as office supplies that are not associated with a specific purchase order release on the 'Line Detail' card.
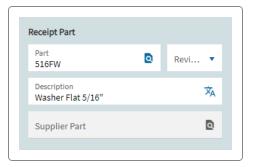
1. Select the **Lines / Line Detail** node in the Nav tree.
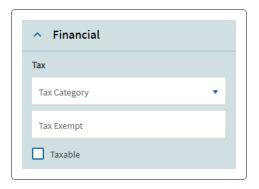
Details

- Detail
- Lines
- Indirect Costs
- Tax
- Landed Costs

Related Pages

- Lines / Line Detail
- Indirect Costs / Indirect …
- Landed Costs / Landed …
- Lines / Import / Duties / …
- Lines / Tax / Tax Detail
- Indirect Costs / Tax / Tax…

2. Enter the purchase order number or search for it in the PO field.

Purchase Order

PO
4207

Line
1

Release
1

3. Enter the purchase order line for the purchase order selected in the PO field or search for it in the Line field.

4. Enter the release for the purchase order selected in the PO field in the Release field.

5. Enter the part number of the item you received in the Part field.

6. Select the part revision number from the Revision drop-down.

7. Enter the description or search for the part associated with this transaction in the Description field.

8. Scroll down and expand the **Financial** card.
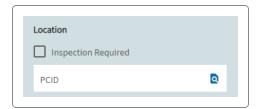
9. Enter the tax category for the receipt line in the Tax Category field.

10. Enter the exempt code for the item in the Tax Exempt field.

11. Select the **Taxable** check box if you want to make the line taxable.

12. Scroll up to locate the **Line Detail** card and enter the number of labels in the No of Labels field.

13. Enter or search for a PCID in the PCID field.

14. Select **Save**. 💾

> ℹ️ For the details on the other fields, use the field help available in the Help and Support panel ❓ of Kinetic.

Adding Duty Details
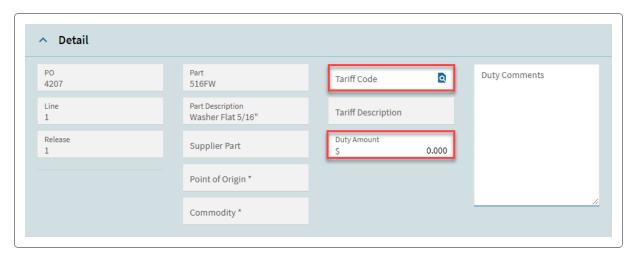
View tariff codes entered for the landed cost shipment receipt line in the **Duty Details** card.

1. Select **Import / Duties / Duty Detail** node in the Nav tree.

2. Select **New** ⊕ to add a new duty record.

3. Enter or search for the tariff code in the Tariff Code field.

4. Enter the duty amount in the Duty Amount field.

5. Review the rest of fields in the Detail card.

- **PO** - Purchase order number associated with the receipt line.
- **Line** - Purchase order line number associated with the receipt line.
- **Release** - Purchase order release number associated with the receipt line.
- **Part** - Part number that you shipped in the container. This information generates from the purchase order line record.
- **Part Description** - Description of the part.
- **Supplier Part** - Supplier part number.
- **Point of Origin** - Country where the part was produced, extracted or fabricated.
- **Commodity** - Commodity code.
- **Tariff Description** - Description of the tariff code.

6. Select **Save**. 💾

Adding Indirect Costs

To add indirect costs and indirect cost tax information select the **Details** node in the Nav tree and expand the **Indirect Costs** card.

1. Select **New** ⊕ to create a new indirect costs line.

2. Enter the purchasing miscellaneous charge code that is flagged for landed cost in the Charge

ID field.

3. Add and review other line details if necessary.

- **Apply Date** - Cost date to use to determine the correct currency exchange rate if the indirect cost is not associated with an invoice miscellaneous charge.
- **Exclude From LC** - Select this check box to exclude the indirect cost from the landed cost disbursement.
- **Trans Value** - Select this check box if the indirect charge increases the transaction value used for disbursement.
- **Tax Category ID** - Sales tax categories divide taxes into groups that apply to different products. This value defaults from the purchase order.
- **Taxable** - Indicates if this receipt indirect cost is a subject to taxation. Select this check box to indicate that the receipt indirect cost is taxable.
- **Currency Code** - Currency code you are assigning to the indirect cost record. Currency codes designate the type of currency you are assigning to the indirect cost record.
- **Exchange Rate** - Rate of exchange between the original, or source currency and the final, or target currency used on the purchase order.
- **Disburse Method** - Calculation methods available for disbursing indirect costs.
- **Type** - Miscellaneous type code used in calculation of indirect costs.
- **Percentage** - If you select Percentage in the Type field, this field displays the associated percentage rate.
- **Doc Actual Amount** -Actual miscellaneous charge amount before you apply indirect costs, expressed in currency you selected in the Currency field.
- **Invoice** - Invoice number for the indirect cost invoice.
- **Invoice Line** - Invoice line number for the indirect cost invoice.
- **Seq. Num** - Miscellaneous sequence number for the indirect cost invoice.

4. Select **Save**. 🖫

> **ⓘ** To view detailed information, go to the **Indirect Cost Detail** page in the navigation tree and expand the **Detail** card.

Selecting Taxes

Select tax calculation parameters, view total tax amounts, and define tax codes for the receipt as a whole in the 'Tax' card. In the 'Receipt Entry' app, you can calculate taxes at the receipt level or by pulling the calculations from the purchase order in the 'Tax' card.

1. Expand the **Tax** card.

2. Select the tax liability type from the Tax Liability drop-down.

3. Enter the date in the Tax Point and Tax Rate Date fields.
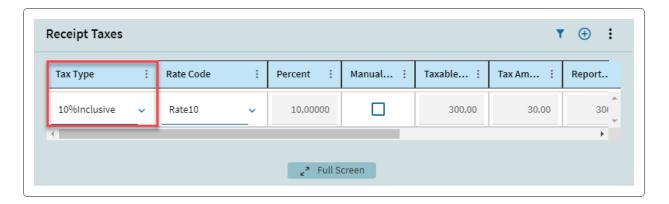
4. Select **Save.** 💾

Adding Receipt Taxes

Scroll down and select tax calculation parameters, and view total tax amounts for receipt lines in the Receipt Taxes card.

1. Select **New** ⊕ to create a new receipt taxes line.

2. Select the tax type from the Tax Type drop-down.

3. Add and review other line details as necessary.

- **Rate Code** - Rate code for the selected tax type. It is only accessible in case of manual calculation or for new lines you added manually.
- **Percent** - Tax rate percentage levied against the purchase order receipt independent cost.
- **Manual Tax Calculation** - Indicates if the tax calculations should be performed manually for this purchase order receipt detail.
- **Taxable Amount** - Total purchase order receipt detail amount to which tax is applied, displayed in the document currency.
- **Tax Amount** - Total taxable amount for the receipt detail.
- **Reportable Amount** - Reportable amount in the document currency.
- **Fixed Amount** - Fixed amount in the document currency.
- **Deductible Tax Amount** - Deductible amount of the tax.
- **Collection Type** - Description of the collection type.

4. Select **Save**.
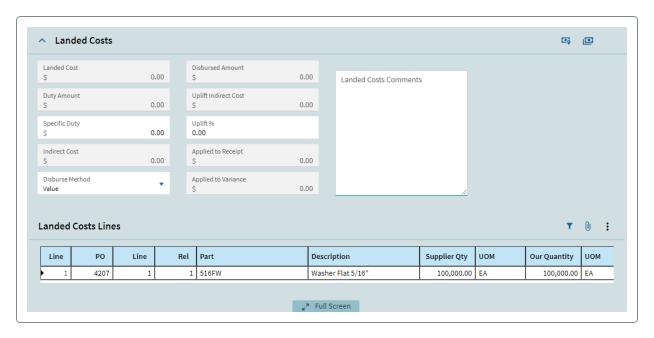
> ℹ️ To view detailed information, select the Tax Detail node in the Nav tree and expand the **Line Tax Detail** card.

Adding Landed Costs

Enter the additional costs of receiving parts that Kinetic requires to reflect in the value of these goods in the 'Landed Costs' card.
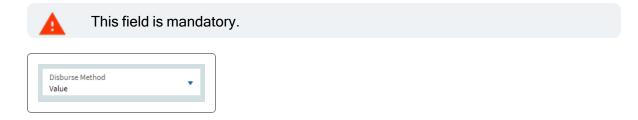
1. Scroll down and expand the **Landed Costs** card.
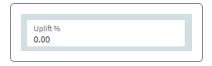
2. Enter the necessary amount in the Specific Duty field.

3. Select the cost method from the Disburse Method drop-down.

> ⚠ This field is mandatory.

4. Enter the necessary uplift percentage in the Uplift % field.

5. Select **Save**. 💾

Adding Landed Costs Details

View landed costs for a shipment receipt line on the 'Landed Costs Detail' card.

1. Select the **Landed Costs / Landed Costs Detail** node in the Nav tree.

2. Enter the indirect cost portion of the landed cost amount for this receipt line in the Indirect Cost field.
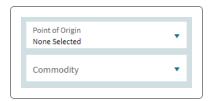
3. Enter the volume of the shipping container associated with the receipt line in the Volume field.

4. Select the volume UOM code from the UOM drop-down.

5. Enter the gross weight of the items in the Gross Weight field.

6. Select the weight UOM code from the UOM drop-down.

Gross Weight: 7,800.00000 UOM: LB

7. Select the country where the part was produced, extracted or fabricated in from the Point of Origin drop-down.

8. Select the commodity code from the Commodity drop-down.

Point of Origin: None Selected

Commodity

9. Enter the purchase order line value, including discounts, but excluding VAT/sales tax in the PO Transaction Value field.

PO Transaction Value: $ 2,000.00

10. Select **Disburse Indirect Costs** 🖳 if you want to disburse landed costs for each landed cost used.

> ℹ️ For the details on the other fields, use the field help available in the Help and Support panel ❓ of the application.

Reviewing Receipt Activities

Using the **Activity** page in the 'Receipt Entry' app you can review information relevant to your receipt.

> ℹ️ You cannot modify information on the Activity page.

You can review information about:
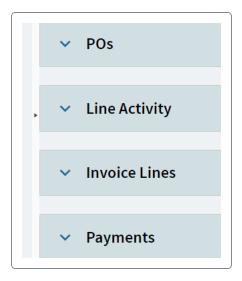
- **POs** - Displays PO information for any POs that are on receipt lines on this pack slip.
- **Line Activity** - Displays transaction data (Part Transactions) for this pack slip, if any.
- **Invoice Lines** - Displays invoice line information for this packing slip, if any.
- **Payments** - Displays information (AP Transactions) that have been made against an invoice for this packing slip, if any.
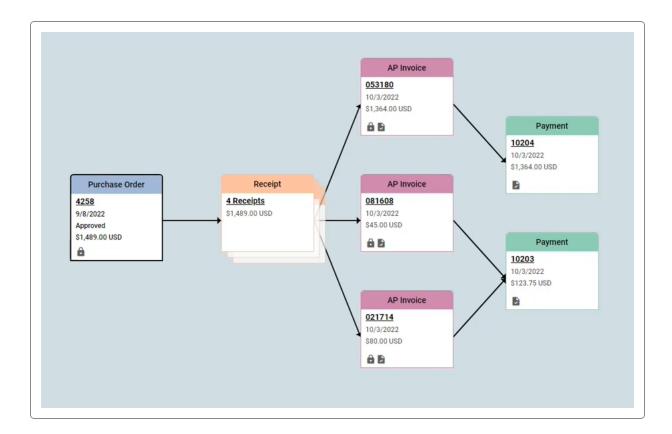
1. Select the **Activity** page.

2. Expand the card you need and review its information.

Open the **Explorer** page to see a graphical representation of relationships between related purchase orders, receipts, AP invoices, and payments - providing a detailed overview of the procurement cycle:

> ℹ️ The record you are in is always outlined with black borders.

This relationship "map" consists of four card groups:

1. Purchase Order
2. Receipt
3. AP Invoice
4. Payment

Each card contains a basic overview and an underlined link (the **PO/Packslip/Invoice/Payment Number** field), which opens a panel with detailed information:
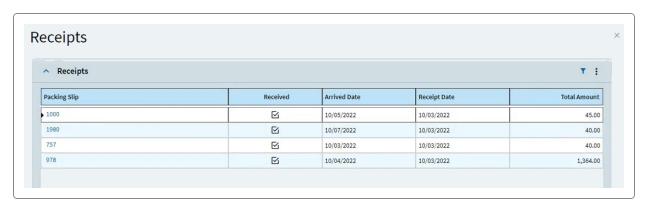
> **ⓘ** More details can be added to the grid using the **Personalize Columns** option in the panel's **Overflow menu**. You can also select the record to access it.

When there are four or more cards in a group, a collapsed version of the cards displays:

You can select the underlinedlink of on the collapsed cards to view a panel with all the records listed:

Using Additional Receipt Options

After you create the receipt entry, you can use the following options:

- Printing Tags

- Printing Labels

- Printing Mass Receipts

- Printing Inventory Movement Reports

- Adding Intercompany Receipts

- Prompt for New Lot on Manual Entry

- Legal Numbers

Recording Container Receipts

In **Container Receipt Entry**, record receipts of containers for all inventory materials (Stock, Job Material and Job Subcontract) and non-inventory items.

> ⚠️ In **Container Receipt Entry**, you only receive purchase receipt lines on a container. Use **Receipt Entry** to receive purchase release lines not on a container. To receive parts returned by the customer, use **RMA Processing**.

On receiving a container, the application automatically generates a PO receipt based on the information of the container entered at shipment. With the volume information the app calculates expected transport cost, which can be used to populate the landed cost information.

The container receipt process is similar to the Receipt Entry > Create Mass Receipts function. You can receive parts to inspection in this app. If you do, you will need to use the **Inspection Processing** app to complete the disposition of the receipt.

Use the landing page of the application to view existing container receipt records or to enter a new one.

In this article, we will cover:

- [Receiving a container](#)
- [Receiving a container shipment line](#)
- [Using tax details](#)
- [Using landed costs](#)
- [Printing tags, labels, and inventory movement reports](#)

Receiving a Container Shipment

1. From the main menu, navigate to **Material Management > Shipping/Receiving > General Operations > Container Receipt Entry**.

2. Select the **Container ID** for which you want to enter a receipt record.

3. In the **Receipt Option** field, specify what happens if the supplier ships fewer items than expected according the associated purchase release.

   - **Create new** - Immediately adjust the current purchase release to the received quantity. Then use the original due date to create a new PO release for the variance quantity.

   - **Arrive short** - Immediately adjust (reduce) the current purchase release and line quantities to the quantity received.

- **None** - Take no action. Allow the **Process MRP** and **Generate PO Suggestions** apps determine what additional action to take to resolve the variance quantity.

If the supplier ships more items than requested on the purchase release, the Kineticdoes not update the shipment line and purchase release quantities. However, it does maintain an audit trail that tracks what you ordered against what you received. This occurs regardless of the selection made in the **Receipt Option** field.

4. The **Status** field displays the current status of the container shipment.

- **Ordered** - The container shipment items have been ordered but not shipped.
- **Shipped** - The container shipment items have left the export port.
- **Imported** -The container shipment items have passed customs.
- **Arrived** - The container shipment items are on site but not yet available for inventory. You can still apply cost.
- **Received** - The container shipment items are in inventory, and the app posted GL transactions. You can no loner add or apply inventory costs for the received items.
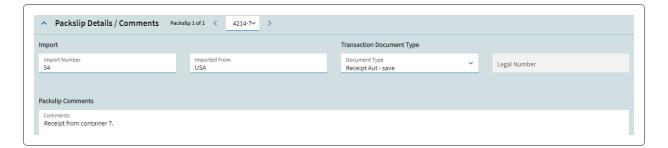
If you selected the **Apply Landed Cost After Receipt** check box in **Company Configuration**, you can maintain and enter additional landed costs for the container shipment, even after you receive inventory items associated with it in **Receipt Entry** or **Container Receipt Entry**. If you enter additional landed costs for a container shipment post-receipt, it affects the total landed cost for the container shipment, not the inventory cost of the received items themselves.

5. Select the **Received All** check box to automatically receive all lines on the entire container receipt and review the totals.

6. Enter details and comments for the packing slip that accompanied the received items.
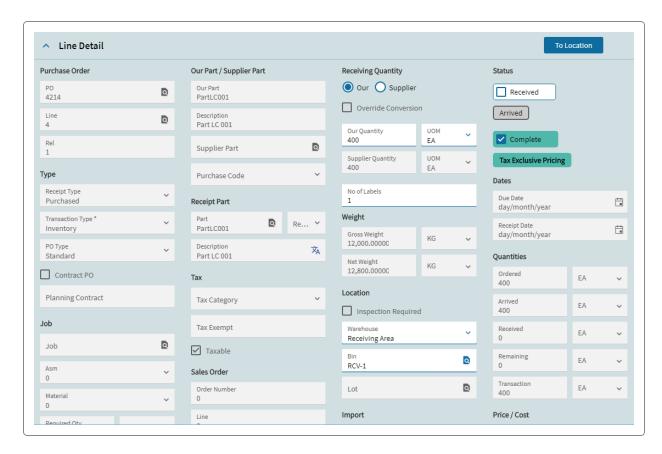
7. Select **Save**. 💾

Receiving a Container Shipment Line

1. In the **Lines** grid, select the line you want to receive.

2. Select **To Location** if you need to change the **Warehouse** from the default receiving warehouse to the warehouse specified on the PO. You also select this option if you need to change the **Bin** from the default receiving bin to the primary bin specified for that part and warehouse in **Part Maintenance**.

3. Enter the part quantity and UOM in the appropriate fields.

> ⓘ You enter this information manually or you can go to the full version of the line details by selecting **Line Detail** in the navigation tree. On the **Line Detail** card, you can view the part's information and other required details.

- **PO** - Displays the purchase order that contains the part you are receiving.

- **Line** - If you select the **Buy To Order** check box for the associated purchase release in **Purchase Order Entry**, this field displays the identifier for the sales order line number to which the item is tied.

- **Rel** - Displays release you are receiving or editing for the purchase order selected in the **PO** field.

- **Part Number** - Displays the number of the part that you are receiving.

- **Quantity Option** - Type of quantity. You can select **Our Qty** to enter the receipt quantity, expressed in your stocking (inventory) unit of measure. Or you can select **Supplier Qty** to enter the receipt quantity, expressed in the supplier's purchase unit of measure.

- **Override** - When selected, means that you can directly enter a quantity into the **Supplier Quantity** field instead of cross reference calculations with the associated UOM conversion.

- **Job** - Manufacturing job you are updating with this receipt.

- **Asm** - Job assembly.

- **Tax Category** - When selected, means the line is taxable.

- **Tax Exempt** - Displays the exempt code for the item.

For more details on the fields, use the field help available in the **Help & Support** panel ![help icon] of the application.

4. Note, the **Status** field displays the current status of the line.

```
Status


  Arrived
```

5. Select the **Received** check box to receive the container shipment line.

```
Status

  ✓ Received
```

6. Select **Save**. 💾

Using Tax Details
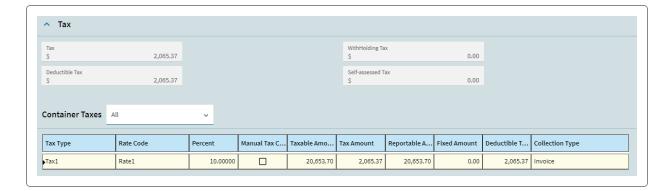
Review the container taxes and total tax amounts in the **Tax** card.

The tax information that displays comes from the taxes defined for the associated purchase order, receipt or container shipment.

The data is display only, and you can't change it.

- **Rate Code** - Rate code for the selected tax type. It is only accessible in case of manual calculation.
- **Percent** - Tax rate percentage levied against this invoice.
- **Manual Tax Calculation** - Indicates if you should manually run tax calculations for this container receipt detail.
- **Taxable Amount** - Total container receipt taxable amount to which tax applies, displayed in the document currency.
- **Tax Amount** - Total sales tax amount for the container receipt.
- **Reportable Amount** - Reportable amount in the document currency.
- **Fixed Amount** - Fixed amount in the document currency.
- **Deductible Tax Amount** - Deductible amount of the tax.
- **Collection Type** - Description of the collection type.

- Taxes calculations are complete when you mark a container line as **Received**.

- Taxes that display on **Container Receipt** come from **Container Landed Cost**. Taxes will not change if you modify the quantity/unit price values.

- Any updates on price or quantity recalculate taxes.

- The app ignores any manual taxes from **Container Landed Cost**.

Using Landed Costs

In the **Landed Costs** card, view the landed costs generated by the container receipt. The app calculates landed cost for each container receipt line. The fields are display only.

- **Landed Cost** - Total landed cost for the entire receipt.

- **Applied to Receipt** - Landed cost amount applied to the received items for the total receipt.

- **Duty Amount** - Specific duty amount for the entire container receipt. This is the prorated portion of the specific duty amount based on the line tariffs as factor.

- **Specific Duty** - Specific duty amount for the container receipt. This is s prorated among the container receipt lines using the line tariffs as a factor.

- **Indirect Cost** - Total indirect cost for the entire receipt.

- **Uplift Indirect Cost** - Uplift amount used to calculate additional landed cost amount that adds to the specified indirect cost.

- **Disbursed Amount** - Total landed cost applied to the receipt lines.

- **Disburse Method** - Calculation method for disbursing the landed cost to the shipment lines (**Indirect Cost**, **Quantity**, **Volume** (default), **Weight**, **Value**, **Manual**).

In the **Landed Costs Disbursement** card, review landed costs disbursed for each container receipt line.

Line	Part	Description	Weight	Weight UOM	Gross Weight	Gross Weight...	Volume	UOM	Supplier Qty	UOM
1	PartLC001	Part LC 001	3,200.00000	KG	3,000.00000	KG	2,500.00	GAL	100.00	EA
2	PartLC001	Part LC 001	6,400.00000	KG	6,000.00000	KG	5,000.00	GAL	200.00	EA
3	PartLC001	Part LC 001	9,600.00000	KG	9,000.00000	KG	7,500.00	GAL	300.00	EA
4	PartLC001	Part LC 001	12,800.00000	KG	12,000.00000	KG	10,000.00	GAL	400.00	EA

Landed Costs Disbursement — Packslip 1 of 1 — 4214-7 — Landed Cost $ 683.70 — Applied to Receipt $ 683.70

Printing Tags, Labels, and Inventory Movement Reports

From the Overflow menu •••,

- Select **Print Tags**to print tags to accompany the parts received on a container.
- Select **Print Labels** to print bar code labels for the received parts.
- If you need to print a report containing all the individually entered items for the job, use the **Print Inventory Movement** option.

Creating Drop Shipments

Drop shipping is a supply chain management technique in which the seller does not keep goods in stock, but instead transfers customer orders and shipment details to a third party (such as a manufacturer or wholesaler), who then ships the goods directly to the customer. The seller makes their profit on the difference between the wholesale and retail price.

Drop shipments are directly shipped by your suppliers to your customers. These goods are never physically received into or shipped from your physical inventory because your supplier directly ships the goods. Because of this, the application prevents drop shipment transactions from being processed using the standard receiving or shipment programs.

You use **Drop Shipment Entry** to mark a drop shipped sales order release as shipped and mark the linked PO release as received. Once the drop shipment transaction is selected as received/shipped in Drop Shipment Entry, you can create a customer invoice for the drop shipped item using AR Invoice Entry, and enter a supplier invoice received for the purchased item into AP Invoice Entry. You do this in the same way as you process invoices for regular customer shipments and received purchases. Read the Customers and Accounts Receivable chapter for more information on AR Invoicing and the Suppliers and Accounts Payable chapter for information on AP Invoicing.

Use the landing page of the application to view existing drop shipments or to enter a new one.

In this article, we will cover creating a new drop shipment.

1. From the main menu, navigate to **Material Management > Shipping / Receiving > General Operations > Drop Shipment Entry**.

2. Select **New** ⊕ to add a new drop shipment.

3. In the **PO** field, enter the PO number that you plan to drop ship to your customer. You can also click the PO button to search for and select your purchase order.

4. In the **Packing Slip** field, specify the packing slip identifier for the drop shipment entry. The application uses this to create a shipment record for drop ship sales orders, and a receipt record for drop ship PO releases.
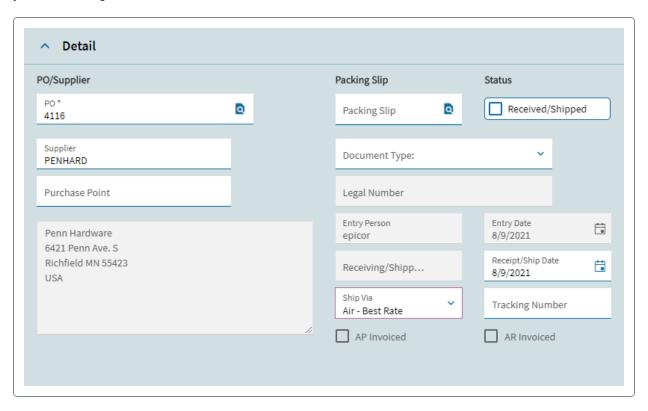
   > ℹ️ When the sales order was entered, the Drop Ship check box was selected indicating this order is being drop shipped by your supplier to your customer. For more information on sales order entry, read the Sales Order chapter.

5. From the **Document Type** drop-down list, select the appropriate document type.

6. Select the appropriate **Ship Via**.

7. The **Customer Ship To** information defaults in from the purchase order; if you need, however, you can change this value.

8. Select **Ship All** on the **Drop Ship Lines** card to ship all drop shipment lines.

   You can also add a new drop shipment line, provided you are ordering from the same supplier for the same drop shipment customer.

   Example: If PO 123 contains three lines being dropped shipped to Customer ABC, and you have sold another drop shipped part from that same supplier to that same customer on a different sales order and linked purchase order (PO 456), you can process the drop shipments for that PO if they are being dropped shipped together with the items from the earlier PO.

9. Use the **Pending PO Lines** card to view all pending drop shipment PO release lines for the purchase order number specified in the PO field. Select a specific pending PO Line record to process or edit a pending drop ship line. The Drop Ship Lines Details card displays the lines as **Complete**.

   Select the **Mass Drop Shipment** button on the **Pending PO Lines** card to process a mass drop shipment transaction for the selected pending PO and drop shipment lines.

   > ℹ️ The grid in the card also displays the 'Revision' field where you can see the revision selected on the purchase order line. The 'Revision' field is also located

> **ⓘ** on the 'Drop Ship Lines' card.
>
> To learn more about the concept of 'Tracking Inventory by Revision', review the Track Inventory by Revision Overview article and its related articles.

10. Once the goods have been shipped and received to your customer, select the **Received/Shipped** check box on the Details card to indicate the shipment can be invoiced in Accounts Receivable and Accounts Payable.

    When you select this check box, the application:

    - Updates the **Ship/Receipt Date** field with the current system date (which can be overridden).

    - Automatically creates shipment and receipt transaction records used when you create AR invoices for the drop shipped item, and AP invoices for purchase of the drop ship item from your supplier.

    Clear the check box if the drop shipment goods have not yet been received/shipped (default). You cannot clear the check box once the drop shipment been invoiced in AR or AP. If this check box has previously been selected and you clear it before AP or AR invoices have been created, the Epicor application deletes the shipment and receipt transaction records created at the time the check box was selected.

    Note: You cannot change fields for any of the associated drop shipment PO lines in the Drop Shipments Line card if the Received/Shipped check box is selected for the purchase order. This check box should only be selected after all drop shipment PO lines have been processed for the specified purchase order.

11. (Optional) Verify that the **Legal Number** field is filled in with the legal number.

    If you need to void legal number, select **Legal Number > Void Legal Number** from the Overflow menu.

    After voiding a legal number, select **Legal Number > Assign Legal Number** to assign a new legal number to this drop shipment. The Legal Number field populates with the new value.

12. Select **Save**. 💾

Transferring Orders

Transfer orders are internal requests for parts that occur between sites within your organization. You indicate that a part can be transferred to another site within the 'Part' app.

To do this, the part record must be a 'manufactured' or 'purchased' part. You then create two part-site details that use the transfer type value. One site detail is defined as the source for the transfer part quantity. The other site detail is set up to receive this transfer part quantity.

You create a new transfer order using the 'Transfer Order Entry' app. You then use the 'Transfer Order Shipment Entry' app to enter the shipment of an inter-'Site' transfer. If your 'Site' record is set up for direct shipping, you can also use the 'Direct Shipment' functionality to ship parts to another Site without using an existing transfer order. To receive the transfer order shipment, use the 'Receive Transfer Order' app.

> Transfer orders are handled through the Inventory functionality. If you need to transfer parts within the same site, you instead use the Inventory Transfer app.

If you are using 'Material Requirements Planning' (MRP), you can use the 'Transfer Order Workbench' app to work with transfer order suggestions. The MRP engine automatically creates transfer order suggestions during its calculations. It does this by monitoring the 'On-Hand Quantity' available within the receiving part-site detail. When it encounters that this part-site detail's 'On-Hand Quantity' is below its 'Minimum On-Hand Quantity', a transfer order suggestion is created for both sites. One suggestion is the demand record, while the other suggestion is the supply record.

The supply record suggestion uses the 'Transfer Order Need By Date'. This record is applied against the receiving site. Any resulting MRP calculations use this date to determine when the transfer part quantity must arrive at the receiving site. The demand record suggestion, however, calculates the 'Transfer Order Request Date'. This record is applied against the source site. Any resulting MRP calculations use this date to determine when production or purchasing must begin at the source site.

Transfer order suggestions are handled in the same way as purchase and job suggestions. Users can accept or reject them. If the transfer order suggestion is accepted, it becomes a transfer order that will be included as a demand source during the MRP process.

When the MRP engine is next run, it will create different types of records depending on whether the transfer part is manufactured or purchased:

If the transfer part is manufactured, it will create either an unfirm job or a job suggestion (if it cannot find an approved method of manufacturing) as a supply record for the source part-site detail.

If the transfer part is purchased, it will create a purchase suggestion as a supply record for the source part-site detail.

Non-Stock Versus Stock

The transfer order suggestions are calculated differently for non-stock and stock parts. These are the differences:

Non-stock parts - Either an unfirm job/job suggestion or a purchase suggestion is created on the source site for the specific transfer part quantity.

Stock parts- The MRP engine will first determine the On-Hand Quantity available at the source site. If there is enough quantity available, no suggestions are generated. If some of the quantity is available, however, the quantity on the unfirm job/job suggestion or purchase suggestion will be reduced by the On-Hand Quantity amount.

> ℹ️ In Kinetic, you can automate allocating of transfer orders. For more information about 'Automated Fulfillment' review the and articles.

In this article, we will cover:

- [Creating transfer orders](#)
- [Entering Transfer Order Line](#)
- [Creating transfer orders from suggestions](#)

Creating Transfer Orders

First, learn how to create a transfer order.

1. Open the **Transfer Order Entry** app.
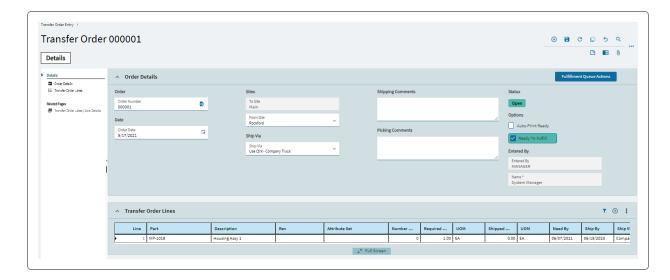
   The **Landing** page displays. The page displays all exiting transfer order records. To select and existing record, click the transfer order link inside the grid.

Order	From Site	Open	To Site
000003	MfgSys	☑	RKF
000002	RKF	☑	MfgSys
000001	RKF	☑	MfgSys

   > ℹ️ This is just an example that reflects the current database entries.

2. Select **New** ⊕ to add a new transfer order.

   The **Order Details** card displays.
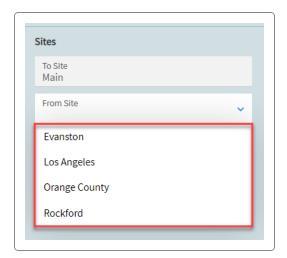
3. The **To Site** defaults from the site you are currently logged in to.

   In this example, you are logged in to the 'Main' site.
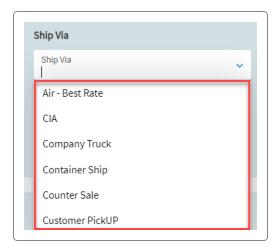
4. Select the **From Site** record.

   This value is the site from which you are transferring the inventory. In this example, the options include '4' sites. However, this is just an example.

5. Select the appropriate **Ship Via** code.
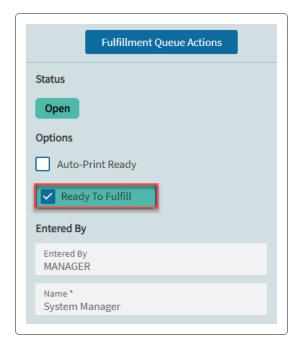
6. You can also enter the **Shipping** or **Picking** comments if required.

7. Select the **Ready To Fulfill** check box if you want to fulfill the order.

> ℹ️ For more information about the concept of 'Automated Fulfillment', review the and articles.

8. Select **Save**. 💾
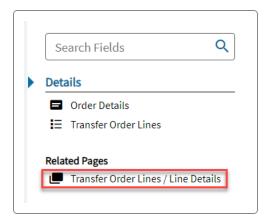
Kinetic generated a new transfer order number.

Entering a Transfer Order Line

Next, enter a transfer order line.

1. In the Nav tree, select the **Transfer Order Lines/Line Details** node.

The **Line Details** card displays.
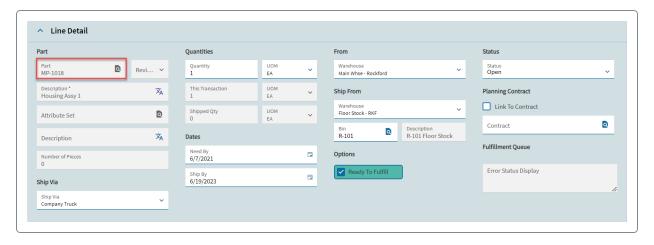
2. Select **New Line**.
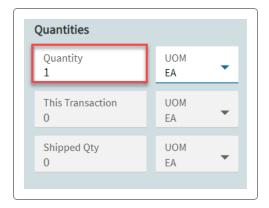
3. Enter a part for the transfer order using the **Part** field and press **Tab**.
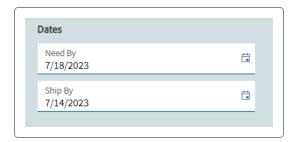
   Alternatively, you can search for and select the part you need.

4. Enter a quantity.
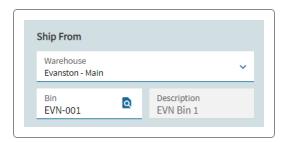
5. Define a **Need By** and **Ship By** dates.

6. The **Shipping From** warehouse and bin default.

   This is the shipping warehouse and bin added to the selected part in the 'Part' app.

7. Select the **Ready To Fulfill** check box if required.

> ⓘ For more information about the concept of 'Automated Fulfillment', review the and articles.

8. Select **Save**.

Creating Transfer Orders from Suggestions
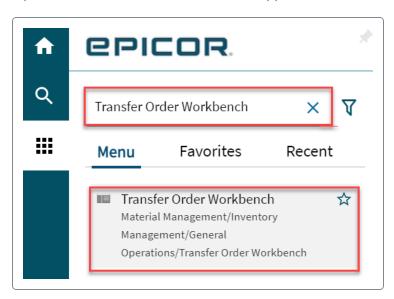
If you are using 'Material Requirements Planning' (MRP), you can use the **Transfer Order Workbench** app to work with transfer order suggestions that were created by the 'Process MRP' app.

To automate transfers across sites for specific parts the items have to be set up in a certain way in the 'Part' app:

- It needs to hold the 'Manufactures' or 'Purchased' type.

- You must set it to 'Quantity Bearing'.

- It needs to include a site the part will be transferred from and should hold the 'Transfer Lead Time'.

- Both sites must have a part revision. If the part is being manufactured at the supply site, then a method of manufacture should be created and approved.
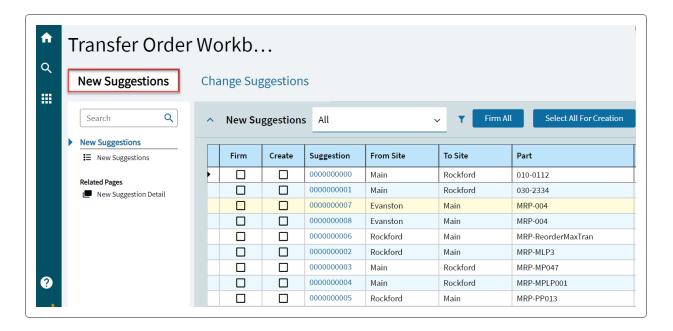
To create a transfer order from new suggestions:

1. Open the **Transfer Order Workbench** app.
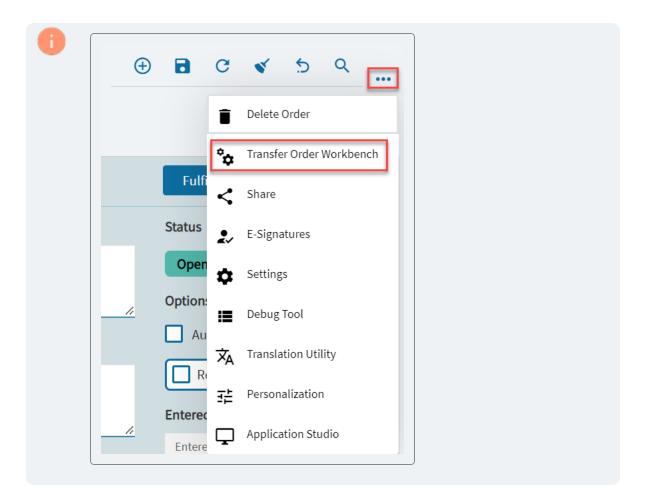
The app displays with the **New Suggestions** page opened.

Transfer Order Workb…

New Suggestions | Change Suggestions

Search 🔍

▶ **New Suggestions**
≡ New Suggestions

Related Pages
🖥 New Suggestion Detail

⌃ **New Suggestions** | All ▾ | ▼ | **Firm All** | **Select All For Creation**

	Firm	Create	Suggestion	From Site	To Site	Part
▶	☐	☐	0000000000	Main	Rockford	010-0112
	☐	☐	0000000001	Main	Rockford	030-2334
	☐	☐	0000000007	Evanston	Main	MRP-004
	☐	☐	0000000008	Evanston	Main	MRP-004
	☐	☐	0000000006	Rockford	Main	MRP-ReorderMaxTran
	☐	☐	0000000002	Rockford	Main	MRP-MLP3
	☐	☐	0000000003	Main	Rockford	MRP-MP047
	☐	☐	0000000004	Main	Rockford	MRP-MPLP001
	☐	☐	0000000005	Rockford	Main	MRP-PP013

ℹ You can also launch the 'Transfer Order Workbench' from within the 'Transfer Order Entry' app using the 'Overflow' menu.

2. Locate your suggestion and select the **Suggestion** link inside the grid.

The **New Suggestion Card** displays.

	Firm	Create	Suggestion	From Site	To Site	Part	
▶	☐	☐	0000000000	Main	Rockford	010-0112	
	☐	☐	0000000001	Main	Rockford	030-2334	
	☐	☐	0000000007	Evanston	Main	MRP-004	
	☐	☐	0000000008	Evanston	Main	MRP-004	
	☐	☐	0000000006	Rockford	Main	MRP-ReorderMaxTran	
	☐	☐	0000000002	Rockford	Main	MRP-MLP3	
	☐	☐	0000000003	Main	Rockford	MRP-MP047	
	☐	☐	0000000004	Main	Rockford	MRP-MPLP001	
	☐	☐	0000000005	Rockford	Main	MRP-PP013	
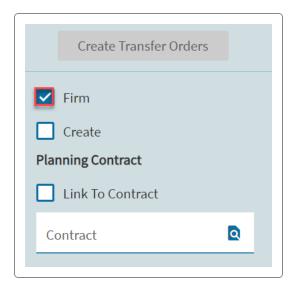
ⓘ The transfer order suggestions were created by the 'Process MRP' app. Transfer orders are suggested when a part is set to 'Transfer' using the 'Part' app and the site has demand that cannot be satisfied by on-hand inventory. Kinetic will suggest a transfer order to get the part from the site that is specified as the 'Transfer Site' for that part in the 'Part' app.

3. Next, review the suggestion you selected.
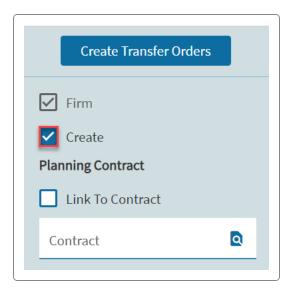
4. Select the **Firm** check box to firm an un-firm suggestion so that it will not be re-planned the next time you run Process MRP.
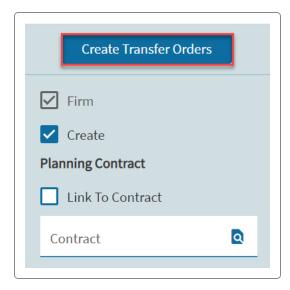
ℹ️ If you select this check box then the **Create** check box is automatically selected. However, you can clear it if required.

5. Select the **Create** check box to indicate that you want to create a transfer order from a new suggestion.

ℹ️ If you select this check box then the **Create Transfer Orders** button activates.

6. Finally, select the **Create Transfer Orders** button.
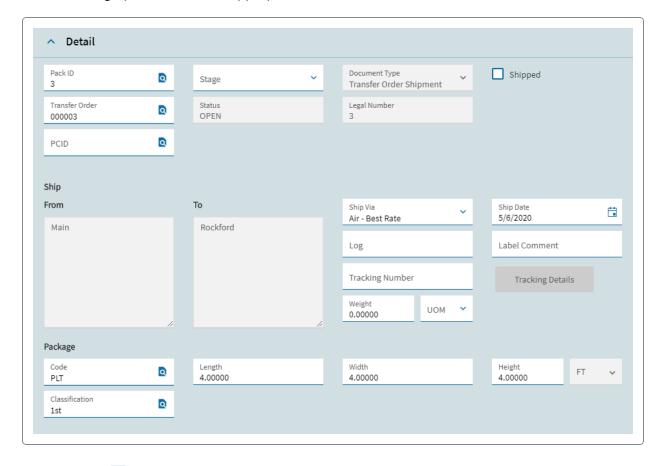
7. Select **Save**.

Entering Transfer Order Shipments

Use **Transfer Order Shipment Entry** to enter the shipment of an inter-Site transfer. If your Site record is set up for direct shipping, you can also use the Direct Shipment functionality to ship parts to another Site without using an existing transfer order.

In this article, we will cover creating a new pack.
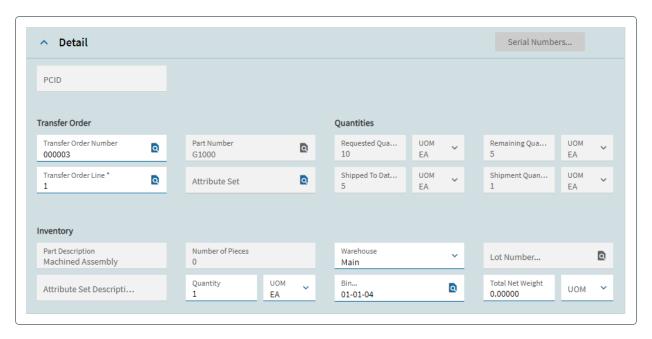
1. From the main menu, navigate to **Material Management > Shipping / Receiving > General Operations > Transfer Order Shipment Entry**.

2. On the landing page, select **New** ⊕ to add a new pack.

3. Select a **Ship Via** for the shipment.

4. Optionally enter the **Tracking Number** and **Weight**.

5. In the **Package** pane, select the appropriate **Code** and **Classification**.

6. Select **Save**. 💾

7. On the **Lines > Line Details** card, select ⊕ to add a new line.

8. Enter the **Transfer Order Number** for the shipment and elect the transfer order line.

9. Enter the shipment **Quantity**.

10. You can optionally change the default **Warehouse** and **Bin** from which the inventory is being shipped.

11. Select **Save**. 💾

12. On the **Details** card, select the **Shipped** check box to complete the shipment.

13. You can find the following options on the Overflow menu ⋯:

- **Freight** - Update the Pack ID status from Closed to Freighted. If your workstation is configured to do so, the shipping information is sent to the URL of an external manifest system where a tracking number will be assigned. The tracking details are then updated with the correct tracking number and estimated shipping cost.

- **Unfreight** - Remove the "Freighted" status from the carton. A message is sent to the manifest system to remove the shipping information and charges. The tracking number is removed from every carton tracking detail associated with the pack, and the carton status is updated to Closed.

- **Stage** - Change the Pack ID status from Open, Closed or Freighted to Staged. As a stage is shipped, confirm the shipment in Stage Ship Confirm.

- **Get Weight** - If the Get Weight from Scale option has been established in Work Station Maintenance, use the Get Pack Weight option to initiate the connection to the scale and retrieve the weight.

- **Direct Shipment** - If your Site is configured to allow shipments without a transfer order, you can use the **Direct Shipment** option.

Using Receive Transfer Order Entry

Run **Receive Transfer Order** to process a receipt of a transfer order shipment. In order to receive the transfer order shipment, you must first change sites to the plant receiving the goods.
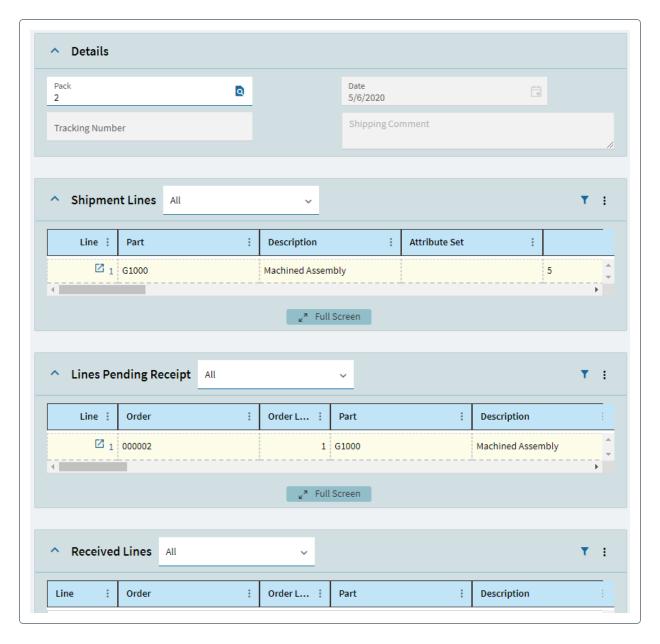
> ⚠️ You cannot unreceive a transfer order.

To receive a transfer order:

1. From the main menu, navigate to **Material Management > Shipping / Receiving > General Operations > Receive Transfer Order**.

2. Select the Pack ID button to find ID for the transfer order shipment. The cards displaying shipment details for this pack display.
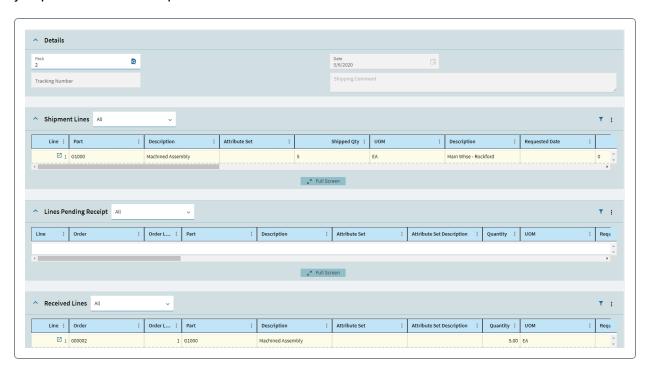
3. Navigate to the line of the **Lines Pending Receipt** card.

4. From the Overflow menu, select **Receive All** to set current date of the shipment.
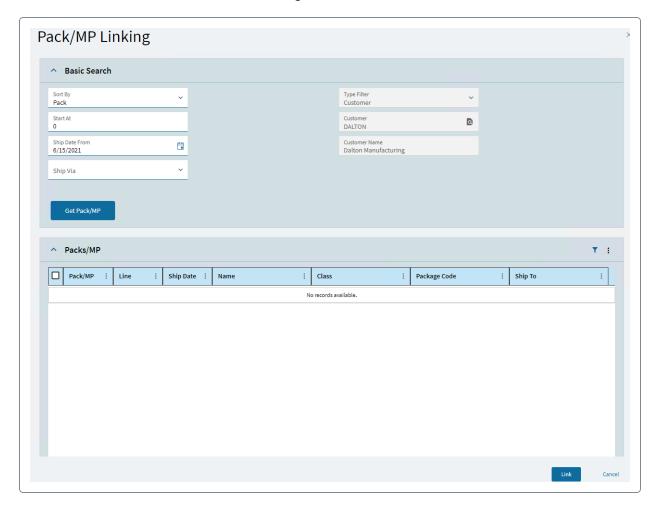
5. Select **Save**. 💾 Now the lines pending receipt display in the **Received Lines** card. It means, you processed the receipt.

Entering the Bill of Ladings

A bill of lading is a shipping document carriers use to identify cargo. These documents can be created automatically from existing pack IDs or they can be created manually. You use the **Bill of Lading** program to enter and update these records.
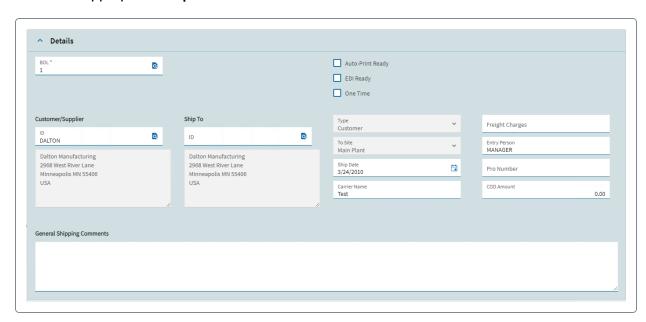
1. From the main menu, navigate to **Material Management > Shipping / Receiving > General Operations > Bill of Lading Entry**.

2. Select **New** ⊕ to add a new bill of lading.

3. I you have a Pack ID or Master Pack ID already created, you select **Link Pack / MP** from the **Overflow menu** to default in the bill of lading information and select **Link**.

Pack/MP Linking		
Basic Search		

Sort By: Pack
Start At: 0
Ship Date From: 6/15/2021
Ship Via:

Type Filter: Customer
Customer: DALTON
Customer Name: Dalton Manufacturing

Get Pack/MP

Packs/MP

☐	Pack/MP	Line	Ship Date	Name	Class	Package Code	Ship To
				No records available.			

Link Cancel

4. Use the **Generate** option from the **Overflow menu** to select the packs to include for creating bills of lading.

5. In the **ID** field, enter the Customer/Supplier ID.

6. Select the appropriate **Ship To** location.

7. Select **New Line** ⊕ on the **Bill of Lading Lines** card to add a new bill of lading.

8. Enter the **Number of Packages** for the bill of lading.

9. Select the appropriate package **Classification**.

10. Select the **Packaging Code**.

11. Enter the **Weight** and **Weight Unit of Measure** for the line item.

12. Select **Save**. 💾

Reports

This section describes some key reports you use to view information about shipping and receiving processes. You can run these reports whenever needed.

Generating the Bill of Lading Form

Run the **Bill of Lading Form** using the **Bill of Lading Entry > Print BOL Form** command from the Overflow menu, to display a hard copy of the current bill of lading. The Bill of Lading report form is useful to verify whether you have entered the bill of lading data correctly.

The **Selection** parameters include:

- **Report Style** - Select the report style option you want to use to run this report.
- **Schedule** - Indicates when you want to print the report. If you select something other than Now, the Recurring check box is available.
- **Archive Period** - Time period you want to keep the report in the System Monitor. The default is 0 Days, meaning that the report will be deleted from the monitor shortly after being printed.

  After the Archive Period passes, the report is purged from the system. When a report is exactly purged is determined by a combination of the date/time the report generates, the number of days set in the report's Archive Period, and the Report Purge Frequency setting. The Report Purge Frequency is defined in the System Agent within its Task Agent Purge Settings.

- **User Description** - Describes a specific report run. The entered description displays in the System Monitor.
- **Recurring** - Select this check box if you want the report to run on a repeating basis. This check box is only available if you select a schedule other than Now.

To generate the form:

1. From the main menu, go to **Material Management > Shipping / Receiving > General Operations > Bill of Lading Entry**.
2. Create a new record or select an existing one.
3. From the Overflow menu, select **Print BOL Form**.
4. Select the parameters depending on what you want the form to display.
5. Select **Print Preview**.

Generating the Container Landed Cost Report

Generate the **Container Landed Cost Report** to display and print out the landed cost applied to container shipments.

> ℹ️ The report is only available if you install the **Landed Cost** license.

> ℹ️ If you select the **Calculate Taxes for Receipts** check box located on the **Company Configuration > All Modules > Tax** sheet, a container shipment line and indirect cost taxes are included in the report.

The **Selection** parameters include:

- **Supplier** - The supplier of the shipment.
- **Reference** - The identifier for the container shipment line reference. This identifies the specific line item on the container shipment. Useful for scrolling between different container items on this record.
- **Status** - Select of the available statuses. For example, if you select **Ordered** then only the report will include only items with the Ordered status. You can select a single or multiple statuses.
- **Include** - Select what you want the report to display. The options include **Duties**, **Indirect Cost**, and **Uplift**.
- **Filter** - Informs you whether you used filters or not. After you select a specific filter option, the fields located in this pane display values depending on whether you filtered (Some Selected) or you did not (All Selected).
- **Sort By** - Select how you want to organize the report. The list items represent the sorting hierarchy options.
- **Schedule** - Indicates when you want to print the report. If you select something other than **Now**, the Recurring check box is available.
- **Report Style** - Select the report style option you want to use to run this report.
- **Archive Period** - Time period you want to keep the report in the System Monitor. The default is 0 Days, meaning that the report will be deleted from the monitor shortly after being printed.

  After the Archive Period passes, the report is purged from the system. When a report is exactly purged is determined by a combination of the date/time the report generates, the number of days set in the report's Archive Period, and the Report Purge Frequency setting. The Report Purge Frequency is defined in the System Agent within its Task Agent Purge Settings.

- **Recurring** - Select this check box if you want the report to run on a repeating basis. The check box is only available if you select a schedule other than Now.
- **User Description** - Describes a specific report run. The entered description displays in the System Monitor.

To generate the report:

1. From the main menu, go to **Material Management > Shipping / Receiving > Reports > Container Landed Cost**.

2. Select the report parameters.

3. Select **Print Preview**.

Generating the Container Shipment Status Report

Generate the **Container Shipment Status Report** to review and print the current status of container shipments.

> ℹ️ The landed cost functionality is only available if your **Landed Cost** license is active.

The **Selection** parameters include:

- **Reference** - The identifier for the container shipment line reference. Useful for scrolling between different container items.
- **Supplier** - the supplier of the shipment.
- **Arrival Date** - The arrival date of the shipment.
- **Late Arrivals** - Select to include late arrivals in the report.
- **Ordered** - Select to include items with a status of Ordered.
- **Shipped** - Select to include items with a status of Shipped.
- **Imported** - Select to include items with a status of Imported.
- **Arrived** - Select to include items with a status of Arrived.
- **Received** - Select to include items with a status of Received.
- **Filter Summary** - Informs you whether you used filters or not. After you select a specific filter option, the fields located in this pane display values depending on whether you filtered (Some Selected) or you did not (All Selected).
- **Sort By** - Select how you want to organize the report. The list items represent the sorting hierarchy options.
- **Report Style** - Select the report style option you want to use to run this report.
- **Schedule** - Indicates when you want to print the report. If you select something other than **Now**, the Recurring check box is available.
- **Archive Period** - Time period you want to keep the report in the System Monitor. The default is 0 Days, meaning that the report will be deleted from the monitor shortly after being printed.

  After the Archive Period passes, the report is purged from the system. When a report is exactly purged is determined by a combination of the date/time the report generates, the number of days set in the report's Archive Period, and the Report Purge Frequency setting. The Report Purge Frequency is defined in the System Agent within its Task Agent Purge Settings.

- **User Description** - Describes a specific report run. The entered description displays in the System Monitor.
- **Recurring** - Select this check box if you want the report to run on a repeating basis. The check box is only available if you select a schedule other than Now.

To generate the report:

1. From the main menu, go to **Material Management > Shipping / Receiving > Reports > Container Shipment Status**.

2. Select the parameters depending on what you want the report to display.

3. Select **Print Preview**. 🖨

Generating the Customer Shipment Compliance Report

Generate the **Customer Shipment Compliance Report** to review and print compliance for each customer shipment.

The **Selection** parameters include:

- **Packing Slip** - Select to include packing slip details in the report.
- **Start Shipment Date** - The start date for the report, when the Dynamic check box is not selected.
- **End Shipment Date** - The end date for the report, when the **Dynamic** check box is not selected.
- **Filter Summary** - Informs you whether you used filters or not. After you select a specific filter option, the fields located in this pane display values depending on whether you filtered (Some Selected) or you did not (All Selected).
- **Report Style** - Select the report style option you want to use to run this report.
- **Schedule** - Indicates when you want to print the report. If you select something other than **Now**, the Recurring check box is available.
- **Archive Period** - Time period you want to keep the report in the System Monitor. The default is 0 Days, meaning that the report will be deleted from the monitor shortly after being printed.

   After the Archive Period passes, the report is purged from the system. When a report is exactly purged is determined by a combination of the date/time the report generates, the number of days set in the report's Archive Period, and the Report Purge Frequency setting. The Report Purge Frequency is defined in the System Agent within its Task Agent Purge Settings.

- **User Description** - Describes a specific report run. The entered description displays in the System Monitor.
- **Recurring** - Select this check box if you want the report to run on a repeating basis. The check box is only available if you select a schedule other than Now.

To generate the report:

1. From the main menu, go to **Material Management > Shipping / Receiving > Reports > Customer Shipment Compliance**.

2. Select the parameters depending on what you want the report to display.

3. Select **Print Preview**. 🖶

Generating the Customer Shipped Substances Report

Generate the **Customer Shipped Substances Report** to produce a list of each substance shipped per customer.

The **Selection** parameters include:

- **Ship Start Date** - The start shipment date for the report, when the **Dynamic** check box is not selected.
- **Ship End Date** - The end shipment date for the report, when the **Dynamic** check box is not selected.
- **Summarize Weight** - Select to include a weight summary in the report.
- **Manual** - Select to include substances that have been marked manually as compliant.
- **Exempt** - Select to include exempt substances in your report.
- **Filter** - Informs you whether you used filters or not. After you select a specific filter option, the fields located in this pane display values depending on whether you filtered (Some Selected) or you did not (All Selected).
- **Sort By** - Select how you want to organize the report. The list items represent the sorting hierarchy options.
- **Schedule** - Indicates when you want to print the report. If you select something other than Now, the Recurring check box is available.
- **Recurring** - Select this check box if you want the report to run on a repeating basis. The check box is only available if you select a schedule other than Now.
- **Report Style** - Select the report style option you want to use to run this report.
- **Archive Period** - Time period you want to keep the report in the System Monitor. The default is 0 Days, meaning that the report will be deleted from the monitor shortly after being printed.

  After the Archive Period passes, the report is purged from the system. When a report is exactly purged is determined by a combination of the date/time the report generates, the number of days set in the report's Archive Period, and the Report Purge Frequency setting. The Report Purge Frequency is defined in the System Agent within its Task Agent Purge Settings.

- **User Description** - Describes a specific report run. The entered description displays in the System Monitor.

To generate the report:

1. From the main menu, go to **Material Management > Shipping / Receiving > Reports > Customer Shipped Substances**.
2. Select the report parameters.
3. Select **Print Preview**.

Generating the Master Pack Shipment Packing Slip

Run the **Master Pack Shipment > Print Pack** command from the Overflow menu ••• , to generate a packing slip for a master pack shipment.

The packing slip is intended to let transport agencies, government authorities, and customers know about the content included in the package. These details help each of these parties to handle the package accordingly.

> ⓘ If you use the Advanced Material Management module, and enable the package control functionality for the current site, you also have the option to include the PCID (Package Control ID) details for PCIDs included in a pack ID on a master pack packing slip.

The **Selection** parameters include:

- **Include PCID Details** - Select this check box to include the PCID details. Even if you include the PCID details, quantities for items in a master pack that you did not assign to a PCID still display. This check box defaults as cleared.

  Even if you select this check box, the master pack slip includes the quantities for items that you add to Pack IDs contained within the master pack, but did not assign to a PCID.

  > ⓘ PCID or Package Control ID, is used to define each package and its contents. Using PCIDs you can enter, track, and change important information such as serial numbers and part codes. For example, PCIDs can be a single container or they can be nested inside other containers. Therefore, a container identified as a PCID can hold other, smaller containers that have their own PCIDs.

  > ⓘ This field is only available if you install the Advanced Material Management license and select the Enable Package Control check box in Site Configuration.

- **Assign Legal Number** - Select this check box to generate legal number(s) for the packing slip. Legal numbers may be required by some countries and provide an additional tracking method.

- **Report Style** - Select the report style option you want to use to run this report.

- **Schedule** - Indicates when you want to print the report. If you select something other than Now, the Recurring check box is available.

- **Archive Period** - Time period you want to keep the report in the System Monitor. The default is 0 Days, meaning that the report will be deleted from the monitor shortly after being printed.

After the Archive Period passes, the report is purged from the system. When a report is exactly purged is determined by a combination of the date/time the report generates, the number of days set in the report's Archive Period, and the Report Purge Frequency setting. The Report Purge Frequency is defined in the System Agent within its Task Agent Purge Settings.

- **User Description** - Describes a specific report run. The entered description displays in the System Monitor.
- **Recurring** - Select this check box if you want the report to run on a repeating basis. The check box is only available if you select a schedule other than Now.

To generate a packing slip:

1. Go to **Material Management > Shipping / Receiving > General Operations > Master Pack Shipment Entry > Print Pack** from the Overflow menu ••• .
2. Select the parameters depending on what you want the pack to display.
3. Select **Print Preview**. 🖶

Generating the Miscellaneous Shipment Packing Slip

Run the **Miscellaneous Shipment Entry > Print** command from the Overflow menu●●●, to generate a packing slip for a miscellaneous shipment.

The packing slip is intended to let transport agencies, government authorities, and customers know about the content included in the package. These details help each of these parties to handle the package accordingly.

The **Selection** parameters include:

- **Assign Legal Number** - Select this check box to generate legal number(s) for the packing slip. Legal numbers may be required by some countries and provide an additional tracking method.

- **Report Style** - From the drop-down list, select the report style option you would like to use to run this report. A report style is a variation of a base report customized for your business needs. Options are user-defined.

- **Schedule** - Indicates when you want to print the report. If you select something other than Now, the Recurring check box becomes available.

- **Archive Period** - Time period you want to keep the report in the System Monitor. The default is 0 Days, meaning that the report will be deleted from the monitor shortly after being printed.

  After the Archive Period passes, the report is purged from the system. When a report is exactly purged is determined by a combination of the date/time the report generates, the number of days set in the report's Archive Period, and the Report Purge Frequency setting. The Report Purge Frequency is defined in the System Agent within its Task Agent Purge Settings.

- **User Description** - Describes a specific report run. The entered description displays in the System Monitor.

- **Recurring** - Select this check box if you want the report to run on a repeating basis. The check box is only available if you select a schedule other than Now.

To generate a packing slip:

1. Go to **Material Management > Shipping/Receiving > General Operations > Miscellaneous Shipment Entry > Print** from the Overflow menu●●●.

2. Select the parameters depending on what you want the pack to display.

3. Select **Print Preview**. 🖨

Generating the Print Packing Slip/Labels Report

Generate the **Print Packing Slip/Labels** report to produce a packing slip, shipping labels, or both for a customer shipment.

On the Packing Slip Report, you can view the ship to and sold to addresses, ship via, and ship date for the items contained within the selected pack ID. For the pack ID's line items, the report displays the sales order number, the line number, release number, and the shipped quantity for those items. The report also displays any salespersons associated with a sales orders that are included in the pack ID. If more than one salesperson is associated with the order, all salespersons display.

You can also set up the application to display the following additional details on the packing slip report:

- **Logo** - If you import a logo image in **Image Maintenance** and attach it to the packing slip report in **Report Style Maintenance**, the logo displays at the top of the packing slip.

- **Tax Information** - If you select the **Calculate Taxes for Customer Shipments** check box in the Company Configuration - Modules - Materials - Shipping Receiving sheet, Kinetic calculates tax amounts for customer shipments when a pack (or master pack) is shipped or closed, and then stores it internally for use when printing the associated packing slips.

  This information includes the single unit and extended tax amounts for shipped goods line items. Note that you can only packing slip after the pack has been shipped or closed. Tax calculations are performed at this point, and may not correspond to the tax amounts that are ultimately calculated at the time the customer is actually invoiced for the items.

  The calculated pack taxes are based on the associated sales order values at the time the taxes are generated, and are not updated with the changes made to the sales order.

- **Pricing Information** - If you select the **Calculate Prices** check box in the Company Configuration - Modules - Materials - Shipping Receiving sheet, packing slips also print pricing information, including the single unit and extended values for shipped goods line items.

- **Free-form Text** - If you have entered free-form text into the **Sub Ship To** and **Routing** fields in the Order Entry - Releases - Detail sheet for the order release being shipped, this information prints on the packing slip. This provides detailed information about where the shipment must be delivered within the ship to address specified for the order release. For example, if the ship to address is a regional distribution center, this information can indicates if the shipment must be delivered to a specific store, and to specific department within the store.

When printing labels, be sure to set your default printer to a 4x6 label printer (set the label size on the printer driver to 4x6). Also set the Crystal layout width on the labels to 3.65 (or less than 3.7).

> ⓘ Note that if you have created custom shipping labels and packing slips, you will need to do an additional step to use these forms. Within Report Style Maintenance, you first indicate that the style will use the Packing Slip Form (PackSlip.rpt). You next must

define the two reports within the new style's **Report Location** field. For example, Reports\PackSlip.rpt,Reports\ShipLabl.rpt.

The **Selection** parameters include:

- **Packing Slip** - Select this option if you only want to print a packing slip.
- **Shipping Labels** - Select this option if you only want to print shipping labels.
- **Both** - Select this option if you want to print both a packing slip and shipping labels.
- **Include PCID Details** - Select this check box if you want to add the PCID details included the Pack ID to the packing slip/shipping labels. This option is only active if you have the Advanced Material Management license installed and the Package Control functionality enabled for the current site.
- **Filter** - Displays the current Pack ID.
- **Output Format** - Select the format for report output.
- **Report Style** - Select the report style option you want to use to run this report.
- **Schedule** - Indicates when you want to print the report. If you select something other than Now, the Recurring check box is available.
- **Recurring** - Select this check box if you want the report to run on a repeating basis. The check box is only available if you select a schedule other than Now.
- **Archive Period** - Time period you want to keep the report in the System Monitor. The default is 0 Days, meaning that the report will be deleted from the monitor shortly after being printed.

  After the Archive Period passes, the report is purged from the system. When a report is exactly purged is determined by a combination of the date/time the report generates, the number of days set in the report's Archive Period, and the Report Purge Frequency setting. The Report Purge Frequency is defined in the System Agent within its Task Agent Purge Settings.

- **User Description** - Describes a specific report run. The entered description displays in the System Monitor

To generate the report:

1. From the main menu, go to **Material Management> Shipping / Receiving> General Operations> Customer Shipment Entry**.
2. Select a **Pack ID** record.
3. From the Overflow menu •••, select **Print Report**.
4. Select the report parameters.
5. Select **Print Preview**. 🖶

Generating the Scheduled Shipments Report

Run the **Scheduled Shipments Report** to display outstanding order releases quantities.

The standard version of the report, does not show Bin Locations for the Part Numbers. The user would need to two reports or track each Shipment individually to identify where these parts are located.

Fortunately, SSRS reports can be customized to include additional fields and information. A table - table relation can be added in the Report Data Definition and thus, allow the addition of new fields to the report. This allows you to include the following fields:

- Warehouse
- Bin Location
- On Hand Quantity

Once you deploy the modified version of the SSRS report, you can continue running the report the same way it has been executed before. When deploying the custom version, you can also choose to either replace the existing version of the report, or create a new Report Style so you can run both versions.

The outstanding order release quantity is calculated by subtracting both the Shipped Quantity and the Shipped from Stock Quantity from the Order Release Quantity. If this value is negative, the outstanding quantity is set to zero.

> ℹ️ Outstanding Quantity = Order Release Quantity - (Shipped Quantity + Shipped from Stock Quantity)

> ℹ️ The report only displays quantities marked as Shipped on a packing slip.

The **Selection** parameters include:

- **Due On or Before** - The cutoff date for the report. Only open order releases that are dated on or before this date are printed on the report.
- **Include Site to Site Shipments** - Select if you want the report to include shipments made from one internal site to another internal site.
- **Sort By** - Gives you the option to sort out the report by Due Date/Customer, Customer/Part/Due Date, Due Date/Part, and Part/Due Date.
- **Report Style** - Select the report style option you want to use to run this report.
- **Schedule** - Indicates when you want to print the report. If you select something other than Now, the Recurring check box is available.
- **Archive Period** - Time period you want to keep the report in the System Monitor. The default is 0 Days, meaning that the report will be deleted from the monitor shortly after being printed.

After the Archive Period passes, the report is purged from the system. When a report is exactly purged is determined by a combination of the date/time the report generates, the number of days set in the report's Archive Period, and the Report Purge Frequency setting. The Report Purge Frequency is defined in the System Agent within its Task Agent Purge Settings.

- **User Description** - Describes a specific report run. The entered description displays in the System Monitor.

- **Recurring** - Select this check box if you want the report to run on a repeating basis. This check box is only available if you select a schedule other than Now.

To generate the report:

1. From the main menu, go to **Material Management > Shipping / Receiving > Reports > Scheduled Shipments**.

2. Select the parameters depending on what you want the report to display.

3. Select **Print Preview**. 🖨

Generating the Transfer Order Shipment Pack Report

Run the **Transfer Order Shipment > Print Pack** command from the Overflow menu ⋯ , to generate a pack report for a transfer order shipment.

The pack report is intended to let transport agencies, government authorities, and customers know about the content included in the package. These details help each of these parties to handle the package accordingly.

The **Selection** parameters include:

- **Assign Legal Number** - Select this check box to generate legal number(s) for the report. Legal numbers may be required by some countries and provide an additional tracking method.
- **Report Style** - Select the report style option you want to use to run this report.
- **Schedule** - Indicates when you want to print the report. If you select something other than Now, the Recurring check box is available.
- **Archive Period** - Time period you want to keep the report in the System Monitor. The default is 0 Days, meaning that the report will be deleted from the monitor shortly after being printed.
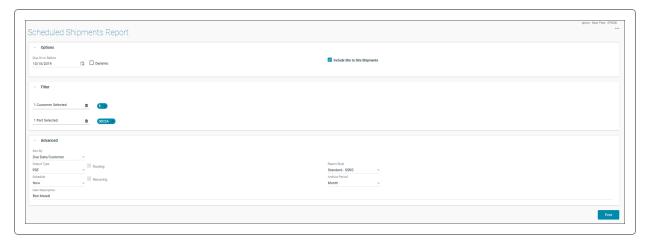
   After the Archive Period passes, the report is purged from the system. When a report is exactly purged is determined by a combination of the date/time the report generates, the number of days set in the report's Archive Period, and the Report Purge Frequency setting. The Report Purge Frequency is defined in the System Agent within its Task Agent Purge Settings.

- **User Description** - Describes a specific report run. The entered description displays in the System Monitor.
- **Recurring** - Select this check box if you want the report to run on a repeating basis. The check box is only available if you select a schedule other than Now.

To generate the report:

1. From the main menu, go to **Material Management > Shipping / Receiving > General Operations > Transfer Order Shipment Entry**.

2. From the Overflow menu ⋯ , select **Print**.

3. Select the parameters depending on what you want the report to display.
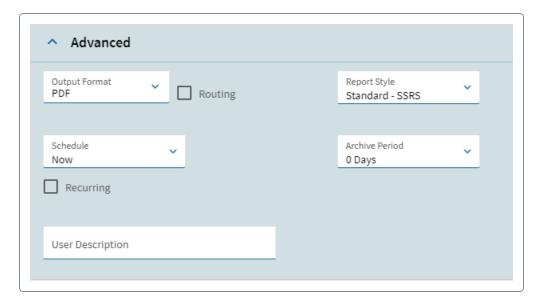
4. Select **Print Preview**. 🖶

Printing Inventory Movement Reports

Print a report containing all the individually entered items for the job using the **Inventory Movement Report** option of the Overflow menu in **Receipt Entry**.

In this article, we will cover printing inventory movement report.

1. In **Receipt Entry**, select a receipt you want to print the inventory movement report for from the grid on the landing page.

2. From the Overflow menu ⦁⦁⦁, select **Print Inventory Movement Report**.

3. Specify the report parameters on the **Advanced** card.

- **Output Format** - The format of the report's output.
- **Report Style** - Select the report style option you want to use to run this report.
- **Schedule** - Indicates when you want to print the report. If you select something other than Now, the Recurring check box is available.
- **Archive Period** - Time period you want to keep the report in the System Monitor. The default is 0 Days, meaning that the report will be deleted from the monitor shortly after being printed.

  After the Archive Period passes, the report is purged from the system. When a report is exactly purged is determined by a combination of the date/time the report generates, the number of days set in the report's Archive Period, and the Report Purge Frequency setting. The Report Purge Frequency is defined in the System Agent within its Task Agent Purge Settings.

- **Recurring** - Select if you want the report to run on a repeating basis. The check box is only available if you select a schedule other than **Now**.

- **User Description** - Describes a specific report run. The entered description displays in the System Monitor.

4. Select **Print Review** .

Printing Miscellaneous Shipment Labels

Use the **Print** command in **Miscellaneous Shipment Entry** to produce the Pack Label or Pack List for a miscellaneous shipment.

The **Selection** parameters:

- **Report Style** - Select the report style option you want to use to run this report.
- **Schedule** - Indicates when you want to print the report. If you select something other than **Now**, the Recurring check box is available.
- **Archive Period** - Time period you want to keep the report in the System Monitor. The default is 0 Days, meaning that the report will be deleted from the monitor shortly after being printed.

  After the Archive Period passes, the report is purged from the system. When a report is exactly purged is determined by a combination of the date/time the report generates, the number of days set in the report's Archive Period, and the Report Purge Frequency setting. The Report Purge Frequency is defined in the System Agent within its Task Agent Purge Settings.

- **Recurring** - Select this check box if you want the report to run on a repeating basis. The check box is only available if you select a schedule other than Now.
- **User Description** - Describes a specific report run. The entered description displays in the System Monitor.

To print the labels:

1. From the main menu, go to **Material Management > Shipping / Receiving > General Operations > Miscellaneous Shipment Entry**.
2. Create a new miscellaneous shipment Pack ID or search for and select an existing one.
3. Define the **Miscellaneous Shipment** settings.
4. From the Overflow menu ***, select **Print**.
5. Select the **Pack Label** check box and click **OK**.
6. In the **Miscellaneous Shipment Labels Print** window, define the printing parameters.
7. Select **Print Preview**. 🖶

Printing Subcontractor Shipment Labels

Print **Subcontractor Shipment Labels** to produce shipping labels for a subcontractor shipment.

The **Selection** parameters include:

- **Schedule** - Indicates when you want to print the report. If you select something other than Now, the Recurring check box is available.
- **Report Style** - Select the report style you want to use to run this report.
- **Archive Period** - Time period you want to keep the report in the System Monitor. The default is 0 Days, meaning that the report will be deleted from the monitor shortly after being printed.

  After the Archive Period passes, the report is purged from the system. When a report is exactly purged is determined by a combination of the date/time the report generates, the number of days set in the report's Archive Period, and the Report Purge Frequency setting. The Report Purge Frequency is defined in the System Agent within its Task Agent Purge Settings.

- **Recurring** - Select this check box if you want the report to run on a repeating basis. The check box is only available if you select a schedule other than Now.
- **User Description** - Describes a specific report run. The entered description displays in the System Monitor.

To print the shipping labels:

1. From the main menu, go to **Material Management > Shipping / Receiving > General Operations > Subcontractor Shipment Entry**.

2. From the Overflow menu ⋯, select **Print**.

3. Select the **Print Label** check box.

4. Select **OK**.

5. Select the parameters such as **Schedule**, **Report Style**, **User Description**, and so on.

6. Select **Print Preview**. 🖨

Printing the Customer Shipment Packing Slip/Labels

Generate the **Print Packing Slip/Labels** form to produce a packing slip, shipping labels, or both for a customer shipment.

> ℹ️ When printing labels, ensure to set your default printer to a 4x6 label printer (set the label size on the printer driver to 4x6). Also set the Crystal layout width on the labels to 3.65 (or less than 3.7).

The **Selection** parameters include:

- **Packing Slip** - Select if you want to print a Packing Slip only.
- **Shipping Labels** - Select if you want to print Shipping Labels only.
- **Both** - Select to print both, the Packing Slip and Shipping Labels.
- **Assign Legal Number** - Select to generate a legal number using the information (Mask, Prefix, Site Code, Sequence, Year) defined in the legal number definition according to the document type.
- **Filter** - Informs you whether you used filters or not. After you select a specific filter option, the fields located in this pane display values depending on whether you filtered (Some Selected) or you did not (All Selected).
- **Report Style** - Select the report style option you want to use to run this report.
- **Schedule** - Indicates when you want to print the report. If you select something other than Now, the Recurring check box is available.
- **Archive Period** - Time period you want to keep the report in the System Monitor. The default is 0 Days, meaning that the report will be deleted from the monitor shortly after being printed.

  After the Archive Period passes, the report is purged from the system. When a report is exactly purged is determined by a combination of the date/time the report generates, the number of days set in the report's Archive Period, and the Report Purge Frequency setting. The Report Purge Frequency is defined in the System Agent within its Task Agent Purge Settings.

- **Recurring** - Select this check box if you want the report to run on a repeating basis. The check box is only available if you select a schedule other than Now.
- **User Description** - Describes a specific report run. The entered description displays in the System Monitor.

To print the Packing Slip/Labels form:

1. From the main menu, go to **Material Management > Shipping / Receiving > General Operations > Customer Shipment Entry**.
2. Create a **Pack ID** or select an existing record.

3. From the Overflow menu ***, select **Print**.

4. Select the form parameters.

5. Select **Print Preview**. 🖨

Printing the Subcontractor Shipment Packing Slip

Use the **Print** command in **Subcontractor Shipment Entry** to produce a pack form for a subcontractor shipment.

The **Selection** parameters include:

- **Assign Legal Numbers** - Select to generate legal numbers using the **Mask**, **Prefix**, **Site Code**, **Sequence**, and **Year** values defined in Legal Number Maintenance according to the Document Type.

- **Report Style** - Select the report style option you want to use to run this report.

- **Schedule** - Indicates when you want to print the report. If you select something other than **Now**, the Recurring check box is available.

- **Archive Period** - Time period you want to keep the report in the System Monitor. The default is 0 Days, meaning that the report will be deleted from the monitor shortly after being printed.

  After the Archive Period passes, the report is purged from the system. When a report is exactly purged is determined by a combination of the date/time the report generates, the number of days set in the report's Archive Period, and the Report Purge Frequency setting. The Report Purge Frequency is defined in the System Agent within its Task Agent Purge Settings.

- **Recurring** - Select this check box if you want the report to run on a repeating basis. The check box is only available if you select a schedule other than Now.

- **User Description** - Describes a specific report run. The entered description displays in the System Monitor.

To print the pack:

1. From the main menu, go to **Material Management > Shipping / Receiving > General Operations > Subcontractor Shipment Entry**.

2. Create a new subcontract shipment Pack ID or search for and select an existing one.

3. Define the **Subcontractor Shipment** settings.

4. From the Overflow menu ⋯, select **Print**.

5. Select the **Pack List** check box and click **OK**.

6. In the **Subcontract Shipment - Packing Slip Report** that displays, define the report parameters.

7. Select **Print Preview**. 🖨