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# SIMMS

# Shipping & Receiving Manual

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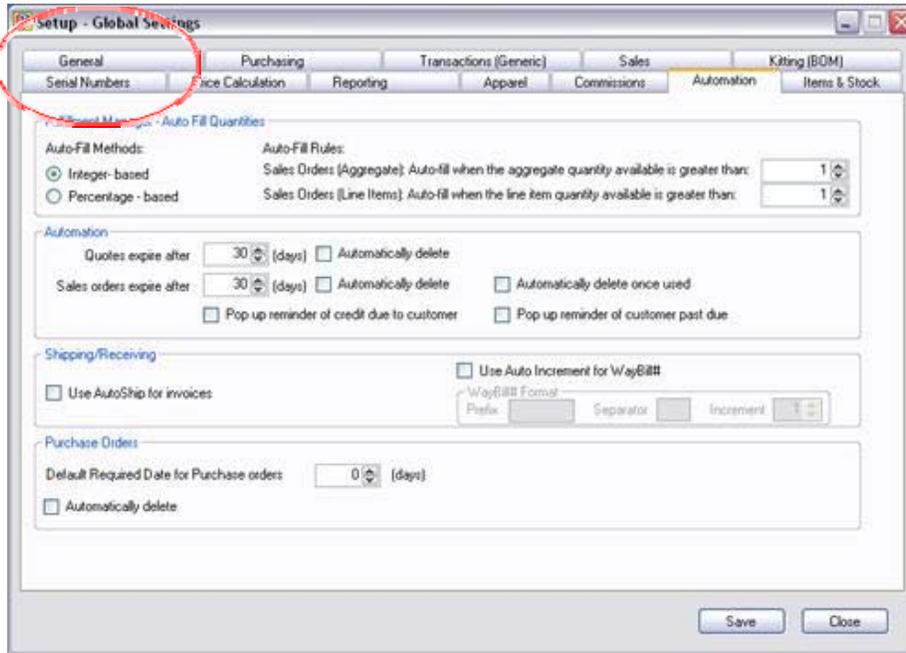
## Shipping Manager
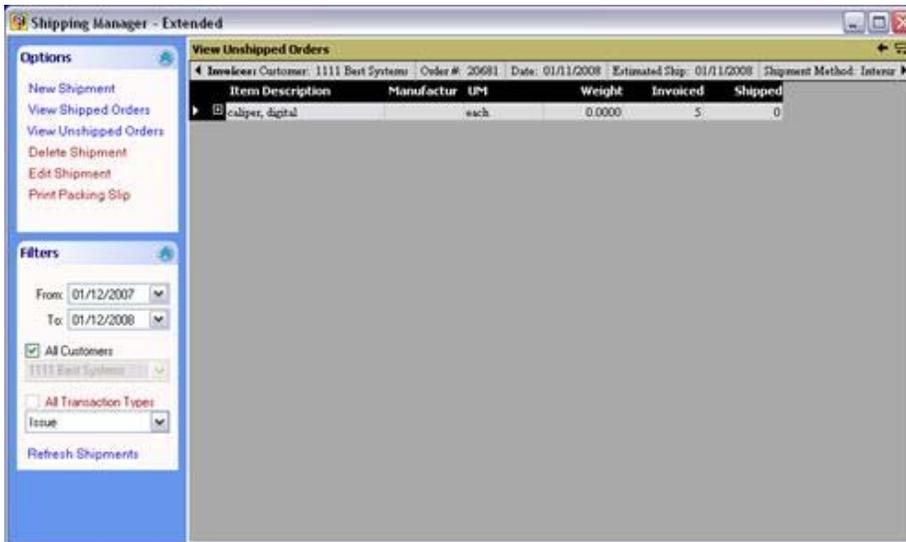


To use the Shipping Manager feature, access the Setup>Global Settings>Automation tab and deselect the respective checkbox in the subsection for Shipping/Receiving.

This will indicate to SIMMS that you wish to manually manage your shipping.



To access the **Shipping Manager**, select **Inventory>Shipping/Receiving then Shipping Manager** from the **Inventory** dropdown menu on the main screen. This will open the **Shipping Manager Form** where selections are made to process pending shipments.

Enter a *Waybill Number* and select a *Shipping Method* to be used. *Estimated Arrival Date* is that day which you expect/desire the shipment to arrive. The Waybill number can be set to auto-increment by accessing the Setup menu>Global Settings screen>Sales tab and selecting the 'Use Auto-Increment for Waybill Number' checkbox. Waybills may also be assigned a prefix and a separator character within this feature as well.

Click on the *Items on Invoice* link to select the pieces to be included in the shipment.

At this point, enter a Box Label for the container(s) and decide on the number of items in the shipment, and click the Add button to commit the lien item to the shipment.

Repeat above steps for any other items you wish to include in the current shipment.

If necessary, click on the *Serial Numbers* link, which takes you to the *Serial Number Manager* screen for selection of the items' serial numbers for inclusion in the shipment. Any line items with incorrect details can be removed by clicking the *Remove* link, and then re-entered correctly.

Enter any additional information in the Comments field.

Enter the Total Shipment Cost, and once certain that this shipment's details are correct, finalize the shipment by clicking the **Save New Shipment** button.

Once you save the shipment, you will be prompted as follows. Choose either Yes or No in regard to your needs.





**Shipping Un-Shipped Orders**

The first step in this procedure is to open the Shipping Manager screen by clicking Inventory>Shipping/Receiving>Shipping Manager.

Once the **Shipping Manager** form is open, proceed with the following:



If you wish to view only the orders within a specific date range then proceed to the *Date Filter* field and select the appropriate range.

If you wish to view only the orders belonging to a specific customer then proceed to the Customer Filter field and select the appropriate Customer.

If you wish to view the Un-Shipped Orders then click on the *View Un-Shipped Orders* link under **Options.** All orders that have not been shipped within the range you selected will appear in the table to the right.
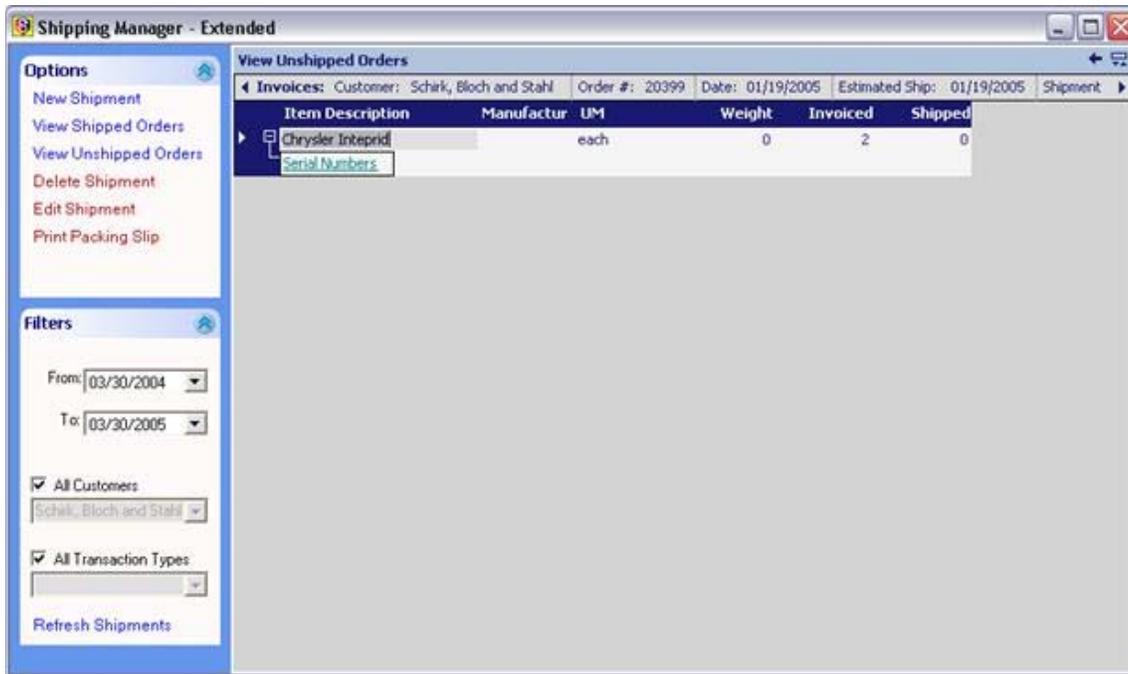
If you wish to view Shipped Orders then click on the *View Shipped Orders* link under **Options**. All orders that have been shipped within the range you selected will appear in the table to the right. You have the option to explode the order list by clicking the ⊞.

Proceed with completion of the details of the shipment as described in the previous section.

## Deleting Shipments

e the user has chosen to delete a shipment, the items on it roll back into stock and once again the shipment will display as un-shipped.

## Processing Partial Shipments

Partial shipments can be processed using the methods described above, but the difference is that the user chooses only some of the product listed on the invoice and thereby leaves the balance of the order available for another shipment sometime in the future. Any invoices whose goods are not completely shipped will continue to appear in the Shipping Manager screen until they are completed.

## Shipping Mixed Orders to a Customer

Mixed orders consist of goods that reside on two or more invoices to the same customer, which in turn can be pulled from those invoices onto one shipment. The method for composing the shipment is the same as described above, with the exception being that when item(s) from the first invoice have been added to the shipment line items on the right, the user then

*a)* Returns to the screen which lists the other unshipped order for that customer by clicking on the back arrow for the left window section (as highlighted below), then,

*b)* Proceeds next to selection and designation of the other item(s) to be included in the shipment, and once complete, the shipment is saved.



Also from this screen, a freight forwarder, port warehouse, customs broker and trucking broker can be assigned to a shipment, and purchase orders can be created for them.

Upon saving the shipment, a prompt appears.



If you select Yes, the related sales orders will show as invoiced; if only part of the order was shipped, the sales order will show as being partially invoiced.

**Confirm Receipts**

If the user has chosen to manually manage receipts of goods within SIMMS, access the screen by clicking

*Inventory>Shipping/Receiving>Confirm Receipts.*



*To manually receive the goods:*

1) Place a checkmark in the Received column for the receipt of goods you wish to commit into the system.

2) Click the Details button if you wish to view the contents of the receipt.

3) Click the Save button to commit the goods to the respective location(s).

4) Click Close to complete the receiving session.

**Confirm Transfers**

If the user has chosen to manually manage transfers of goods within SIMMS, access the screen by clicking *Inventory>Shipping/Receiving>Confirm Transfers.*



*To manually receive the goods:*

1) Place a checkmark in the Received column for the transfer you wish to finalize in the system.

2) Click the Details button if you wish to view the contents of the transfer.

3) Click the Save button to commit the item(s) to their new location.

4) Click Close to complete the transfer.

**Important SIMMS Software Contact Information**

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