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SIMMS

Shipping & Receiving Manual

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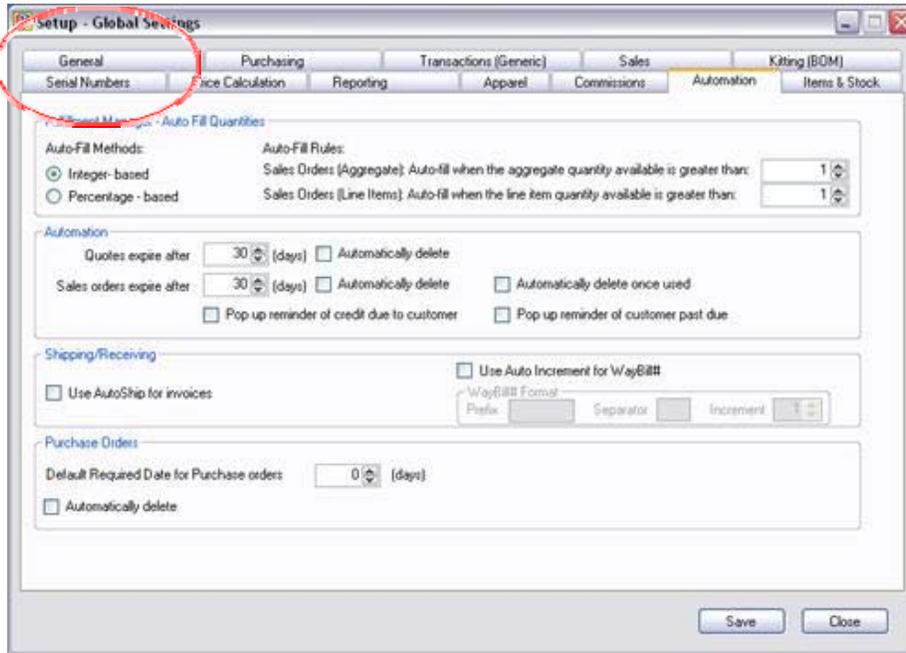
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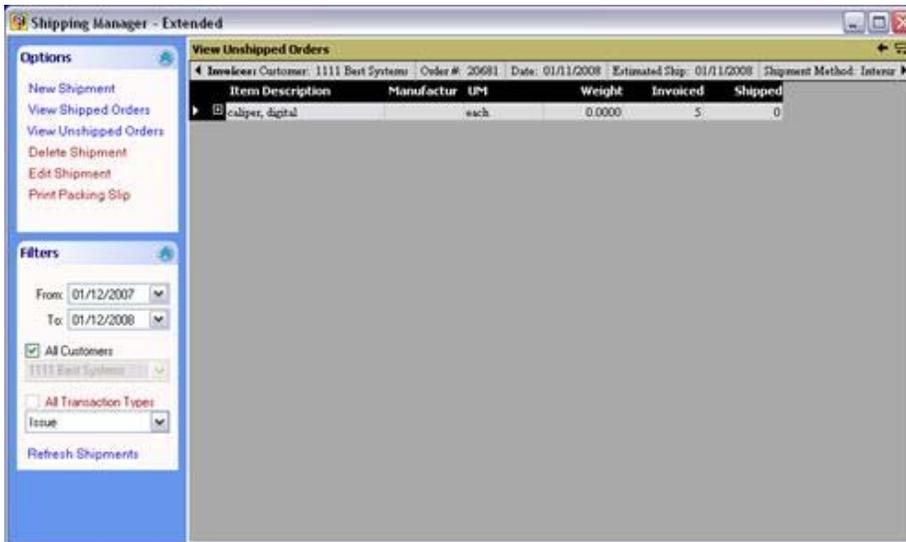
Sales Orders –Picking Items

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.

Shipping Detail

Customer: 1111 Best Systems Waybill #: 929292 Shipping Date: 01/12/2008
 Contact: [Defer Waybill assignment for FedEx](#) Shipping Time: 12:00:00 AM
 Shipping Method: Interurban Supervisor: Estimated Arrival Date: 01/12/2008

Alternative Ship To Address: Refresh

Customer Address: 9-32904 Ventura Ave Thuman OH 45685

Freight Forwarder: Create PO Customs Broker: Create PO
 Port Warehouse: Create PO Trucking Broker: Create PO

Unshipped Items for 1111 Best Systems

Invoices: Order#: 20681 Date: 01/11/2008

Item Description	Manuf. Lot	Qty Available	UM	Weight
caliper, digital		5	each	0.0000

Box Label (Carrier Tracking #): Shipped Qty: 5 Total Weight (lb): 0.0000 Add

Box	Item Description	Qty	Weight	Manuf. Lot
Box 1	caliper, digital	5	0	

Serial Numbers Remove

Comments:

No. of Boxes: 1 Total Weight (lb): 0.0000 Total Shipment Cost: 20.00 Save

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.

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Customer: 1111 Best Systems Waybill #: 929292 Shipping Date: 01/12/2008
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Unshipped Items for 1111 Best Systems

Invoices: Order#: 20681 Date: 01/11/2008

Item Description	Manuf. Lot	Qty Available	UM	Weight
caliper, digital		5/each		0.0000

Box Label (Carrier/Tracking #) Shipped Qty Total Weight (lb) Add

Box	Item Description	Qty	Weight	Manuf. Lot
Box 1	caliper, digital	5	0	

Serial Numbers Remove

Comments:

No. of Boxes: 1 Total Weight (lb): 0.0000 Total Shipment Cost: 20.00 Save

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.

Question

Do you wish to print the packing slip?

Yes No

Report

PACKING SLIP

SVZ Company Inc.
 18 Massachusetts Avenue, Cambridge MA 02142-1017
 Web: www.svz.com
 Phone: 617-452-0100 Fax: 617-452-0101

Ship To: AJ-NYS 2.0 Customer: 0981 Francis Road
 Contact Person: George Turner Address: Box 8100 E A 92100
 Ship Via: Interurban Shipping Point: 02123-2004 Shipping Address: Box 8100 E A 92100
 Shipping Point: 02123-2004

Box Label	Order #	Item Description	Manuf. Lot	Qty	Weight (lb)
1	20675	Adjuster, vertical-handled		2 each	0.00

No. of Boxes: 2 Total Weight: 0.00

Current Page No. 1 Total Page No. 1 Zoom Factor: 80%

Shipping Un-Shipped Orders

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

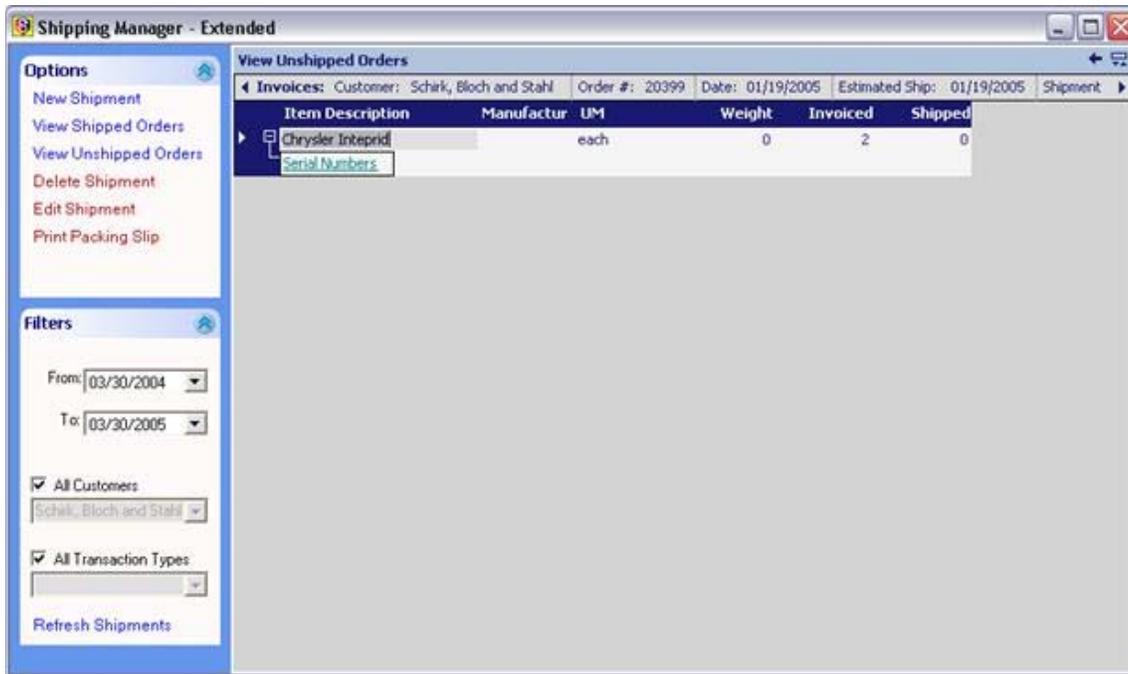
Once the **Shipping Manager** form is open, proceed with the following:



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

When 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.

The screenshot shows the 'Shipping Detail' window. At the top, there are fields for Customer (1111 Best Systems), Waybill # (929292), Shipping Date (01/12/2008), Contact, Shipping Method (Interurban), Supervisor, Shipping Time (12:00:00 AM), and Estimated Arrival Date (01/12/2008). Below these are fields for Alternative Ship To Address, Customer Address (9-32904 Ventura Ave/Turman OH 45685), Freight Forwarder, Create PO, Customs Broker, Create PO, Port Warehouse, Create PO, and Trucking Broker, Create PO. A section titled 'Unshipped Items for 1111 Best Systems' contains a table with columns: Invoices: Order#, Date, Item Description, Manuf. Lot, Qty Available, UM, and Weight. The table shows one item: 'caliper, digital' with Qty Available 5 and Weight 0.0000. To the right of this table is a 'Box Label (Carrier/Tracking #)' section with a table: Box Label, Shipped Qty, Total Weight (lb), and an Add button. The table shows 'Box 1' with Shipped Qty 5 and Total Weight 0.0000. Below the box label table is a 'Serial Numbers' section with a Remove button. At the bottom of the window, there is a 'Comments' field and summary statistics: No. of Boxes (1), Total Weight (lb) (0.0000), Total Shipment Cost (20.00), and a Save button.

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.

The screenshot shows a 'Question' dialog box with a question mark icon. The text inside the dialog box asks: 'Do you want to create a new invoice based on the present shipment?'. At the bottom of the dialog box, there are two buttons: 'Yes' and 'No'.

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.

Received	Order No.	Trans. Type	Trans. Date	Vendor	Doc. No.	Prop. Date	Received Date	Ship Method
<input checked="" type="checkbox"/>	20119	Receipt	03/22/04	Valley Distributors		03/22/04	(null)	(null)

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.*

Received	Order No.	Trans. Type	Trans. Date	Destination	Doc. No.	Prop. Date	Received Date	Ship Method
<input checked="" type="checkbox"/>	20120	Transfer	03/22/04	BDG-B		03/22/04	(null)	(null)

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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