Warehouse Shipping Automation
For Sage 100 2016

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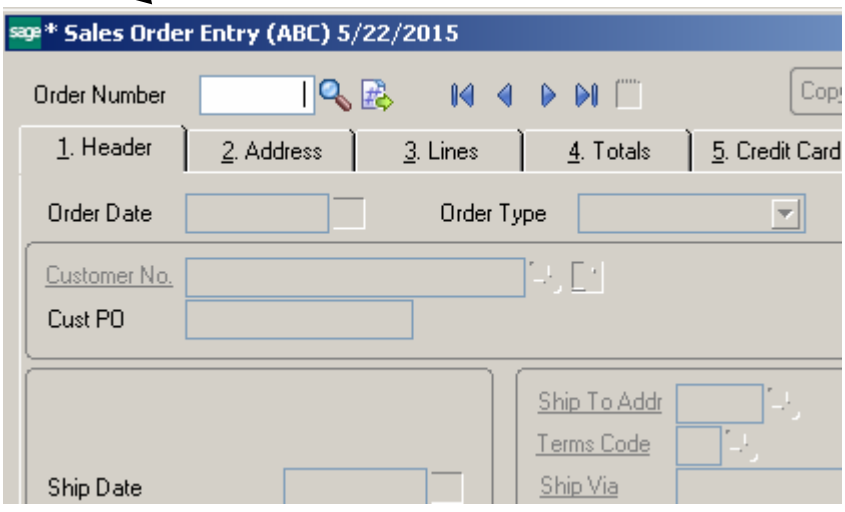
Installation Instructions and Cautions

PLEASE NOTE: SAGE 100 *must already be installed on your system before installing any IIG enhancement. If not already done, perform your SAGE 100 installation and setup now; then allow any updating to be accomplished automatically. Once SAGE 100 installation and file updating is complete, you may install your IIG enhancement product by following the procedure below.*

Wait! Before You Install – Do You Use CUSTOM OFFICE?

THIS IS AN IMPORTANT CAUTION: *If you have Custom Office installed,* ***and*** *if you have modified any SAGE 100 screens, you must run* ***Customizer Update*** *after you do an enhancement installation.*

But wait! BEFORE *you run* ***Customizer Update****, it is* ***very important*** *that you* ***print all of your tab lists.*** *Running* ***Customizer Update*** *will clear all Tab settings; your printed tab list will help you to reset your Tabs in Customizer Update.* ***Custom Office*** *is installed on your system if there is an asterisk in the title bar of some of the screens. The asterisk indicates that the screen has been changed.*



An ***asterisk*** in a window's title bar indicates that the screen has been modified. This means that **Custom Office** is installed.

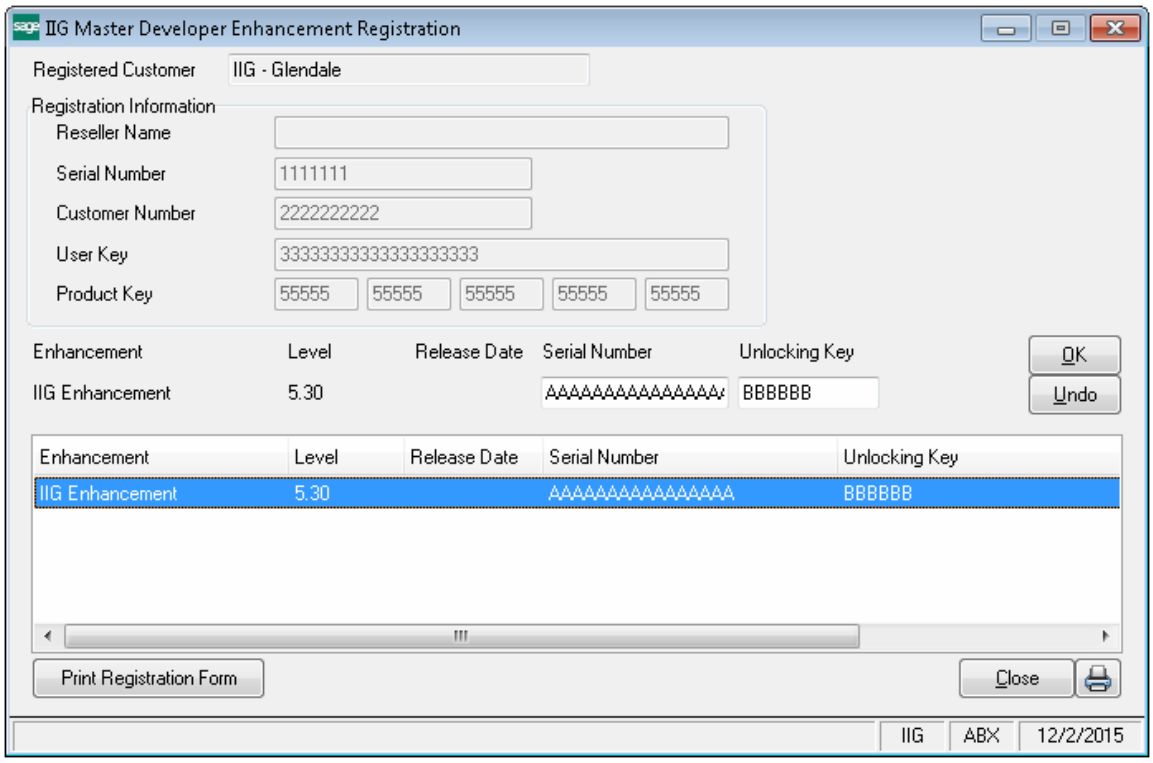
Follow all the instructions on this page before you run **Customizer Update**!

Registering IIG products

IIG Enhancement should be registered to be able to use it. If registration is not performed, the enhancement will work in a demo mode for a limited time period. The registration can be still done during the demo period.

Select the **IIG Product Registration** program under the **Library Master Setup** menu of the SAGE 100.

If this option is not listed under the Library Master Setup menu, go to the main menu, and select **Run** from the **File** menu. Type in SVIIGR and click **OK**.



Enter **Serial Number** and **Unlocking Key** provided by IIG, and click **OK**.

If multiple IIG Enhancements are installed, Serial Numbers and Unlocking Keys should be entered for each enhancement.

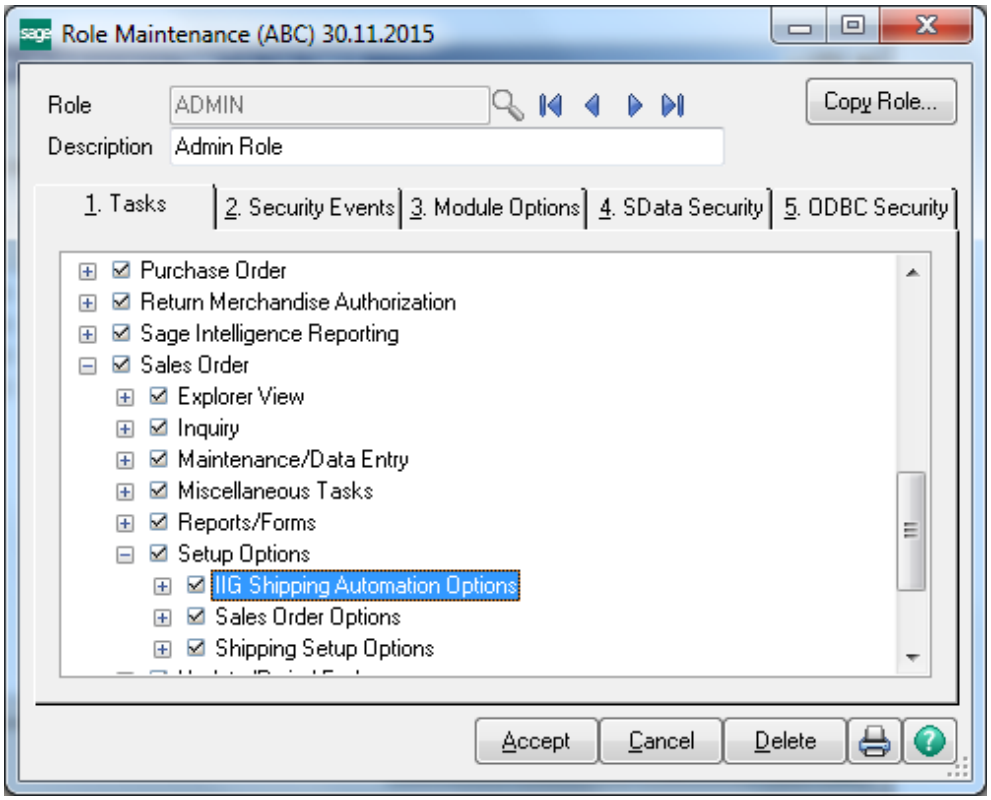
Use the **Print Registration Form** button to print IIG Registration Form.

ODBC Security

After installing an **IIG Enhancement**; it is **very important to verify** whether or not the **Enable ODBC Security within Role Maintenance** check box is selected in the **System Configuration** window of your system. If it is selected you must assign ODBC security permissions and allow access to custom data tables/fields for the Roles defined in your system.

Role Maintenance

After installing an **IIG Enhancement**, permissions must be configured for newly created Tasks and Security Events.



Introduction

IIG **Warehouse Shipping Automation** with Malvern provides all the features needed to automate and improve the shipping processes. IIG Warehouse Shipping Automation with Malvern provides seamless integration of Malvern, Clippership, Ship Manager shipping solutions into Sage 100, providing you the flexibility to adapt your business and customer shipping needs.

It works also with IIG Credit Card Processing and Point Of Sale - Fast Sale enhancements.

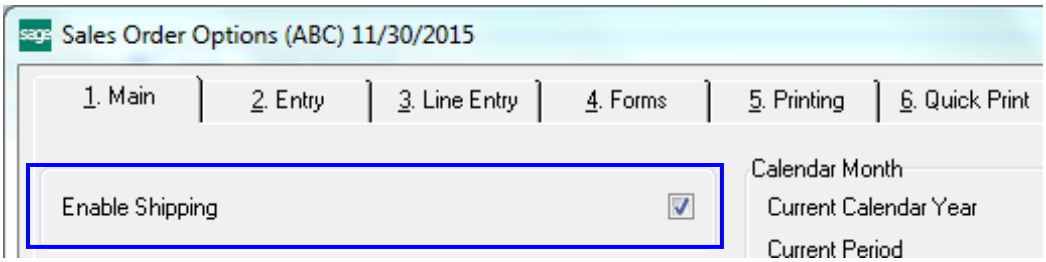
WARNING:
If IIG Credit Card Processing (CCP) exists in the system, the installation order must be the following:

1. CCP
2. WSA

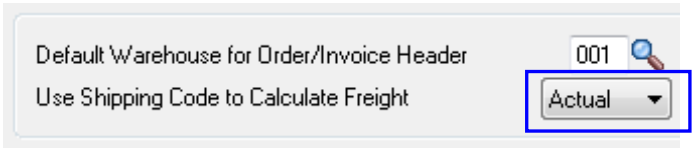
Shipping Automation Setup

Sales Order Options

Once the installation of the **Warehouse Shipping Automation** enhancement module is completed, allow the program to automatically perform proper system updates, conversions and self-settings upon first launch.
From the **Sales Order Setup** menu, select the **Sales Order Options** program. Make sure the **Enable Shipping** box is checked on the **Main** tab.



On the **Entry** tab, select **Actual** in the **Use Shipping Code to Calculate Freight.**

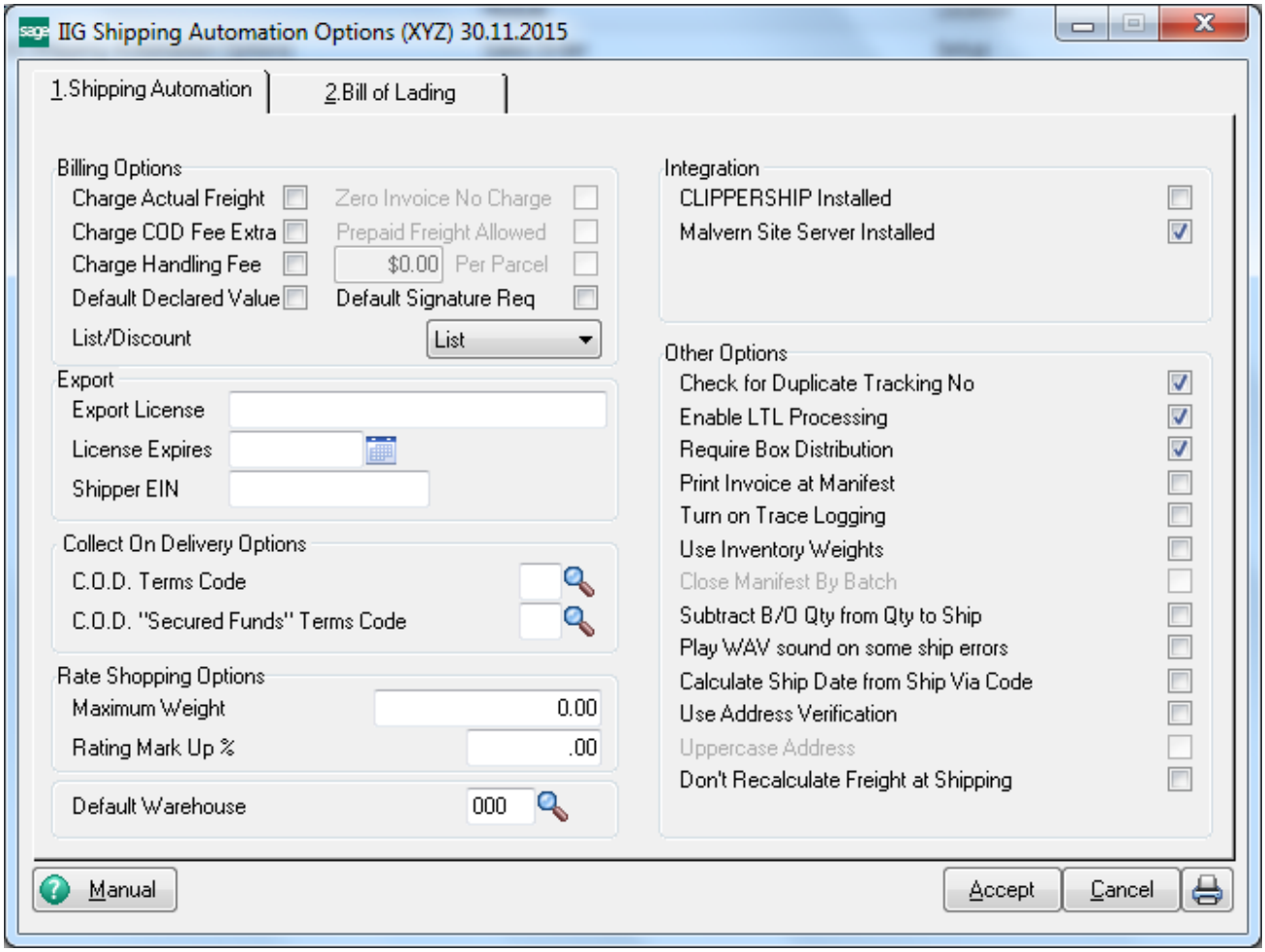


Be sure if you are using IIG shipping to calculate freight that you also do not have freight calculations turned on or set up in the **Shipping Rate Maintenance** as these can lead to the programs conflicting and incorrect freight charged.

Shipping Automation Options

Shipping Automation Tab

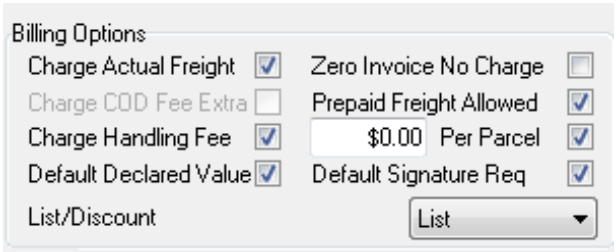
Select **IIG Shipping Automation Options** under the **Sales Order Setup** menu. When running the Shipping Automation Options for the first time the system sets default data.



The **Manual** button allows for viewing WSA enhancement manual.

A warning is displayed, if there is no Shipping Terminal configured. Terminals are configured in the **Shipping Terminal Maintenance** under the **Sales Order Setup** menu.

Billing Options



Check the **Charge Actual Freight** box if the actual freight amount will be invoiced. Checking this box enables the following two options:

- **Zero Invoice No Charge** - check this box to allow zero dollar invoices to not be charged freight. This is most commonly used with "no charge" replacement invoices.
- **Prepaid Freight Allowed** - check this box if allowing freight charges to not be charged to customer.

Check the **Charge COD Fee Extra** box if the COD fee should be added to the invoice freight amount. This amount is calculated based on the carrier, when **Charge Actual Freight** is unchecked. COD fees are not freight charges, they are money handling fees.

Check the **Charge Handling Fee** box if the customer will be charged for the handling of the package. Enter the amount the customer will be charged. Select the **Per Parcel** checkbox to specify that the handling fee that was entered will be applied to each individual parcel. If the **Per Parcel** checkbox is not selected, the handling fee that you entered will be applied to the entire shipment, regardless of how many individual parcels it contains.

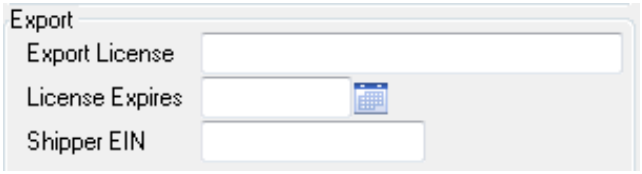
Note: The handling fee will be added to the invoice freight amount and may be subject to taxes in your tax jurisdiction.

Check the **Default Declared Value** box to attach a declared value based on the invoice amount. Leaving this option unchecked will not apply a declared value to the shipment. This is used to calculate the freight insurance value and will be turned at point of shipment if the box value is less than $100.00 as almost all carriers cover the first $100.00 value of the shipment.

Check the **Default Signature Req** box to turn on the **Signature Required** box in **IIG Manifesting** as the default per shipment.

The **List/Discount** option allows specifying what freight will be used by Malvern Site server program. If **List** is selected the returned freight will be used, if **Discount** is selected the discounted freight will be applied.
The list and discount options are applied to actual shipping.

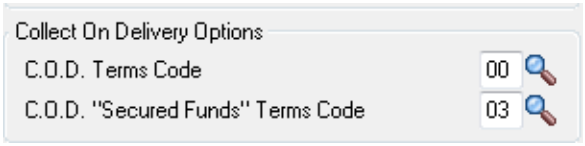
Export



Enter your **Export License** if required. You must enter the date your **Export License** expires in the **License Expires** field if you have a license.

Enter your business Tax ID or Social Security ID as the **Shipper EIN**, This is required for certain customs documentation.

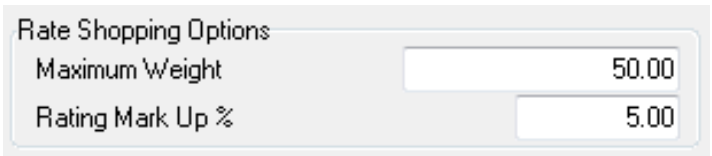
Collect on Delivery Options



Enter **A/R Terms Code** for COD and COD "Secured Funds" shipments. These terms specify to the system whether a COD shipment requires cash or secured funds only or if a check is acceptable.

Note: The Terms Codes for “COD” and “COD "Secured Funds"” should be created in the **Accounts Receivable Terms Code Maintenance** before the Terms Code may be used here.

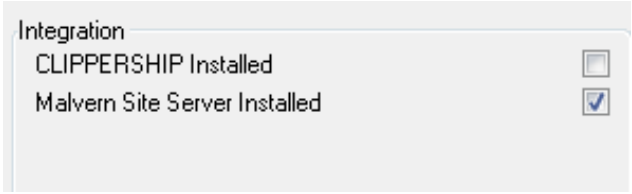
Rate Shopping Options



Enter the **Maximum Weight** of "loose item" boxes that do not have defined TARE quantities (see **Inventory Maintenance**) for rate shop calculations.

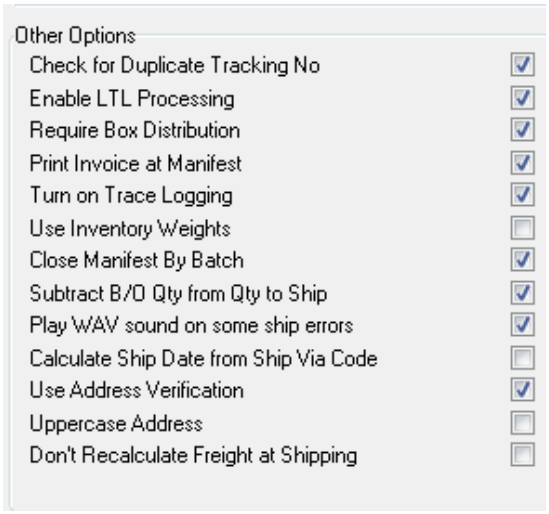
Enter the **Rating Mark Up %** to adjust the rated freight returned. This is sometimes required to compensate for loose item box fill percentages.

Integration



By default, **Malvern Site Server Installed** is checked. IIG also supports Clippership by Kewell. If you have Clippership installed then check the **CLIPPERSHIP Installed** option. Note that both can be installed and used at the same time, although normally only one is checked.

Other Options



Check for Duplicate Tracking No – This option enables checking for duplicate tracking numbers when a shipment is processed either through the shipping interface (Malvern, Clippership) or manually. If a duplicated tracking number is found, the shipment cannot be saved and must be voided. This option is selected by default.

Enable LTL Processing - This option enables the LTL processing screens. It is checked by default. If turned off, it limits the system to small parcel shipment only.

Check the **Require Box Distribution** box to forbid distribution of additional boxes when manifesting. The box distribution will be limited to the boxes entered in the **Shipping Data Entry**.

Check the **Print Invoice at Manifest** if using the two step manifest processing method. Rarely used.

Check the **Turn On Trace Logging** when requested by the IIG Support Technician. This logs all transactions between the carrier manifest program (Malvern or Clippership) to diagnose issues with shipments. When first setting up the system we recommend you turn it on while the setup and training is going on for tuning.

Check the **Use Inventory Weights** option to use the weight from the inventory master to calculate the box weight of the items in it. We recommend this for two reasons: Speed and accuracy. Scales bounce and can have a wide reading over time which can lead to weight penalties with the carrier. We do however recommend that you weigh the boxes and compare the calculated value of the box, because if there is a significant difference in the weight (higher or lower) then there is a discrepancy that the shipper can stop and investigate. Chances are there is either a missing weight or something was mis-shipped.

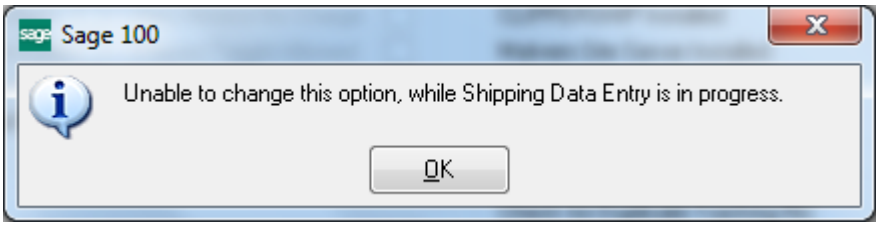
Check the **Close Manifest by Batch** box to be able to close the manifest by the specified Shipping Batch Number. In this case you can add new shipment to the selected batch number after closing the Manifest. You cannot add shipments to any batch in case the Manifest has been closed for all batches.

If the **Subtract B/O Qty from Qty to Ship** box is checked, the **Qty to Ship** is displayed instead of the **Ordered Quantity** in the **Lines** tab of the **Shipping Data Entry** program and it is calculated according to the following formula:

Qty to Ship = Quantity Ordered – Backordered (data taken from the Sales Order).

This option is functioning only for standard orders. It is not available for Kit or Non-inventory items.

The following message appears when trying to change this option while there is even one Shipping Batch in your system.



If the **Play WAV sound on some ship errors** box is checked, WAV file will play a sound:

- If one of the lines has not been completely shipped
- Wrong Item has been scanned
- The quantity shipped for an Item exceeds the quantity ordered

Otherwise, (if the box is unchecked) it will just beep.

*Note: Any WAV file can be used, but it must have **IIG_SHIP_ERROR.WAV** file name and be put in the **\mas90\soa** folder. If MAS200 is running, do the same for any workstation in the client **\mas90\soa** folder.*

Calculate Ship Date from Ship Via Code - this option is intended for calculating the Ship Date of the Order taking into account the Lead Time in days value set for current Ship via code in the IIG Carrier Maintenance.

Use Address Verification – select this checkbox to enable address (Address 3) verification during Sales Order/Invoice creation. Upon selecting this checkbox the

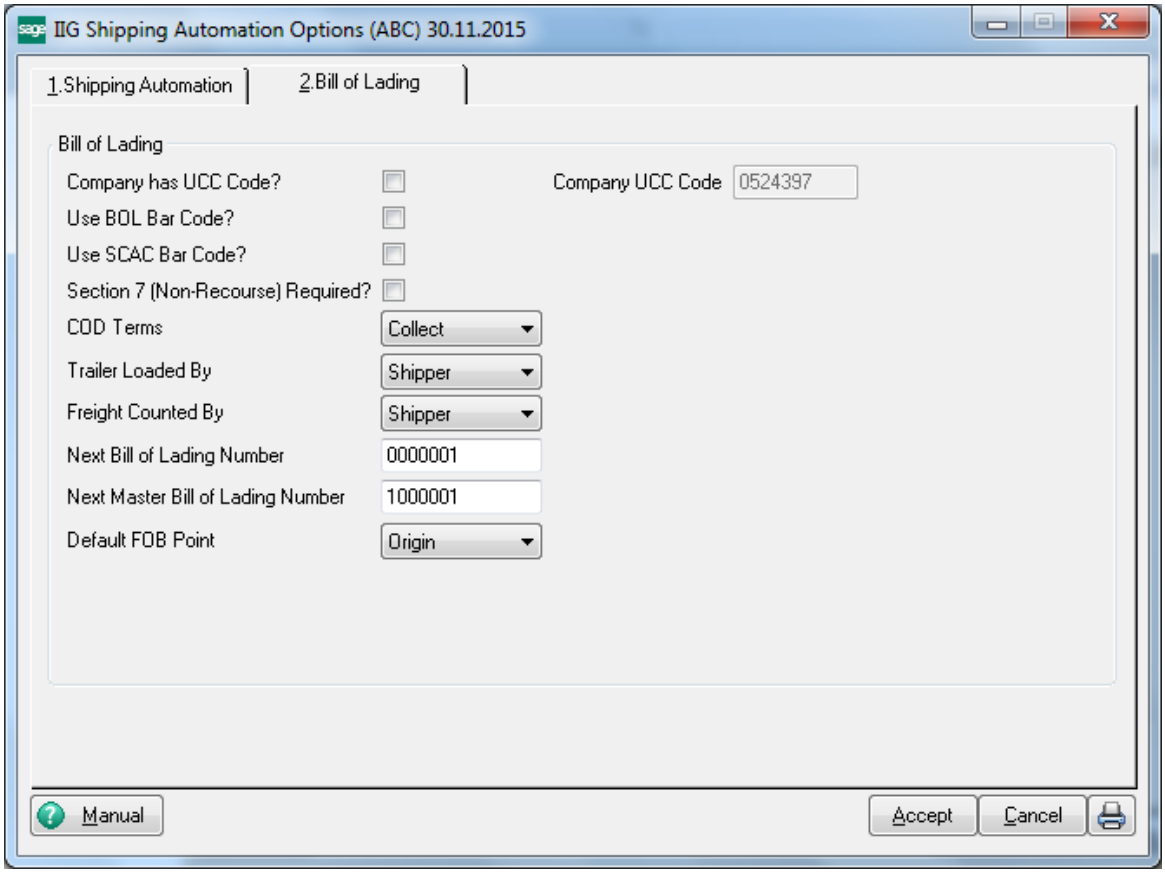
Uppercase Address checkbox is enabled to allow verifying address information entered in uppercase.

Don't Recalculate Freight at Shipping – select this checkbox to have the Freight of the Sales Order carried over to the shipment and don't recalculate it in the Shipping Data Entry.

The **Default Warehouse** specified in the IIG Shipping Automation Options is used for processing Address verification from Customer Maintenance and Customer Ship-To Address Maintenance if there is not a warehouse selected for Location Code.
Refer to **Address Verification** section for details**.**

Bill of Lading tab

The **Bill of Lading** tab added to the **IIG Shipping Automation Options** allows setting options to be used for **Bill of Lading** generation. This tab is enabled only if the **Enable LTL Processing** option is turned on.



Company has UCC Code? – Used for generation of a UCC BOL number. If checked, the Company UCC Code field is enabled. If unchecked, the last 7 digits of the system SSN are used.

If SWK's MapaDoc is installed, the program will display the Company UCC Code from MAPADOC options:

Use BOL Bar Code? – Option prints the BOL bar code on the bill of lading. Required for VICS bills of lading. Is unchecked by default.

Use SCAC Bar Code? – Prints the carrier's Standard Carrier Alpha Code as a Code 128 bar code on VICS bills of lading. Is unchecked by default.

Section 7 (Non-Recourse) Needed? – If checked, the Section 7 verbiage appears on the bill of lading. Refers to how funds are collected in COD LTL shipments. Default is N.

COD Terms – COD fees for TL/LTL are either Prepaid or Collect. Prepaid means that the receiver must pay for the shipment before delivery, and Collect means that the fees are collected when the driver arrives at the customer's loading dock. This option is defaulted to **Collect**.

Trailer Loaded By – Who physically loaded the freight into the trailer or truck? Options are **Shipper** or **Driver.** Defaults to **Shipper.**

Freight Counted By – This states who counted the tare units of the shipment. Options are **Shipper**, **Driver-pallets**, or **Driver-pieces**. Defaults to **Shipper.**

Next Bill of Lading Number – Next sequential bill of lading number. A bill of lading number is issued for each invoice shipped, even if shipped with other invoices in the same shipment.

Next Master Bill of Lading Number – Next sequential master bill of lading number. When multiple orders for the same customer are shipped together, a master bill of lading is created listing the individual (sub) bills of lading. A master bill of lading is a bill of lading containing other bills of lading shipped together for the same customer.

Default FOB Point – This must print on the bill of lading to determine ownership of the goods in transit. The options are:

Origin – Goods become the property and responsibility of the receiver once released to the common carrier and left the dock.

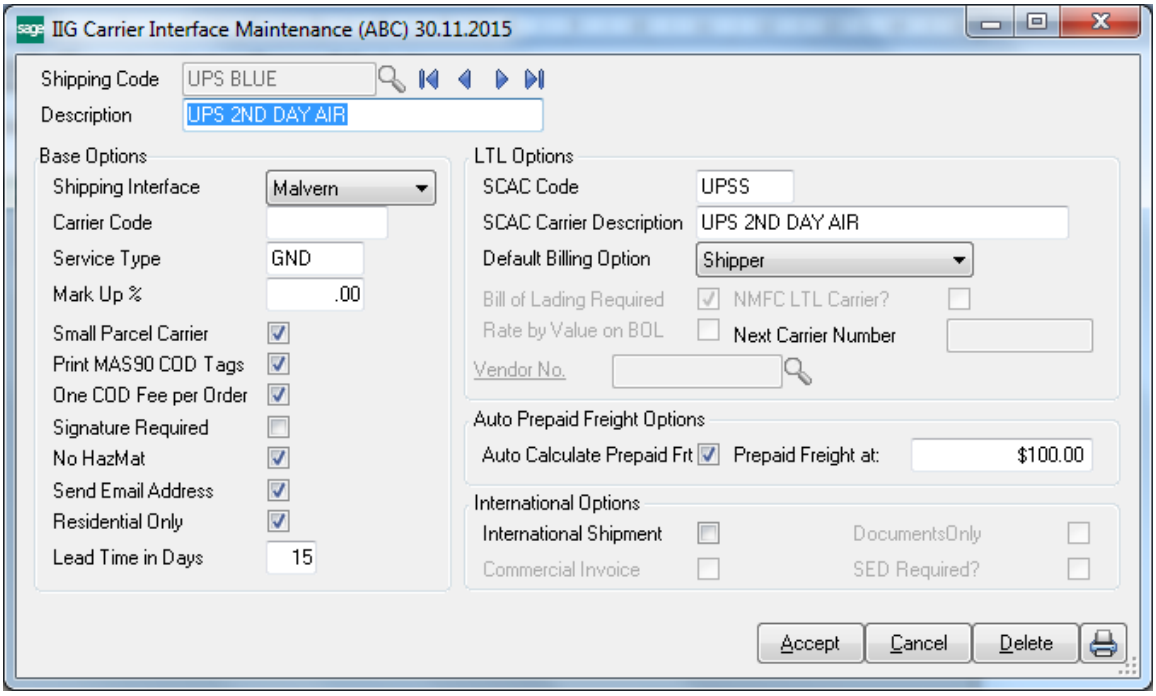
Destination – Goods remain the property and responsibility of the shipper until delivered.

If the FOB field in MAS is blank, this will be the value printed on the bill of lading.

Note: If orders have differing FOB points, they cannot be shipped together on the same master bill of lading.

IIG Carrier Interface Maintenance

Select the **IIG Carrier Maintenance** program under the Sales Order Setup menu.



Here you can setup more advanced carrier options for the **Shipping Codes** defined in the **Shipping Rate Maintenance** program. You can add new **Shipping Codes** just from this screen**.**

Base Options

Shipping Interface – Determines which interface will be used for the shipment:

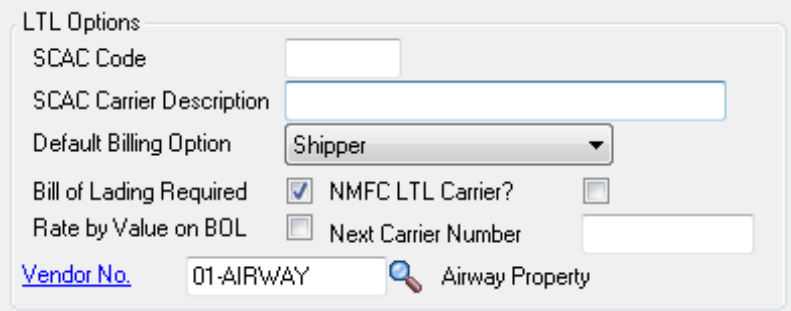
- None. No freight method defined, and can't be used for manifesting.
  - (Examples: Will Call, Customer P/U, etc.)
- Clippership Clippership (Kewell) Shipping System interface.
- Manual Manual entry of freight. No BOL or label will print.
- Truck Direct BOL Entry (does not use Malvern or Clippership)
- Malvern Malvern Shipping System interface.

Carrier Code Service level (ex: Ground, Air, etc. See interface method code list in Appendix A and Appendix B)

Service Type- Usually the carrier type as it is linked by interface. (Ex: UPS, FDX, etc.)

Mark Up %	Percentage (+/-) indicates that the freight portion of the shipment will be adjusted. Enter a negative percentage to mark down (reduce) the freight amount.
Small Parcel Carrier	Identifies that this Shipping Code interfaces with small parcel carrier services such as UPS or FedEx. No bill of lading required.
Print MAS90 COD tags	Used primarily for local courier or small carrier and prints the old style physical UPS COD tags. Rarely used, but will automatically print the split COD amounts per box.
One COD Fee per Order	Overrides splitting the COD fee across all packages for this shipment for small parcel domestic shipments. Use with caution! Recipient can decline the COD box and accept the rest of the shipment. This option is automatically set for LTL shipments, as all LTL shipments are per shipment.
Signature Required	If set, will require the shipment to be shipped requiring an adult signature.
No HazMat	If checked, no item in the shipment may be a HazMat item. See the IIG Item Freight Additional Fields.
Send Email Address	If the carrier supports it (UPS Quantum View, or FedEx Shipment Notification) the email address from the order (or customer if order email address is blank) is sent to carrier. Also both Malvern and Clippership can send shipment emails with tracking numbers as an option.
Residential Only	This ship via should only go to residential addresses (ex: FedEx Home). The IIG Manifest Entry programs check and validate that the Residential Address option is checked for the Ship-To address of the shipment.
Lead Time in Days	Based on the IIG Shipping Option **"Calculate Ship Date from Ship Via Code"** this tells the program how many business days to add to today's date for the ship date.

LTL Options



SCAC code Standard Carrier Alpha Code for the carrier. Required for LTL/TL carriers.

SCAC Carrier Description The carrier's name as it will appear on the bill of lading.

Default Billing Option This option determines how this ship via is billed by default:

- Shipper – The shipper will pay the carrier for the shipment.
- Recipient – The carrier will collect the freight charges from the recipient, typically if the recipient has a freight account. Effectively Freight Collect.
- Third Party – A third party (such as freight aggregator or corporate office) is paying the freight. Shipment will require the account number and Payor information.
- Consignee – Similar to recipient, but the freight is paid by the named company that is receiving the shipment. For UPS and FedEx this is the contractual Freight Collect option. For LTL no contract is required.
- Freight Collect – Similar to Recipient, the freight charges are paid before the shipment is delivered. Not the same as COD, because only the freight charges are collected at delivery and must be paid before driver will unload.

Bill of Lading Required Some carriers do not require a physical BOL. Normally checked for LTL shipments.

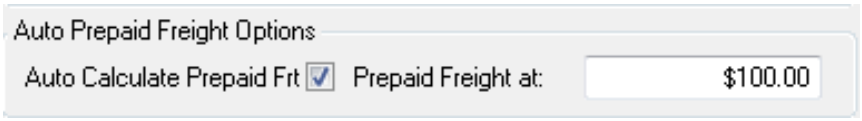
NMFC LTL Carrier? Carrier requires National Motor Freight Codes on the bill of lading.

Rate by Value on BOL This activates the "Rate By" section of the Bill of Lading.

Next Carrier Number For carriers that do not provide PRO numbers or Pickup numbers. This is what the system will assign to the shipment and increment the number. Rarely used.

Vendor No **Vendor** link and **Vendor** number field is enabled for LTL carrier allowing the user to select a Vendor from the lookup list or add a new carrier vendor on the fly. If the **Small Parcel Carrier** flag is set for a **Shipping Code,** both the Vendor link and the Vendor Number fields are disabled.

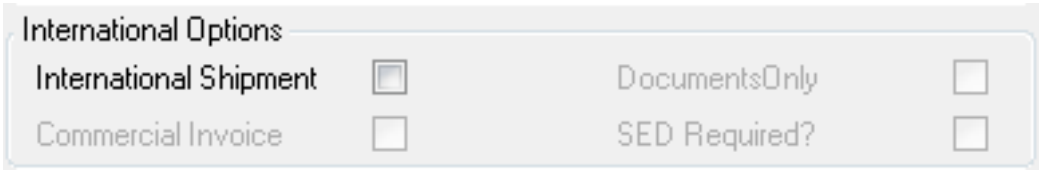
Auto Prepaid Freight Options



Auto Calculate Prepaid Frt Enables the ability to automatically set the prepaid freight flag at a certain order amount. If checked, the **Prepaid Freight at** field is enabled.

Prepaid Freight at This is currency amount of the new order (taxable plus non-taxable less discount) that will trigger setting the prepaid freight flag for the shipment.

International Options



International Shipment Indicates current ship via will be an international shipment. This activates international shipping if installed. International shipping is different than domestic US shipping. For domestic shipping, all parcels for small parcel are considered separate shipments even though they may be part of a multi-package shipment and will be delivered individually. For international shipments all parcels in the shipment are considered part of the first box in the shipment. These shipments will be delivered all boxes or none. ***Note:*** *Even if the carrier uses the same*

service level as domestic for international, you must set up one ship via for domestic and one for international.

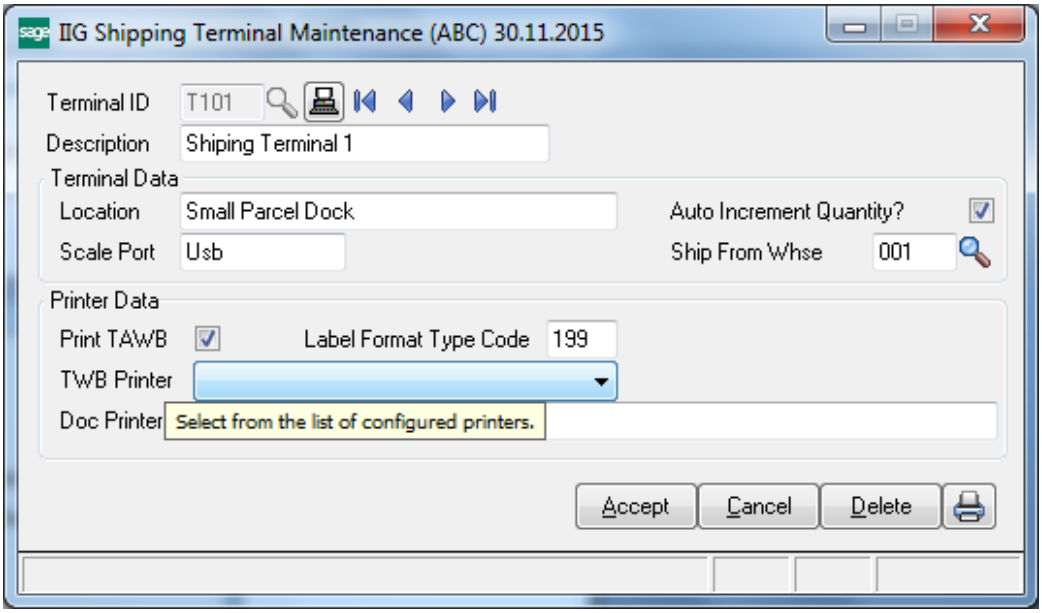
Documents only This option indicates that shipment is physical documents, not products. For catalogs and sales material.

Commercial Invoice A commercial invoice must be generated for this shipment.

SED Required? If checked, Shipper's Export Declaration is required for this shipment.

Shipping Terminal Maintenance

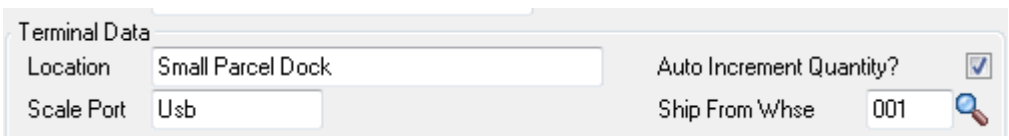
In the **Shipping Terminal Maintenance** screen, specify the workstations that will be manifesting shipments and options used for calculating carrier charges. At least one **Terminal ID** must be set up.



Enter **Terminal ID** or click the **Current Terminal ID** button.

Enter the **Description** of the terminal.

Terminal Data



Enter the physical **Location** of the terminal.

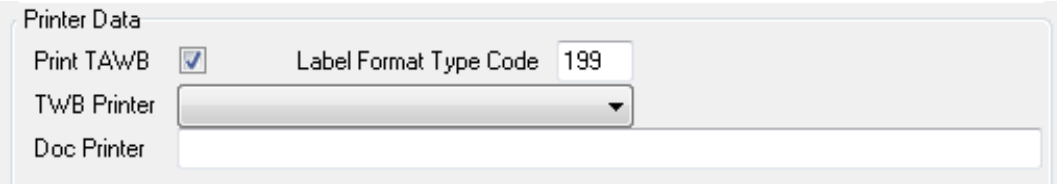
The **Scale Port** is the ID number of the communication port to which the weight scale will be connected in the range of COM1 to COM9. Please note for COM ports you must first configure the port in Windows, then program the scale to match the COM settings.

For certain USB scales using the HID interface, such as the Fairbanks Ultegra scale, enter **USB** and the program will scan for the scale and link to it. New scales come on the market so your scale may not be recognized. Please contact IIG so that we may look at your scale to determine compatibility if it does not receive weight from the scale.

Check the **Auto Increment Quantity** box to add to quantity automatically for the selected terminal.

Enter the warehouse code from the **Ship From Warehouse** lookup. If this field is blank, the program will continue to use the warehouse code from the invoice header during Shipment. This is required for closing operations for the terminal shipment as well.

Printer Data



Print TAWB - Check this option to print to a local thermal label printer. Both Malvern and Clippership can be configured to print directly to networked label printers so the local workstation does not print the labels. Normally the workstation prints the labels.

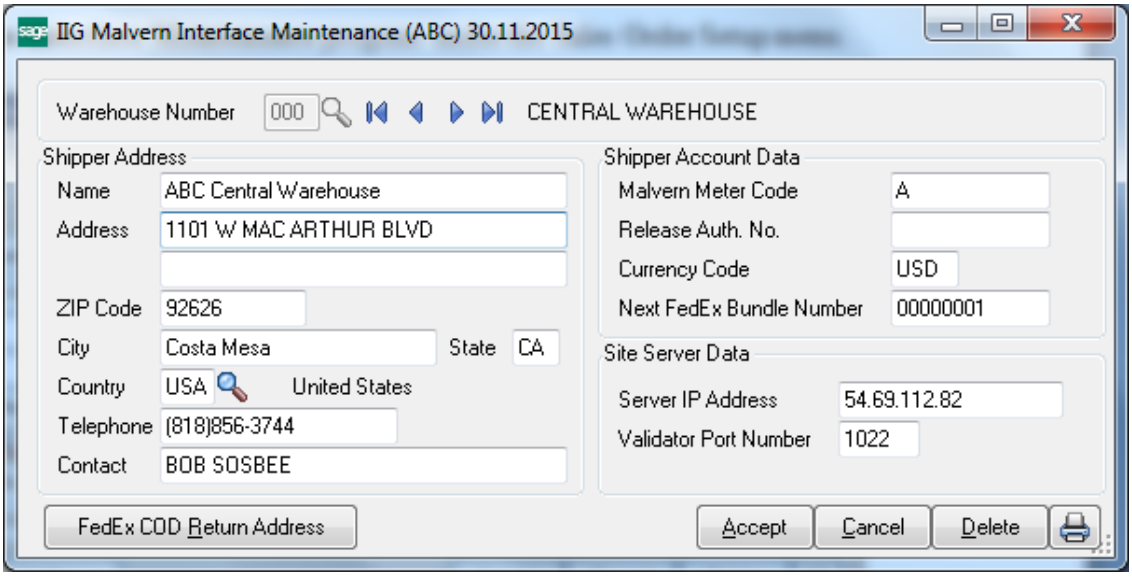
Label Format Type Code will either be *188* for Eltron printers or *199* for Zebra printers.

TWB Printer is handled one of two ways, depending on your system; UNC or Device Configurator.

- UNC is the thermal label printer UNC share path on the workstation to print the thermal label to. We strongly recommend that the path assignments be as short as possible. If at all possible, limit them to 32 characters total. Sometimes works best with Window XP machines. Windows 7 SP1 and later will not work reliably with this option.
- Device Configurator uses the Sage Device Configurator to configure the local printer on the workstation as the label printer.
- Please see the **Setting up a local thermal printer** in Appendix C.

Malvern Interface Maintenance

Select the **Malvern Interface Maintenance** program under the Sales Order Setup menu.

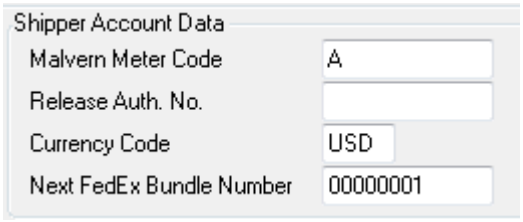


Enter **Warehouse Code**, or select it using the **Lookup** button.

Shipper Address

Enter a **Shipper Address**, **Telephone** number, and **Contact** person for each location. This information will appear on the shipping label as the return address depending on the options set in Malvern or Clippership. This is the "Alternate Return Address" option in Malvern.

Shipper Account Data



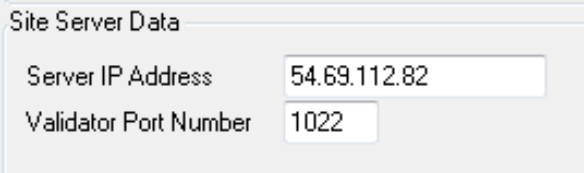
Malvern Meter Code is the linked meter code in Malvern for this ship from location. Default is **A** for single ship from locations. If you have multiple company accounts or multiple locations, this will be the meter code that Malvern will use for the shipment and billing.

Release Auth. No. is the FedEx Release Authorization number, a contractual service.

Currency Code is normally **USD** for US dollars. Other currencies may be used on a contractual basis. Contact IIG on this option.

Next FedEx Bundle Number is a number starting at 0000001 that links multi-package shipments together. Required for FedEx.

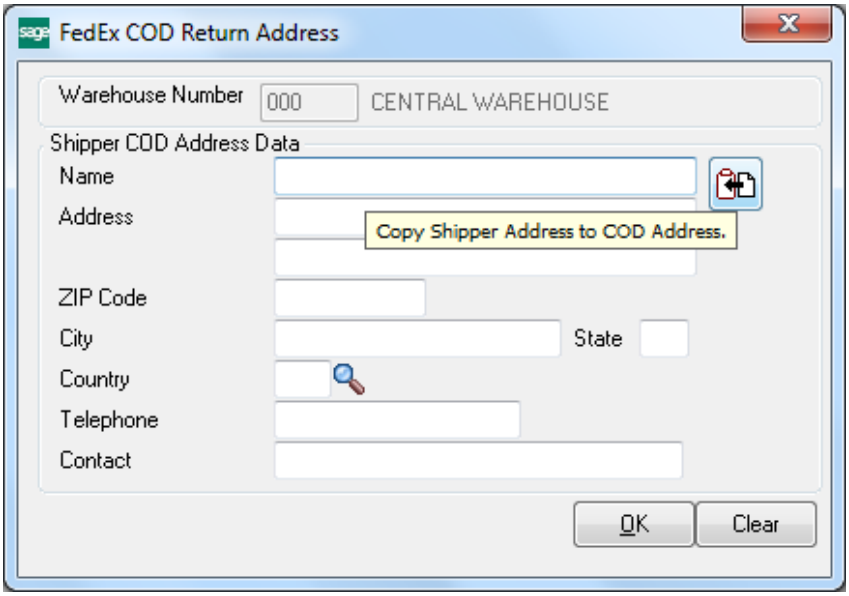
Site Server Data



The **Server IP Address** should be assigned by the company's System Administrator. This is the IP Address of the Malvern Site Server. ***Note:*** *This must be a static IP address.*

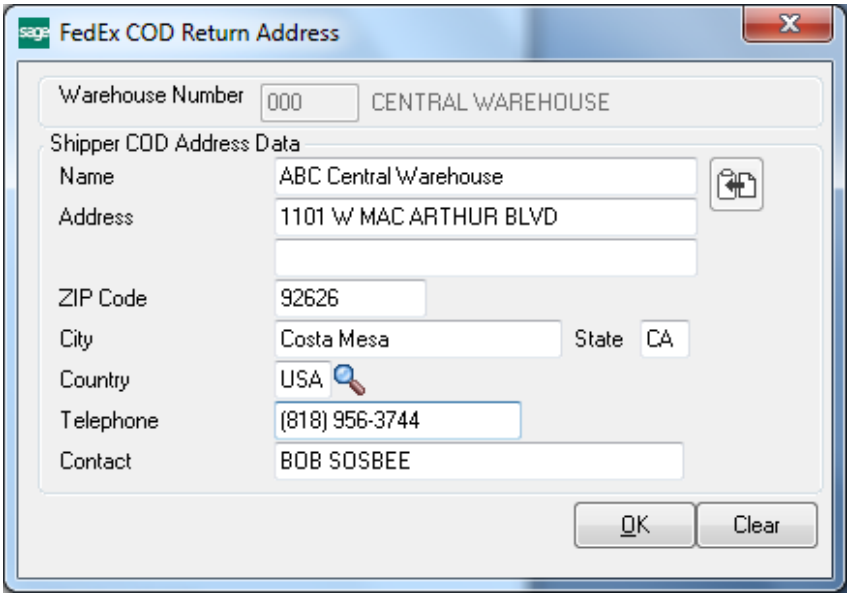
The **Validator Port Number** is assigned by Malvern and is normally *1022*. This identifies the TCP/IP port on the Malvern Site Server.

Upon clicking the **FedEx COD Return Address** button the **FedEx COD Return Address** screen is opened allowing the user to enter the COD Return Address information for the selected warehouse.



FedEx returns the recipient's check to this address. Typically you would make this the address for your company's Accounts Receivable department.

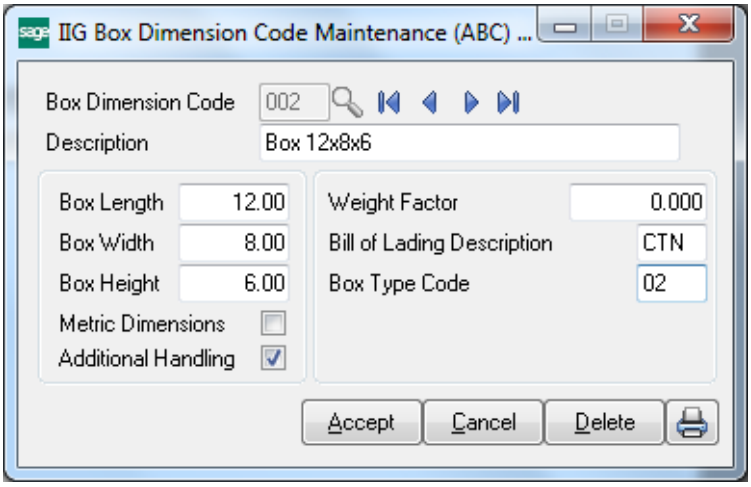
Clicking the **Copy** button loads the **Shipper Address** information in.



Typically, this will be the address of the corporate office that will handle the COD receipts.

IIG Box Dimension Code Maintenance

Shipping Automation allows the setup of codes for packaging types that are shipped on a regular basis. Select the **IIG Box Dimension Maintenance** program from the **Inventory Management Setup** menu.



For each **Box Dimension Code**, enter a description, box dimensions, and, if applicable, a Weight Factor (used to account for the weight of pallets or box fill). Box dimensions are in centimeters if the **Metric Dimensions** is checked, and the **Weight Factor** will be in kilograms. Otherwise, this is inches and pounds.

The **Additional Handling** can also be set. This is passed through to the carrier.

The **Bill of Lading Description** is set automatically and can be changed.

The **Box Type Code** is set for packaging type used by the small parcel carriers. This does not apply to TL/LTL carriers. If left blank will default the carrier to customer packaging.

FedEx Express

01	Customer Packaging (default)
02	FedEx Pak
03	FedEx Box
04	FedEx Tube
08	FedEx Packet (select markets)

UPS International – Box types with /00 are alternate codes.

10/22	UPS 10 KG (22 lbs.) box
25/55	UPS 25 KG (55 lbs.) box.

US Postal Service – Box types with /00 are alternate codes.

FLT	Flat
LTP/30	Priority Mail Letter Pack
LTR/06	Letter
FSB/32	Priority Mail Small Flat Rate Box
FRB/33	Priority Mail Medium Flat Rate Box
FRL/34	Priority Mail Large Flat Rate Box
FLE/31	Priority Mail Legal Flat Rate Envelope
SFE	Priority Mail Small Flat Rate Envelope
FCE	Priority Mail Flat Rate Cardboard Envelope
RBA/35	Priority Mail Regional Rate Box A
RBB/36	Priority Mail Regional Rate Box B
RBC/37	Priority Mail Regional Rate Box C
FPE/38	Priority Mail Flat Rate Padded Envelope
PCB/39	Cubic Rate
SCB/40	Soft pack Cubic Rate
FEW	Priority Mail Flat Rate Window Envelope
FGW	Priority Mail Flat Rate Gift Envelope
IRG	Irregular Parcel

All Carriers

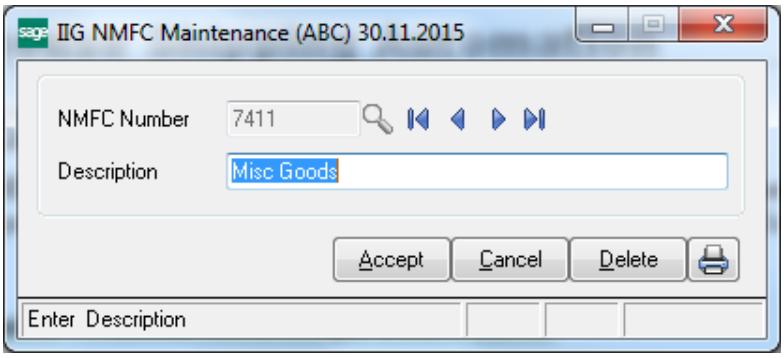
06	Letter

IIG NMFC Maintenance

The **IIG NMFC Maintenance** has been added to the **Inventory Management Setup** menu. This program maintains the active National Motor Freight Code list for the customer.

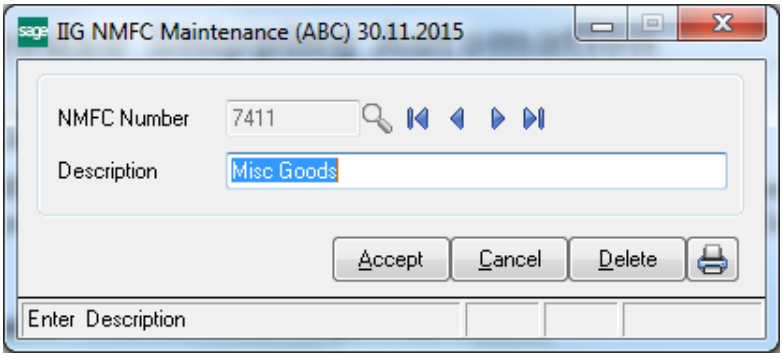
NMFC Number – National Motor Freight Code Number.

Description – Description of freight code.

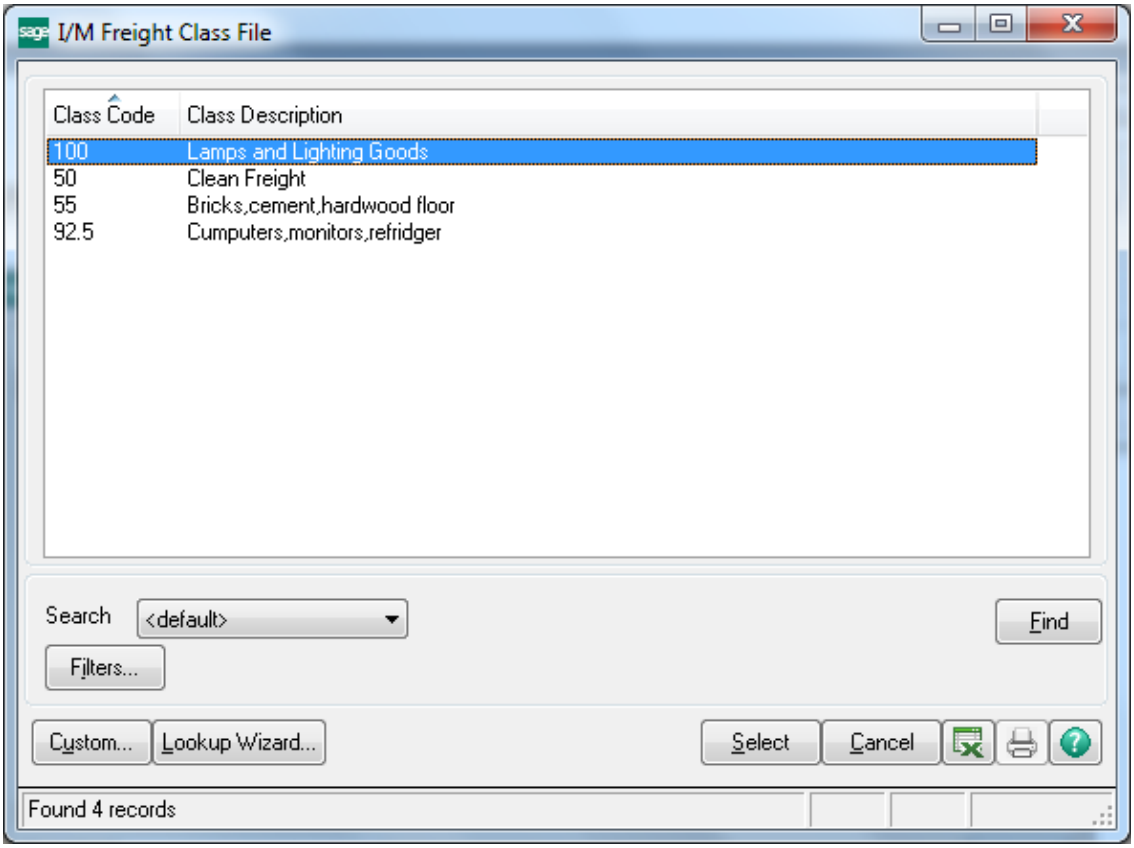


IIG Freight Class Maintenance

The **IIG Freight Class Maintenance** has been added to the Inventory Management setup menu to allow adding/maintaining freight classes for shipment.



Press the lookup button to list the LTL **Class Codes** setup in the system.
The Class Code Description is defaulted as the description of the goods on the bill of lading.



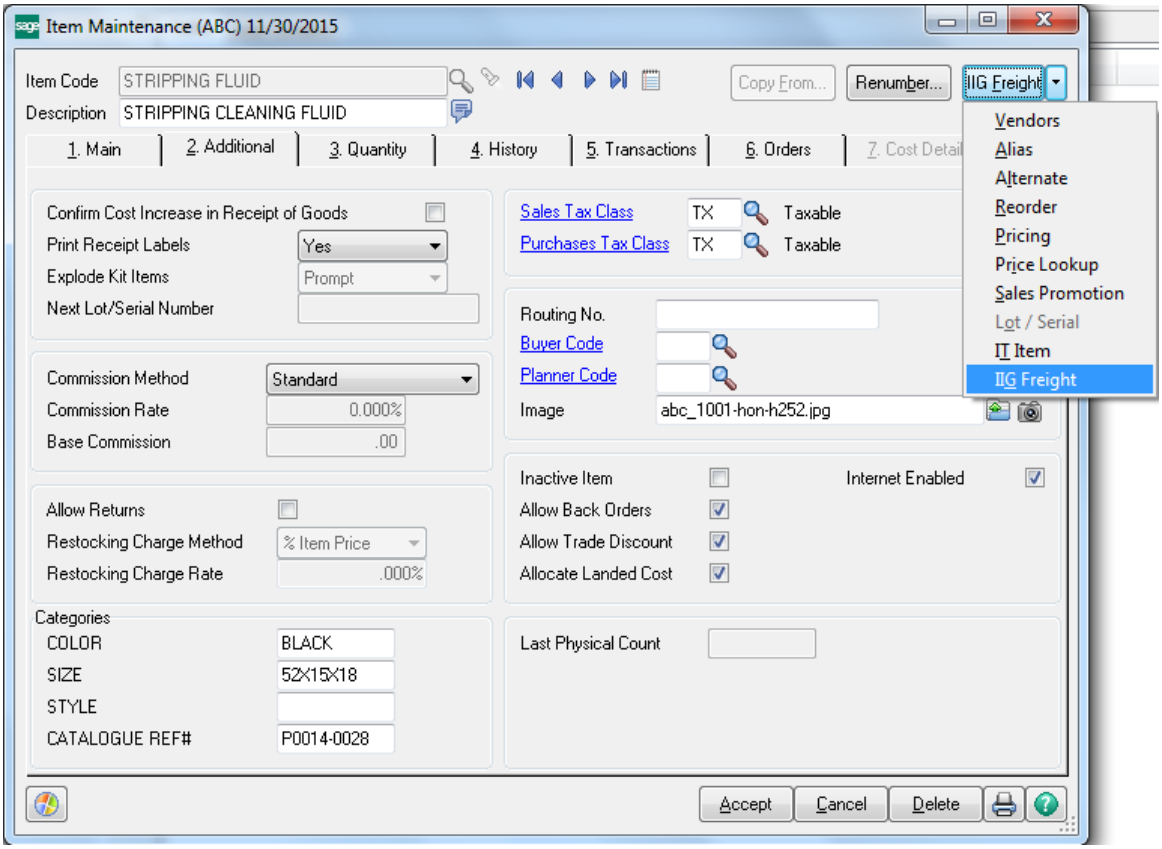
Item Freight in the Item Maintenance

The **IIG Freight** menu item has been added under the **More…** menu button on the **Item Maintenance** screen allowing the user to set some freight specific data such as Freight Class, Export Data, specifying the Packaging/Tare settings.

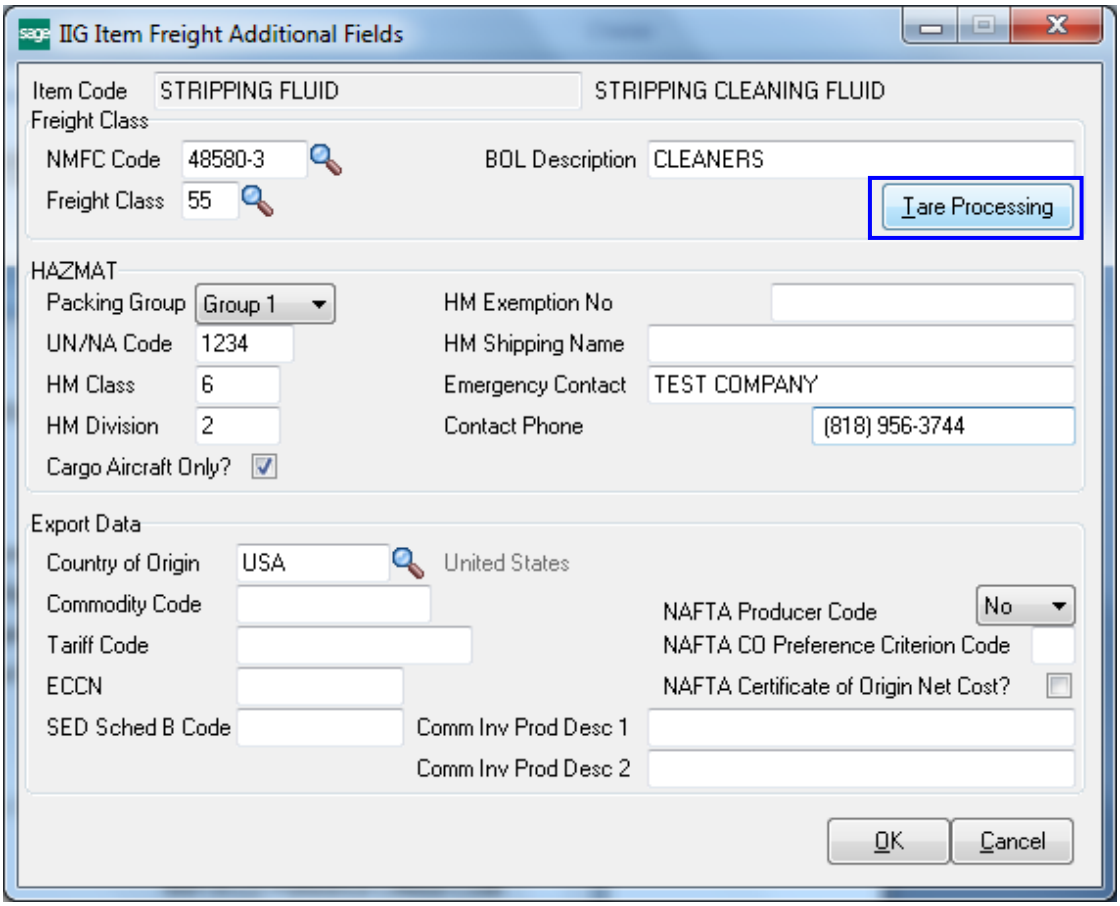
Note: *The Weight field must be a number and cannot have letters in the weight for both Sage and IIG Shipping to properly calculate weights. Examples of bad weights: 35lb, 35#, 35kg. Examples of valid weights: 35, 35.4, 0.22. While we will use the actual weight here, the carrier will round up to the whole number for rating purposes.*

For USPS shipments, convert ounces to decimal weight. Malvern or Clippership will convert these back to ounces as needed. Multiply ounces by 0.0625 to convert to decimal pounds.

Select the **Item Maintenance** program under the **Inventory Management Main** menu. Select an item.



Upon clicking the **IIG Freight** menu item the **IIG Item Freight Additional Fields** screen is opened:

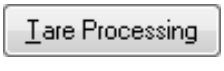


Freight Class

NMFC Code is the National Motor Freight Code set up in **IIG NMFC Maintenance**. Use the lookup to select the NMFC code for this item. This code will print on the VICS and Short Form BOL if the carrier is a NMFC carrier.

Freight Class is the freight/volume class of the item. Use the lookup to select from the classes entered in the **IIG Freight Class Maintenance**.

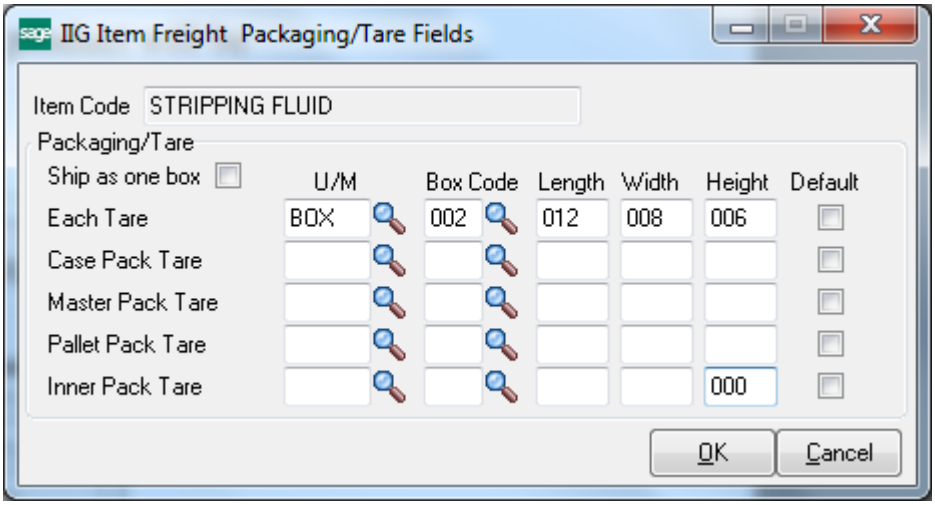
BOL Description is the description that will print on the bill of lading when printing product detail. Normally the **Freight Class** description is used and the Freight Class description will automatically load into this field if blank.

Tare Processing button 

will open the IIG Item Freight Packaging/Tare Fields screen.

Tare Processing

This is used primarily for Rate Shopping to calculate how the product will be shipped.



Ship as one Box is checked if this item is only shipped as the each TARE. Examples would be large items (such as a desk or a hard sided golf bag) that will not be shipped in multiples in a case or pallet. This speeds up the rating process.

Enter the **Each Tare, Case Pack Tare, Master Pack Tare, Pallet Pack Tare** and **Inner Pack Tare** unit of measures and select the **Box Code**s. The **Length, Width, Height** fields will be populated with corresponding values set for the selected Box Code in the **Box Dimension Code Maintenance**. Select the **Default** Tare to be used when the product is rated for shipping. Only one of these five check boxes can be selected as default.

For items that do not match the dimensions in the **Box Dimension Maintenance**, you can enter the actual dimensions.

Refer to Shipping Rate Shop In Sales Order Entry for more details about the Item Freight Packaging/Tare fields.

HAZMAT

Note: *Information Integration Group, Inc. (IIG) provides these fields to help link to a certified HAZMAT labeling and documentation system like LabelMaster ® or similar systems. IIG is neither certified nor responsible for HAZMAT labeling and certification. You as the shipper must have certified employees and certified HAZMAT labeling software to safely and legally ship HAZMAT products. IIG cannot assist your company on HAZMAT labelling and documentation as this is the responsibility of the shipping company and the HAZMAT software company.*

Packing Group – This drop down list is *None, Group 1, Group 2,* and *Group 3*. If this is not set to *None* this activates the HAZMAT checks by carrier if HAZMAT is allowed on that carrier. Packing group is determined by the class and division of the HAZMAT product. This must be determined by your HAZMAT certified employee or consultant.

UN/NA Code is the United Nations and North America HAZMAT class code. Please see http://en.wikipedia.org/wiki/UN_number for a detailed description of these codes.

HM Class refers to the general hazard class.

HM Division refers to the division within the general hazard class.

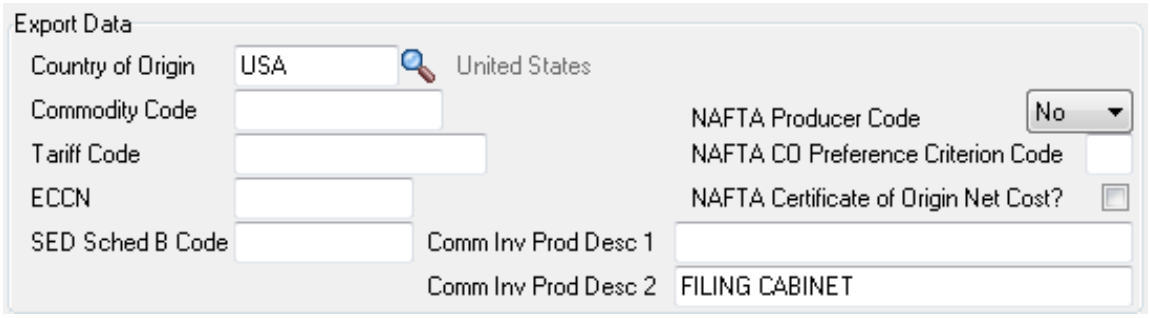
HM Exemption No is the DOT Exemption number.

HM Shipping Name is the common chemical name. (Example: anhydrous ammonia). Note that the name may be larger than this field. LabelMaster ® or your HAZMAT software will have the full proper shipping name.

Emergency Contact is the name of the person or organization to contact if there is any issue with this product in shipment.

Contact Phone is the phone number of the Emergency Contact.

Export Data



Country of Origin is the country the product was manufactured or produced in. Select from the Country Code list as entered in the **Country Code Maintenance** in the Library Master Setup menu.

Commodity Code is normally the NIGP Commodity Code. Used to classify the product for government and university agencies. For international shipping this may be the UN SITC code. Note this is not the Harmonized Tariff Code.

Tariff Code is the US Customs Harmonized Tariff code for this item for export.

ECCN is the Export Commodity Control Number. Used for restricted item exports such as some software and all weapons. See the US Customs ITAR list.

SED Schedule B Code is required if a Shippers Export Declaration must be created for any item valued $2,500.00 shipped from the same exporter to the same recipient on the same day or any item on the ITAR list.

NAFTA Producer Code indicates if the shipper is the producer of the goods. This will default to *No* on the drop box. Options are *Yes, No, No 1, No 2,* and *No 3*.

NAFTA CO Preference Criterion Code which is the Certificate of Origen Preference Criteria Code. Values are *A, B, C, D, E, F*, and blank.

NAFTA Certificate of Origin Net Cost? If checked will print **NC** on the certificate of Origin documentation for this item. If unchecked will print **No.** Note that we do not currently support the RVC over time method at this time.

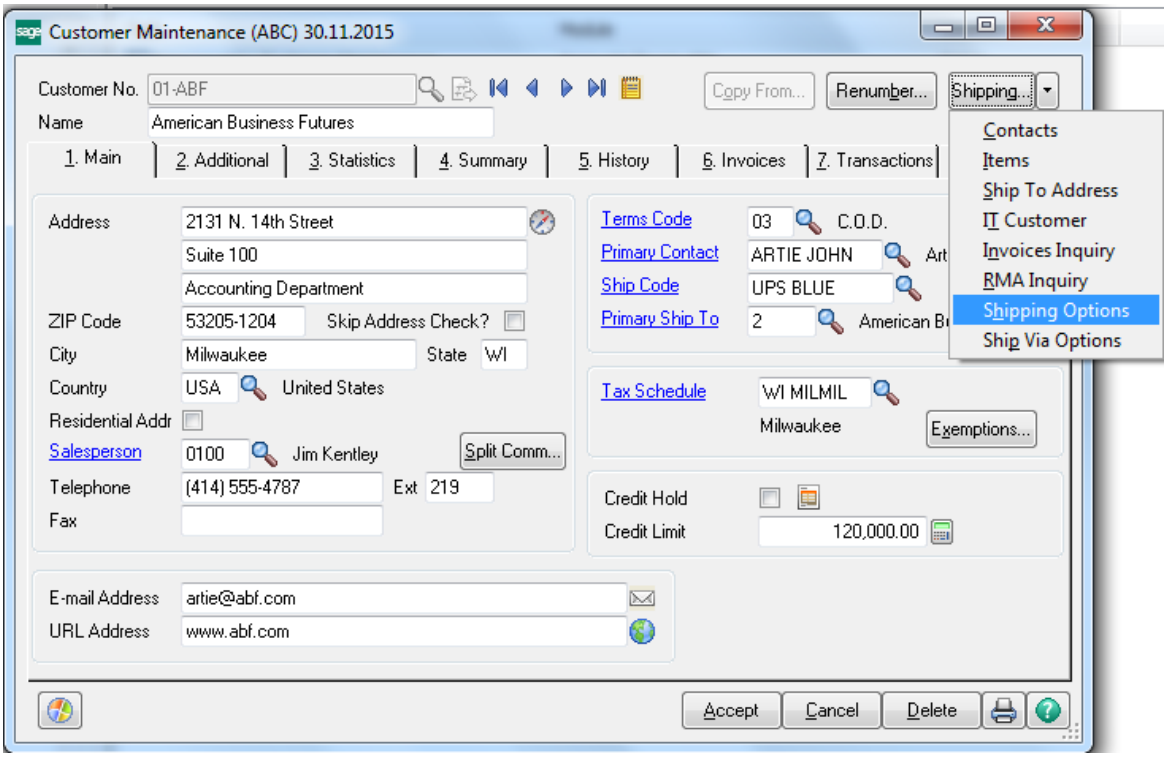
Comm Inv Prod Desc 1 is the first line of the commercial invoice description for this product. If left blank it will use the short product description.

Comm Inv Prod Desc 2 is the second line of the commercial invoice description for this product. You may leave this blank if the first description line is sufficient.

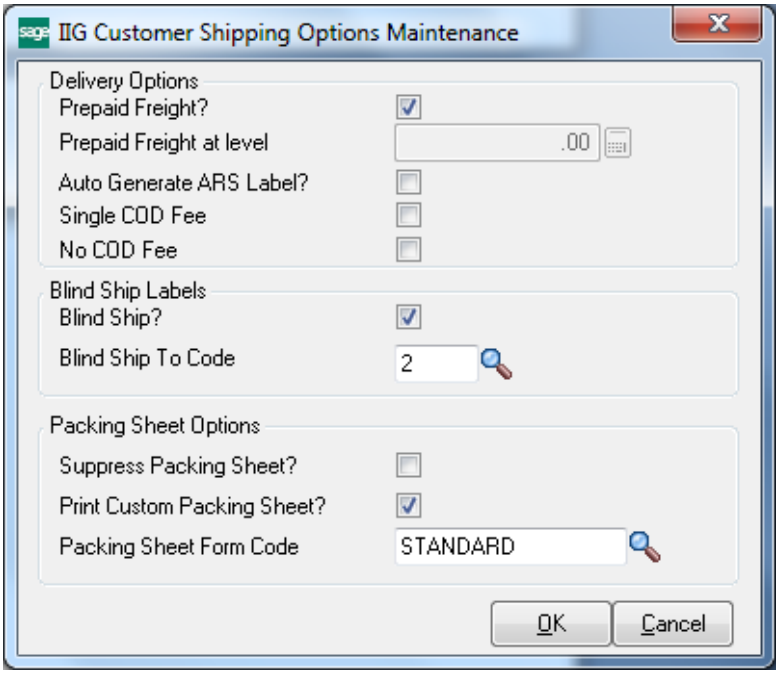
Note: *Be sure you are clear on your description. Your product description may not be clear to Customs, who may hold your shipment for clarification. Example: "HON model 2000 classic" is not clear. "Two Drawer Letter File Cabinet" is clear. So if your item description is "HON Model 2000 classic" make the* ***Comm Inv Prod Desc 2*** *"2 drawer letter file cabinet" which will print only on the commercial invoice.*

Shipping Options in Customer Maintenance

The **Shipping Options** button added to the **More** menu buttons on the **Customer Maintenance** screen is intended for specifying special shipping options for the selected Customer.
Select the **Customer Maintenance** program under the **Accounts Receivable Main** menu.



Select the **Shipping Options** button to configure shipping settings for the customer in the **IIG Customer Shipping Options** screen:



Delivery Options

Prepaid Freight – if this checkbox is selected for a Customer, it is the default for all ship via that are not specifically defined.

Prepaid Freight at level – this field is enabled if the **Prepaid Freight** option is off. If the amount of the prepaid freight at level entered here is lower than the Ship Via code prepaid freight at level, the customer amount takes effect.

Auto Generate ARS Label- select this checkbox to have a Auto Return Service label automatically generated if the carrier provides it (LTL carriers do not provide this).

Single COD Fee - if this checkbox is selected one **COD** fee will be charged per Customer instead of by ship via.

No COD Fee- if this checkbox is selected, no **COD** fee will be charged by Customer.

These settings are defaulted to the Order Shipping Options.

Blind Ship Labels

Check the **Blind Ship?** option to use the customer's bill to address as the return address for the shipment.

Enter the **Blind Ship To Code** for the customer's warehouse or for double blind shipments.

The **Blind Ship?** option setting and the **Blind Ship To Code** specified here are defaulted to the Sales Order and Invoice Data Entry.

Packing Sheet Options

Select the **Suppress Packing Sheet** option to skip packing sheet printing from **Shipping Data Entry.** If this option is turned on the **Quick Print** button will be disabled in the **Shipping Data Entry**.

Upon selecting the **Suppress Packing Sheet** checkbox the **Print Custom Packing Sheet** option and **Packing Sheet Form Code** field are disabled.

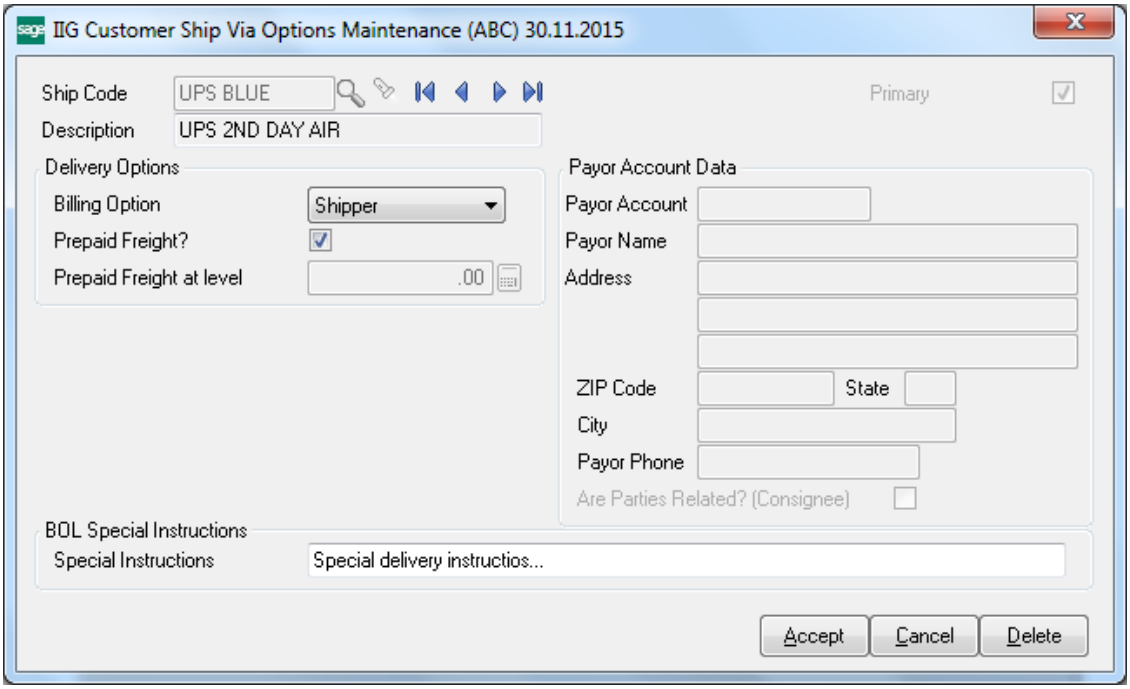
Select the **Print Custom Packing Sheet** option to make the **Packing Sheet Form Code** field enabled. It is necessary to select the Form Code to be used by default in the **Packing Sheet Printing** run from the **Shipping Data Entry** for the selected customer. If the **Print Custom Packing Sheet** option is selected the user cannot close the Shipping Options screen unless a form code is specified.

Note: the user must set up the custom packing sheet form in packing sheet printing before it is available for this field.

The **Packing Sheet Options** set in the **Customer Shipping Options** are defaulted to the **Sales Order Entry** and **Shipping Data Entry**.

Customer Ship Via Maintenance

Select the **Ship Via Options** button from the drop-down menu to configure settings for specific Ship Via Code.



Delivery Options

Billing Option This option determines how this ship via is billed by default:

- *Shipper* – The shipper will pay the carrier for the shipment.
- *Recipient* – The carrier will collect the freight charges from the recipient, typically if the recipient has a freight account. Effectively Freight Collect.
- *Third Party* – A third party (such as freight aggregator or corporate office) is paying the freight. Shipment will require the account number and Payor information.
- *Consignee* – Similar to recipient, but the freight is paid by the named company that is receiving the shipment. For UPS and FedEx this is the contractual Freight Collect option. For LTL no contract is required.
- *Freight Collect* – Similar to Recipient, the freight charges are paid before the shipment is delivered. Not the same as COD, because only the freight charges are collected at delivery and must be paid before driver will unload.
- *Drop Ship* – This uses separate accounts in the Malvern server where the account is billed and paid by the customer directly and uses separate tracking numbers specific to that customer and account. Requires the purchase of Malvern subaccounts (accounts that ship from the same location as the main shipping account).

The Payor name and address data will print on the shipping labels and the Payor account is the Malvern account code.

For all the selections except for Shipper and Consignee the **Payor Account Data** fields are enabled. Please note that Consignee for UPS and FedEx are a contractual option and must be set up.

Prepaid Freight - If set on the customer ship via level, then it is prepaid for that Customer-ship via only. If it is set on the general ship vias (in IIG Carrier Maintenance) it overrides for that ship via only. Disabled for any **Billing Option** other than *Shipper.*

Prepaid Freight at level - this field is enabled if the **Prepaid Freight** option is off. If customer is prepaid freight at $1200.00, and has a ship via of UPS Ground at $500.00, and the ship via UPS Ground is set to prepaid freight at $400.00, then the $400.00 level being the lowest is used. Disabled for any **Billing Option** other than *Shipper*.

Payor Account Data

Payor Account is the Carrier Account number for the customer. For *Recipient, Third Party, or Freight Collect* you must enter the carrier account number of company that will be paying the freight. For UPS and FedEx this will be their customer's account number. For *Drop Ship* this is the Malvern Account Code for the drop ship account. ***Note:*** *Not required for Consignee, but you must sign up with the carrier for this service.* Malvern and Clippership will require this. **Be warned:** Carriers will bill **your** account if the customer refuses to pay Recipient or Freight Collect.

Payor Name, Address, Zip Code are all required. You must enter the **Payor Phone** as well for the carriers.

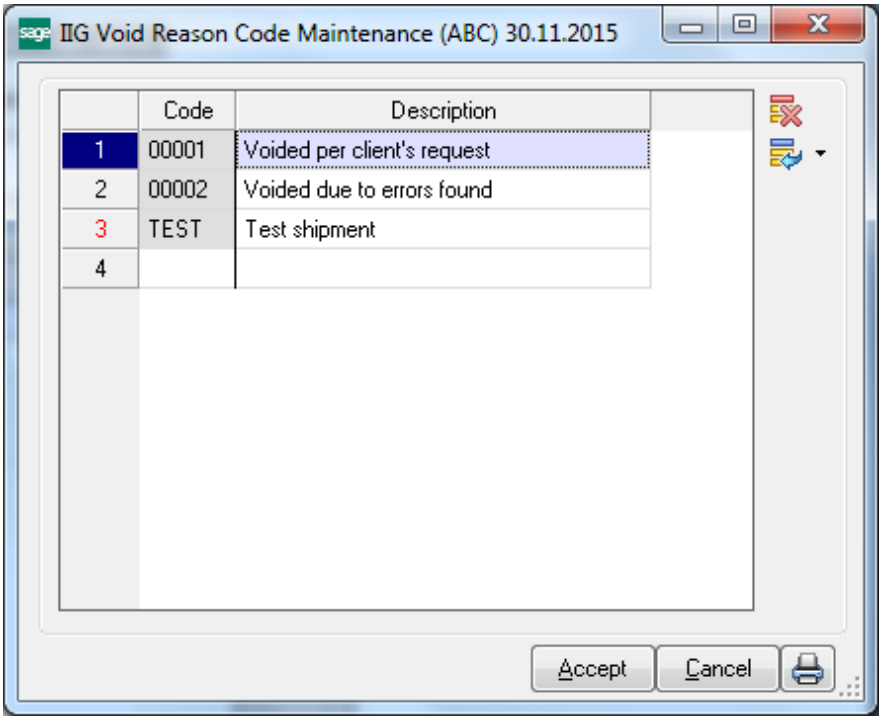
Check the **Are the Parties Related?** check box if the consignee or 3rd party are related (Example: Walmart Corporate 3rd party shipping to a store.)

Bill of Lading Special Instructions

Enter the **Special Instruction** to flow down to the order and to the Bill of Lading for TL/LTL shippers.

IIG Void Reason Code Maintenance

The **IIG Void Reason Code Maintenance** added under the **Sales Order Setup** menu is intended for entering Reason codes to be used when the transaction is voided.



Code is the user supplied code. Examples: ERROR, CANCEL, or TEST.

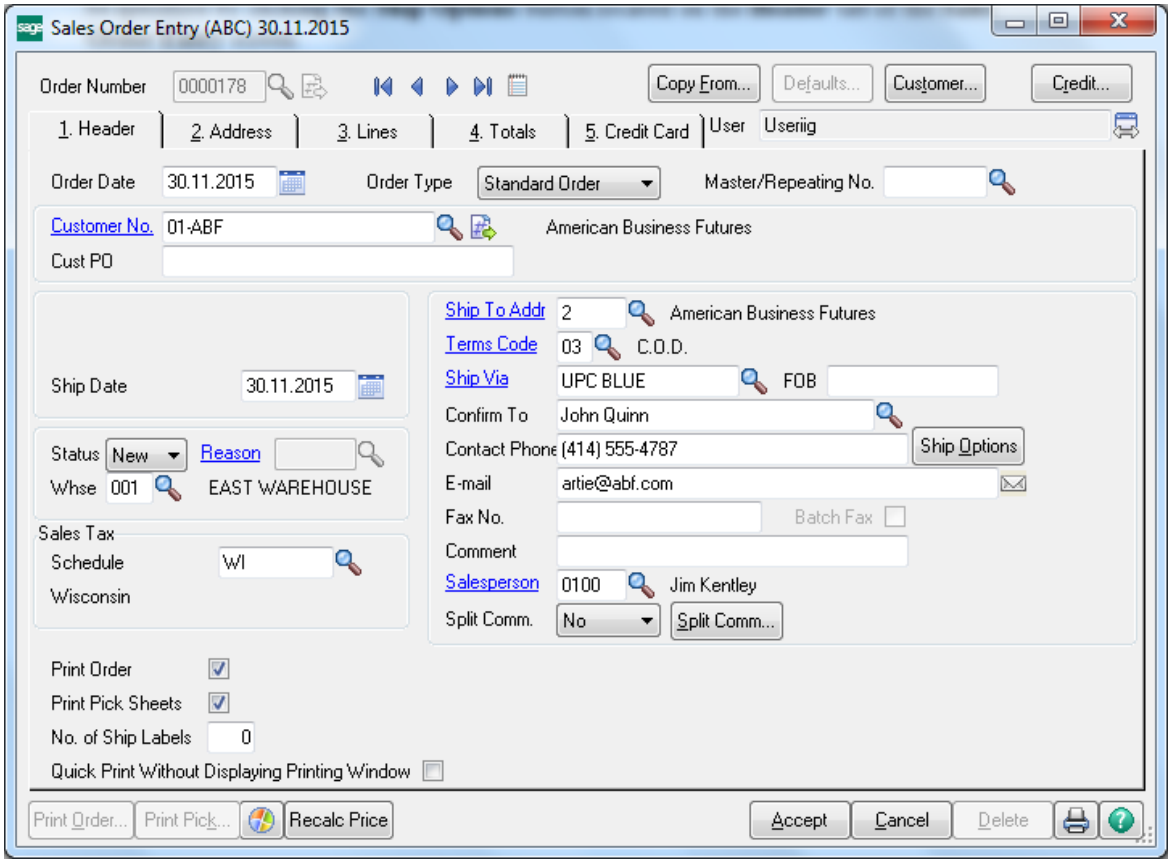
Description is the description of the reason code.

Shipping Automation Activity

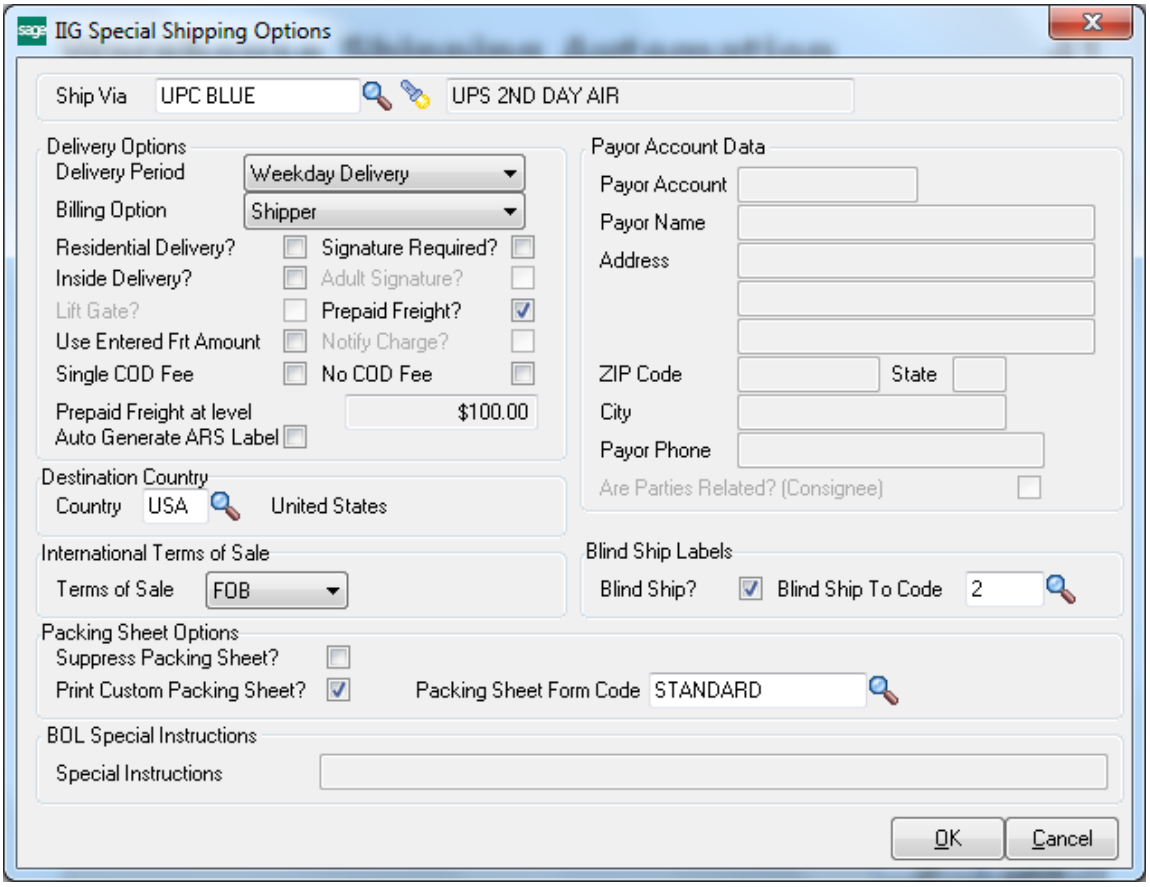
Shipping Options in Sales Order Entry and Invoice Data Entry

Below is demonstrated an example of Sales Order Entry.

While creating a new sales order in the **Sales Order Entry** screen, shipping options can be specified by clicking the **Ship Options** button located on the **Header** tab of the **Sales Order Entry** screen.



Click the **Ship Options** button to open the **Special Shipping Options** screen.



Depending on what **Ship Via Code** is selected on the **Header** tab of the **Sales Order Entry** screen, the chosen shipping method will be displayed in the **Ship Via** fields within the **Special Shipping Options** screen.

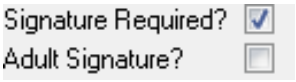
All of these settings are defaulted from the Shipping and Ship Via Options accessed (and, initially, set up) through the **Accounts Receivable** module's **Customer Maintenance** screen.

Select the **Delivery Period** from the drop-down list. Choose from the following three options: Weekday, Saturday, or Sunday delivery. Note that this is treated as a delivery service option. Saturday and Sunday delivery options are carrier and service dependent.

Check the **Residential Delivery?** box if shipment is a residential delivery.

Check the **Inside Delivery?** box if shipment is an inside delivery.

Check the **Signature Required?** box if a signature is required at delivery.



Adult Signature field is enabled only if the **Signature required ?** checkbox is selected. This field is available also in the Sales Order Header, Invoice Header as well as in the Sales Order and Invoice History tables.

Select the **Billing Option** from the drop-down list. Choose from the following options: Shipper, Recipient, Third Party, Consignee, Freight Collect or Drop Ship. For all the selections except for Shipper or Consignee, enter **Payor Account Data**. For **Drop Ship**, enter the Malvern account code and the Payor Name and Address fields, which will become the return address on the shipping labels.

Select the foreign **Destination Country** using the **Lookup** icon if the shipment is not being sent to a **US** destination.

Select the appropriate **Terms of Sale** from the drop-down list, if this is an international shipment.

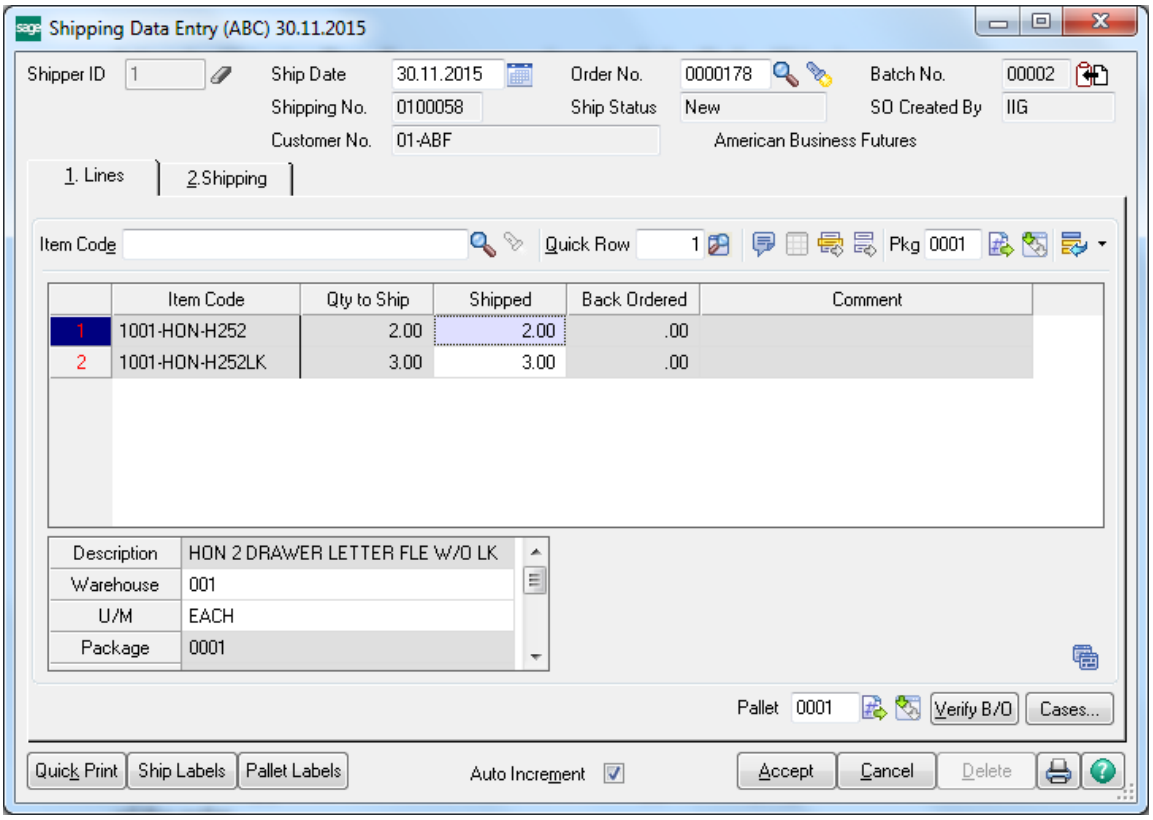
In **Invoice Data Entry**, when the Order is manifested, the **Ship Options** button becomes disabled, otherwise it is always enabled.

The **Lift Gate, Notify Charge** and **Special Instruction**s fields are enabled for Ship Via codes flagged as LTL carriers in the **IIG Carrier Interface Maintenance**.
Use Entered Frt Amount – select this checkbox if you want the Freight Amount entered in the Sales Order Entry be applied to the Invoice or Shipping regardless of the options set in the IIG Shipping Automation Options.

Shipping Data Entry

To start shipping, you must first open a manifest in either of the **IIG/Sage Shipping/ Manifesting** or **IIG Manifest Processing** programs. Depending on the Sales Order Module Options, you may need to open or select a shipping batch as well.

Select the **Shipping Data Entry** program from the **Sales Order Shipping** menu.



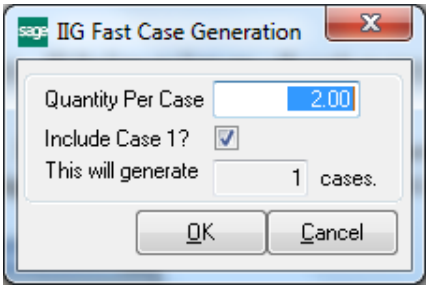
Select the **Shipper ID** and **Order Number** to be shipped. The program loads all the lines of the order.

The **Current Package** field displays the package number, where the items are distributed currently. To change the current package, click the **Next Package No.** button. The items will be distributed to the new package.

Fast Case Processing enables easy way to distribute large quantities to large number of cases.

The **Fast Case Processing** can be used for a line ***only once*** and only before accepting the entry.

Clicking the **Cases**… button opens the **Fast Case Generation** for the selected line, if there is **Quantity Shipped** specified (and if the generation has not been done before):



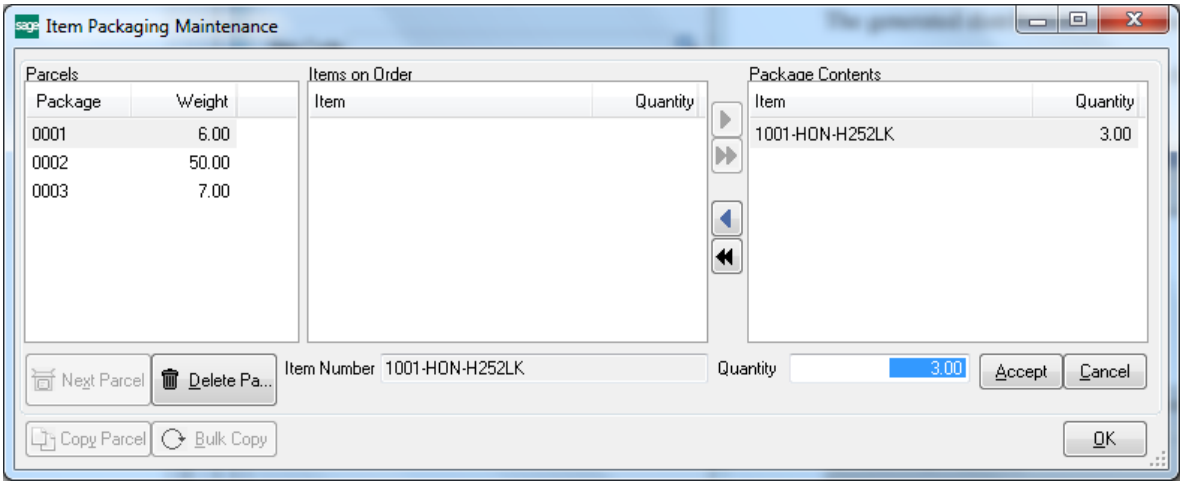
Enter the **Quantity Per Case**. Based on it the program will calculate the number of cases needed to **generate** for the **Quantity Shipped**. If the Quantity Shipped is not a multiple of the **Quantity Per Case**, the quantity remaining after distributing to the cases completely will be placed in a separate case (which will remain incomplete).

Check the **Include Case 1** box, to include the first case in the distribution being generated.

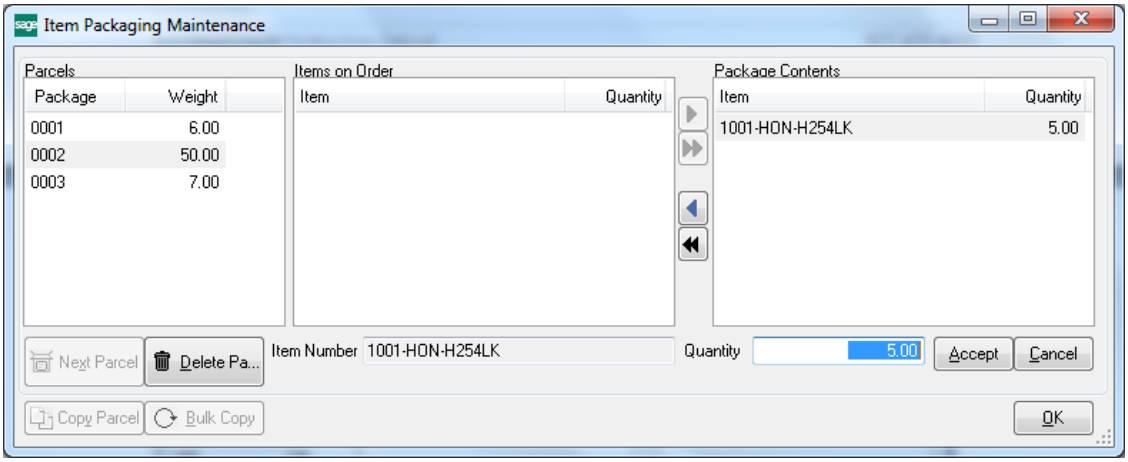
If the quantity of the selected line has already been distributed before starting the **Fast Case Generation**, the program will clear the previous distribution.

The generated distribution can be seen in the **Item Packaging Maintenance**.

The **Item Packaging Maintenance** has been modified to allow more convenient parcel managing.



(In our example, one of the generated cases includes 3 units of the item. The next one contains the remaining 5 units)



The **Cases…** button will be disabled for that line on the **Shipping Data Entry** screen.

When this screen is first entered, the parcels where product is allocated are shown in the **Parcels** list box, and any unallocated items are show in the **Items on Order** list box. Selecting a parcel line in the **Parcels** list box will display the contents of that parcel in the **Package Contents** list box. Moving the products from **Package Contents** to **Items on Order** allows those items to be allocated to other parcels. The parcel is deleted when moving all items from **Package Contents** for that parcel.

The **Next Parcel** button generates the next available parcel number for the operator to allocate items to. This is disabled if there are no items to allocate.

The **Delete Parcel** button is enabled when a parcel is selected. When a parcel is deleted, the items in that parcel are moved to the **Items on Order** list box for allocation.

The **Copy Parcel** button is enabled when a parcel is selected and the items in the parcel are also in the **Items on Order** list box to allocate. Clicking it creates a new parcel with the same items up to the quantity to allocate. For example:

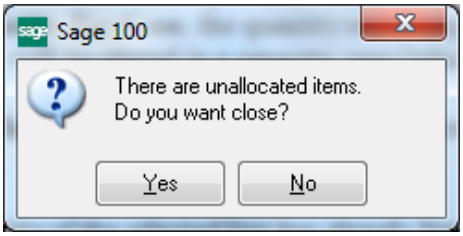
There are three items, each with a quantity of 5, and, of the three items, one item has only a quantity of three remaining to allocate; then pressing the **Copy Parcel** button will generate a new parcel with two items with a quantity of 5 allocated, the third item with 3 allocated, and the fully allocated item is removed from the **Items on Order** list box.

The **Bulk Copy** button does what the **Copy Parcels** does, but keeps going until all items are allocated from the **Items on Order** list box. This allows the operator to create a "template" box and copy it to allocate all items to boxes. This is especially handy in the apparel business, where it is not uncommon to have four to six different sizes in a box, and sixty boxes to process.

The **Accept** button accepts and writes the parcel contents in the **Package Contents** list box.

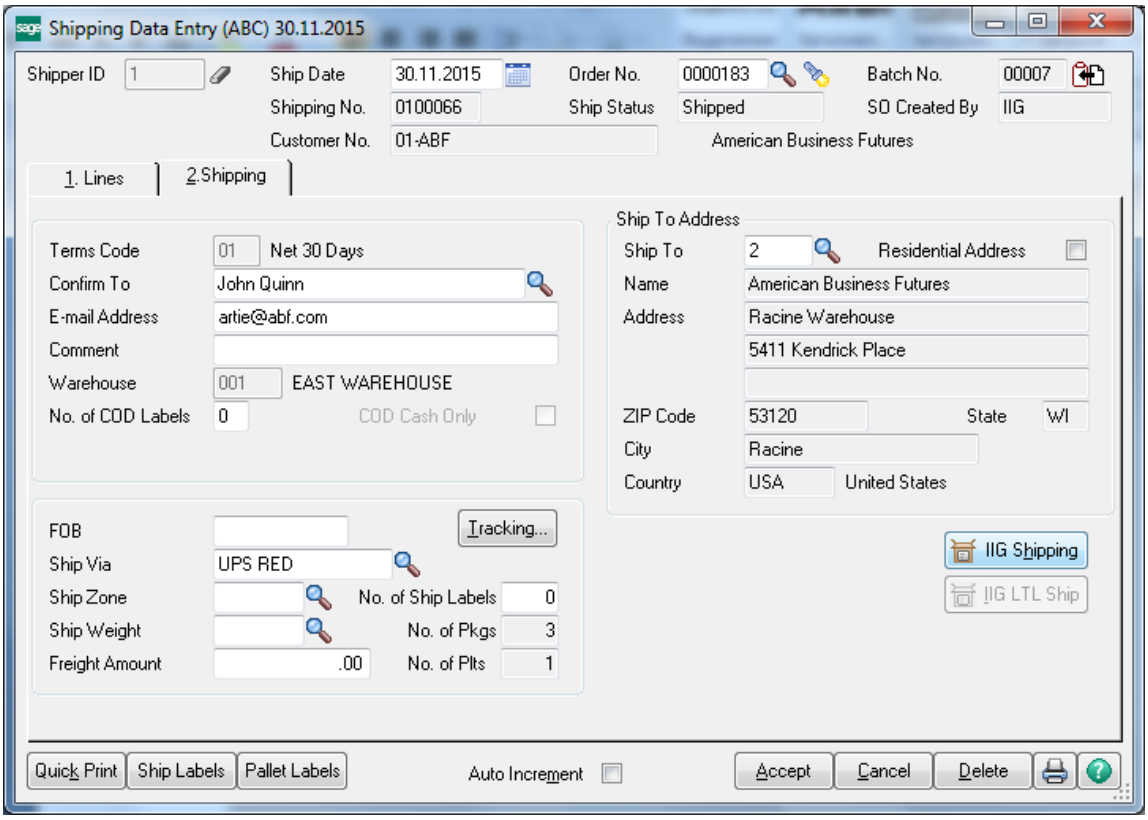
The **Cancel** button undoes changes made in the **Package Contents** list box.

The **OK** button accepts and closes the dialog. A warning message will be displayed if there are unallocated items in the **Items on Order** list box, which will allow return to allocating boxes.

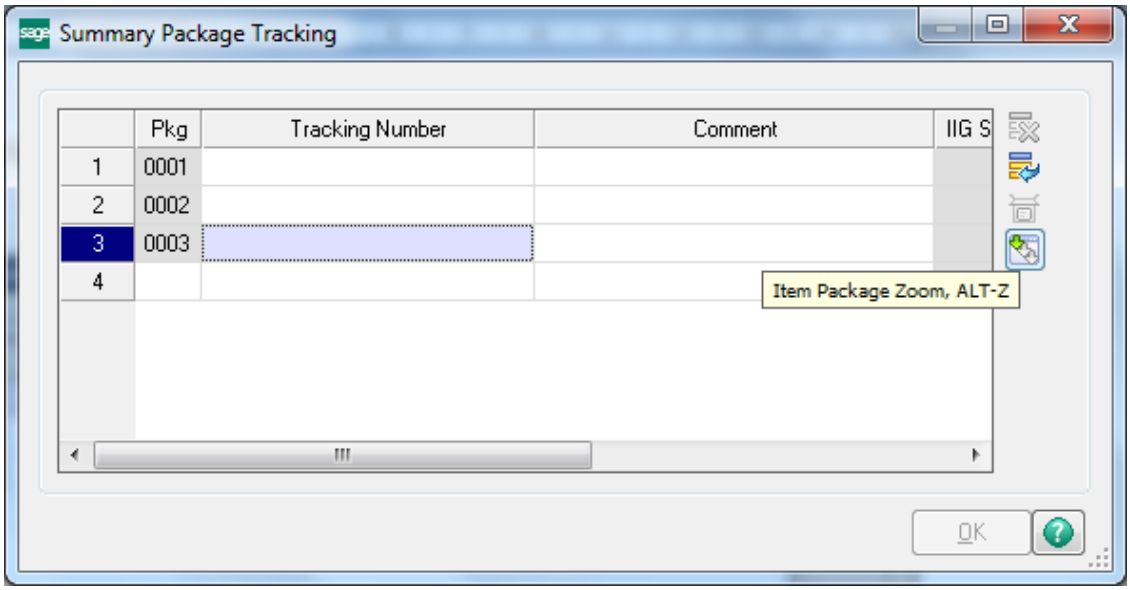


Go to the **Shipping tab** of the **Shipping Data Entry**.

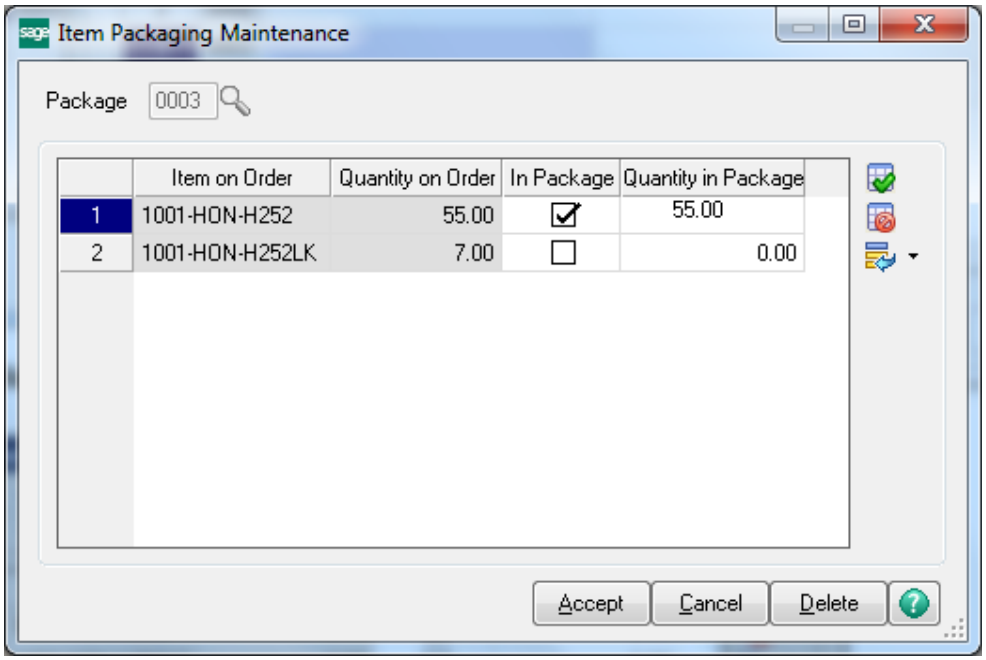
The **Tracking** button allows tracking item packages.



Click the **Tracking…** button to open the Summary Package Tracking Maintenance screen.



The **IIG Ship** fields have been added to this screen.

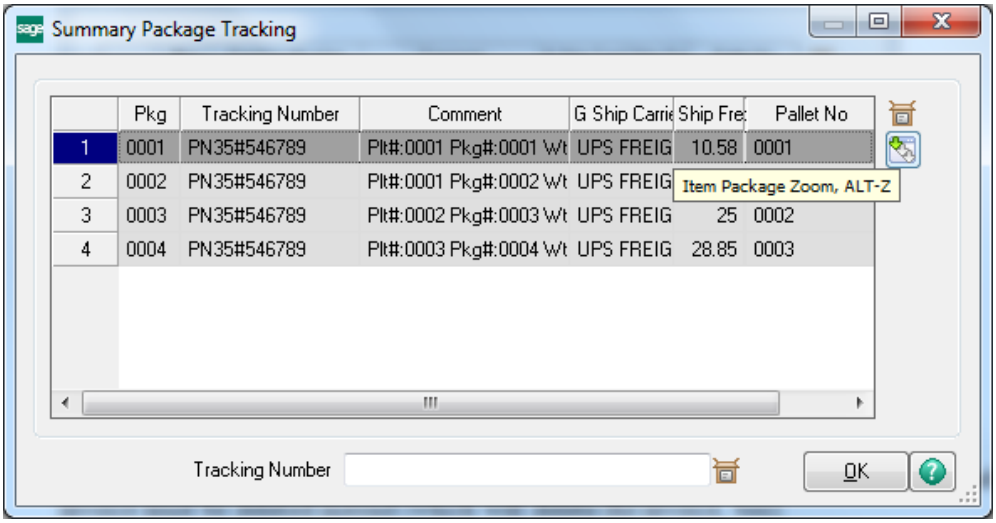


Click the **IIG Shipping** button on the **Shipping Data Entry** screen to proceed to **IIG Manifest Generation**.

The **IIG Ship** fields on the **Summary Package Tracking Maintenance** will display information after clicking the Ship button in IIG Manifest Entry.
When a Shipping Data Entry is accepted, an invoice is generated. The Invoice Number is the same as the Shipping Number.

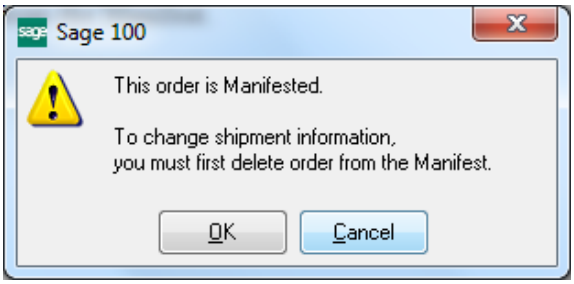
The shipping information can be viewed by clicking the **Tracking** button on the **Header** tab of the **Invoice Data Entry** screen.

Shipping information cannot be modified in the generated invoice.



The Shipment invoice cannot be deleted from Invoice Data Entry. The Shipment Number invoice must be deleted instead (which will delete the invoice, too).

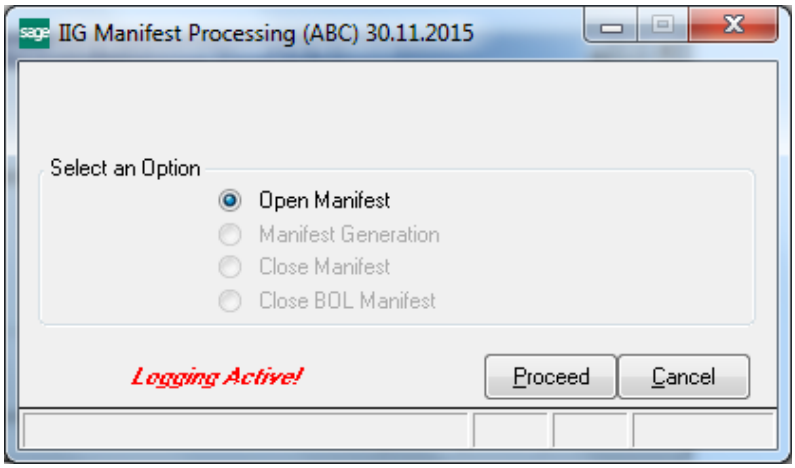
If the order is already manifested, the shipment number cannot be opened in the **Shipping Data Entry** program, until the order is removed from the Manifest.



Clicking **OK** opens the Manifest to **Void** it, if necessary, after which the Shipment is opened.

Manifest Processing

Manifest processing features can be accessed through selecting the **IIG Manifest Processing** or **IIG/Sage Shipping Manifesting** programs from the **Sales Order Shipping** menu.

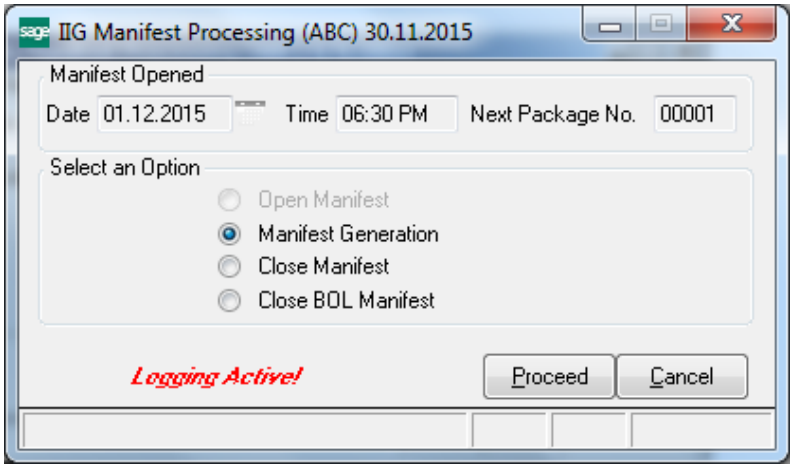


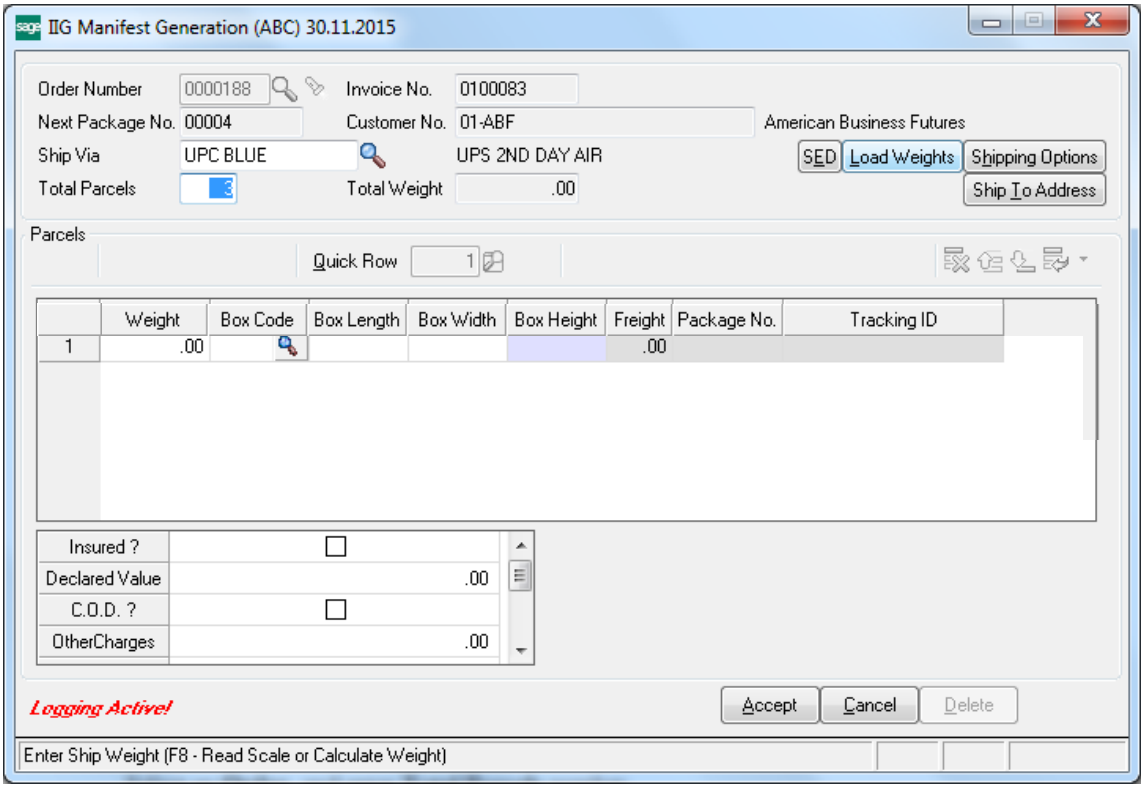
Manifest Generation/Shipping allows user to create a **Shipping Data Entry**, and proceed to **Manifest Generation**.

Selecting the **Open Manifest** option will set all proper files to begin shipment manifesting.

New Manifest cannot be opened until the current manifest is closed.

When the manifest is opened, select the Manifest Generation option and click Proceed to generate manifest for sales order.





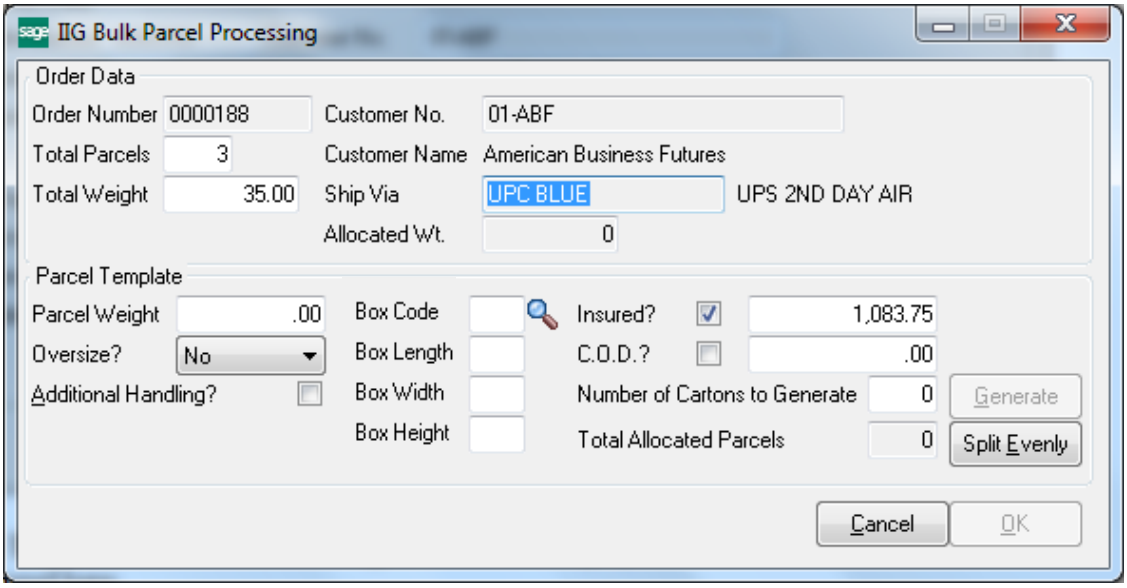
Select an **Order**, and enter **Total Parcels** number.
The **Customer No.** field displays the customer specified for the selected order.

You can view/edit **Shipping Options** and view **Ship To Address** information by clicking the corresponding buttons.

Select the **Box Code** and enter the **Ship Weight** for the current **Parcel**.

You can facilitate entry of the parcels by clicking the **Load Weights** button. This button is enabled if the **Require Box Distribution** option is not turned on in the **IIG Shipping Automation Options.**

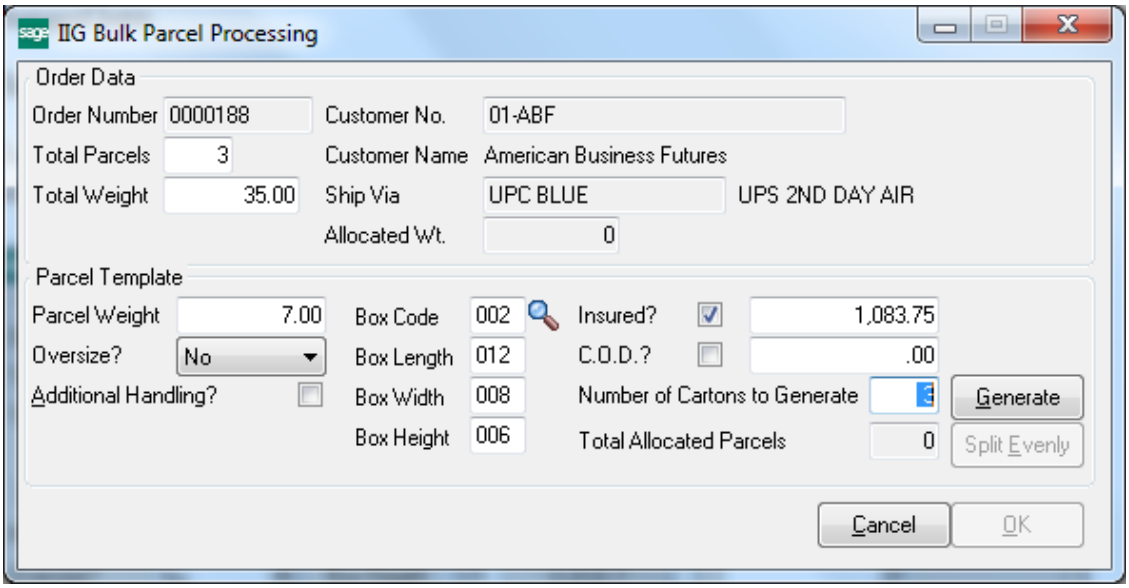
The **IIG Bulk Parcel Processing** screen will be opened.



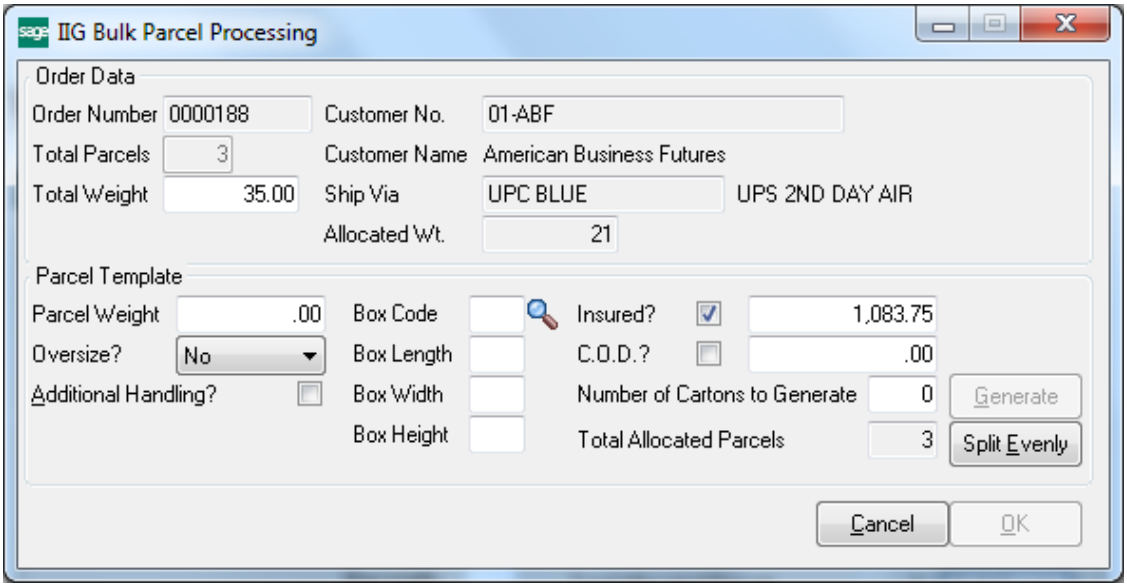
The **Total Parcels** and **Total Weight** values are displayed from the Manifest and can be changed here.

The **Allocated Wt.** displays sum of the weights of already allocated parcels.

To allocate multiple parcels at once, in the **Parcel Template** part, enter **Parcel Weight**, select **Box Type**, and enter the **Number of Cartons to Generate**.

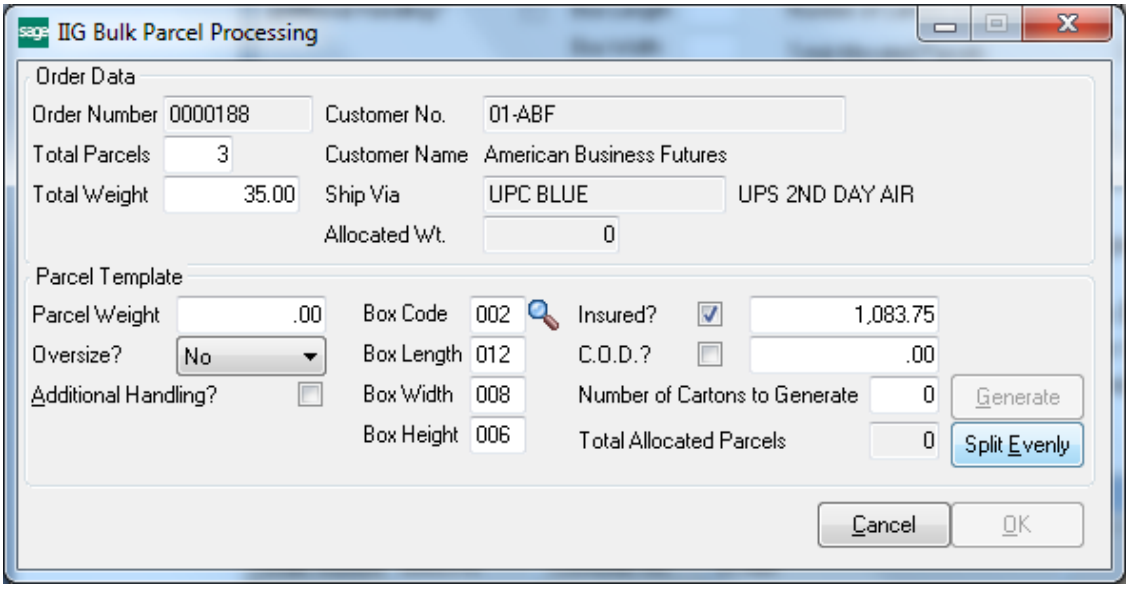


Click the **Generate** button to generate parcels with the selected settings.

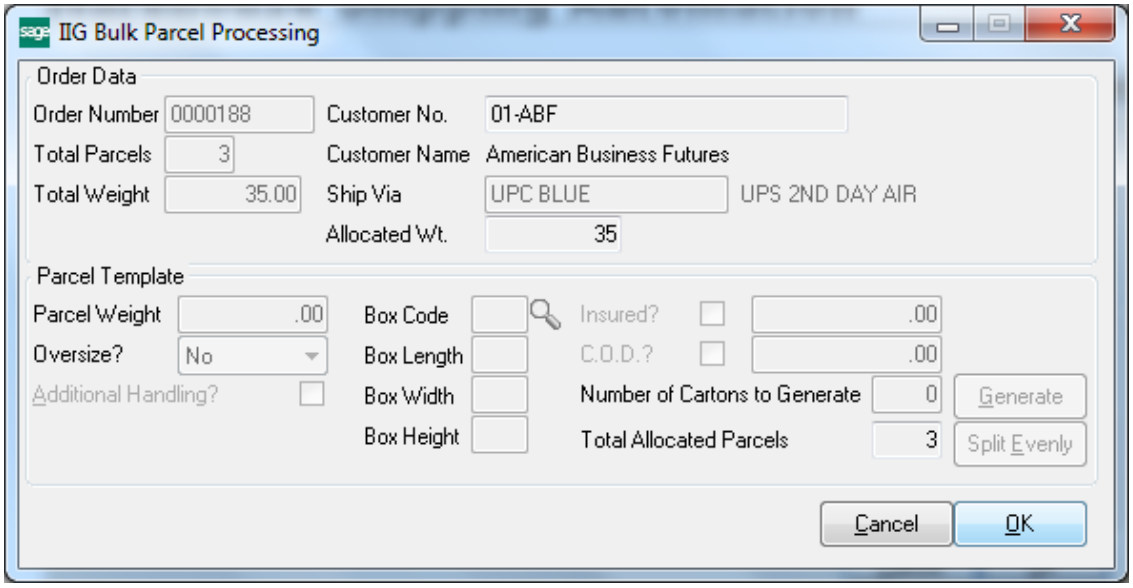


The **Total Allocated Parcels** displays the number of already allocated parcels.

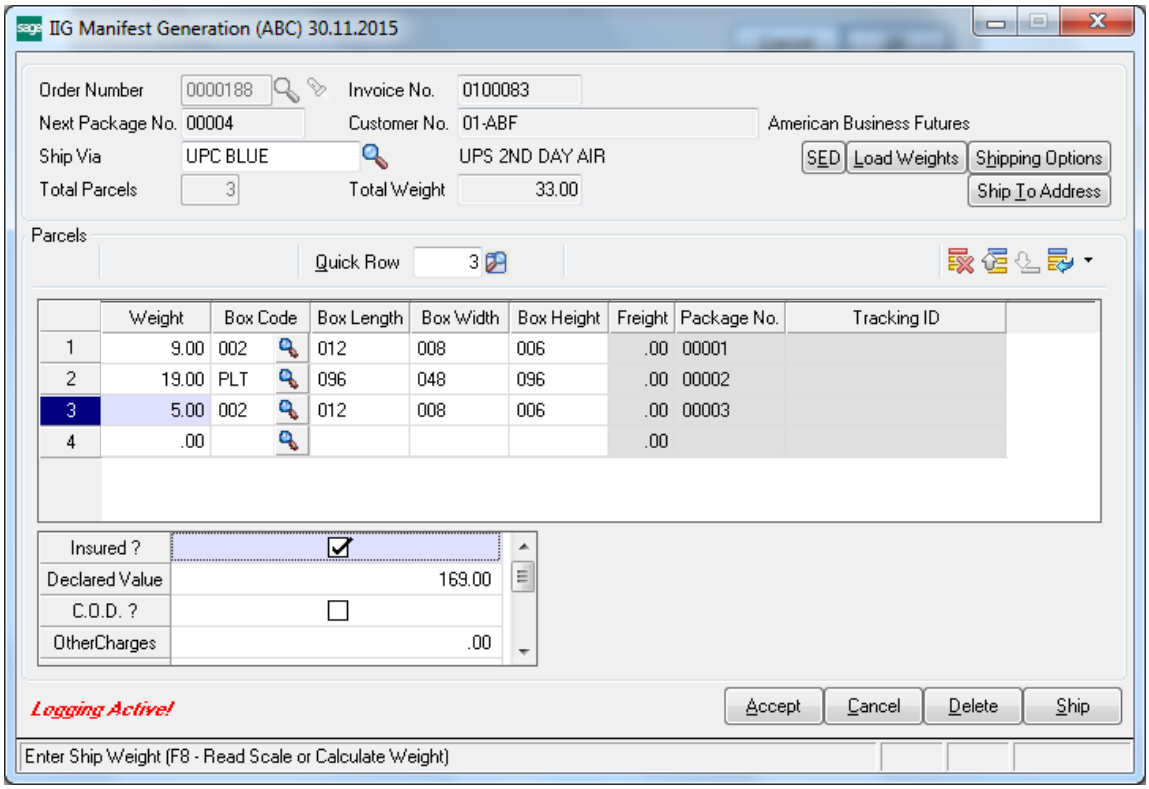
You may create parcels for the weight not allocated yet by selecting the **Box Code** and clicking the **Split Evenly** button. The program will automatically create the necessary number of parcels of the selected Box Type to allocate the remaining weight (the difference of the **Total Weight** and **Allocated Weight**).



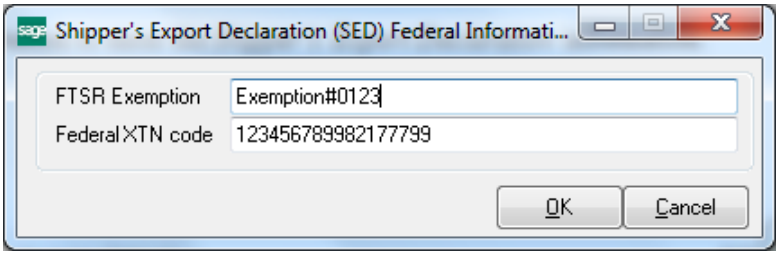
All the fields on the screen become display-only after splitting the weight.



Return to the **IIG Manifest Generation** screen to view the allocated parcels.



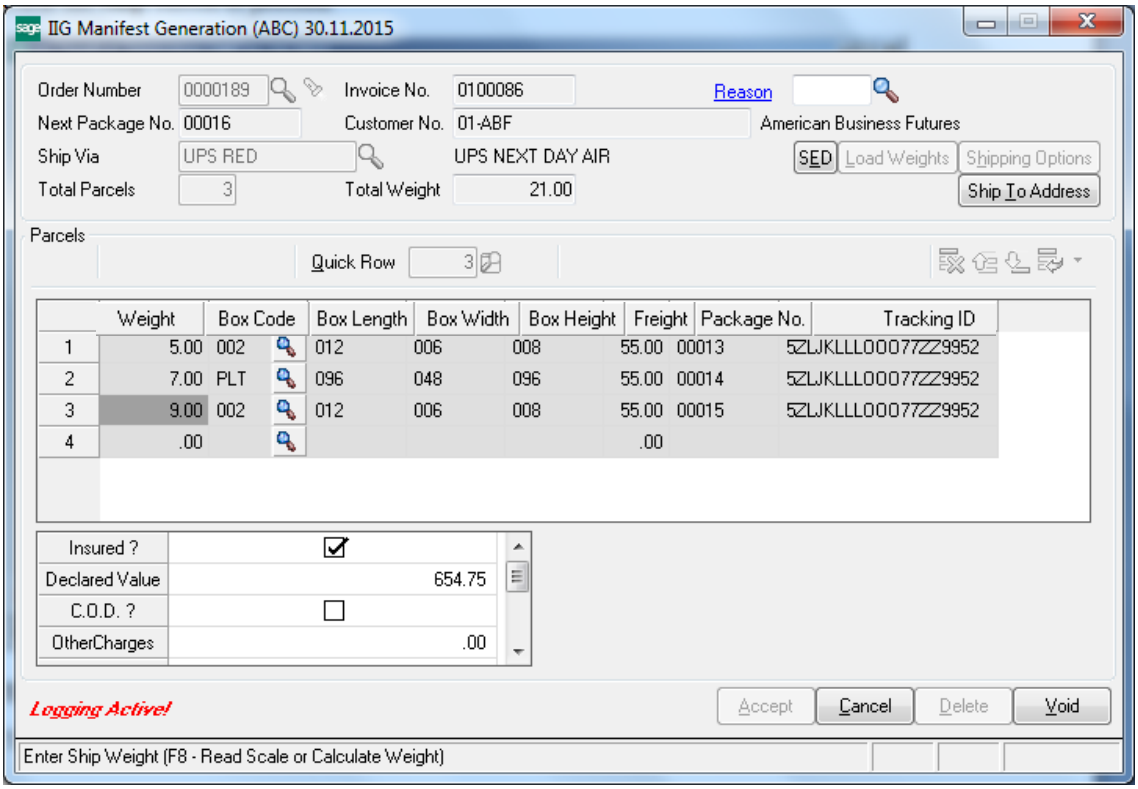
Click the **SED** button to enter the *Shipper's Export Declaration* information.



In the opened dialog box enter the **FTSR Exemption** and **Federal XTN code**. This information will be sent to the carrier automation system.

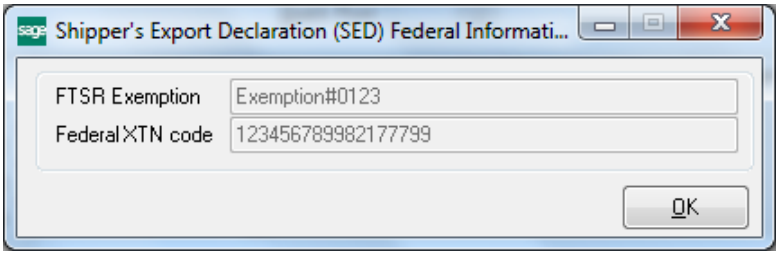
The **SED** information will become display-only after manifesting, so you must obtain these values from the AES web site before manifesting.

Click the **Ship** button to proceed.

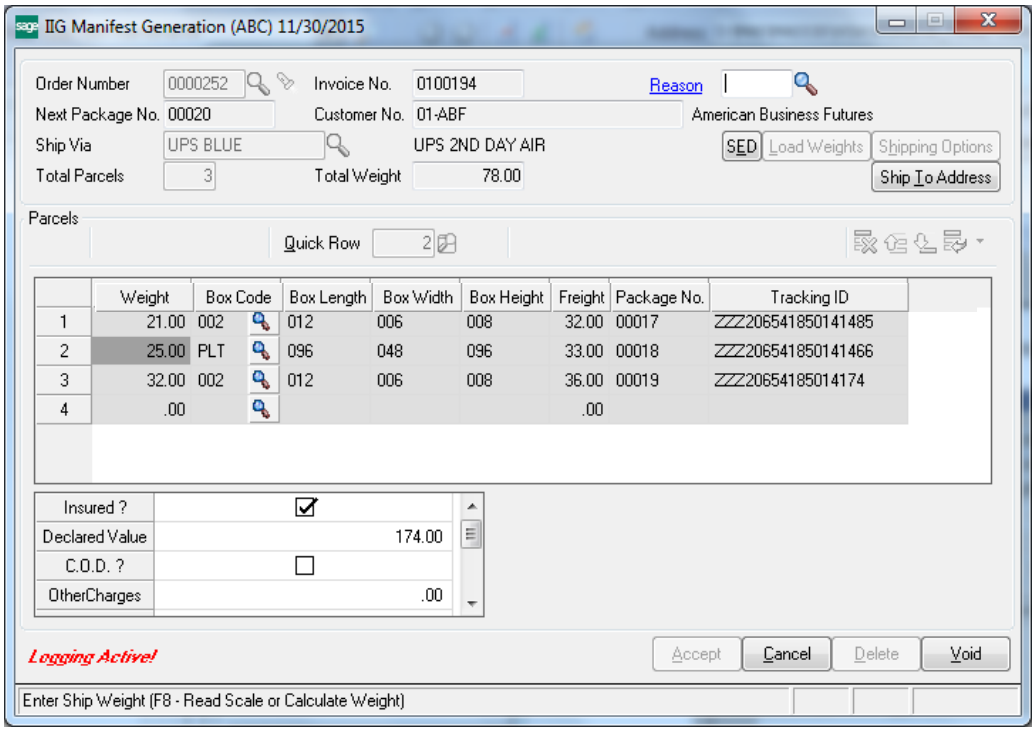


Tracking Numbers are assigned to parcels.

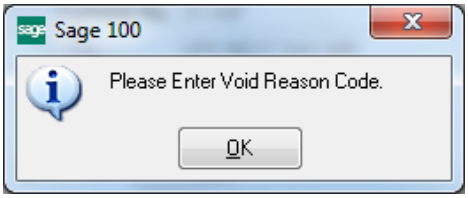
You can view the SED information after shipping by clicking the **SED** button:

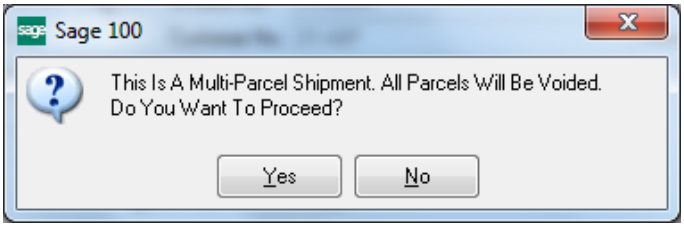


You can use the **Void** button to delete an existing order manifest.



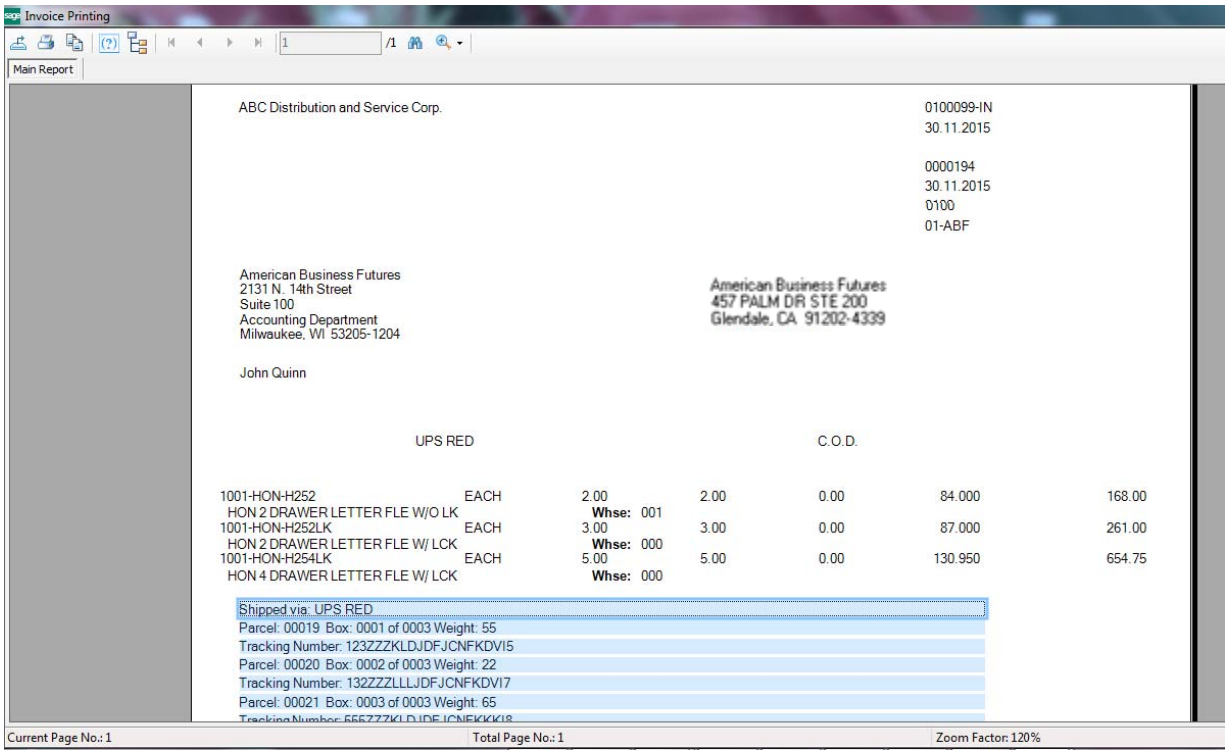
It is necessary to enter/select the **Reason Code** when voiding the shipment.



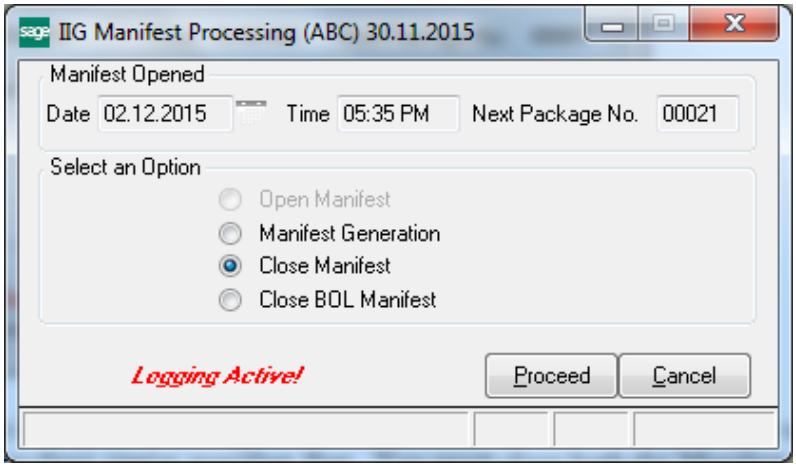


The same **IIG Manifest Generation** program is available from the **Shipping Data Entry** program.

After manifesting, the invoice printing contains information on shipment (Shipped via, Parcels, Boxes, Weights, and Tracking Numbers).

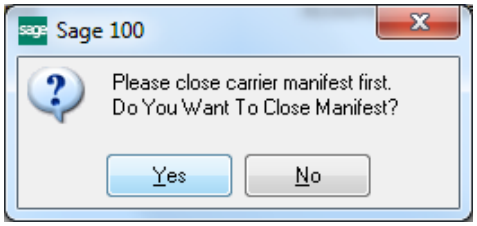


To close a manifest, run the **Manifest Processing** program under the **Sales Order Shipping** menu, select the **Close Manifest** option, and click **Proceed**.

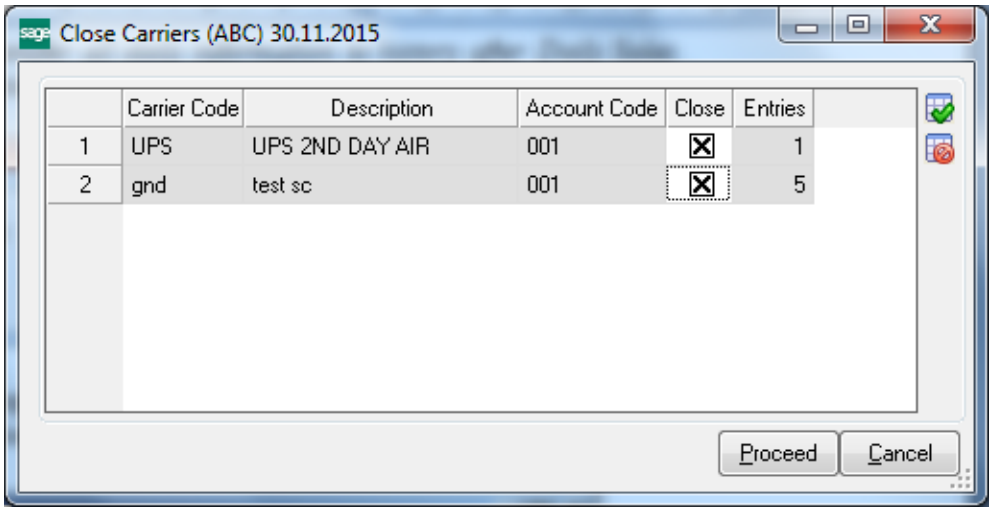


A message is displayed asking for confirmation to close the manifest. The user is prompted to close carrier manifest first. You must close both the Manifest and the BOL Manifest before you can open the manifest for a new day.

Note: *Closing Manifest will transfer all daily information to history after Daily Sales Journal/Update. That information will be available in the Invoice History Inquiry.*

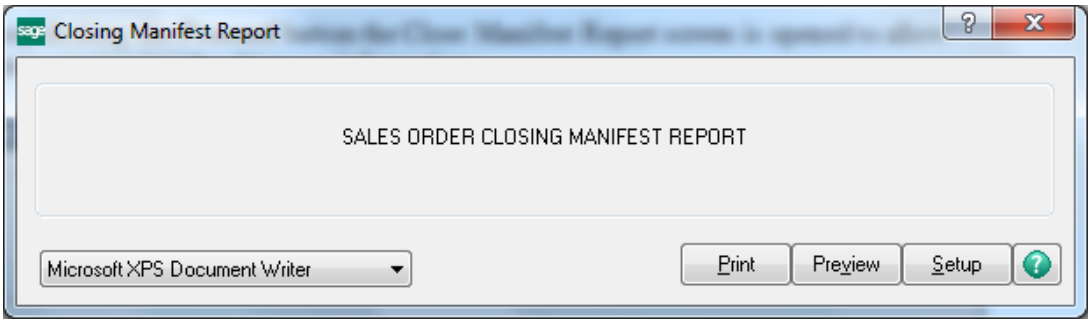


The **Close Carriers** screen is opened allowing the user to select the Carrier Code (Service Type) to be closed prior to closing the Manifest:

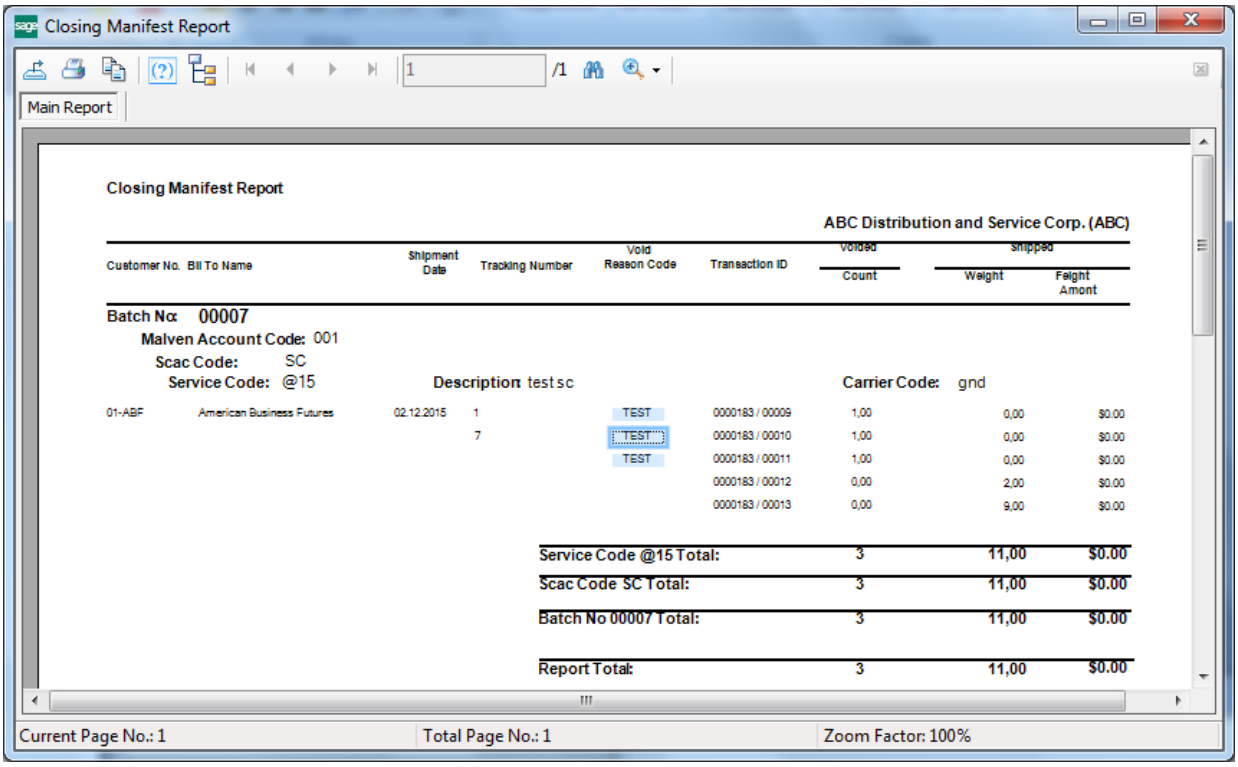


The **Account Code** is defaulted to the **Default Warehouse** code setup in the Sales Order Options if the Shipping Interface for current Carrier Code is: Clippership, Manual or Truck. For Malvern Shipping Interface the **Account Code** is populated with **Malvern Meter Code** from **IIG Malvern Interface Setup.**

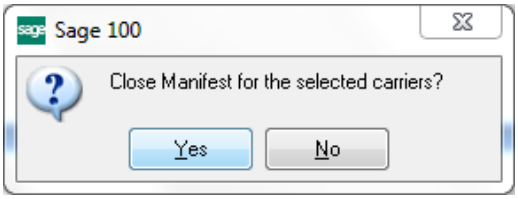
Upon clicking the **Proceed** button the Close Manifest Report screen is opened to allow printing/reviewing the shipment information:



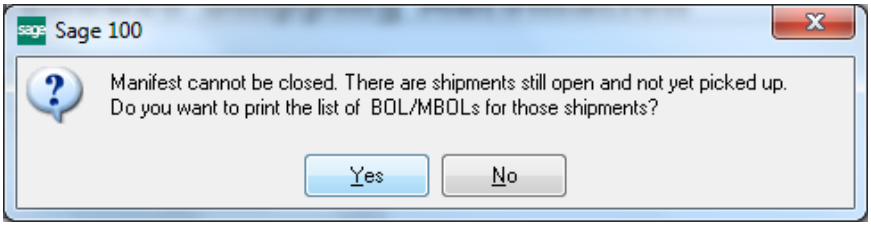
The Voided shipments are printed with corresponding Void Reason Code:



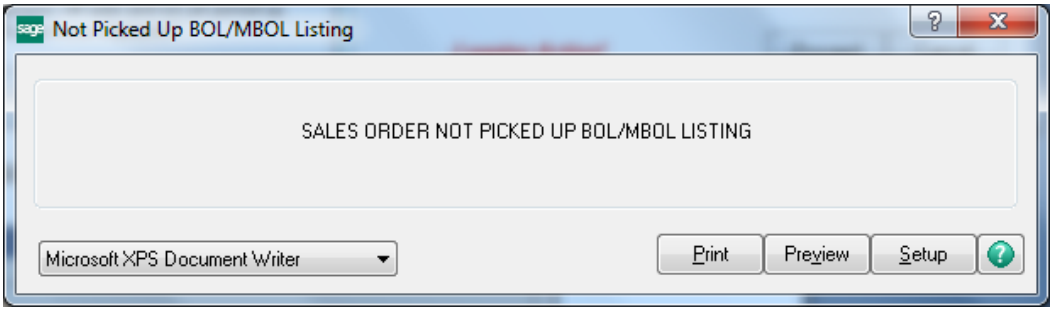
After the report is printed the user is asked for confirmation to close the Manifest:

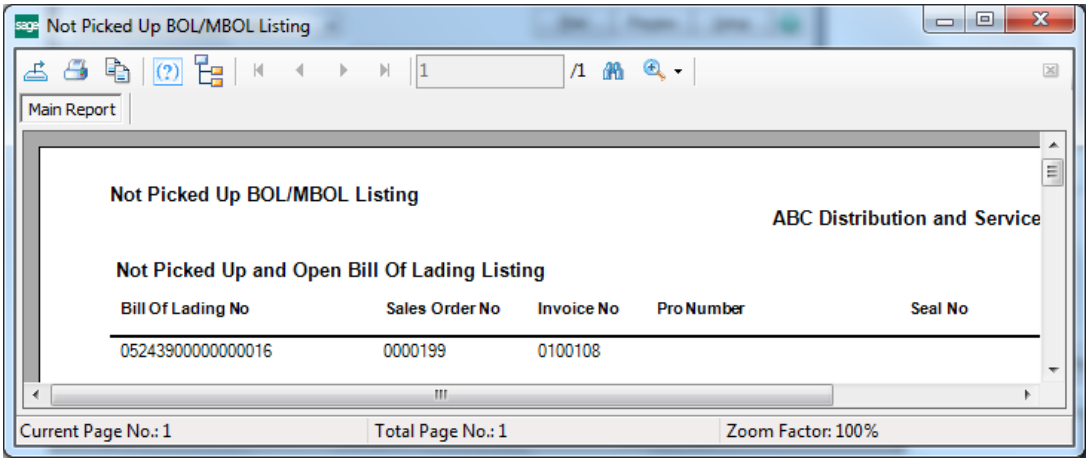


When closing BOL Manifest the following message will popup upon selecting Yes if not picked up shipments are found:

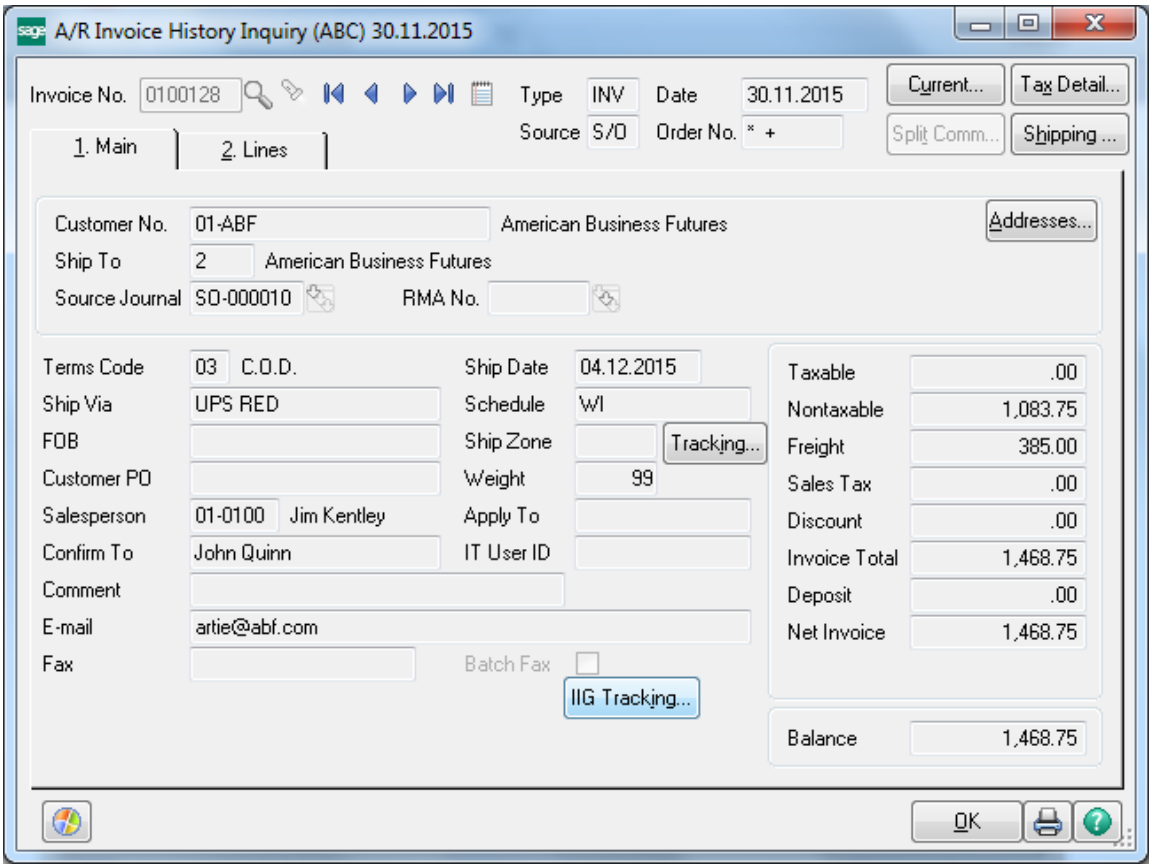


Selecting Yes will print the list of BOL/MBOLs for the shipments not picked up:

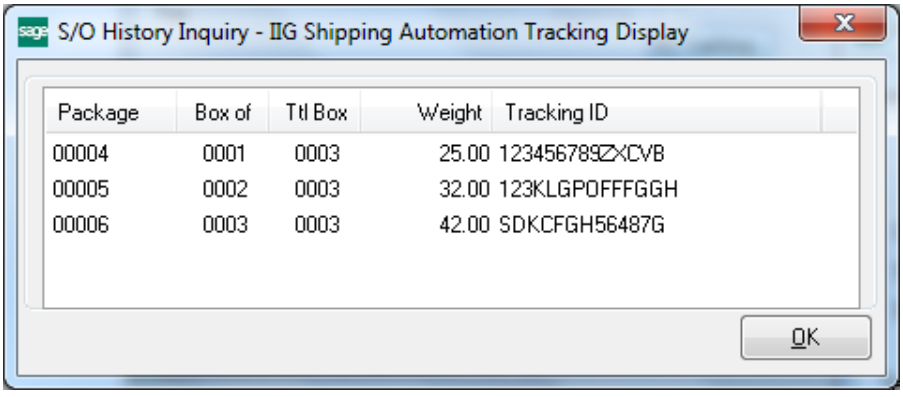




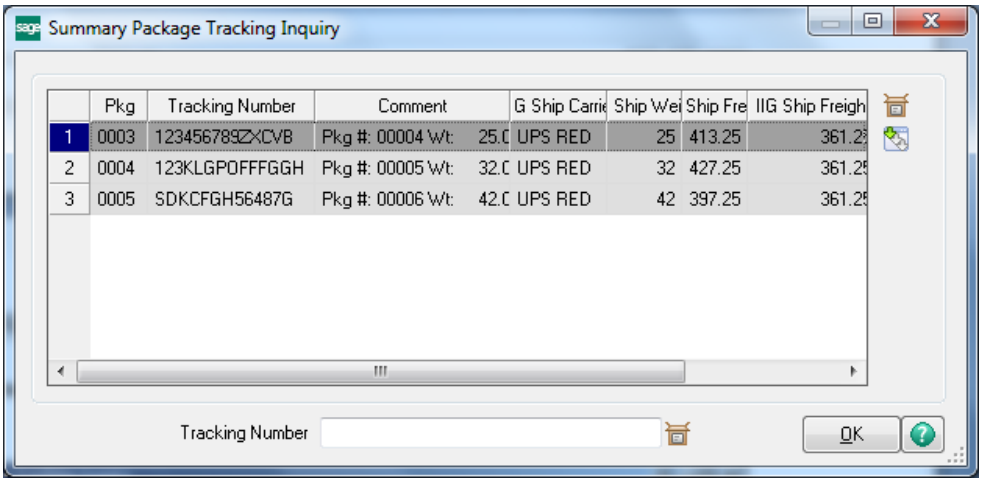
After running the Daily Sales Update, select the Invoice History Inquiry program from the Sales Order Inquiries menu.



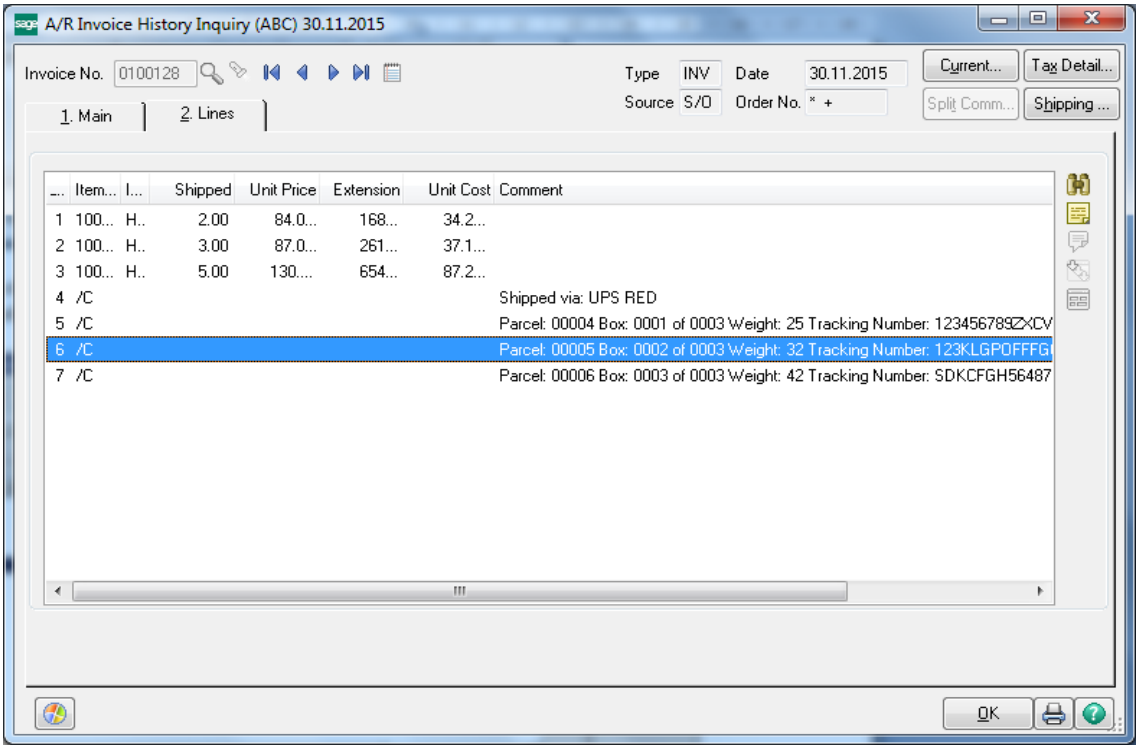
Click the **IIG Tracking** button to view the IIG Shipping Manifest package/tracking information.



Clicking the **Tracking** button displays the package tracking information from Shipping Data Entry:



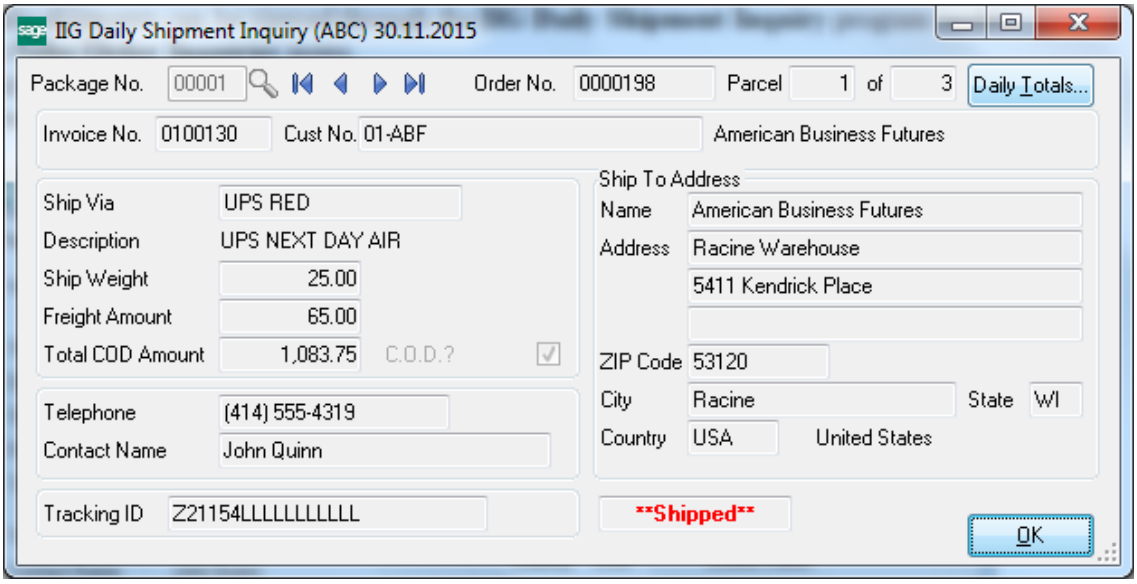
The **Lines** tab of the **Invoice History Inquiry** displays comment lines, added during the Daily Sales Update.



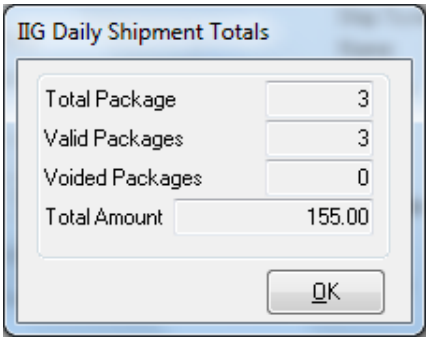
*Note: **Retain Comment Lines** must be turned on in the **Accounts Receivable Options** to print the IIG tracking numbers from history.*

IIG Daily Shipment Inquiry

Daily shipments can be viewed through the **IIG Daily Shipment Inquiry** program under the **Sales Order Inquiries** menu.
Only open manifests can be viewed through the **Daily Shipment Inquiry** program by selecting the **Package Number**.

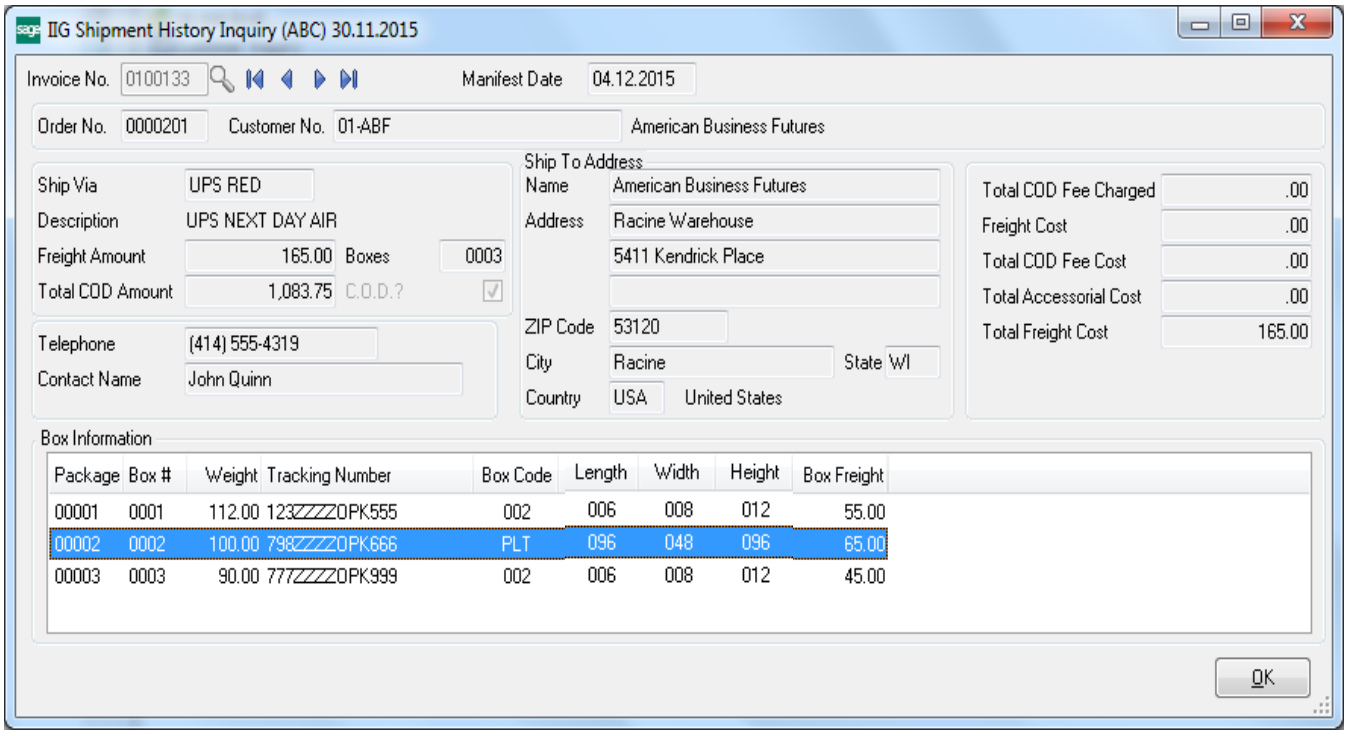


Click the **Daily Totals** button to view current information on all the packages of the day.



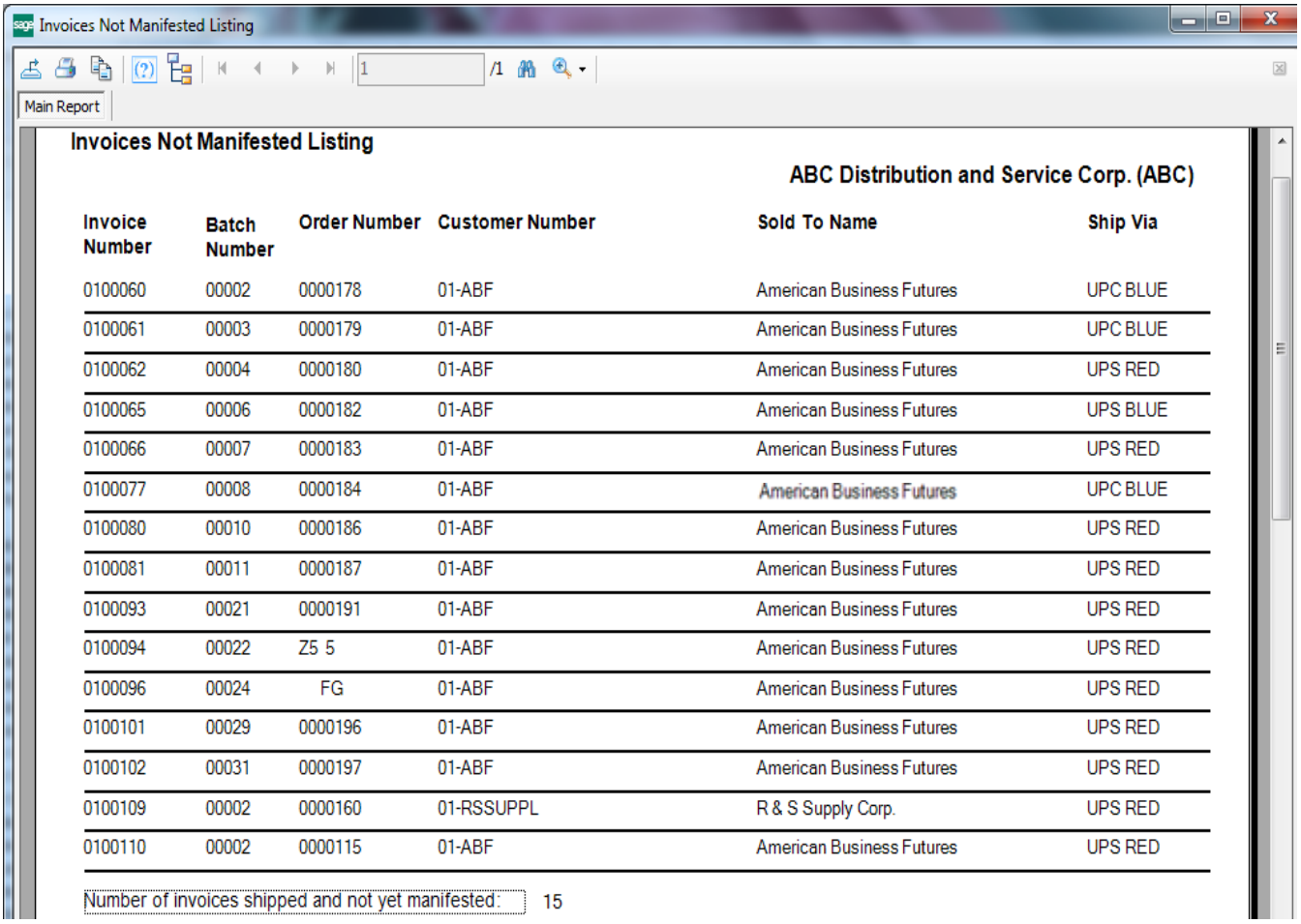
Shipment History Inquiry

The closed manifests by **Invoice Number** can be viewed through the **IIG Shipment History Inquiry** program**.**



Invoices Not Manifested Report

The **Invoices Not Manifested Report** program under the **Sales Order Reports** menu prints a list of the invoices shipped with the **Shipping Automation** system and not manifested yet.



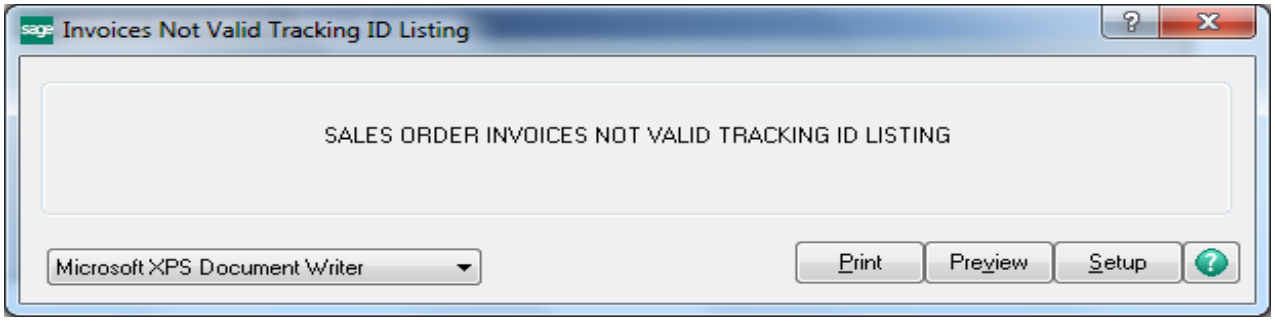
Invoice Number	Batch Number	Order Number	Customer Number	Sold To Name	Ship Via
0100060	00002	0000178	01-ABF	American Business Futures	UPC BLUE
0100061	00003	0000179	01-ABF	American Business Futures	UPC BLUE
0100062	00004	0000180	01-ABF	American Business Futures	UPS RED
0100065	00006	0000182	01-ABF	American Business Futures	UPS BLUE
0100066	00007	0000183	01-ABF	American Business Futures	UPS RED
0100077	00008	0000184	01-ABF	American Business Futures	UPC BLUE
0100080	00010	0000186	01-ABF	American Business Futures	UPS RED
0100081	00011	0000187	01-ABF	American Business Futures	UPS RED
0100093	00021	0000191	01-ABF	American Business Futures	UPS RED
0100094	00022	Z5 5	01-ABF	American Business Futures	UPS RED
0100096	00024	FG	01-ABF	American Business Futures	UPS RED
0100101	00029	0000196	01-ABF	American Business Futures	UPS RED
0100102	00031	0000197	01-ABF	American Business Futures	UPS RED
0100109	00002	0000160	01-RSSUPPL	R & S Supply Corp.	UPS RED
0100110	00002	0000115	01-ABF	American Business Futures	UPS RED

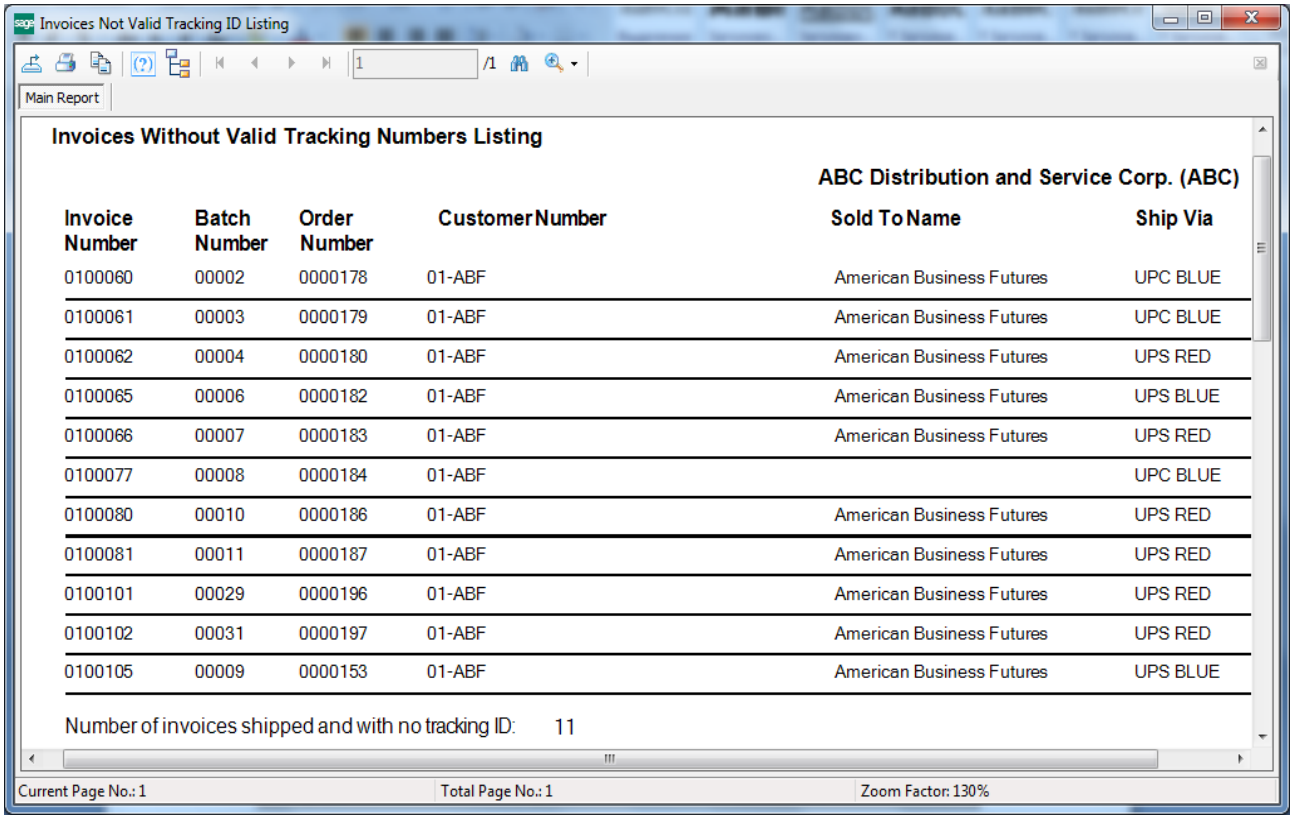
Number of invoices shipped and not yet manifested: 15

The Sales Journal cannot be updated until these orders are manifested or voided.

Invoices Without Tracking Numbers

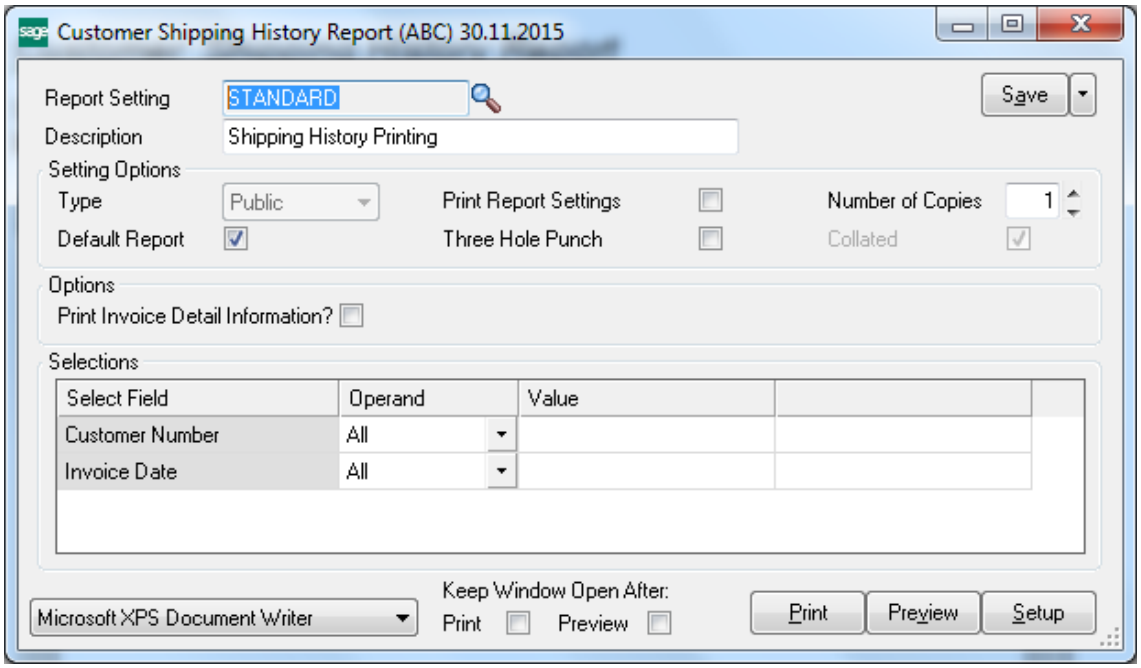
Select the **Invoices Without Tracking Numbers** program under the **Sales Order Report** menu. The program prints the list of invoices that do not have Tracking numbers. These can be invoices created without Shipping, invoices created by shipping but not manifested.



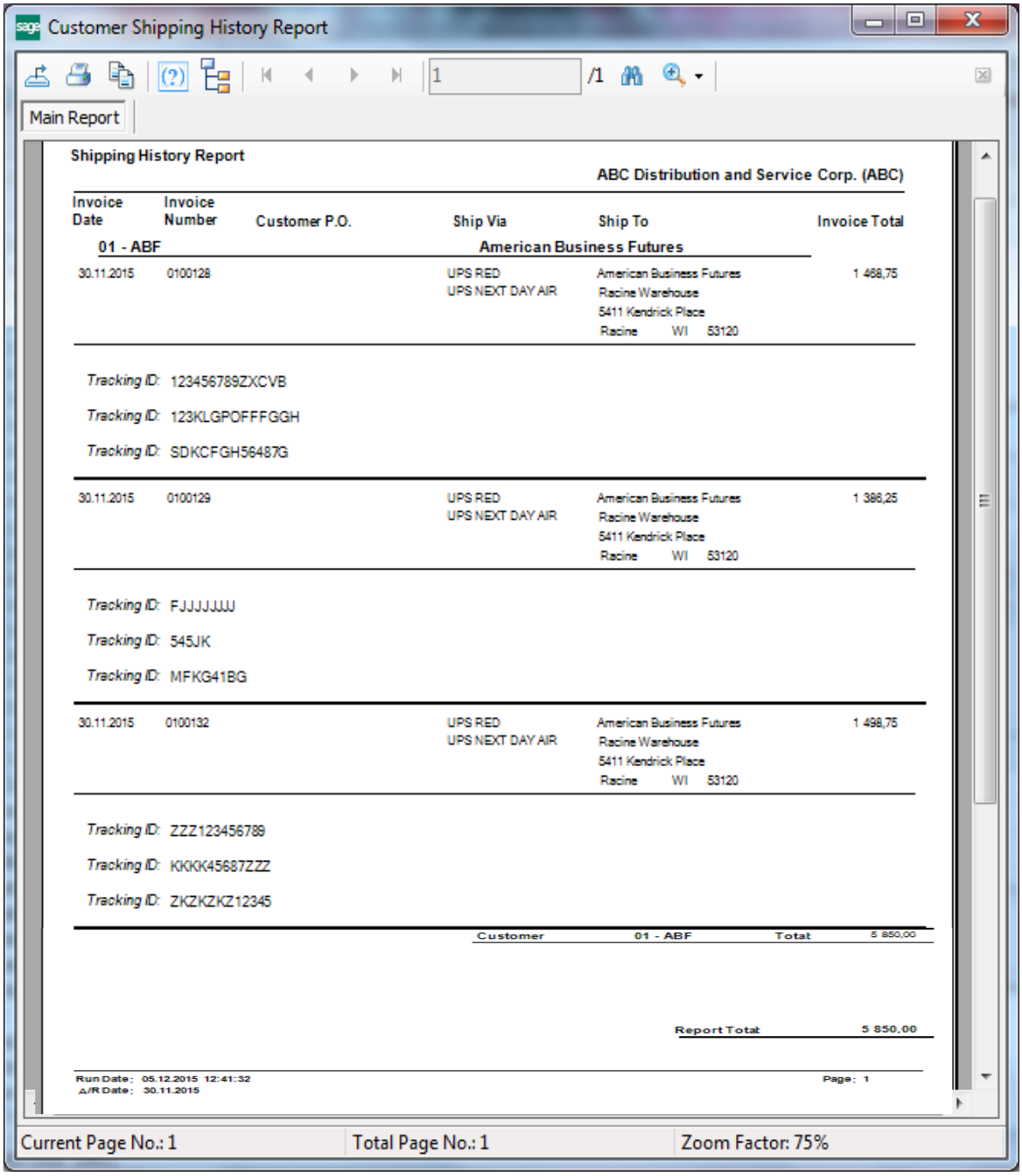


Customer Shipping History Report

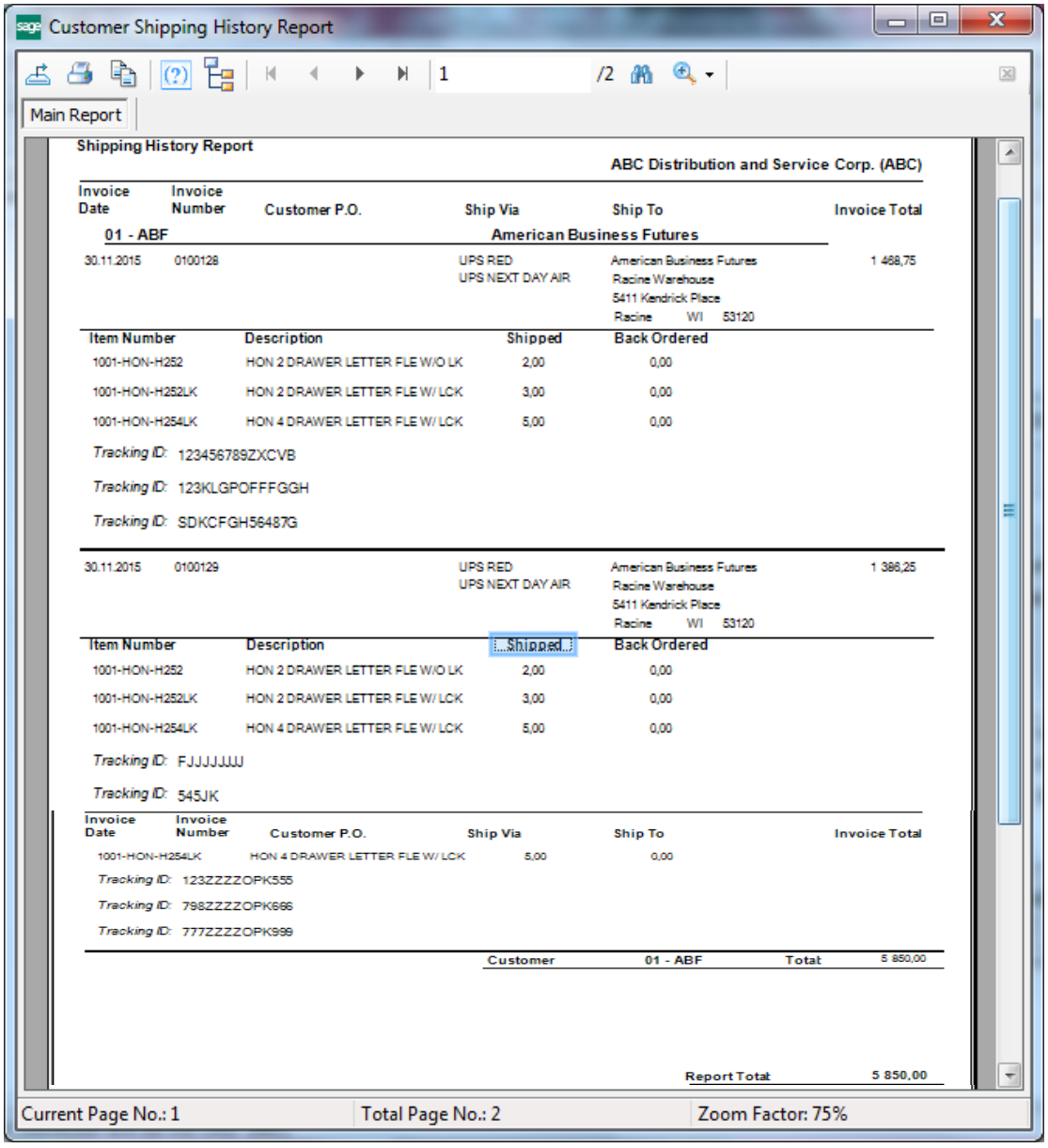
Select the **IIG Shipping History Report** program under the **Accounts Receivable Reports** menu. The program prints the list of invoices with their Tracking IDs.



Here is an example of the printout without Invoice Detail Information:

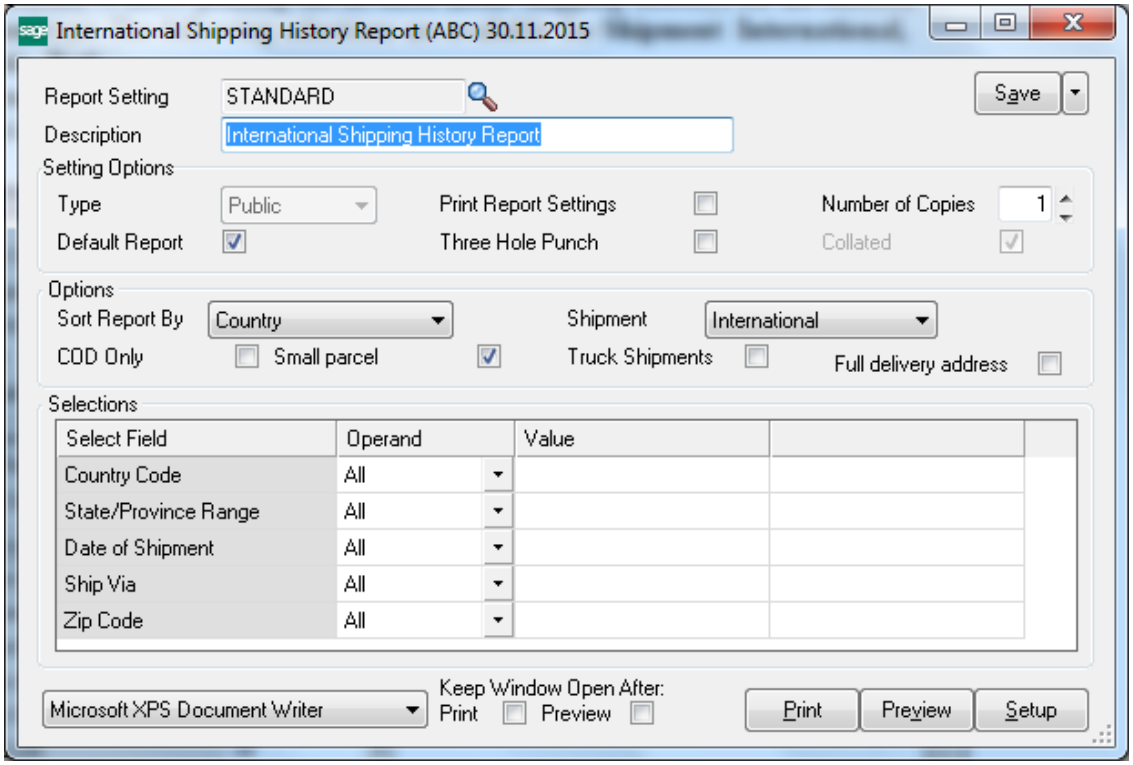


This is an example of the printout with the Invoice Detail Information:


Customer Shipping History Report
Main Report
Shipping History Report
ABC Distribution and Service Corp. (ABC)
Invoice Date
Invoice Number
Customer P.O.
Ship Via
Ship To
Invoice Total
01 - ABF
American Business Futures
30.11.2015
0100128
UPS RED
UPS NEXT DAY AIR
American Business Futures
Racine Warehouse
5411 Kendrick Place
Racine WI 53120
1 468,75
Item Number
Description
Shipped
Back Ordered
1001-HON-H252
HON 2 DRAWER LETTER FLE W/O LK
2,00
0,00
1001-HON-H252LK
HON 2 DRAWER LETTER FLE W/ LCK
3,00
0,00
1001-HON-H254LK
HON 4 DRAWER LETTER FLE W/ LCK
5,00
0,00
Tracking ID: 123456789ZXCVB
Tracking ID: 123KLGPOFFFGGH
Tracking ID: SDKCFGH56487G
30.11.2015
0100129
UPS RED
UPS NEXT DAY AIR
American Business Futures
Racine Warehouse
5411 Kendrick Place
Racine WI 53120
1 386,25
Item Number
Description
Shipped
Back Ordered
1001-HON-H252
HON 2 DRAWER LETTER FLE W/O LK
2,00
0,00
1001-HON-H252LK
HON 2 DRAWER LETTER FLE W/ LCK
3,00
0,00
1001-HON-H254LK
HON 4 DRAWER LETTER FLE W/ LCK
5,00
0,00
Tracking ID: FJJJJJJJJ
Tracking ID: 545JK
Invoice Date
Invoice Number
Customer P.O.
Ship Via
Ship To
Invoice Total
1001-HON-H254LK
HON 4 DRAWER LETTER FLE W/ LCK
5,00
0,00
Tracking ID: 123ZZZZOPK555
Tracking ID: 798ZZZZOPK666
Tracking ID: 777ZZZZOPK999
Customer
01 - ABF
Total
5 850,00
Report Total
5 850,00
Current Page No.: 1
Total Page No.: 2
Zoom Factor: 75%

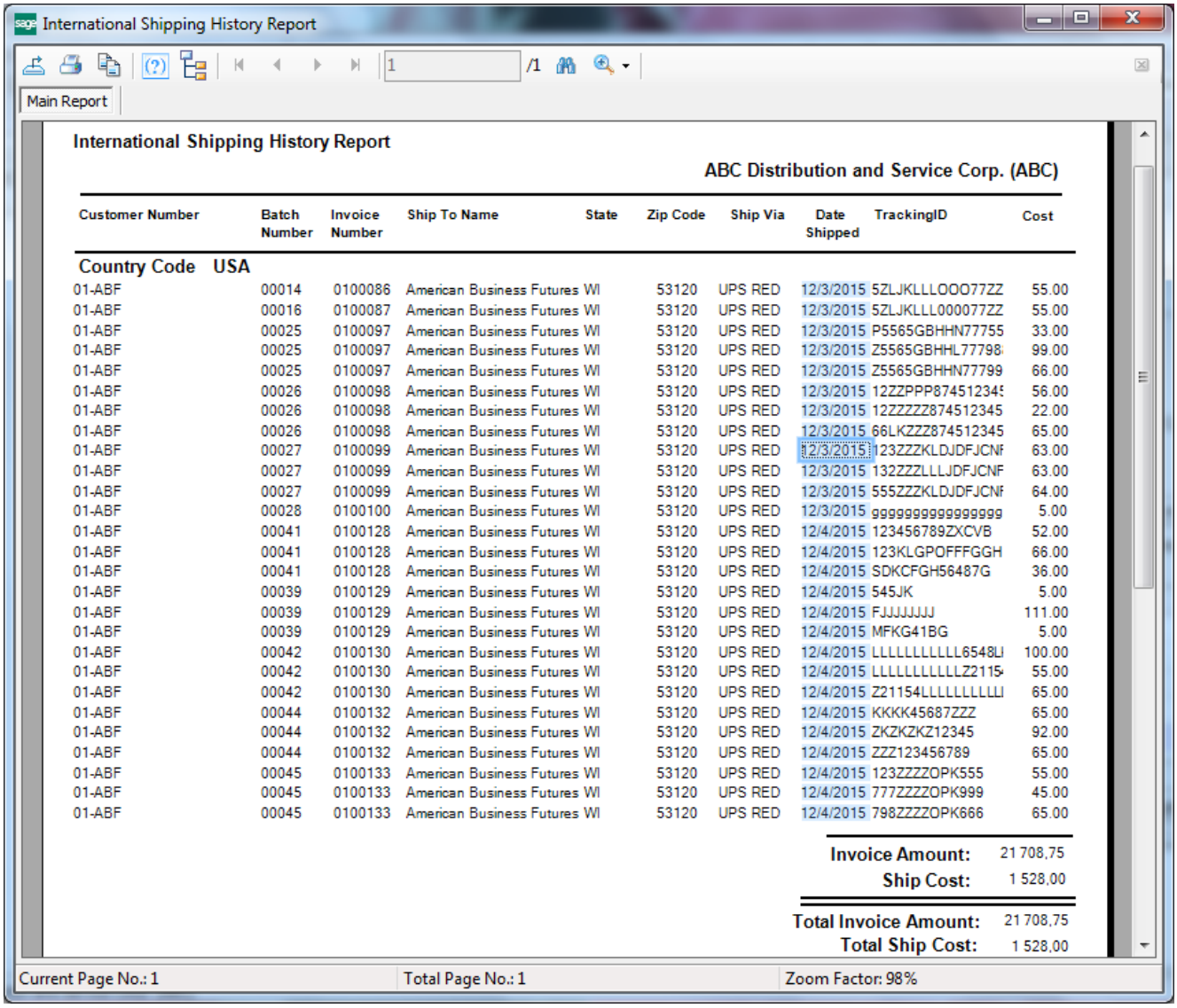
International Shipping History Report

The **International Shipping History Report** has been added to the **Sales Order Reports** menu to allow printing the Invoices (from Shipping History) for the selected **Shipment** type. The following selections are available for **Shipment**: **International, Domestic, Both**.
If **International** is selected only the Invoices with **Ship Via** code indicated as International Shipment in the IIG Carrier Maintenance will be included in the report.



Selections by **Country Code, State/Province Range, Date of Shipment, Ship Via** and **Zip Code** are available.

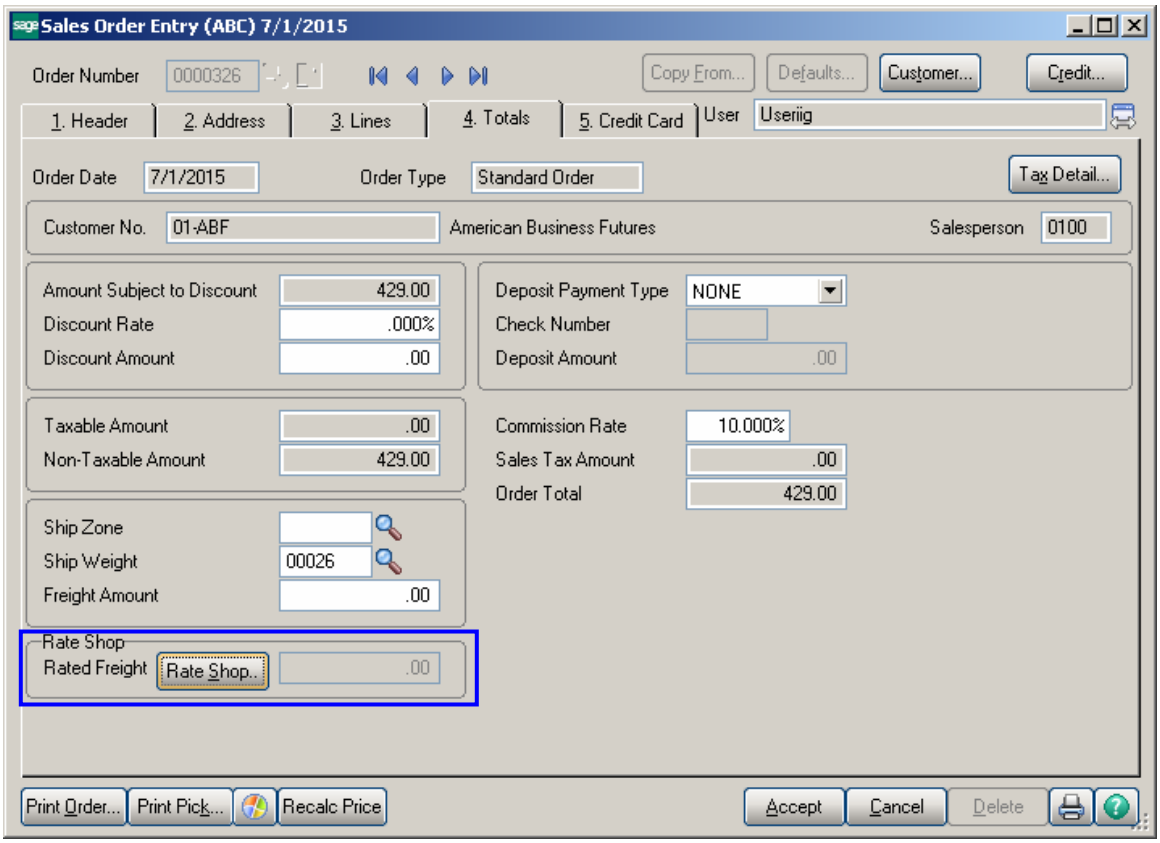
Here is a printout for International Shipping History Report:



The Invoices are printed with corresponding Tracking numbers.

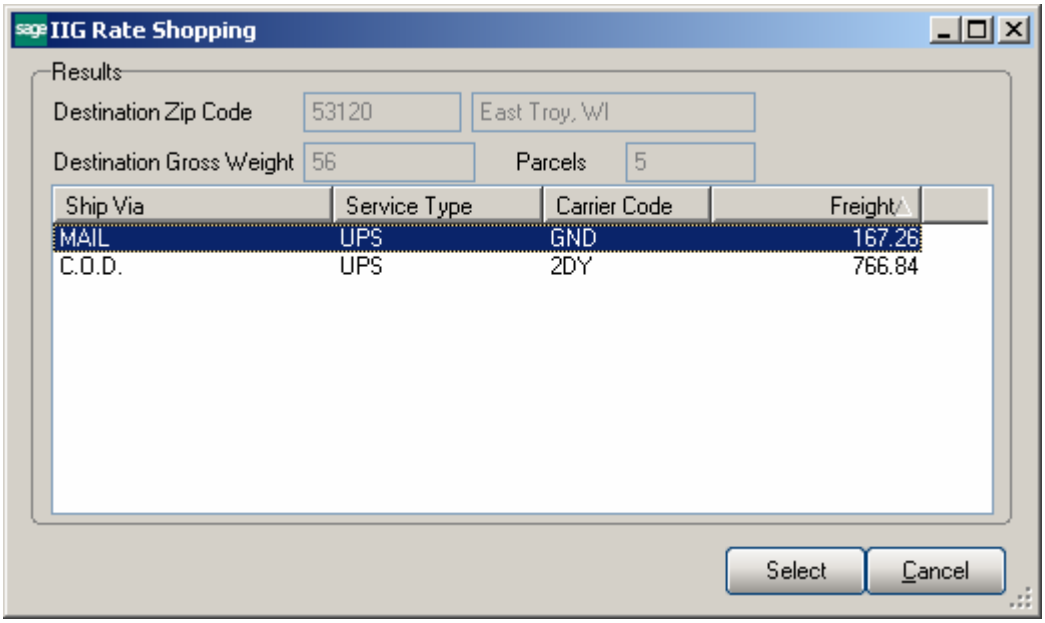
Shipping Rate Shop in Sales Order Entry

The **Rate Shop** button added on the Totals tab of the Sales Order Entry allows rating the order. Upon clicking the **Rate Shop** button the system starts identifying how the product is shipped for rating.
Rating is available only for Shipping Codes with Malvern Shipping Interface set in the IIG Carrier Interface Maintenance.

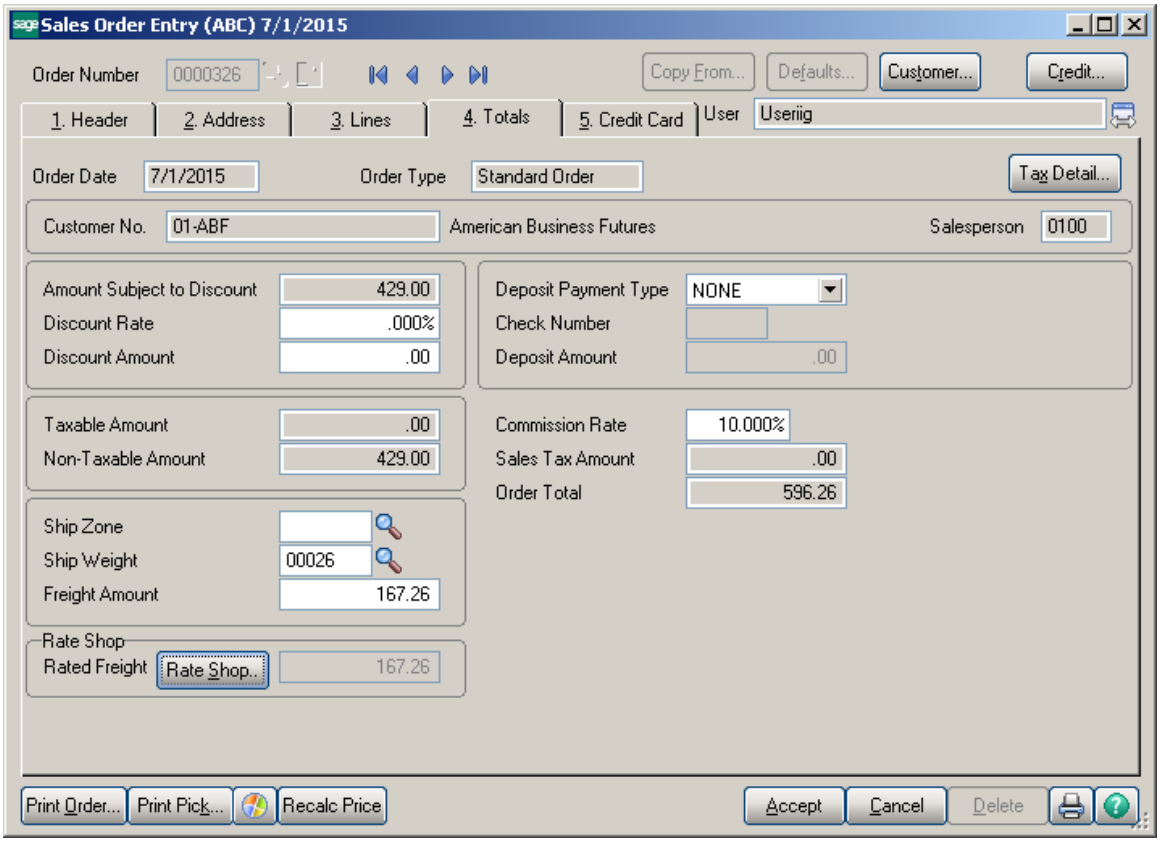


Click the **Rate Shop** button to determine the **Rate** for each **Service Type.**

The **IIG Rate Shopping** screen is opened allowing the user to select the **Ship Via** with corresponding **Service Type, Carrier Code** and **Freight.**



***Note*:** *The Ship Via code displayed will be the first ship via code that matches for the service type and carrier code. So if you have UPS Grd Collect and UPS Ground as carriers, UPS Grd Collect will sort first and that will be what is displayed. UPS Ground in this card will not show in the list.*



Upon the **Ship Via** selection**,** the corresponding **Rated Freight** is populated in the **Rated Freight** and **Freight Amount** fields.

The purpose of this function is when the rating processing is working through the products on the order; many of their products are always shipped as separate box due to the dimensions of the item.

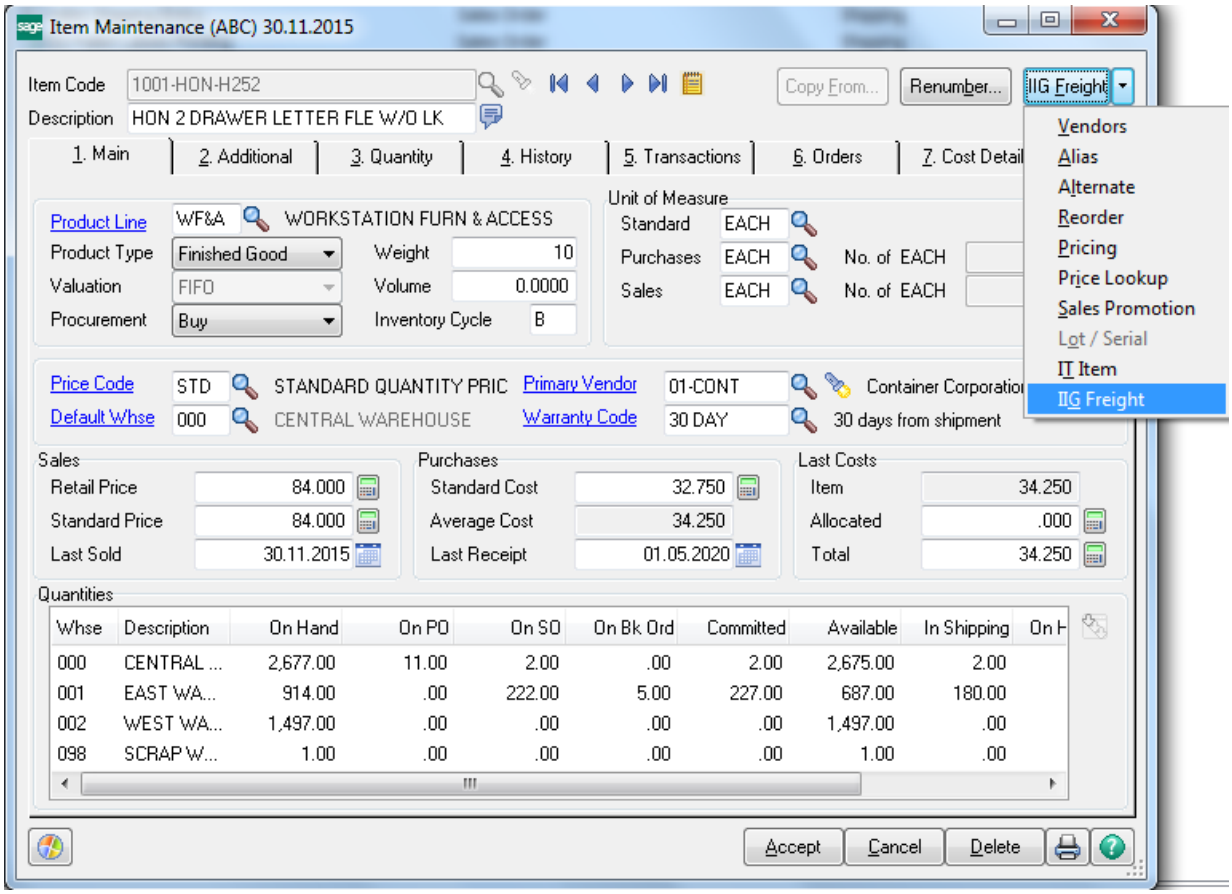
So when the rating program is looping through the product ordered to determine what boxes the product can go into, these items will be treated as a separate box with nothing else in it. The rating process will add the box factor to the item's weight and use that (along with the dimensions) to generate a rating transaction.

Products that are not always shipped as a separate box are added to the first box until the weight reaches the user set value in the **Shipping Automation Options** (Maximum weight per box for rating), which will default to 60 pounds. Once box weight exceeds this threshold, the box count is incremented and the program continues to accumulate in the next box number.

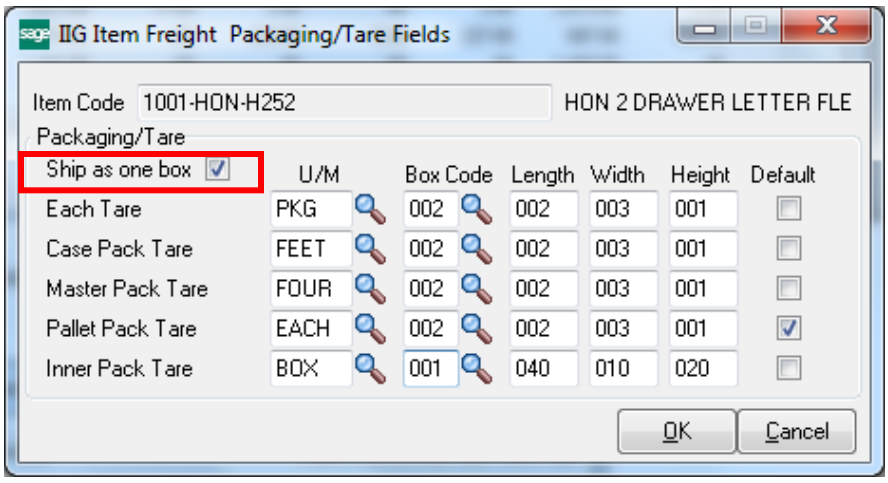
Here is an example of how the **Rate Shopping** logic works in **Sales Order Entry**. The following 2 cases may occur:

1. Products are shipped as separate box due to the dimensions of the item (these items will be treated as a separate box with nothing else in it).If Each UOM doesn't match and product is determined as separate box, the program will turn off the ship as one box logic.
2. Products are not shipped as a separate box (such items can be added in the same box until the weight exceeds the value set in the **Shipping Automation Options**).

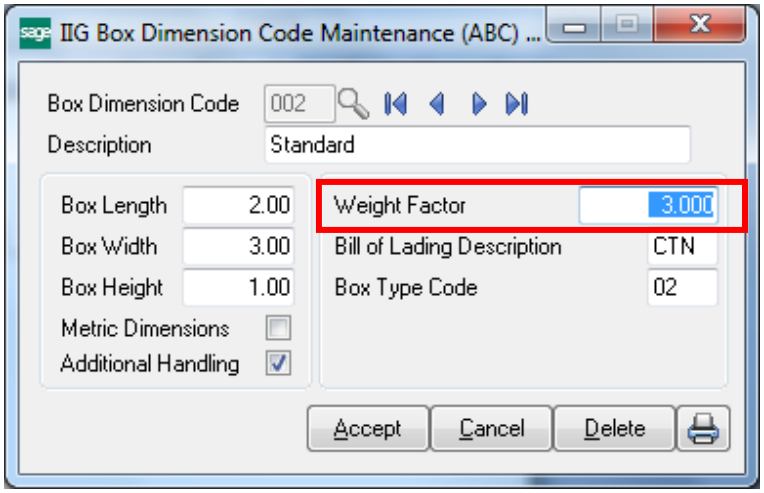
1. Item shipped as one box



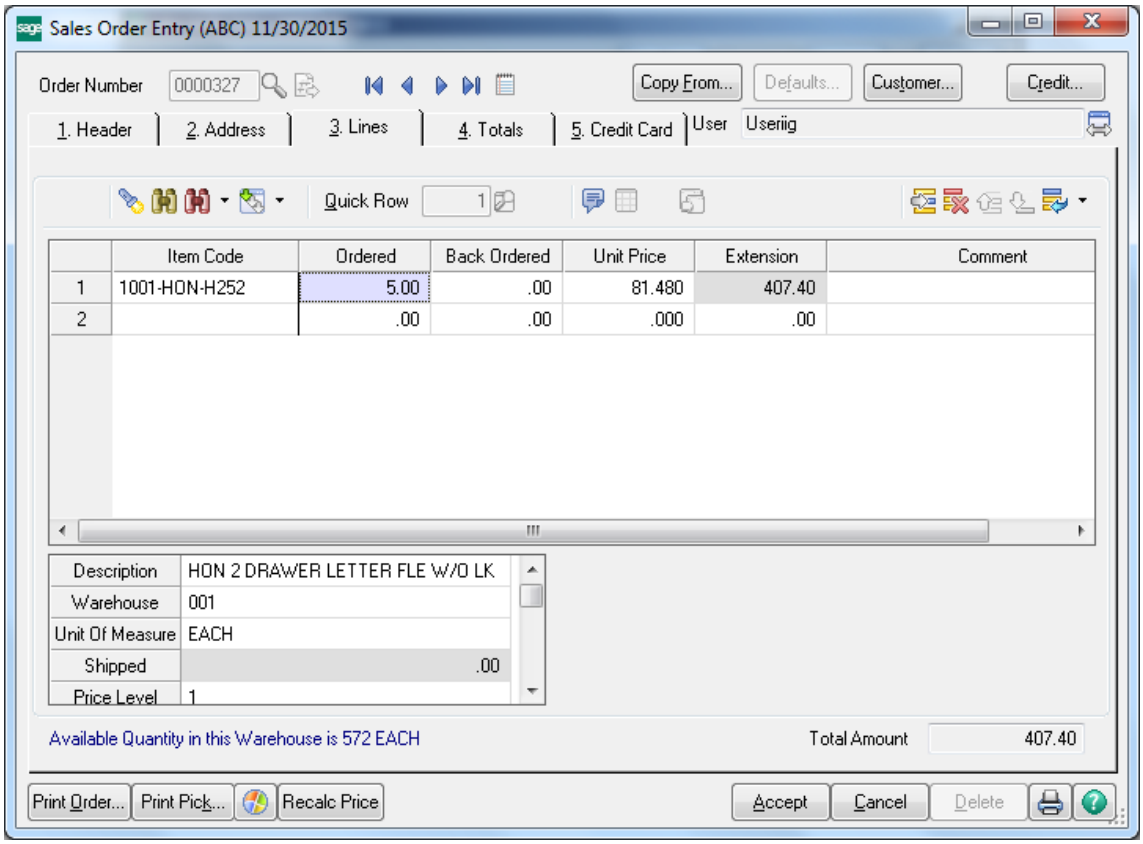
The Ship as One Box is set for 1001-HON-H252 Item.

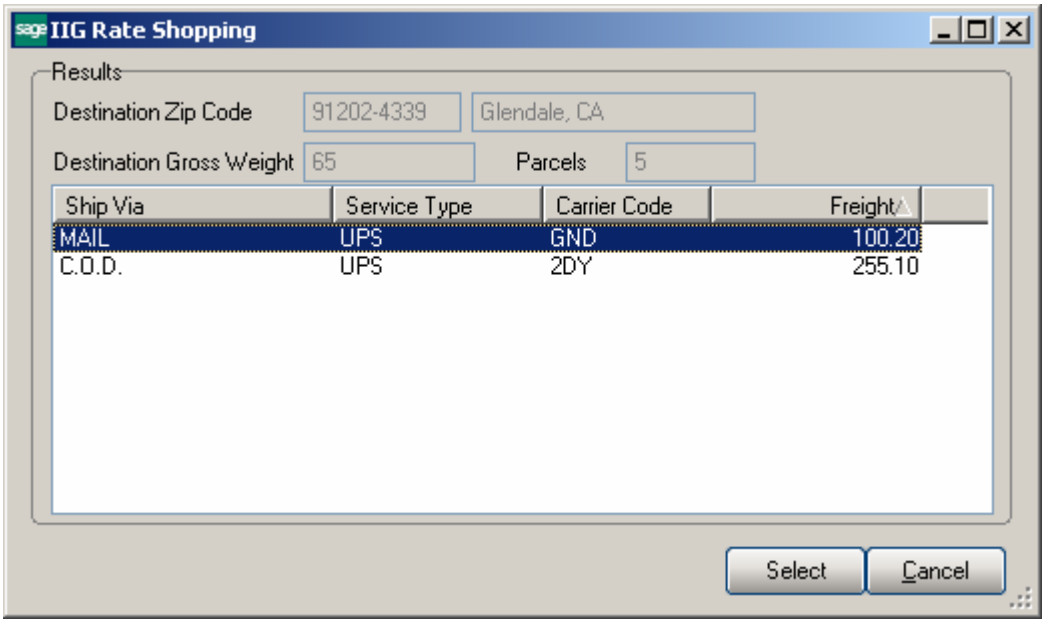


For selected “002” Box Code Weight Factor will be 3.



If the customer orders five of this item:





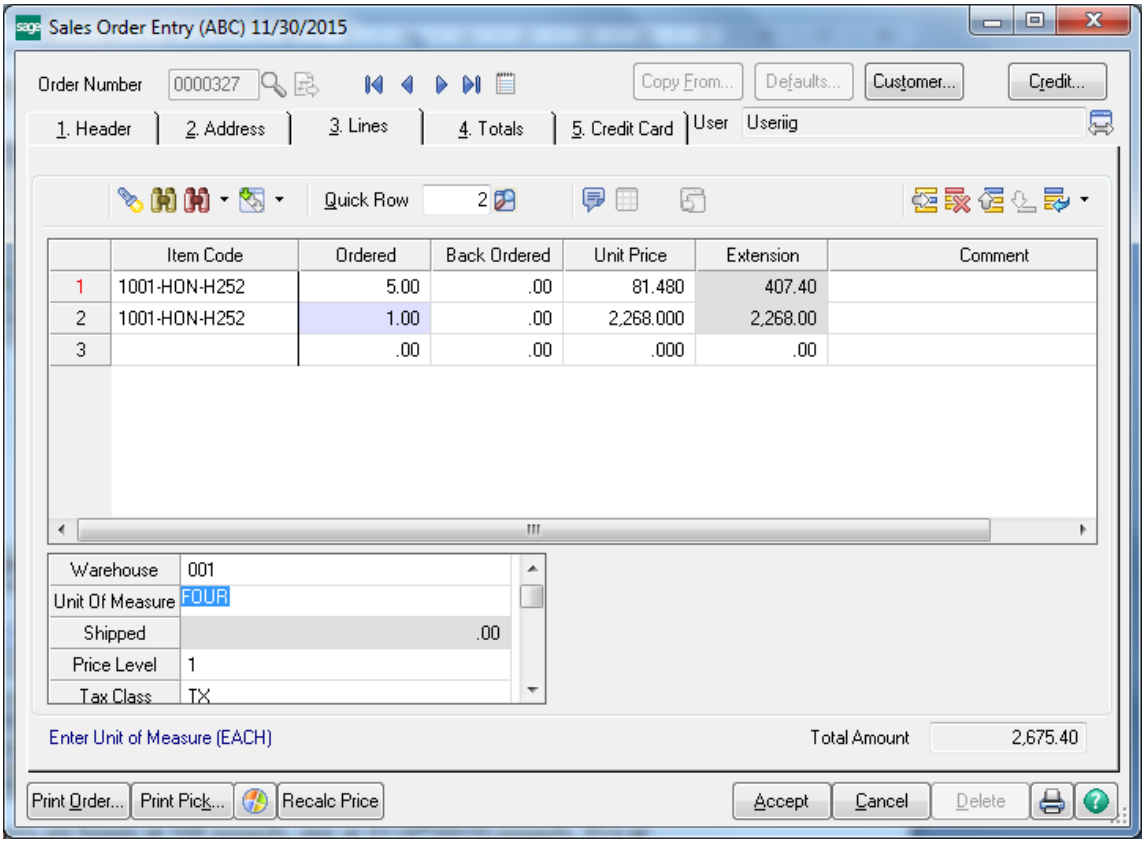
Rate shop showing five cartons at 65 pounds total.

The Formula of Weight for each item will be the following: **Item Weight + Weight Factor**

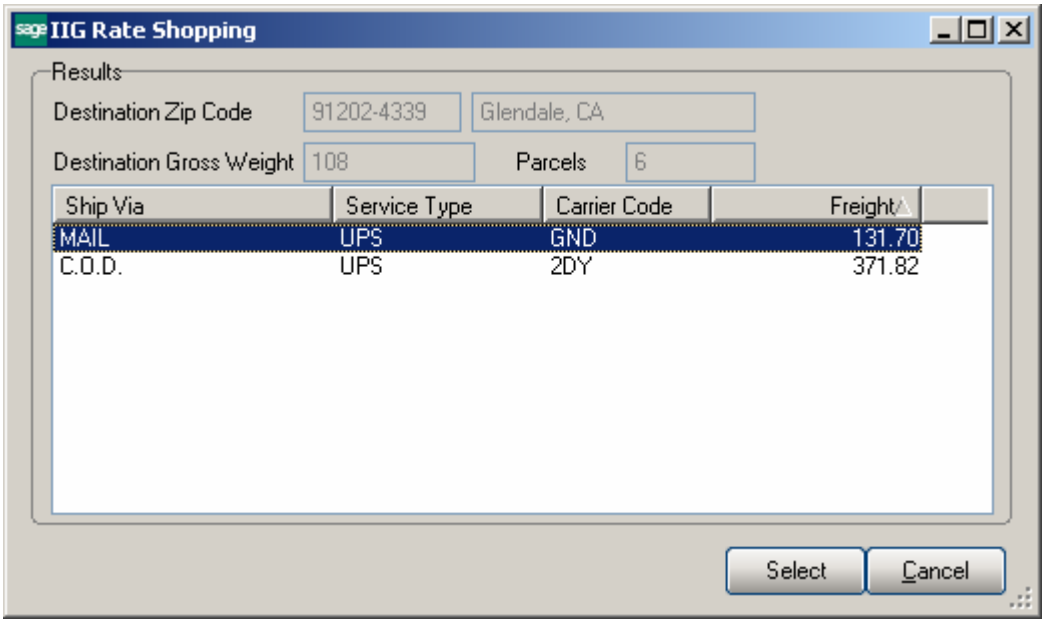
If a widget is 10 pounds, and the box factor is 3 pounds, then:

- Box 1 will be sent with dimensions 20 x 30 x 50, weight 13 pounds
- Box 2 will be sent with dimensions 20 x 30 x 50, weight 13 pounds
- Box 3 will be sent with dimensions 20 x 30 x 50, weight 13 pounds
- Box 4 will be sent with dimensions 20 x 30 x 50, weight 13 pounds
- Box 5 will be sent with dimensions 20 x 30 x 50, weight 13 pounds

Adding the same item sold with **FOUR** U/M.



Rate shop now shows six boxes at 108 pounds, one at 43 (4*10+3) pounds, five at 13 pounds.



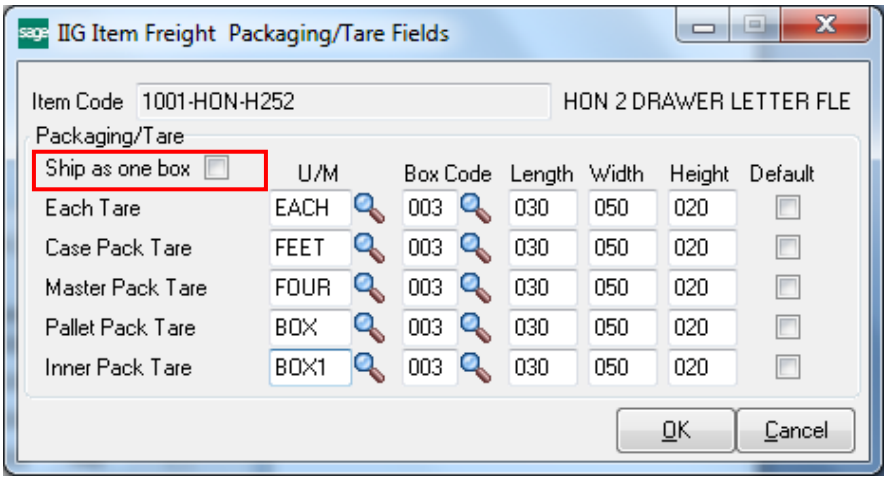
2. Products are shipped as a separate box:

Here is the sequence of steps how the program works:

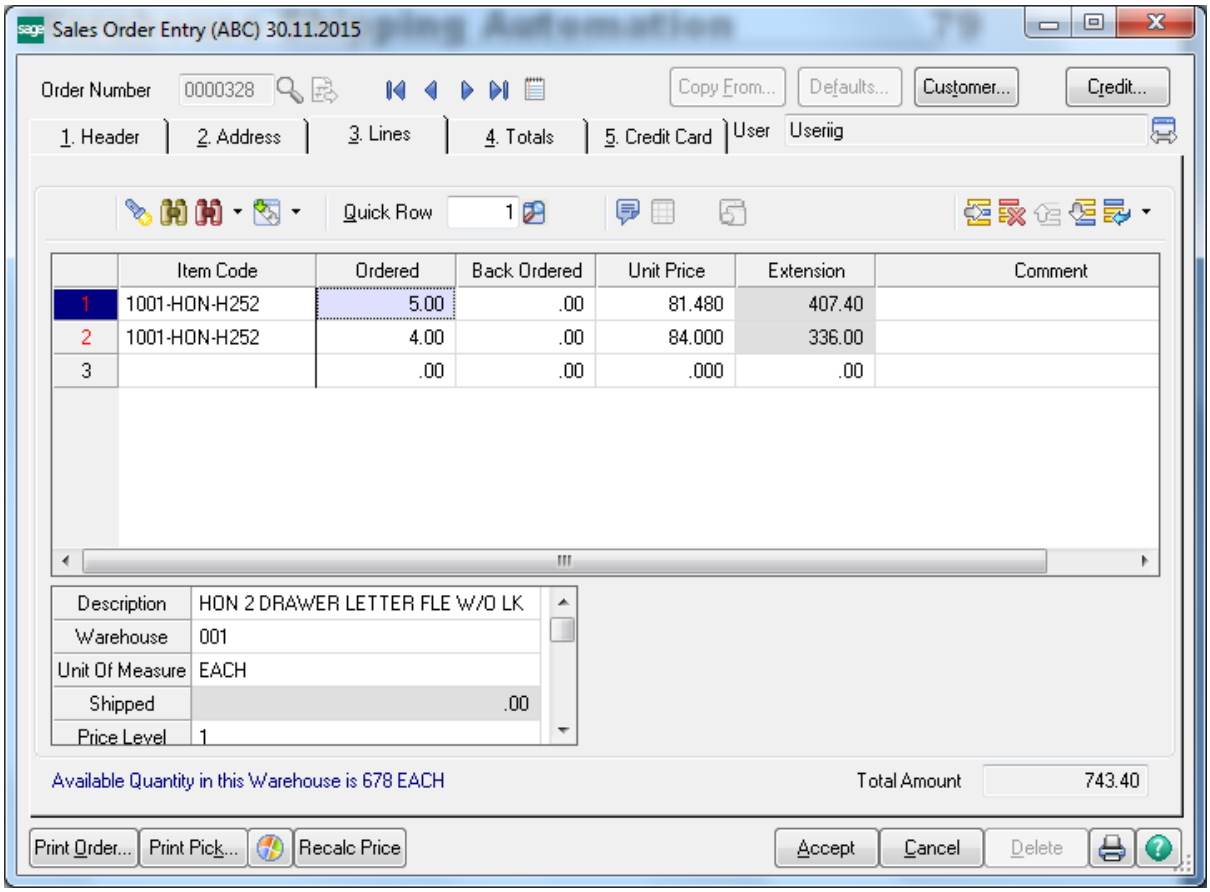
1. Determines what unit of measure is put in the **Tare Processing** screen in **I/M Maintenance**.
2. Then the program checks to see if the product is shipped in the same UOM as defined in the **Tare Processing** screen (excluding EACH). If it is, then boxes are generated for that line by the UOM.
3. Checks for the default method of shipment. If there is sufficient product to meet that default method, the line is processed in the default UOM rather than in the largest UOM because that is the default. For example, if an item is 48 to a master pack, 96 on a pallet, and 12 to a case, and the case is marked as default, a shipment of 50 would be four cases and two each, instead of one master pack and two each.
4. If not checked as one box and no default is set, the program will try to match the largest package to ship by. It will iterate down until it either hits each (if filled in), or if only cases are entered, the program will put the item back into the general weight pool until all other lines are processed.

Here is an example:

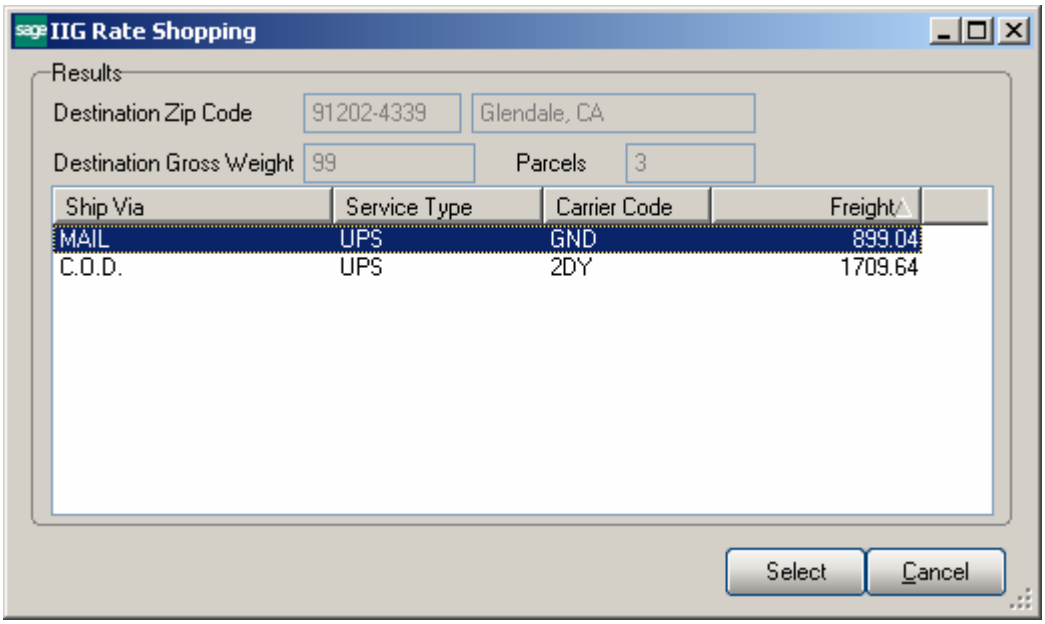
The **Ship as one box** is not checked.



Same shipment of 9 total units sold.



Same total weight, but now three boxes, 2 at 43 pounds, one at 13 pounds.



The Formula of Weight for this item will be the following. **UOM conversion factor * item weight + box factor**

If a widget is 10 pounds, and the box factor is 3 pounds, then:

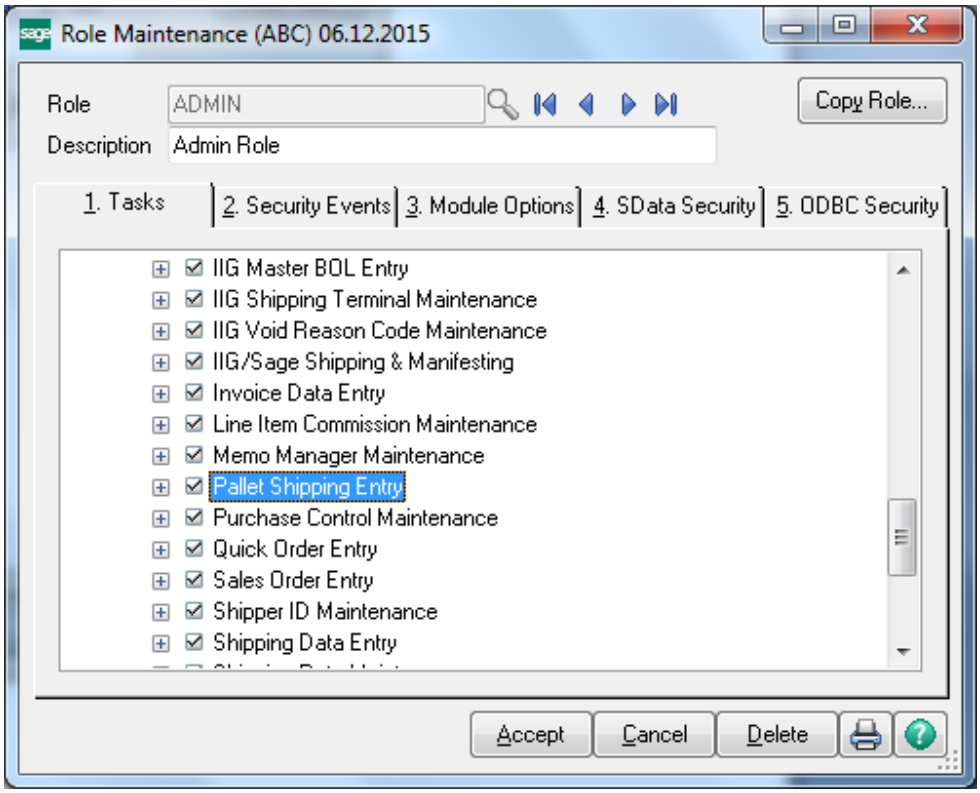
- Box 1 will be sent with dimensions 20 x 30 x 50, weight 4*10+3 = 43 pounds
- Box 2 will be sent with dimensions 20 x 30 x 50, weight 43 pounds
- Box 3 will be sent with dimensions 20 x 30 x 50, weight 10+3 = 13 pounds

So the **Default Box code** (by unit of measure) and **Ship as one box** flags allow the rating transaction to determine what the freight is really likely to be.

Pallet Shipping

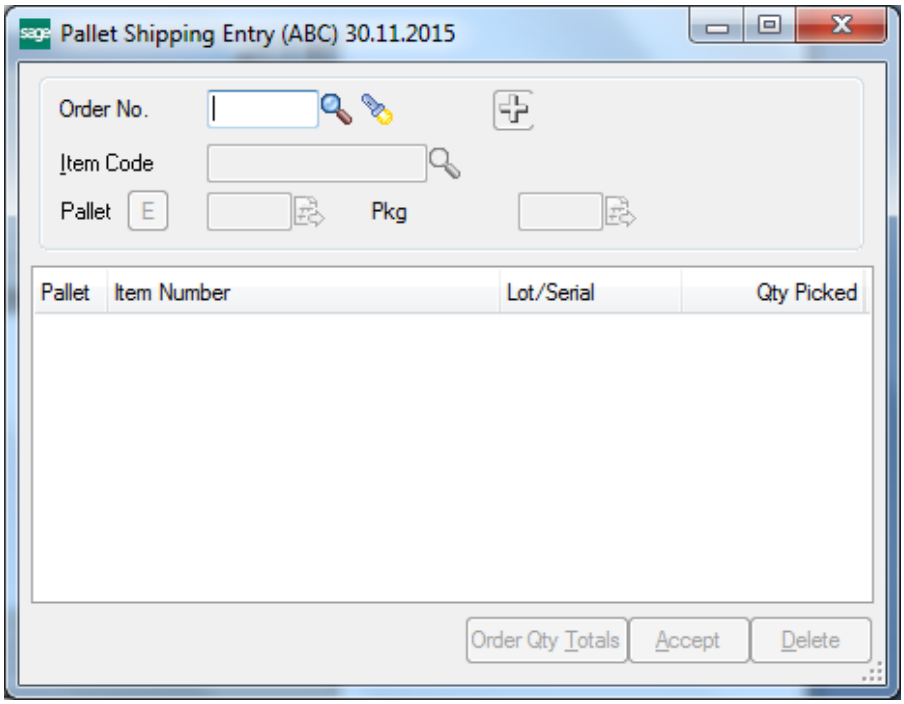
Role Maintenance

It is necessary to enable the **Pallet Shipping Entry** in the **Role Maintenance** in order to have **Pallet Shipping Entry** running for current user.



Pallet Shipping Entry

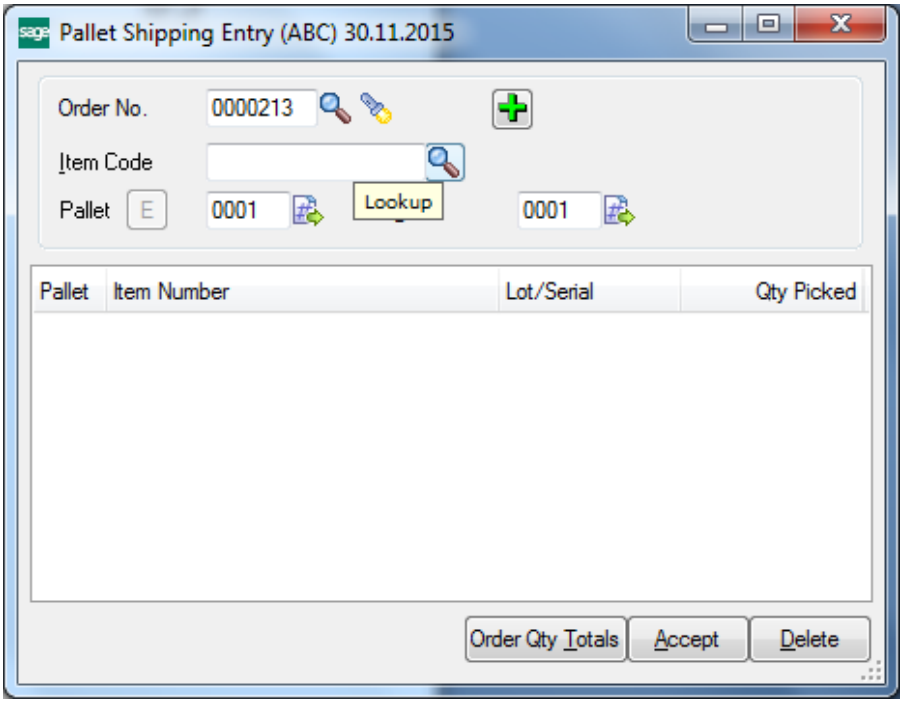
The **Pallet Shipping Entry** program has been added to the SO **Shipping Menu.** The **Pallet Shipping Entry** allows the user to scan what is picked for the order onto a pallet and accurately track what is on the pallet.



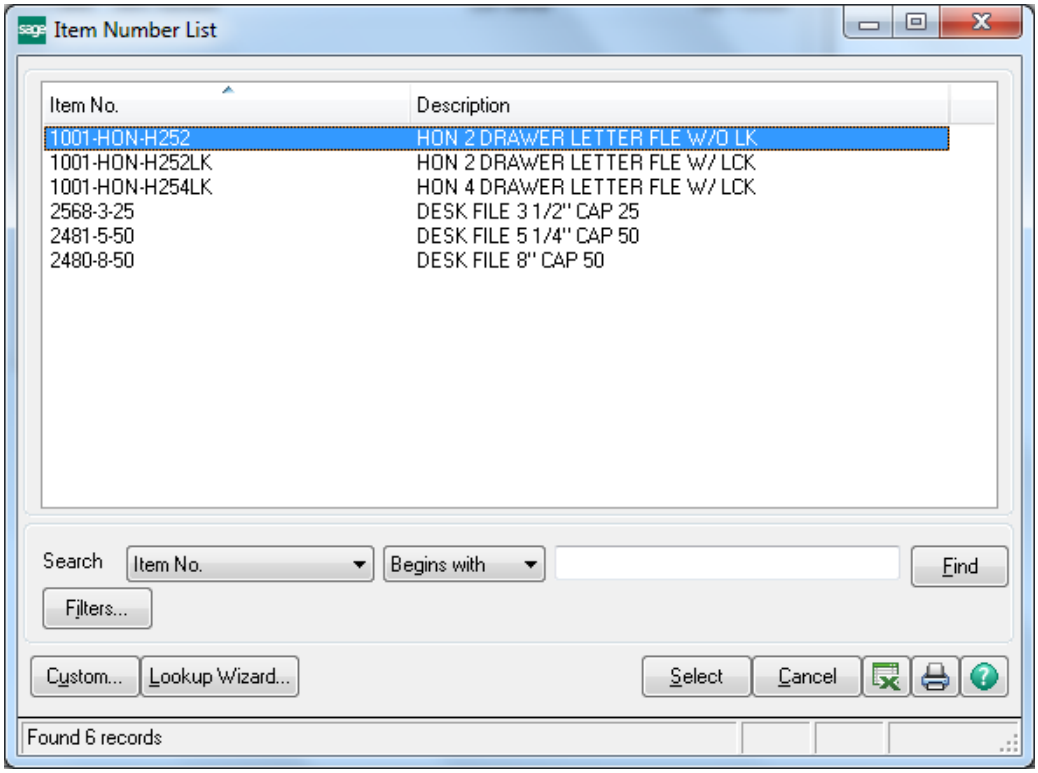
Order Number – Select Order number to process. The lookup button lists only Standard and Back Orders.

Sales Order List (flashlight button) – Lists the orders already processed.

Pallet – Is the Pallet number being processed. The Next Pallet Number button generates the next sequential pallet number for current order.

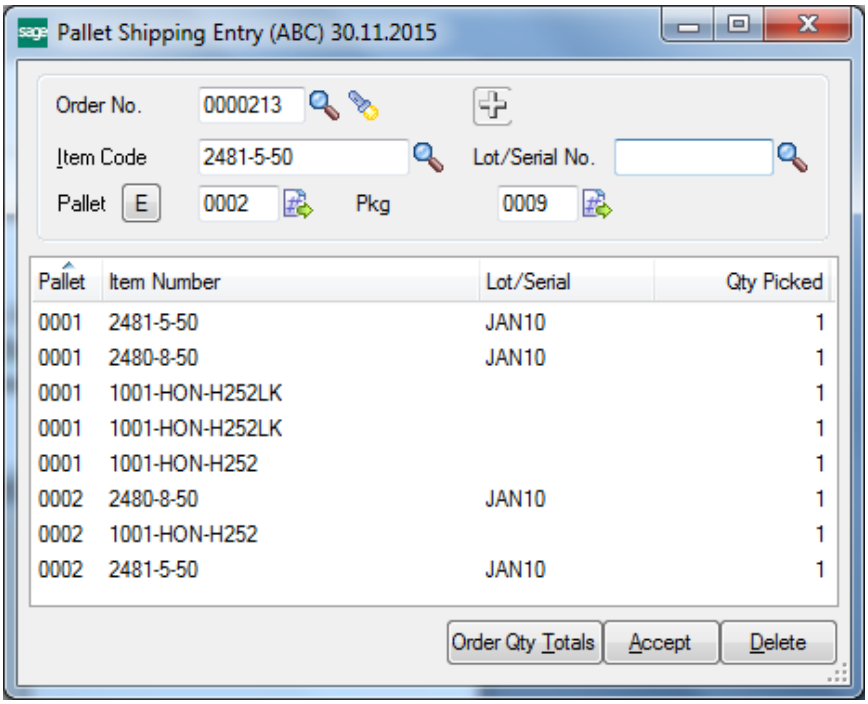


Item number – This field allows for entry of item number. The Item Lookup lists all inventory lines of current Order. For Lot/Serial Items the Lot/serial No field is shown allowing for entry of Lot/Serial number.

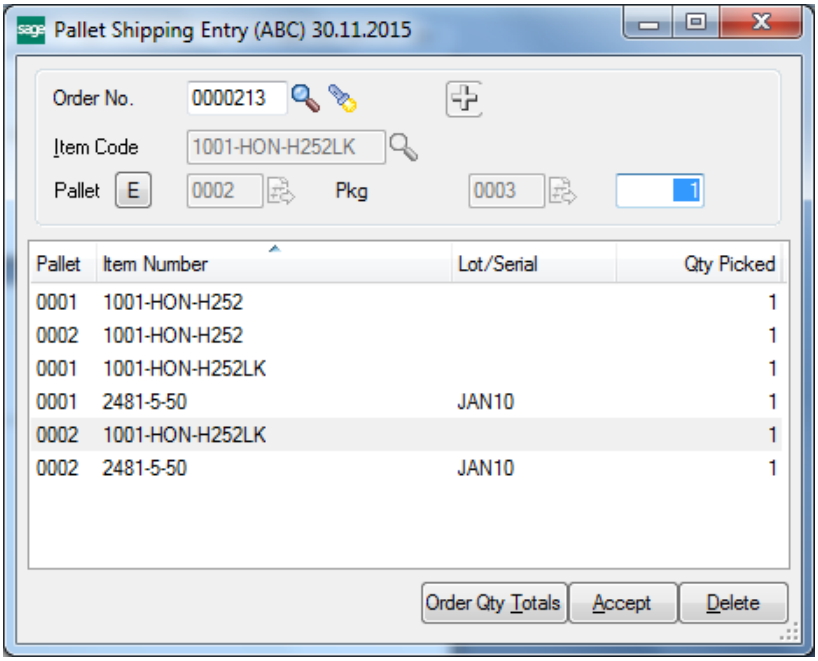


Pkg – Indicates the current Box number. The Box number is incremented as the boxes are scanned.

Plus/Minus button (+/-) – In **Plus** mode (default), upon scanning an item the quantity of the item is incremented by one. In **Minus** mode (pushed), scanning the item subtracts from the quantity already scanned. If the item quantity is zero it is removed from the list. After each scan, the button is reset to the **Plus** mode.

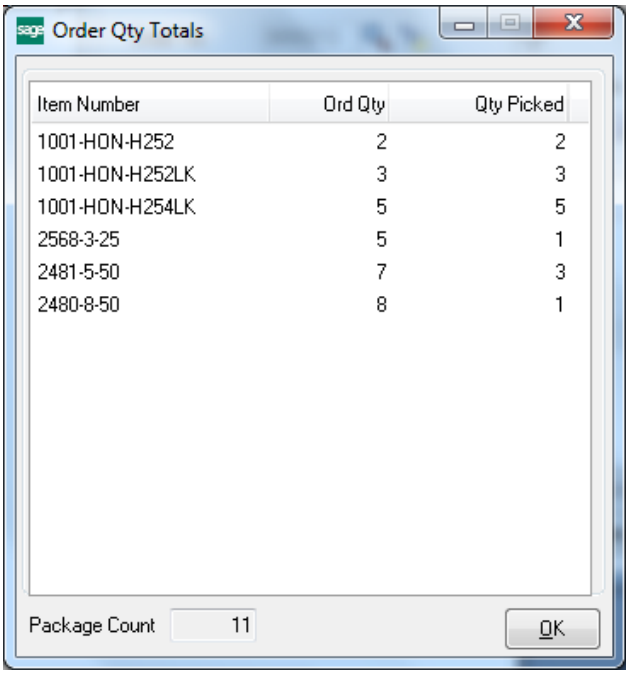


The **E (Edit)** button next to the Pallet field allows for editing the Qty Picked on the selected line.



Pallet List – This list box shows the pallet number, item, and Qty Picked (quantity of the product scanned on the pallet). Clicking on a list box line allows the user to change the quantity. If the quantity is set to zero the line is removed from the shipment list.

Order Qty Totals – Displays the items ordered and the quantities picked.



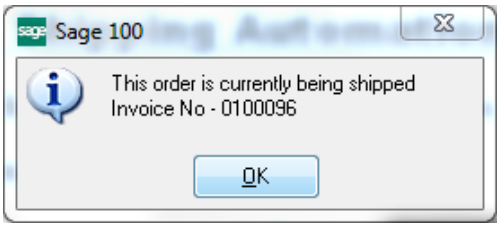
Package Count – this field displays the total number of packages.

OK – Click the OK button to return to the pallet entry.

Accept – This button writes the records in the list box and clears the screen for the next shipment.

Delete – Deletes the entire order from the Pallet Shipping Entry.

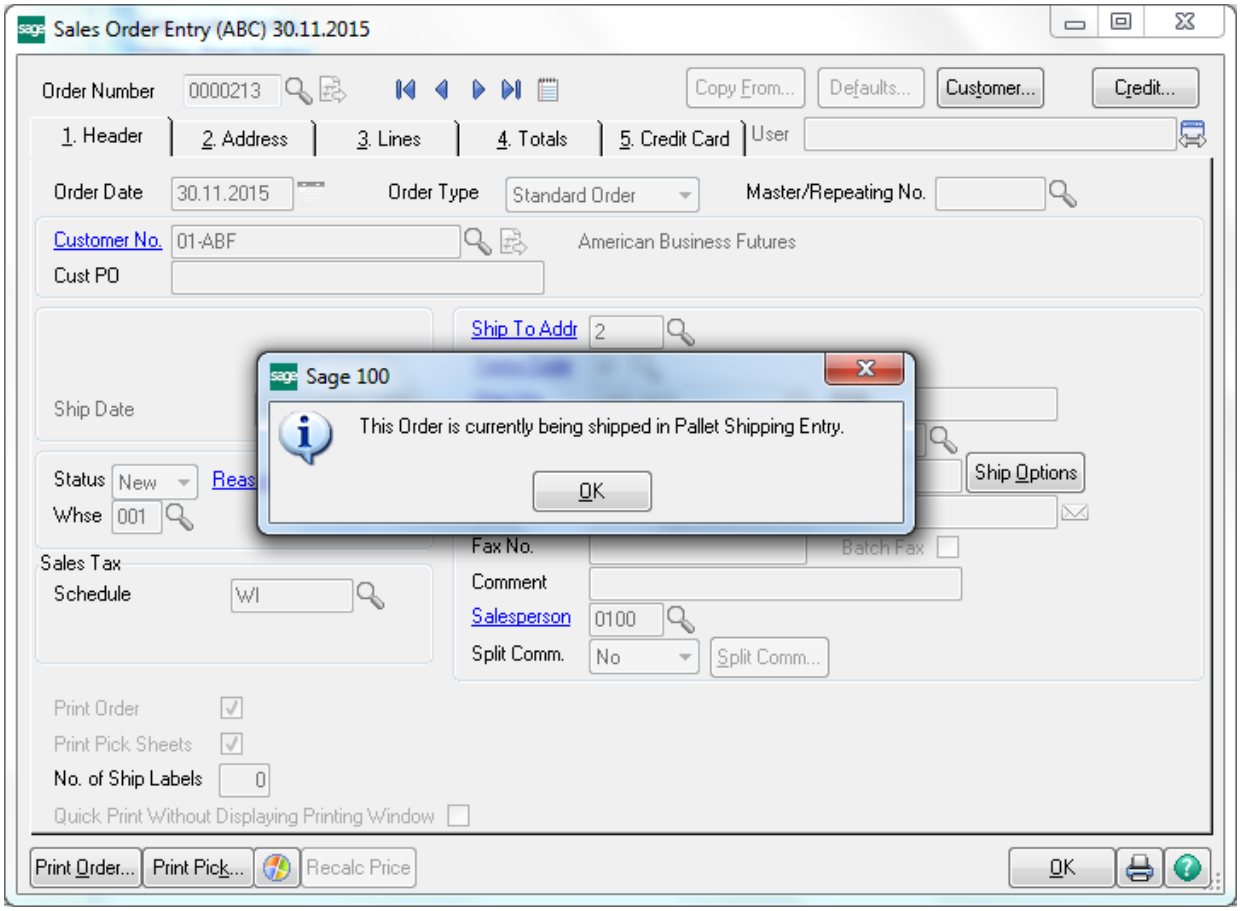
The following message appears if the selected Order number is already Invoiced:



Note: If running in the system with IIG RFS enhancement installed, the Pallet Shipping Entry is available also in the RF mode.

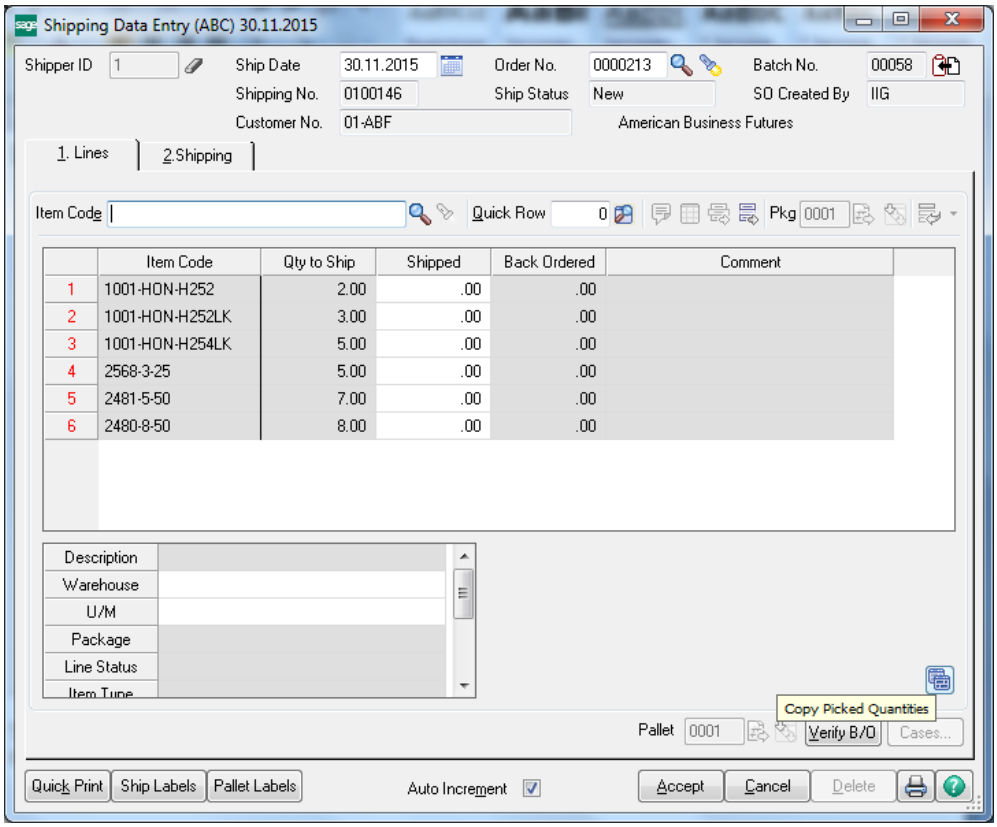
Sales Order Entry

The **Sales Order Entry** program has been modified to not allow access to the order if the order is processed by Pallet Shipping Entry.
A message will popup when the user selects a Sales Order processed by **Pallet Shipping Entry**.

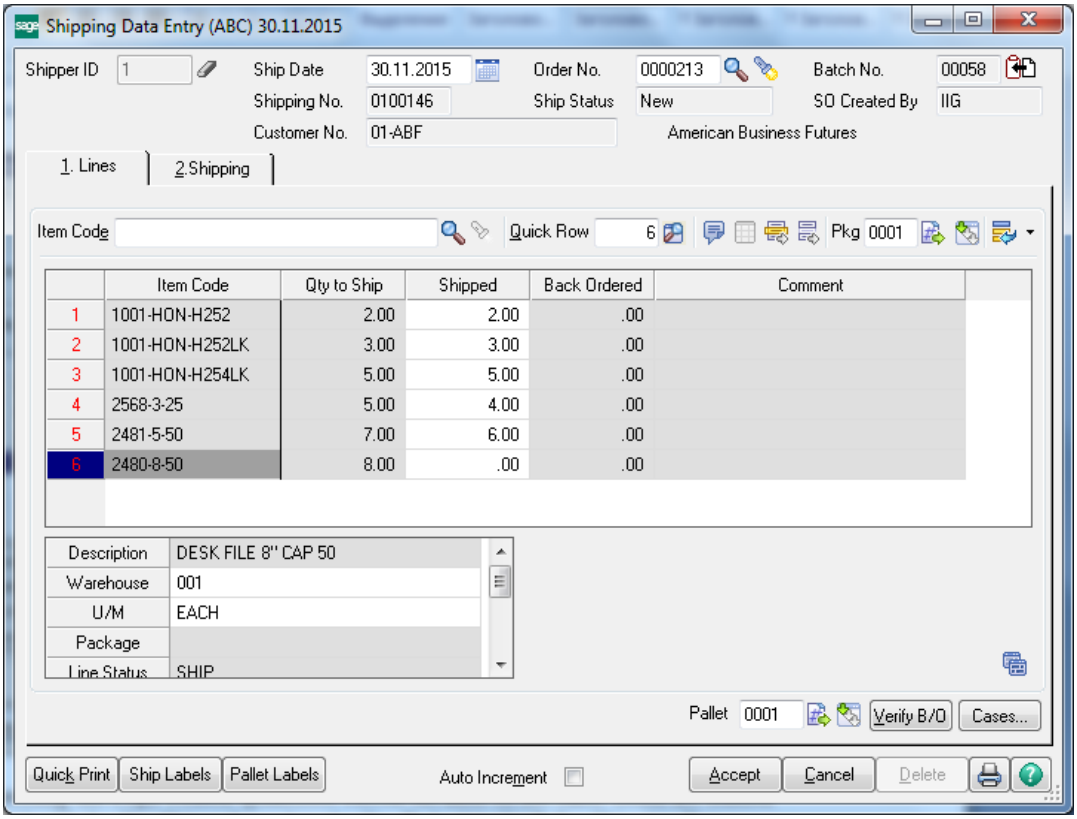

Sales Order Entry (ABC) 30.11.2015
Order Number
0000213
Copy From...
Defaults...
Customer...
Credit...
1. Header
2. Address
3. Lines
4. Totals
5. Credit Card
User
Order Date
30.11.2015
Order Type
Standard Order
Master/Repeating No.
Customer No.
01-ABF
American Business Futures
Cust PO
Ship To Addr
2
Ship Date
Sage 100
This Order is currently being shipped in Pallet Shipping Entry.
OK
Status
New
Whse
001
Ship Options
Fax No.
Batch Fax
Sales Tax
Schedule
WI
Comment
Salesperson
0100
Split Comm.
No
Split Comm...
Print Order
Print Pick Sheets
No. of Ship Labels
0
Quick Print Without Displaying Printing Window
Print Order...
Print Pick...
Recalc Price
OK

Shipping Data Entry

The **Copy Picked Quantities** button has been added to the Shipping Data Entry Lines tab to allow automatically shipping the quantities already picked in the **Pallet Shipping Entry.**

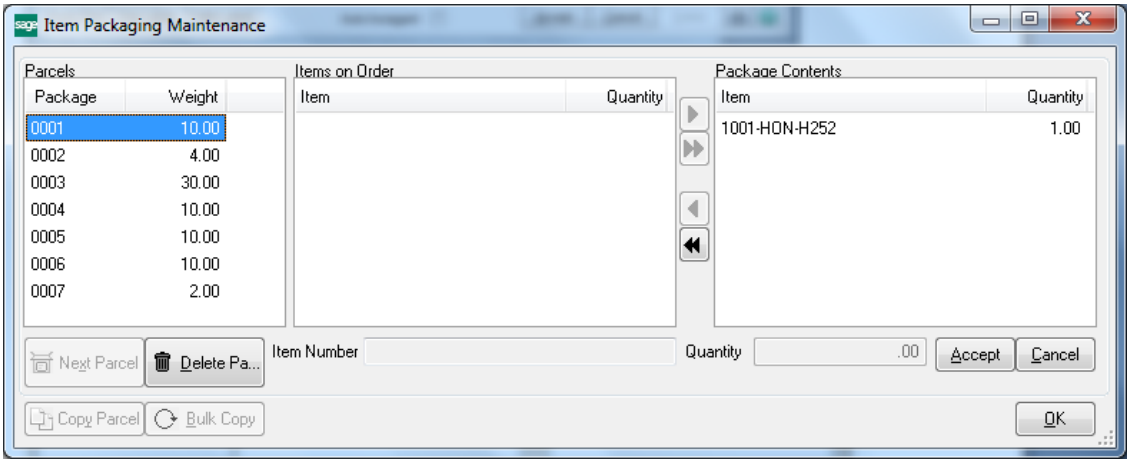


The **Copy Picked Quantities** button works only if there is no Shipped quantity entered for a line.

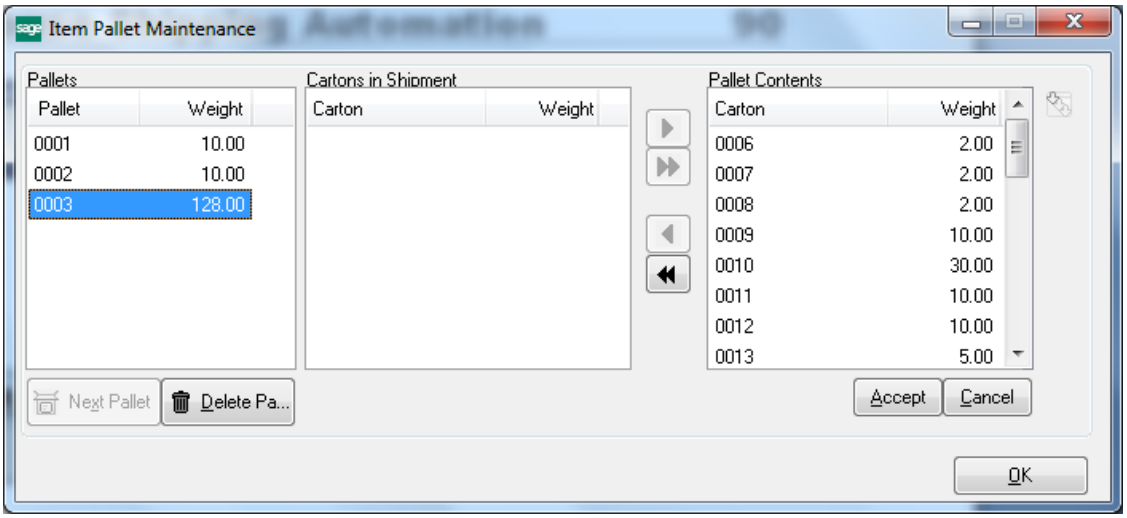


Upon pressing the Copy Picked Quantities button the lines of the Sales Order are loaded in the grid with the Qty Shipped equal to the Qty Picked in the Pallet Shipping Entry.

The Items shipped by packages are added in the **Item Packaging Maintenance** with respective Package numbers.



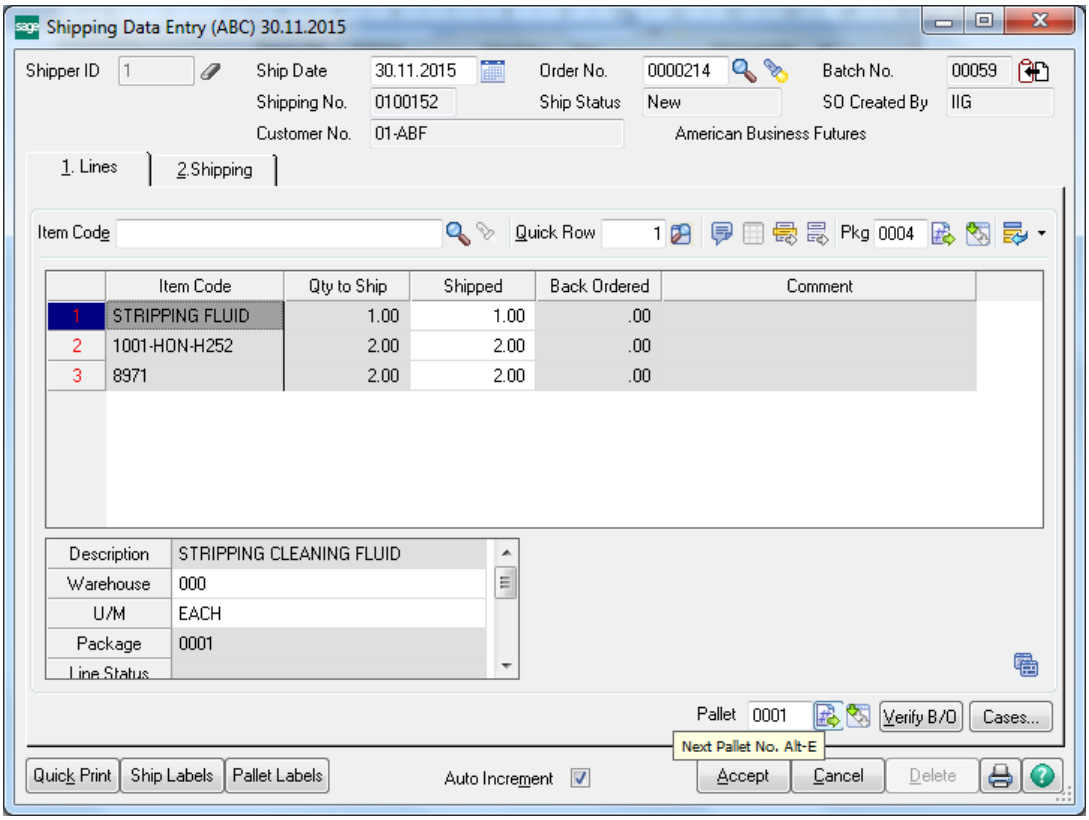
The Items shipped by pallets are added in the **Item Pallet Maintenance** with respective Pallet numbers.



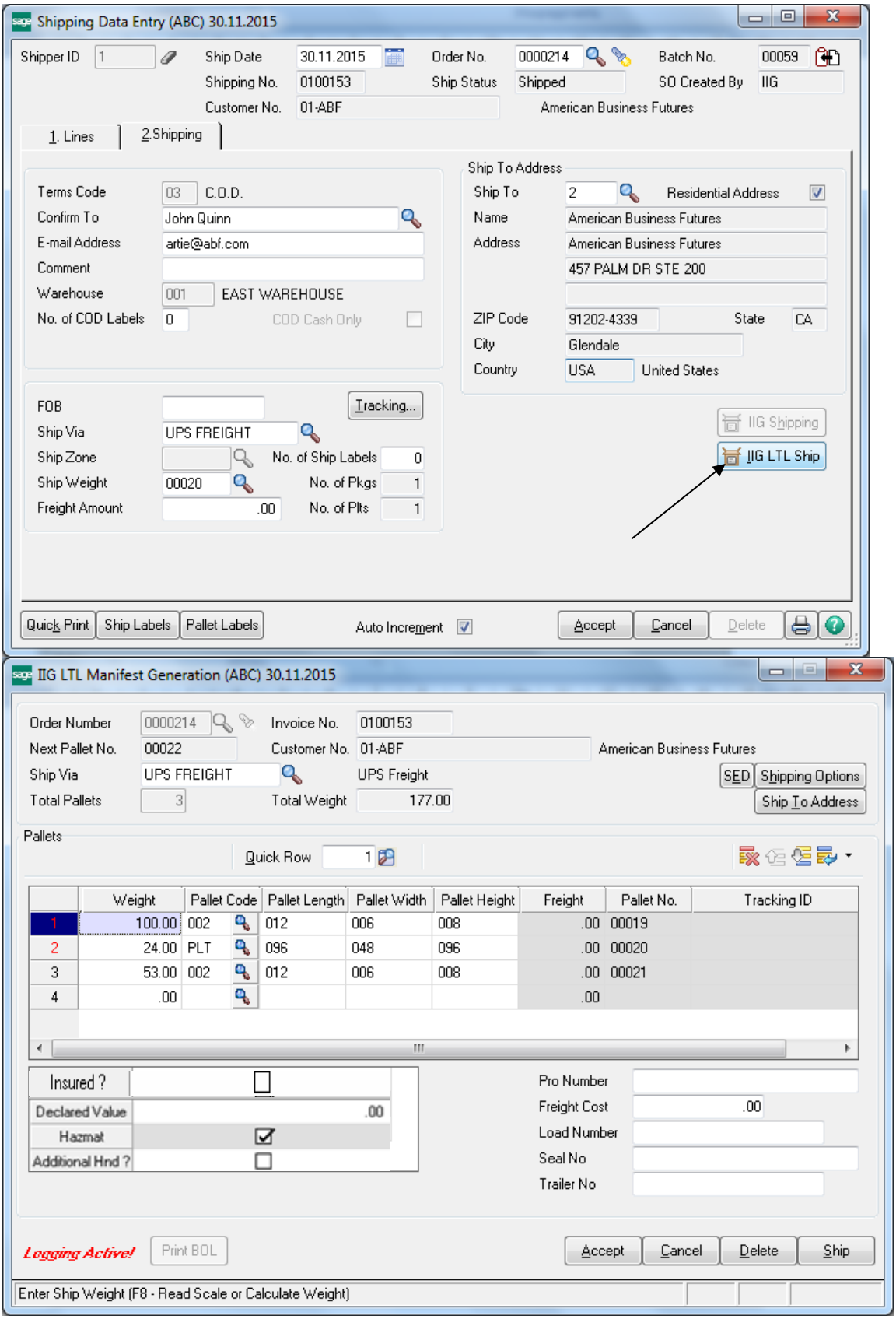
LTL Shipment and Bill of Lading Processing

Shipping Data Entry

The **Shipping Data Entry** program has been modified to update the Pkg or Pallet numbers on the screen when **Copy Picked Quantity** button is pressed and picked quantities are loaded.

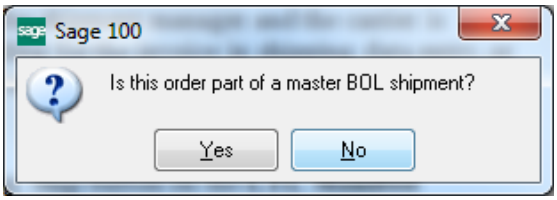


The **IIG LTL Ship** button is enabled on the Shipping tab if the selected Ship Via carrier is marked as an LTL carrier or the total shipment weight exceeds 150 pounds.

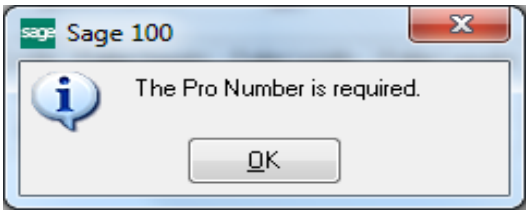

Shipping Data Entry (ABC) 30.11.2015
Shipper ID 1
Ship Date 30.11.2015
Order No. 0000214
Batch No. 00059
Shipping No. 0100153
Ship Status Shipped
SO Created By IIG
Customer No. 01-ABF
American Business Futures
1. Lines
2.Shipping
Terms Code 03 C.O.D.
Confirm To John Quinn
E-mail Address artie@abf.com
Comment
Warehouse 001 EAST WAREHOUSE
No. of COD Labels 0
COD Cash Only
Ship To Address
Ship To 2
Residential Address
Name American Business Futures
Address American Business Futures
457 PALM DR STE 200
ZIP Code 91202-4339
State CA
City Glendale
Country USA United States
FOB
Tracking...
Ship Via UPS FREIGHT
Ship Zone
No. of Ship Labels 0
Ship Weight 00020
No. of Pkgs 1
Freight Amount .00
No. of Plts 1
IIG Shipping
IIG LTL Ship
Quick Print
Ship Labels
Pallet Labels
Auto Increment
Accept
Cancel
Delete
IIG LTL Manifest Generation (ABC) 30.11.2015
Order Number 0000214
Invoice No. 0100153
Next Pallet No. 00022
Customer No. 01-ABF
American Business Futures
Ship Via UPS FREIGHT
UPS Freight
Total Pallets 3
Total Weight 177.00
SED
Shipping Options
Ship To Address
Pallets
Quick Row 1
Weight Pallet Code Pallet Length Pallet Width Pallet Height Freight Pallet No. Tracking ID
1 100.00 002 012 006 008 .00 00019
2 24.00 PLT 096 048 096 .00 00020
3 53.00 002 012 006 008 .00 00021
4 .00 .00
Insured ?
Declared Value .00
Hazmat
Additional Hnd ?
Pro Number
Freight Cost .00
Load Number
Seal No
Trailer No
Logging Active!
Print BOL
Accept
Cancel
Delete
Ship
Enter Ship Weight (F8 - Read Scale or Calculate Weight)

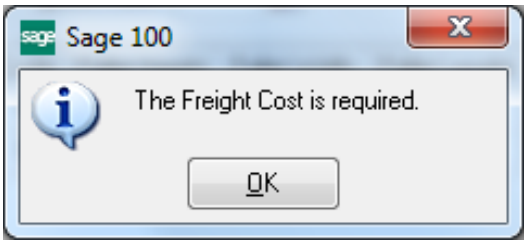
Once the shipment is scanned, reviewed by the shipment manager and the carrier is selected, he can either generate the bill of lading for the invoice in shipping data entry, or generate the master bill of lading for several invoiced orders using the Master Bill of Lading Entry program.

The following message appears upon pressing Ship button on the **LTL Manifest Generation** screen if no Pro Number and no Freight Cost are entered:

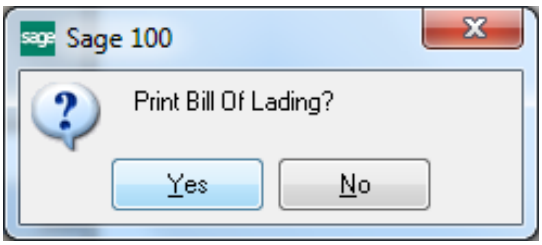


If **NO** is selected, meaning just bill of lading should be generated for current shipment, the **Pro Number** and **Freight Cost** fields must be filled in. Otherwise the following messages appear:

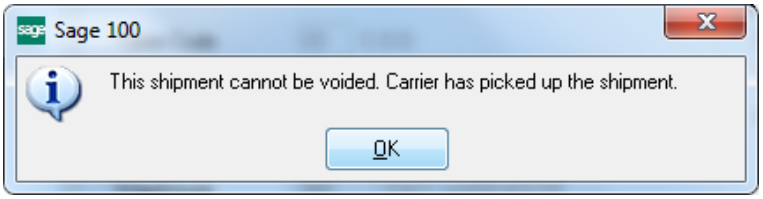




Upon selecting **Yes a**nother message is popup to confirm printing of Bill of Lading:

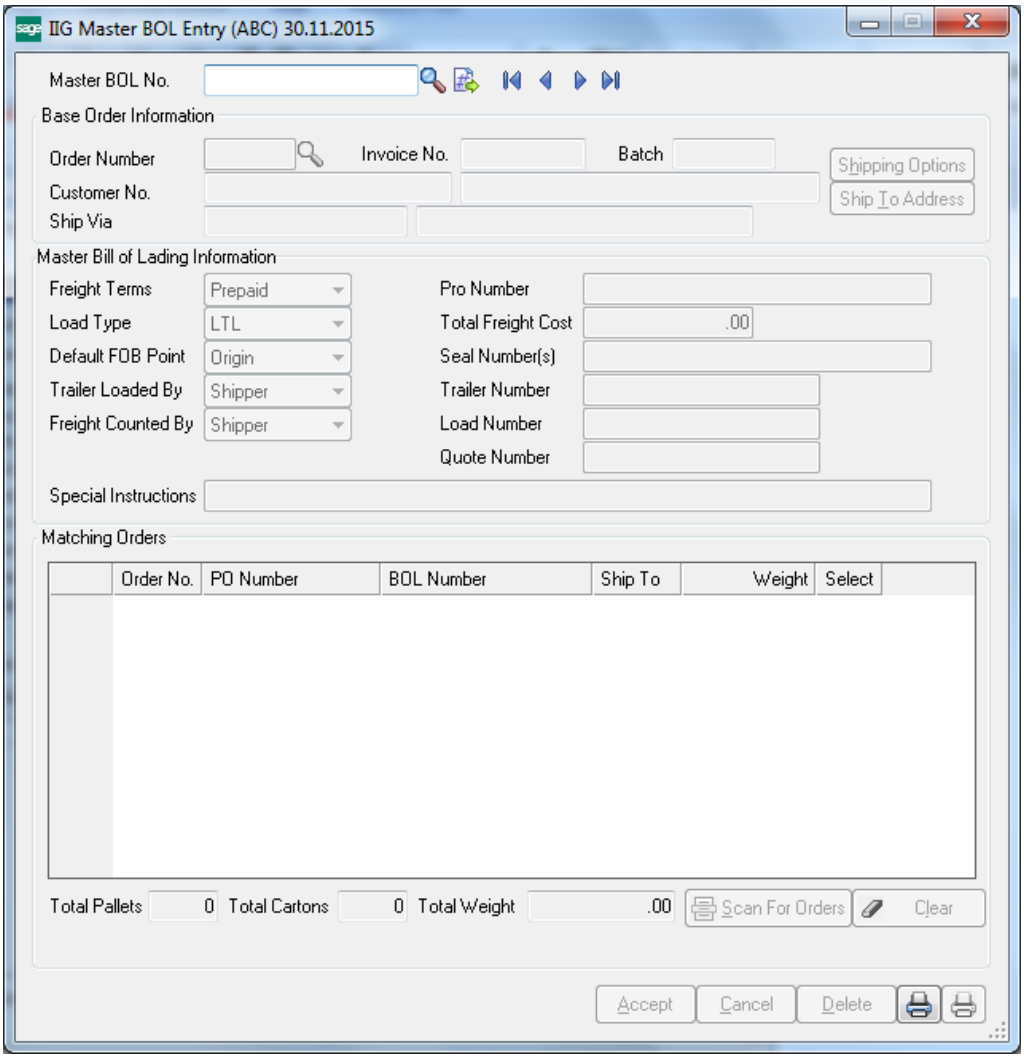


The Shipment can no longer be voided after it is picked up in the **IIG BOL Manifest Pickup Entry.**

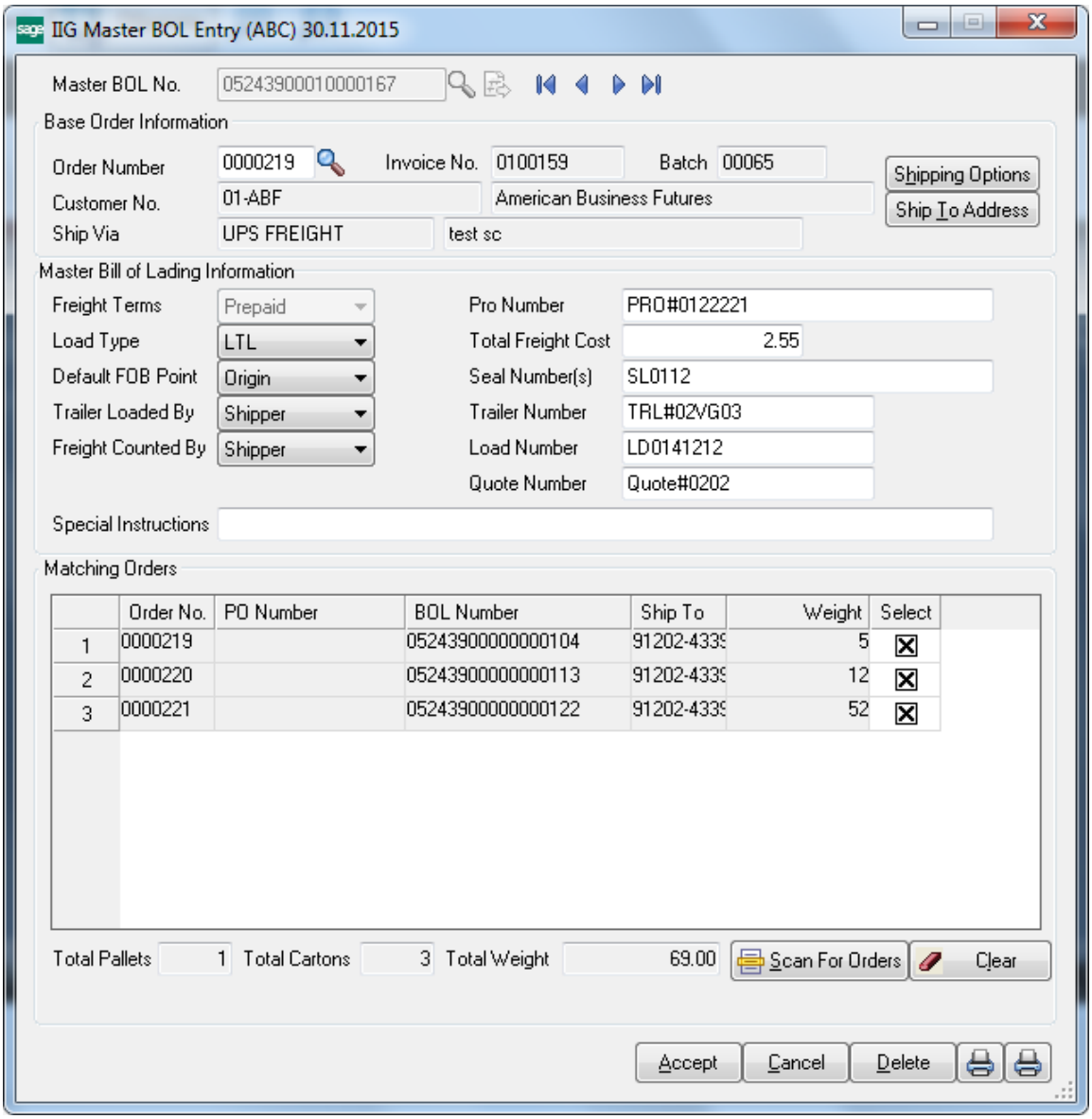


IIG Master BOL Entry

The **IIG Master BOL Entry** program has been added under the **Sales Order-> Shipping** menu to allow grouping customer shipments with the same ship to and carrier in the same batch into one master bill of lading. Each of the underlying invoices must first be processed through shipping data entry to process the individual cartons and pallets that will be added to current shipment.



It is necessary to select the lead order in the shipment. The program uses the selected order to match the other orders in the batch that can be shipped with this order, matching the carrier and ship to.



Based on the terms code, if the shipment is COD, only orders that are COD also (same terms code as the base order) are selected for the MBOL. Other terms codes can be mixed in a non-COD shipment.

The program loads and displays the list of orders in the batch that match and are not already on other MBOL. The user can unselect any orders that should not be shipped on the MBOL. The Pro Number and Total Freight fields are required for Master BOL and must be entered by the user.
Once the needed information is entered, the MBOL can be printed.

Master BOL Number	Master Bill of Lading number (17 digits).
Next MBOL Number	Click on this button to generate the next master bill of lading number for a new shipment.
Order Number	**I**s the base order for the shipment. Typically this would be the largest order in the shipment. Once an order is selected, this field is disabled while the program scans for matching orders.
Shipping Options	This button displays the Shipping Options for the first order. These options are applied to the entire shipment.
Ship To Address	Displays the Ship To address field and allows setting the Residential Address flag if not set.
Ship Via	Selects the Ship Via if blank on the order.
Freight Terms	Set by the terms in the Shipping Options, this is a display only field that will display *Prepaid*, *Freight Collect*, or *3rd Party*.
Load Type	Drop down list: *LTL* (default) or *Truckload*
FOB Point	Drop down list: *Origin* (default) or *Destination*. Defaults from BOL options.
Loaded by	Drop down list: *Shipper* (default) or *Driver*. Defaults from BOL options.
Counted by	Drop down list: *Shipper* (default), *Driver-Pallets*, or *Driver-Pieces*. Defaults from BOL options.
Pro Number	Pro Number from the carrier. Maximum of 30 characters.
Seal Number(s)	Seal numbers on the trailer/container.
Trailer Number	Trailer number.
Load Number	Load number from the trading partner if used.
Quote Number	Quote number from 3rd party consolidators.
Matching Order Grid	This grid shows the orders that match the ship to zip code**,** Ship To code, and Carrier. The orders in the shipment match also on how they are paid for (Shipper/3rd party, consignee, etc.). The system loads all of the matching orders that are invoiced, same carrier, and with a bill of lading number. The user may select not to ship some of the selected orders with this shipment due to weight or trailer size issues. Orders that are on a different MBOL or are already marked as picked up cannot be selected or loaded.
Total Pallets	Total of the pallets on the listed order/invoices.
Total Cartons	Total of the cartons on the listed order/invoices.
Total Weight	Total weight of the listed order/invoices.
Scan for Orders	This button is enabled after the base order is selected. Upon pressing the button the program scans the orders and loads the ones that match the base order that are invoiced with bills of lading in the same batch as the base order's invoice.

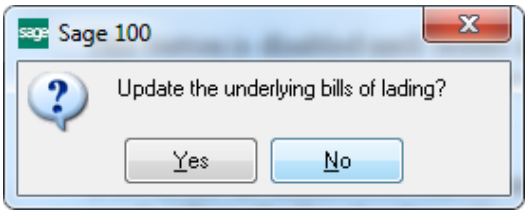
Clear This button is disabled until orders are found and loaded. Clears the list of orders found in the Scan For Order function.

Delete Deletes the un-manifested MBOL and removes the MBOL number from the listed orders selected.

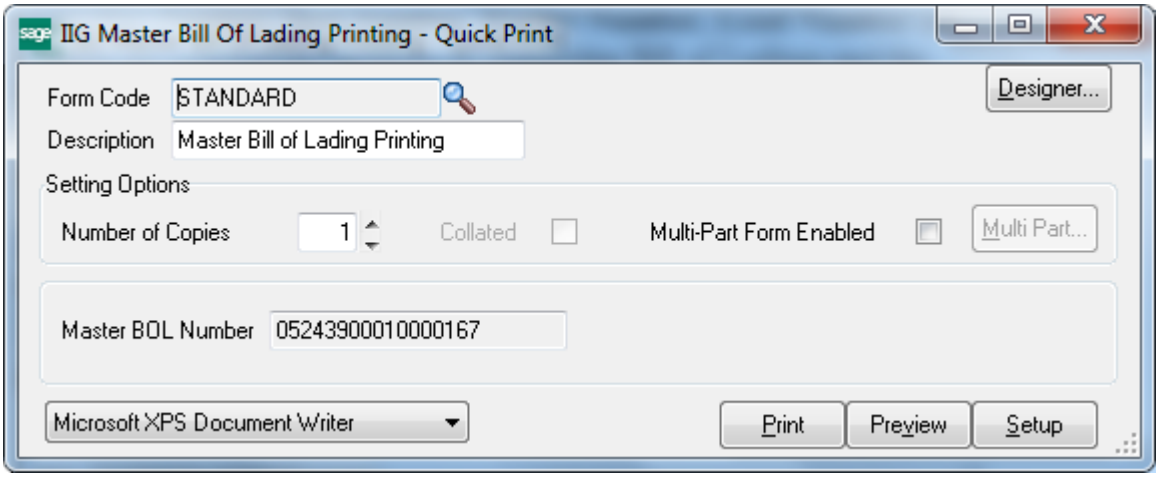
Print BOL List This button prints a list of the orders/invoices with the bill of lading information).

Print This button prints the Master Bill of Lading.

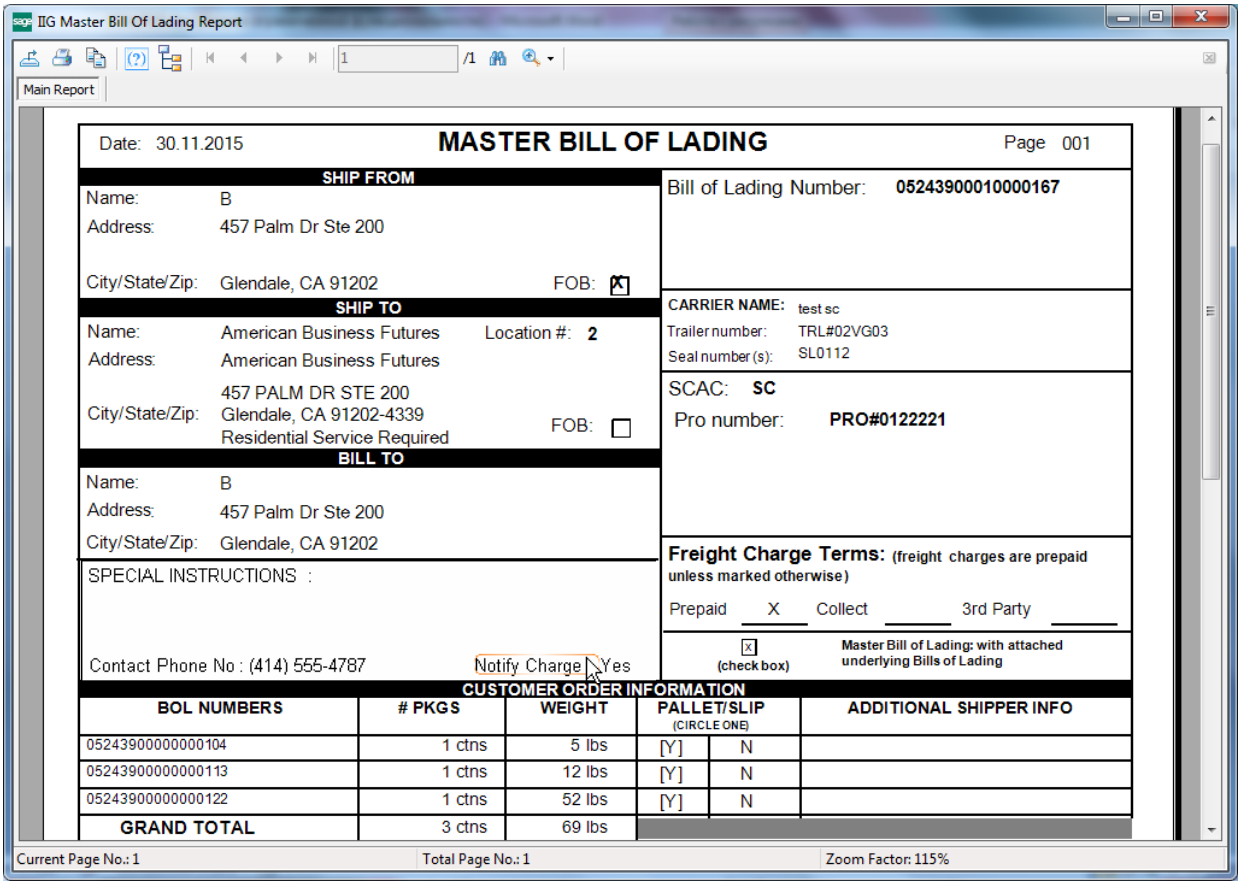
Upon pressing the Print MBOL button the following message appears:



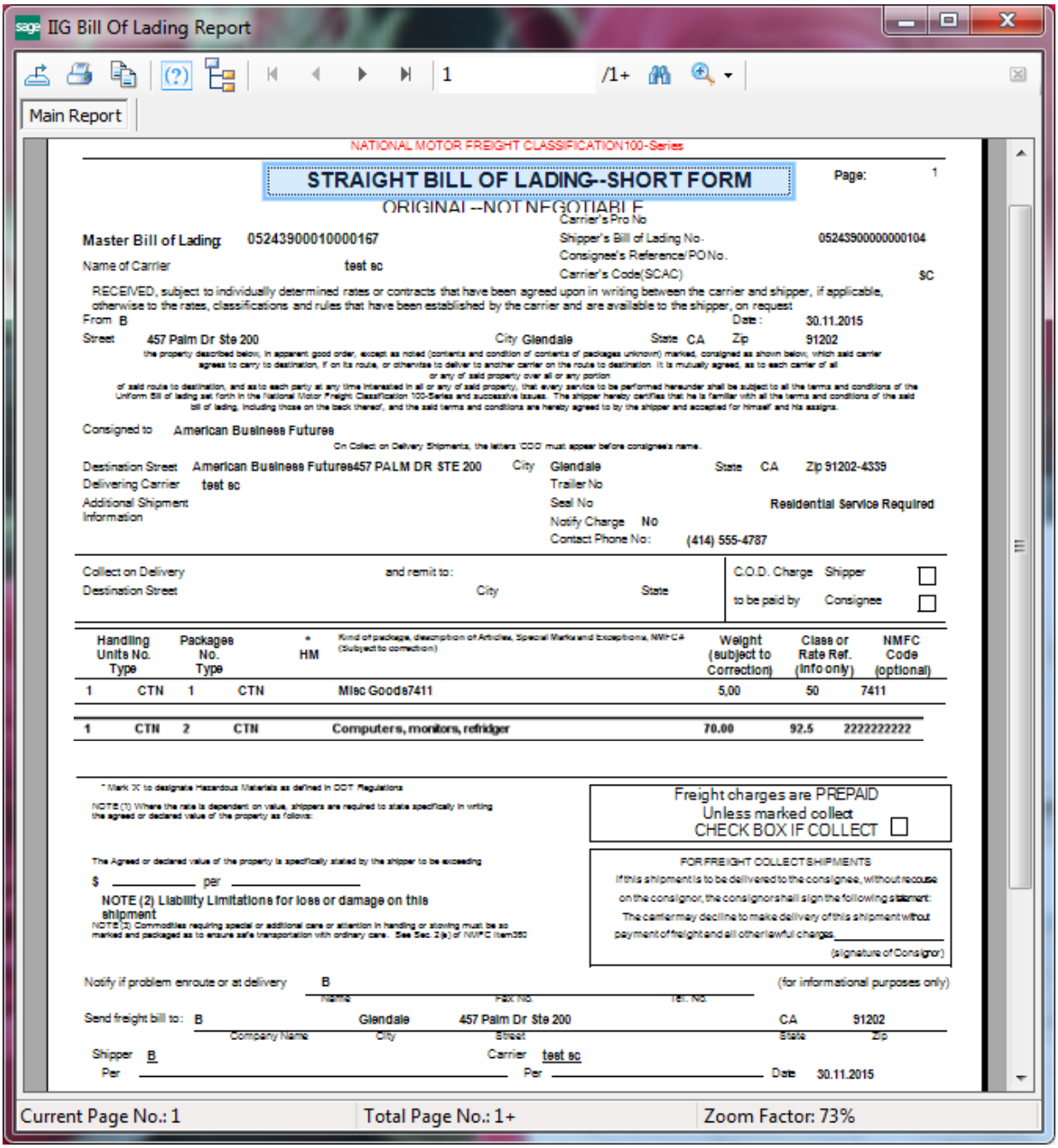
If Yes is selected the **Pro Number, Seal Number, Trailer Number, Load Number** and **Quote Number** fields are respectively updated on underlying Bill of Ladings and the **Total Freight Cost** is allocated to the sub BOL-s by percentage of the total weight.



Here is an example of Master Bill of Lading printout:



After printing **Master Bill of Lading** the underlying Bill of Lading is printed by the IIG Bill Of Lading form last used:

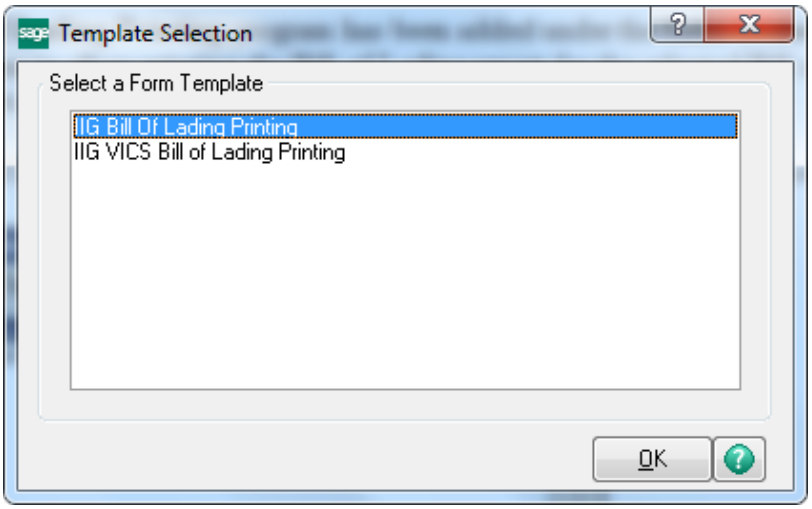


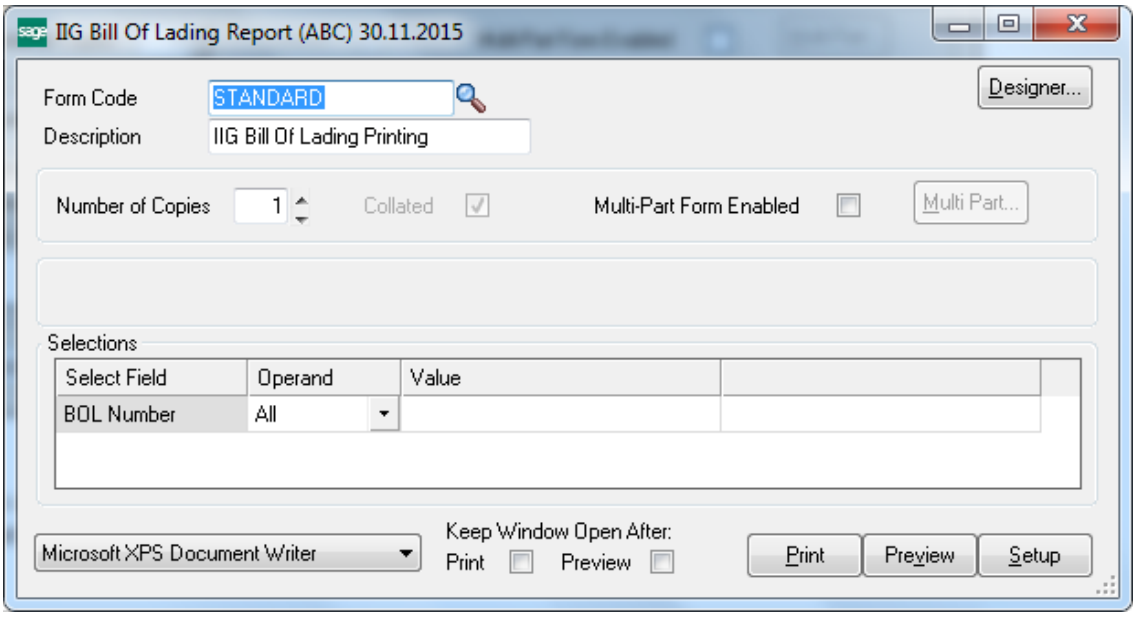
The **Master Bill of Lading** printing may be run also from the menu.

IIG Bill Of Lading Printing

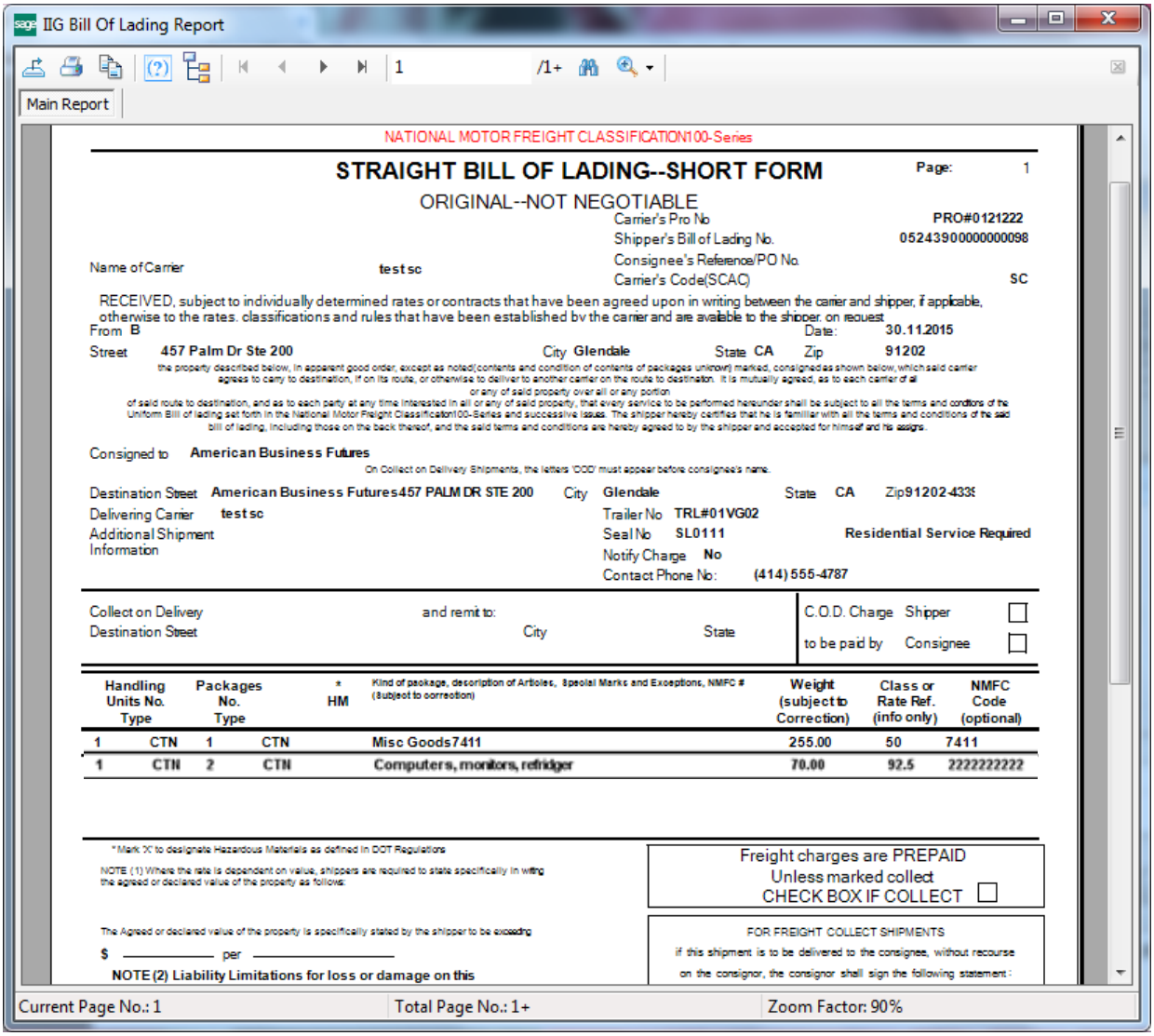
The **IIG Bill of Lading Printing** program has been added under the **Sales Order->Shipping** menu to allow printing the Bill of Lading report for the selected Bill of Lading numbers.

Both the Bill of Lading short form and VICS Bill of Lading form templates are available:

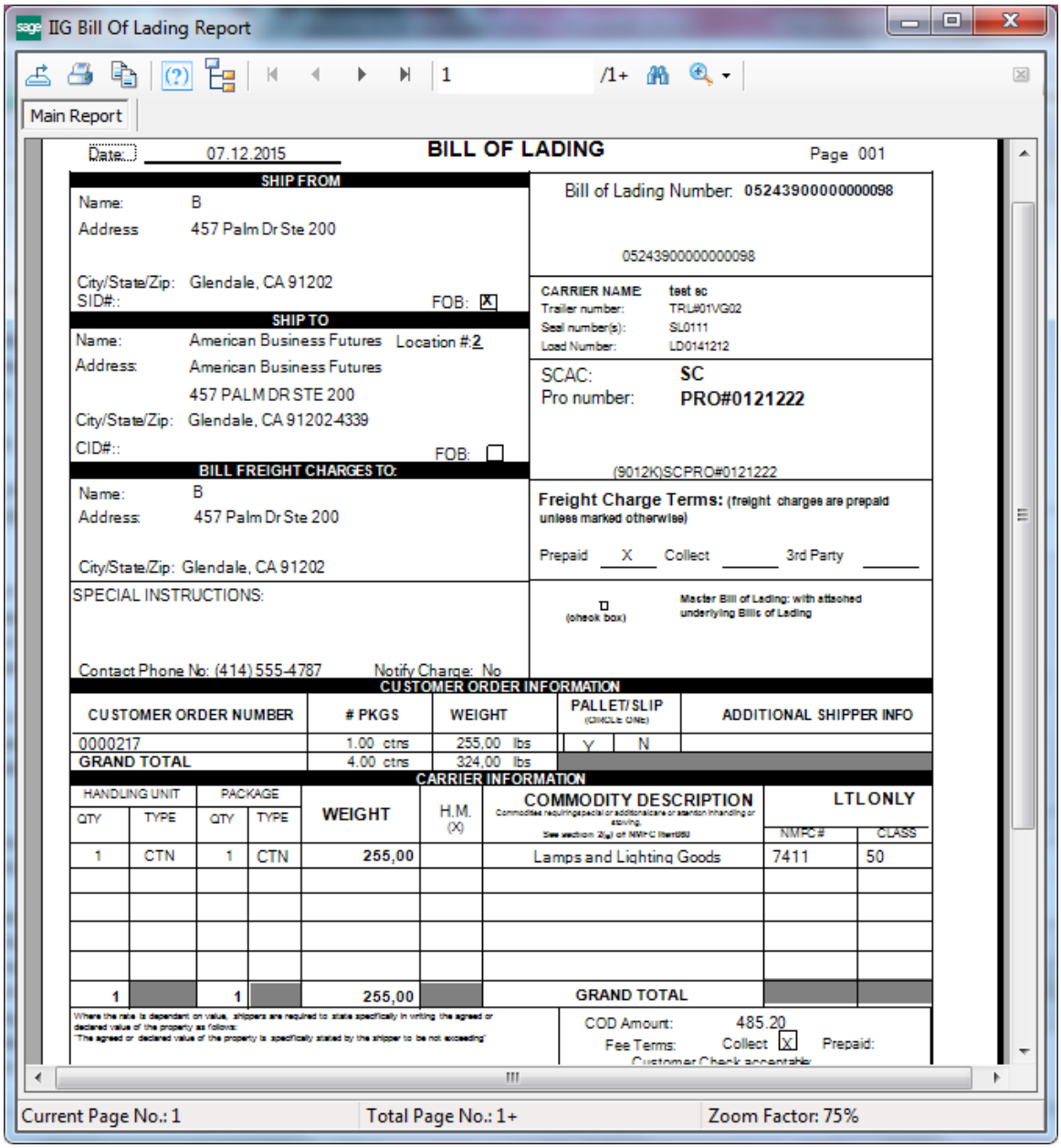




Here is an example of **Bill of Lading Printing** (short form) printout:



Here is an example of **VICS Bill of Lading** form printout:

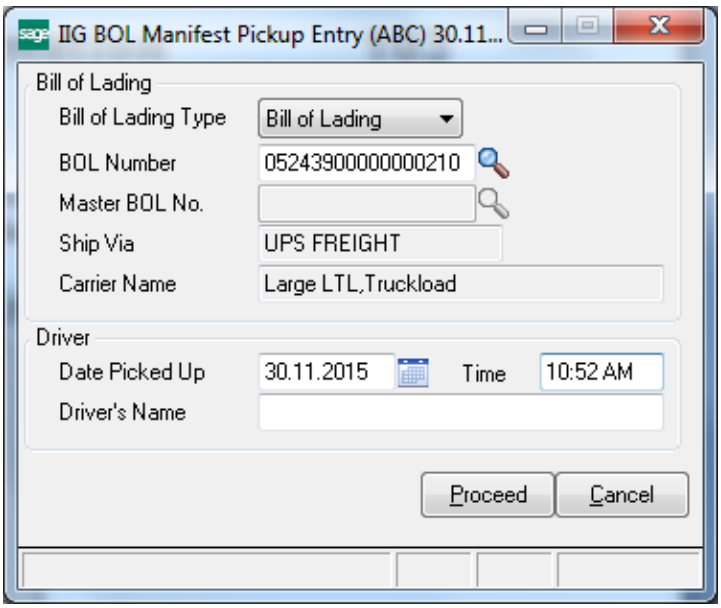


Bill Freight Charges To: prints the address based on the Billing Option set for current shipment. Shipper's address is printed if the billing is shipper, otherwise:

a. Recipient – prints the ship to address.
b. 3rd Party – prints the 3rd party address from the shipping options of the order header.
c. Consignee – prints the Bill To Address
d. Freight Collect – prints the Ship to address
e. Drop Ship – prints the address from the Malvern shipper file.

IIG BOL Manifest Pickup Entry

The **IIG BOL Manifest Pickup Entry** has been added under the **Sales Order Shipping Menu.** This program is used to release the bills of lading as shipped.



Bill of Lading Section

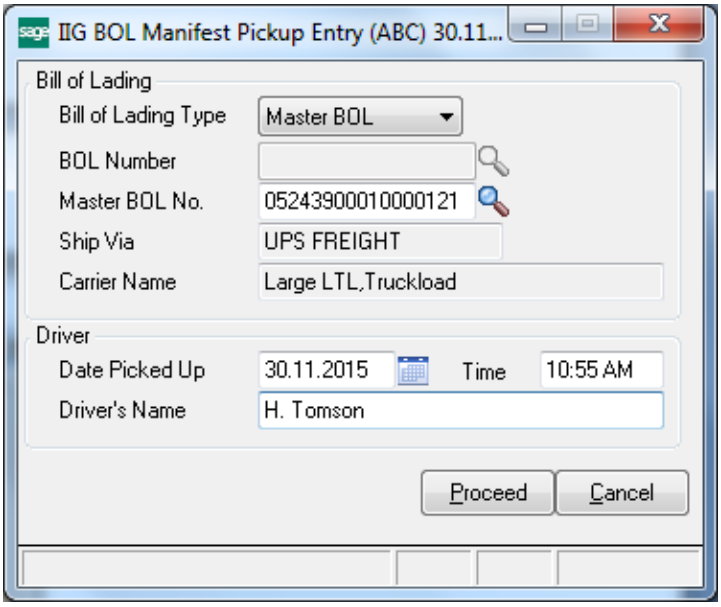
Select the **Bill of Lading** type to retrieve. Bill of Lading and Master Bill of Lading types are available. Selecting *Bill of Lading* disables the Master BOL No. field, and selecting *Master BOL* disables the Bill of Lading field.

Enter the **BOL Number** or **Master BOL No.** by manually entering, scanning, or using the lookups.

Ship Via is a locked field showing the Ship Via code.

Carrier Name is the full carrier name from the IIG Carrier Maintenance.

Selecting *Master BOL* type disables the **BOL Number** field:



Date Picked Up is the date the driver picked up the shipment. Auto loads today's date.

Time Time of pickup. Auto loads the current time when bill of lading is selected.

Driver Name This field identifies the driver that picked up the shipment.

Date Picked Up is the date the driver picked up the shipment. Auto loads today's date.

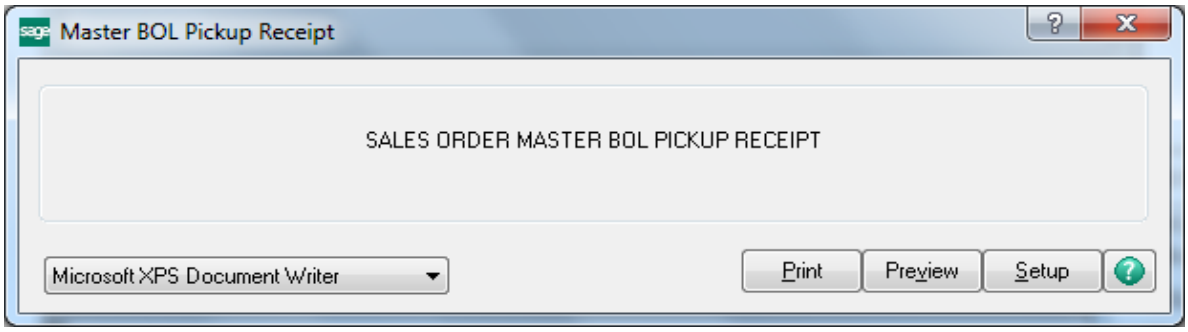
Time is the time of pickup. Auto loads the current time when bill of lading is selected.

Driver Name This field identifies the driver who picked up the shipment.

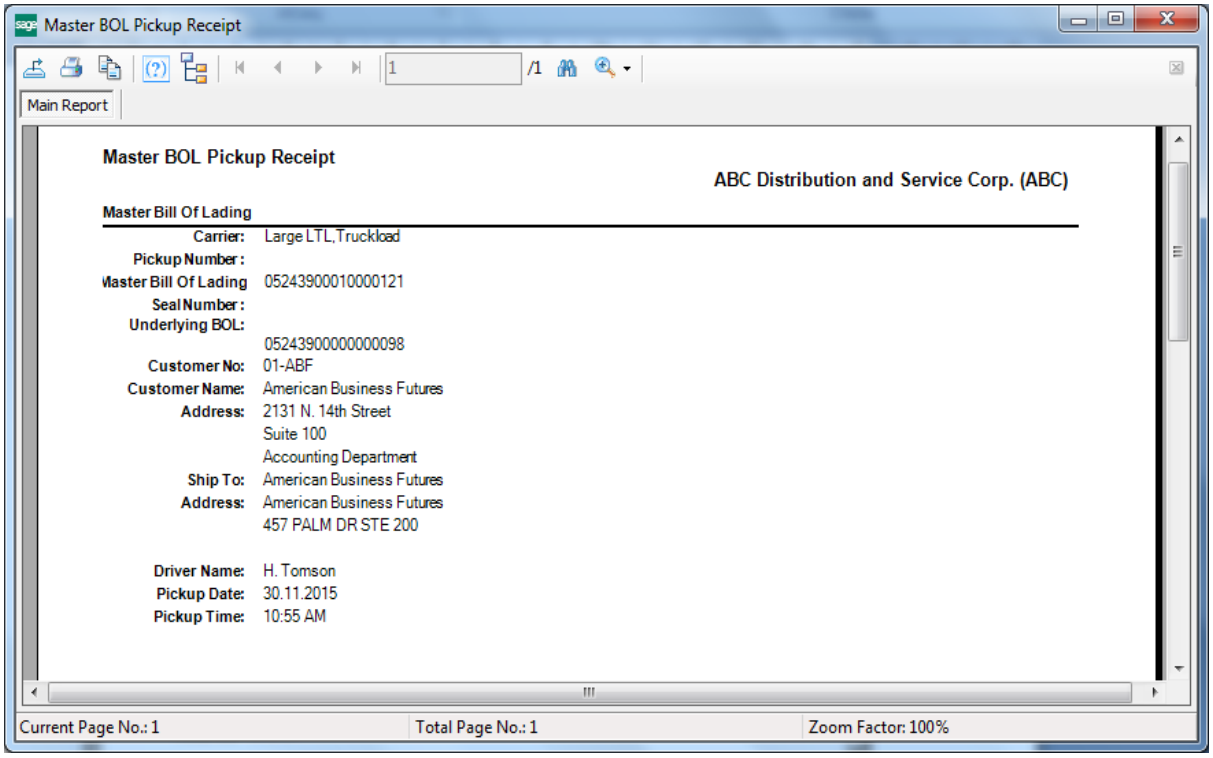
Proceed Press to post the bill of lading as picked up. The Date Picked Up, Time Picked Up, and Driver information will be posted to the bill of lading and the BOL is released for update. If the BOL is a Master BOL, this information is posted to all of the linked BOL and they in turn are also released for update.

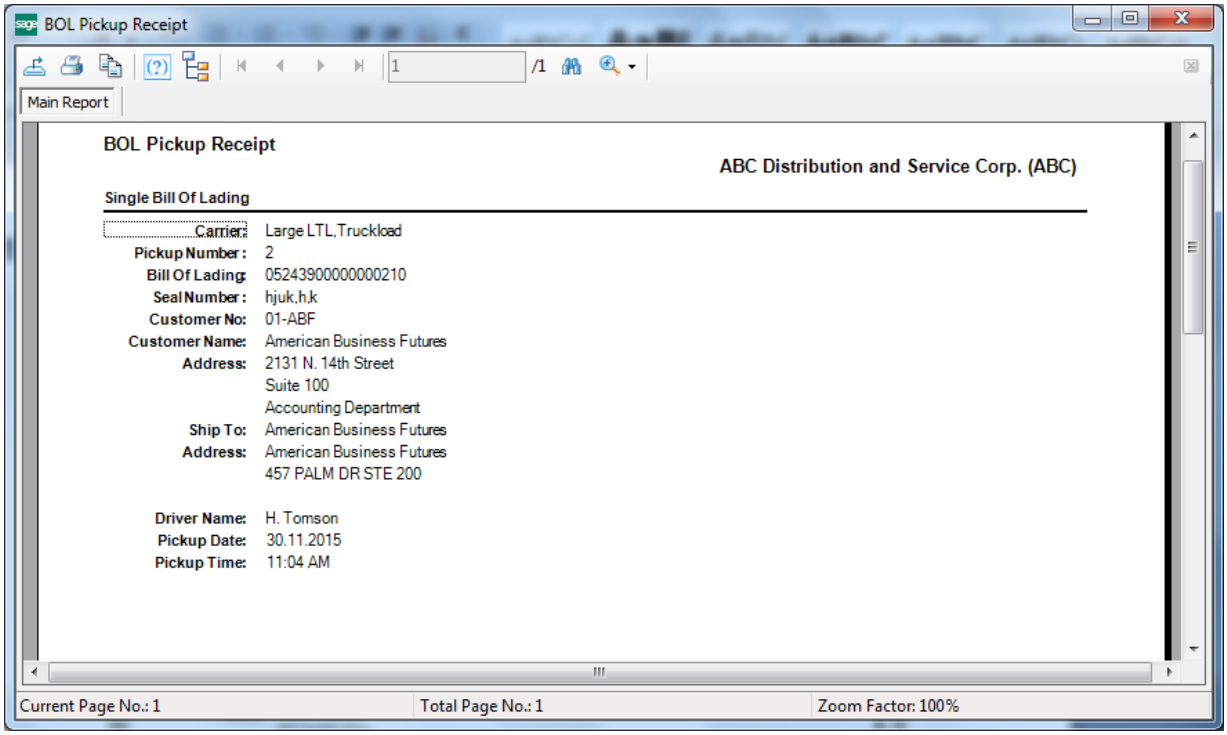
Cancel Press this button to cancel the transaction and returns to the menu.

On posting the **Print Pickup Receipt** program is run.
After the BOL is posted as picked up the BOL Pickup Receipt print dialog is opened allowing to print the Pickup Receipt. The pickup receipt prints the company name, carrier name, Bill of Lading number(s), Quote/Pickup number, Driver Name, Date and Time Picked up, seal number, customer number and name, and ship to address.



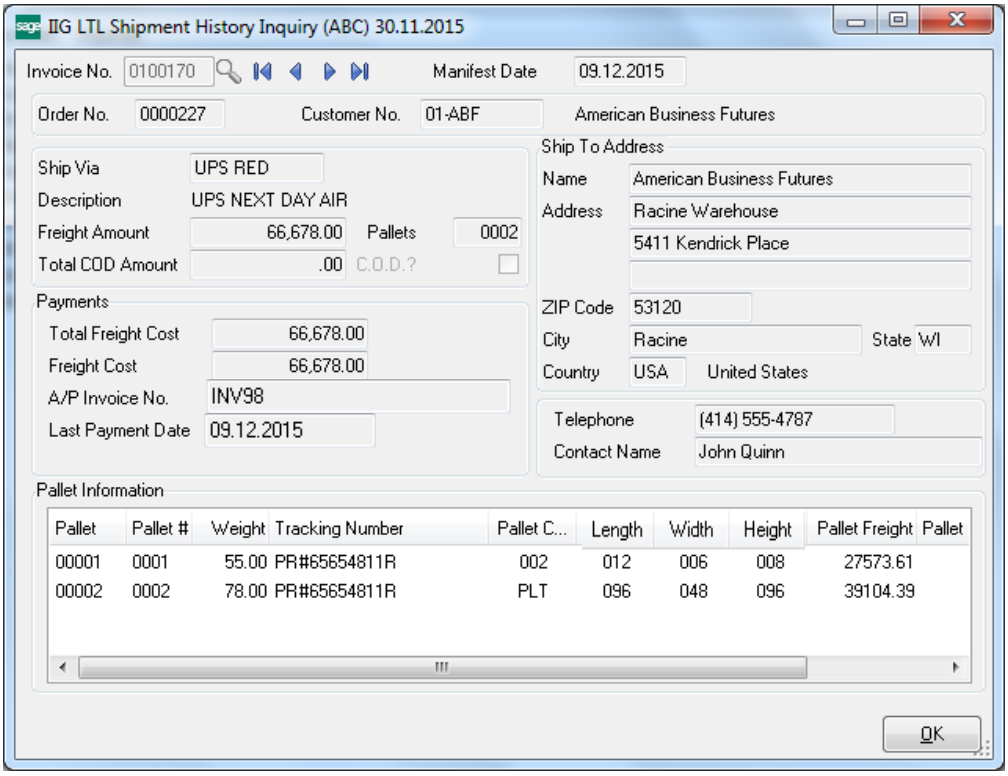
Below are examples of printouts for Master BOL and BOL Pickup Receipts:




BOL Pickup Receipt
1
/1
Main Report
BOL Pickup Receipt
ABC Distribution and Service Corp. (ABC)
Single Bill Of Lading
Carrier: Large LTL,Truckload
Pickup Number: 2
Bill Of Lading: 05243900000000210
Seal Number: hjuk,h,k
Customer No: 01-ABF
Customer Name: American Business Futures
Address: 2131 N. 14th Street
Suite 100
Accounting Department
Ship To: American Business Futures
Address: American Business Futures
457 PALM DR STE 200
Driver Name: H. Tomson
Pickup Date: 30.11.2015
Pickup Time: 11:04 AM
Current Page No.: 1
Total Page No.: 1
Zoom Factor: 100%

IIG LTL Shipment History Inquiry

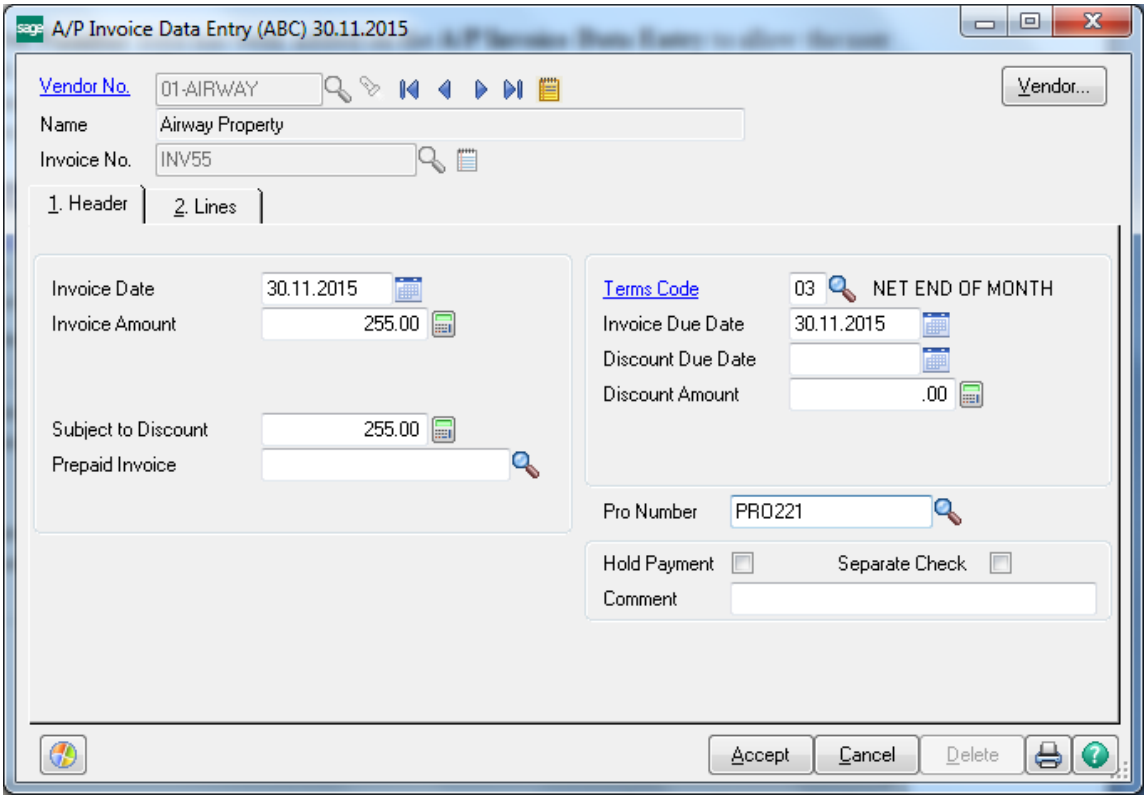
The **IIG LTL Shipment History Inquiry** menu added under the S/O Inquiries Menu allows for viewing closed BOL manifests by Invoice Number:



Freight A/P Tracking

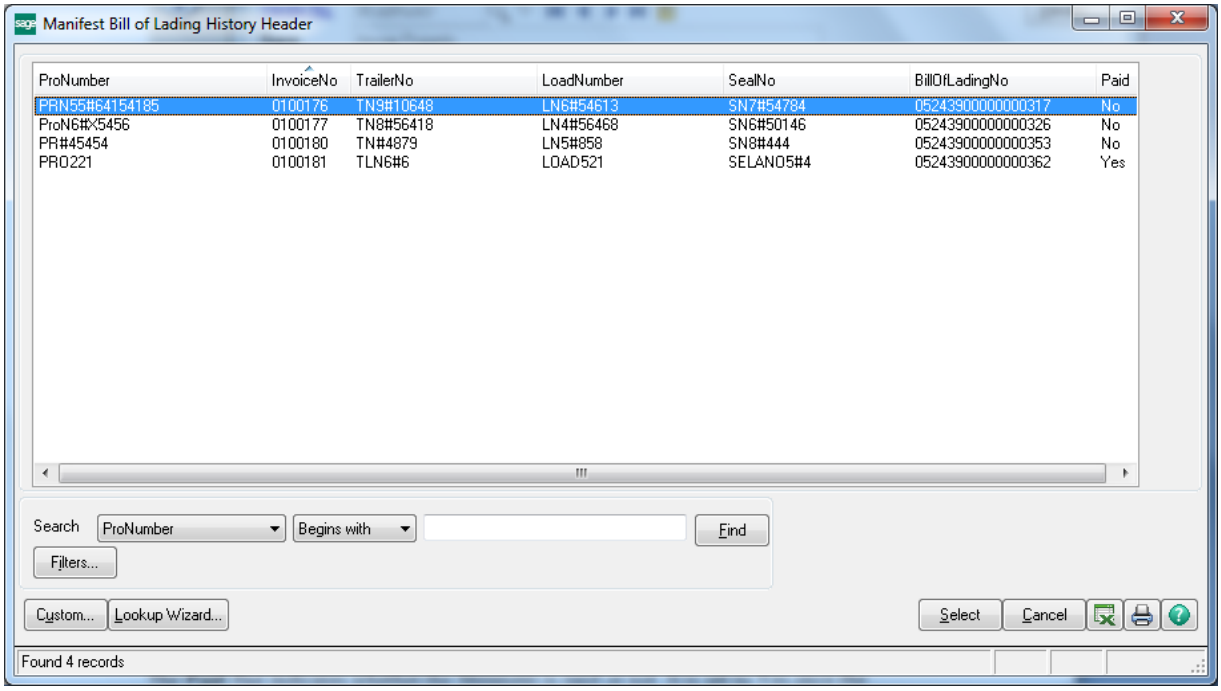
A/P Invoice Data Entry

The **Pro Number** field has been added on the **A/P Invoice Data Entry** to allow the user to look up any open Pro Numbers to select for payment.
This modification is applied only if the Sales Order is shipped through the LTL shipping carriers having a Vendor number assigned in the **IIG Carrier Maintenance**.



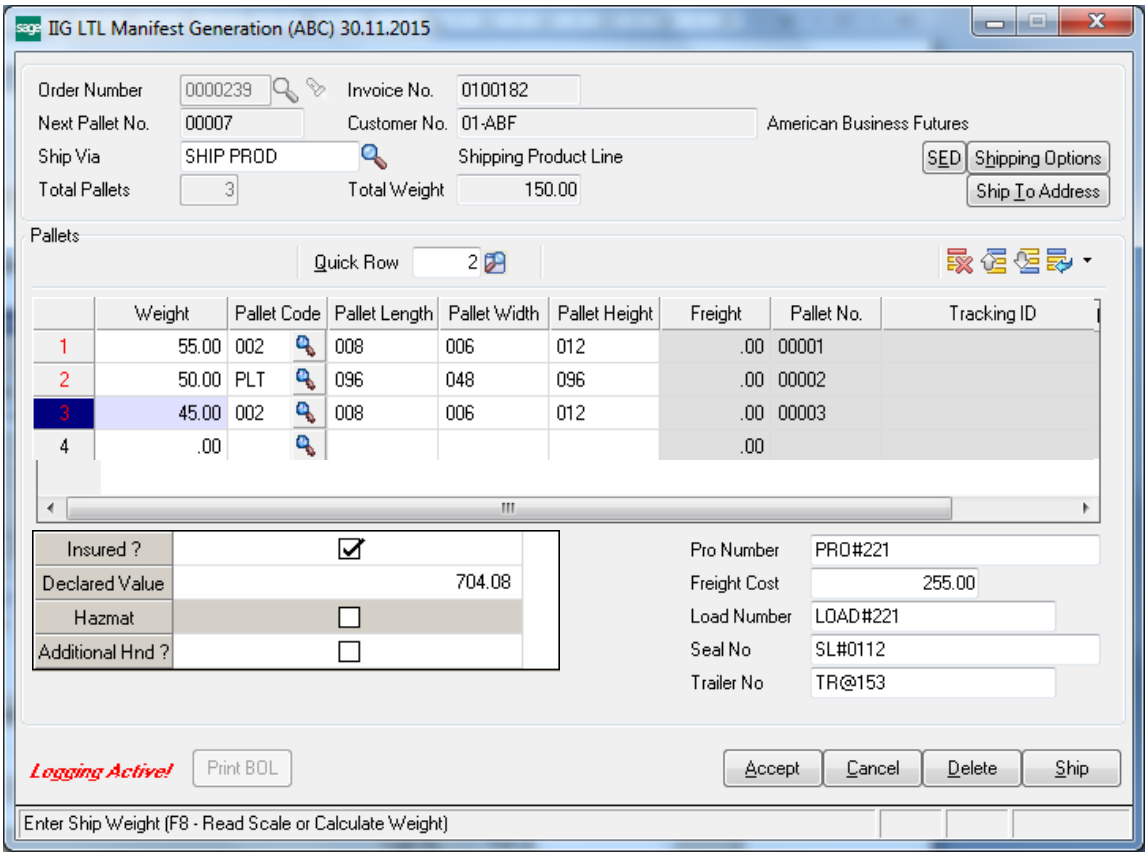
The **Pro Number** Lookup lists the records from the **Bill of Lading Manifest History Header** file.

Upon selecting a Pro Number for payment, the program checks to verify if the shipment is shipper pay. If the selected shipment is not shipper pay (freight collect, 3rd party, etc.) a warning is displayed that the freight invoice should not be paid:



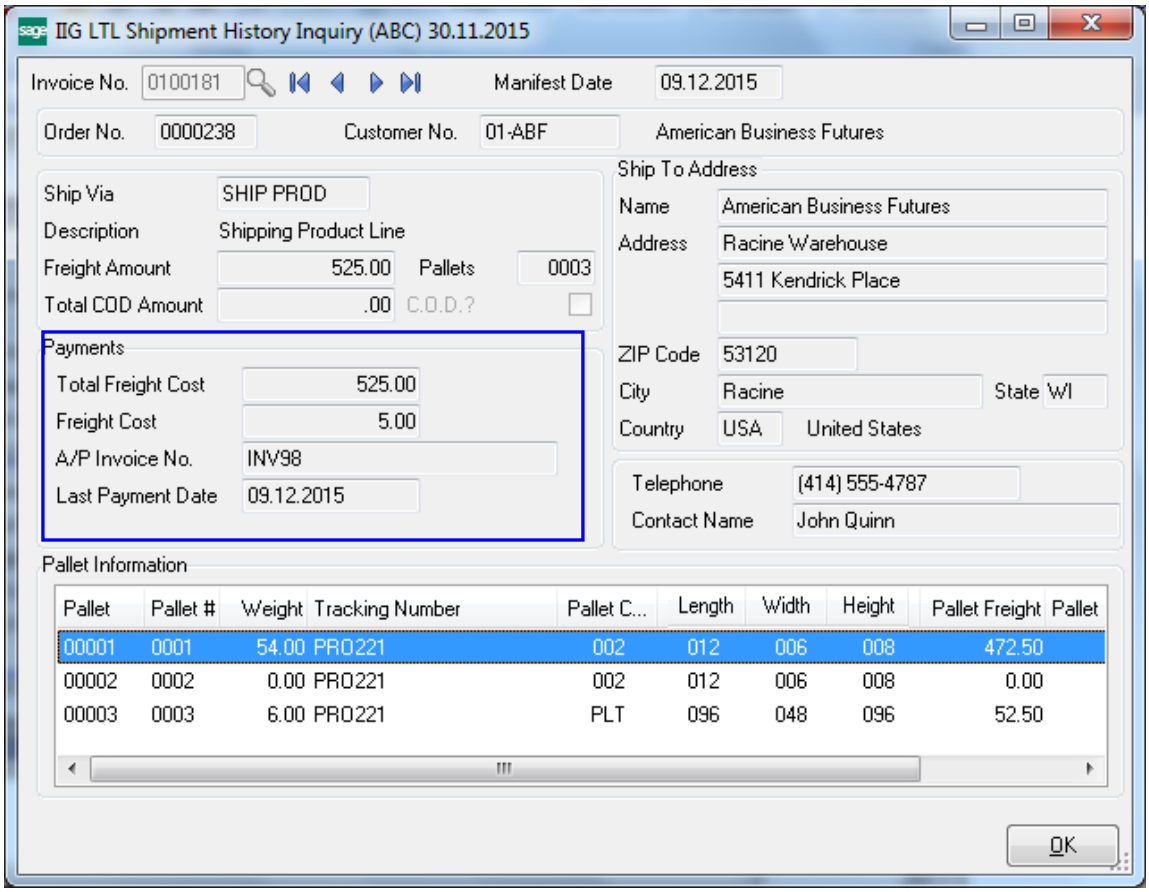
The **Paid** flag indicates whether the Shipment is paid or not. It is set to Yes once the shipment is paid.

Here is an example of Freight tracking for LTL shipment:



After BOL Manifest is closed and the Sales Journal updated for current LTL shipment, the user may select the Pro Number in the A/P Invoice Entry to pay.

When the A/P Invoice Register is updated, the Freight cost Paid by the A/P Invoice is loaded in the Freight Cost field of the **LTL shipment History Inquiry**. The **A/P Invoice No**. field is populated with respective Invoice number and the Last Payment Date is populated with the date when A/P Invoice Register is updated:

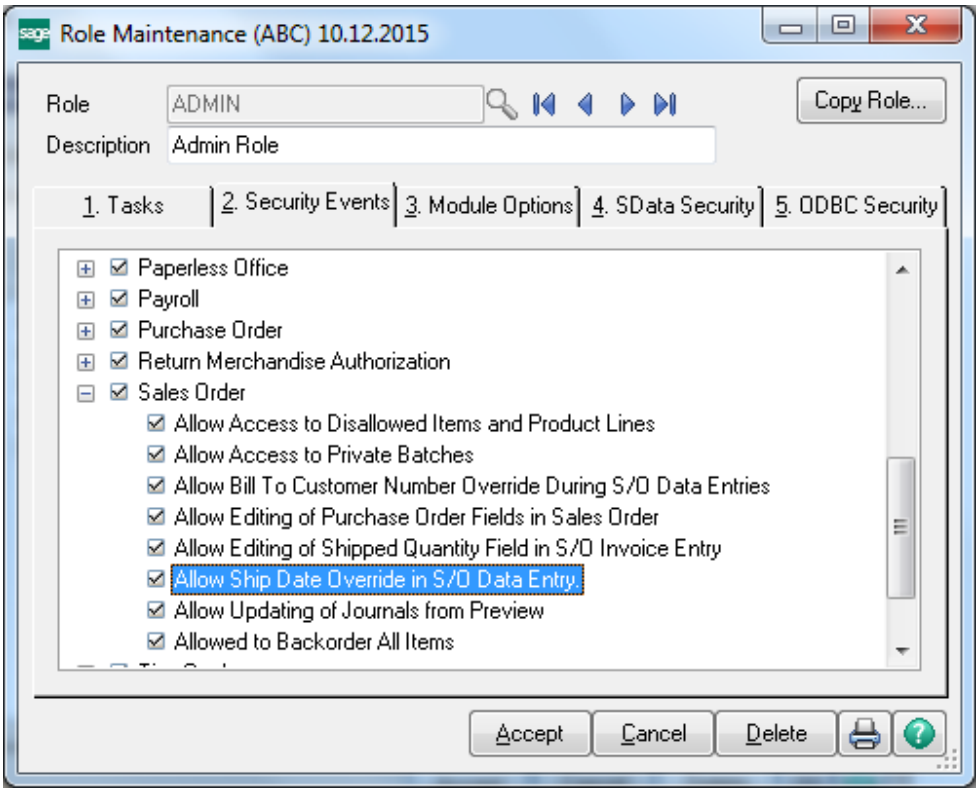


Paying the same shipment next time by another Invoice will update the Freight Cost Amount, A/P Invoice Number and the Last Payment Date respectively.

Allow Ship Date Override in S/O Data Entry

Role Maintenance

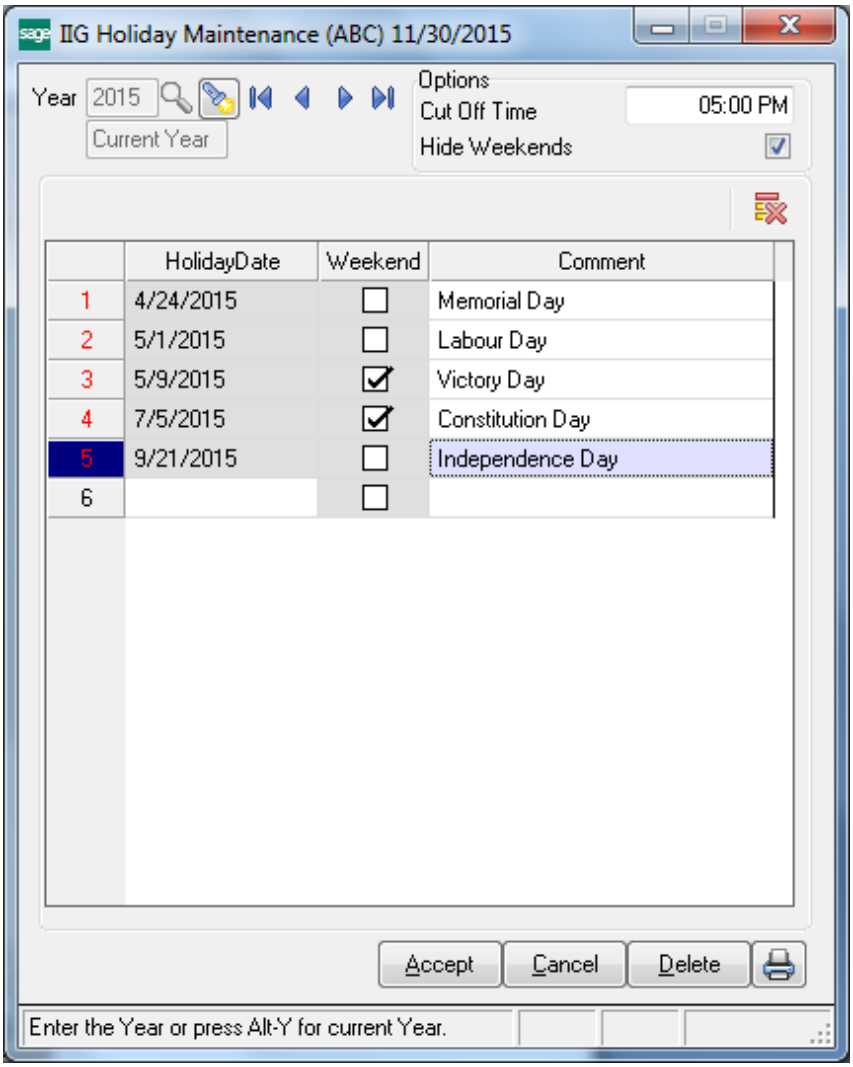
The **Allow Ship Date Override in S/O Data Entry** Security Event has been added to the **Role Maintenance** to allow the user with respective role to update the Sales Order Ship Date.



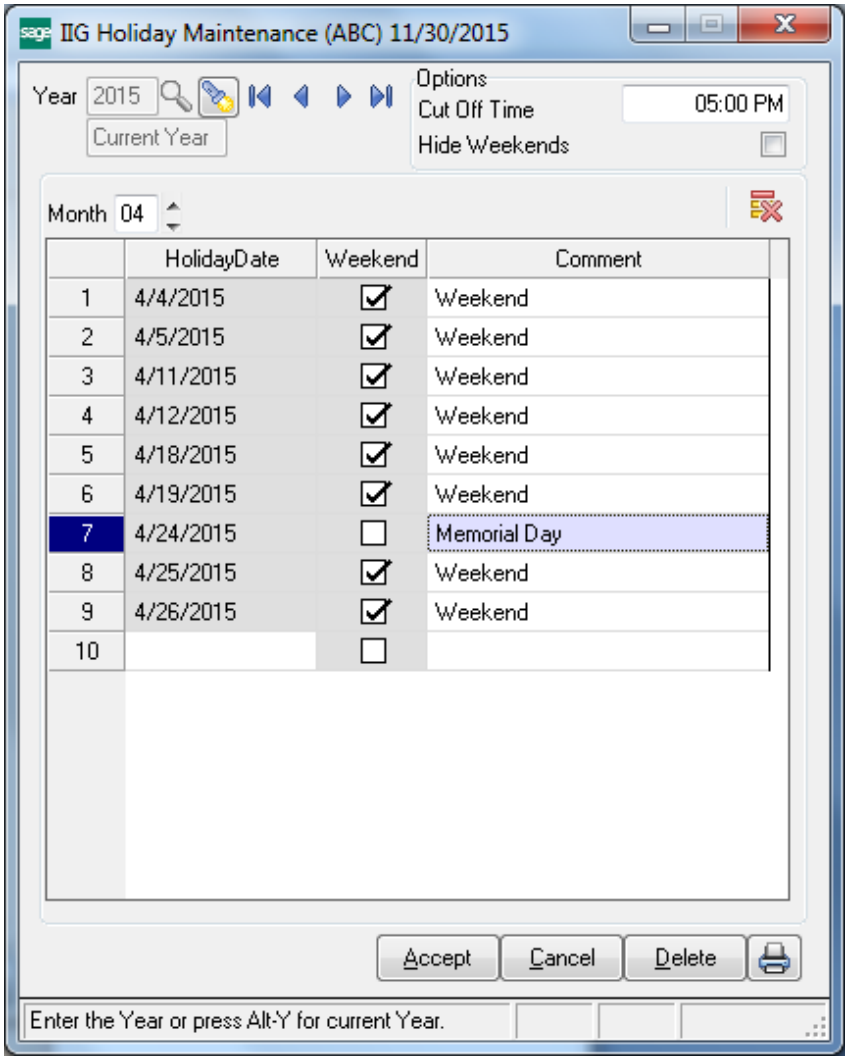
Only the users assigned to a role with this security event enabled are allowed to run the "IIG Recalculate Sales Order Ship Dates" utility.

IIG Holiday Maintenance

IIG Holiday Maintenance has been added under the **Sales Order Setup** menu to allow users fix their holidays. In the **Holiday Date** column specify the nonworking days and write descriptions in the **Comment** column.



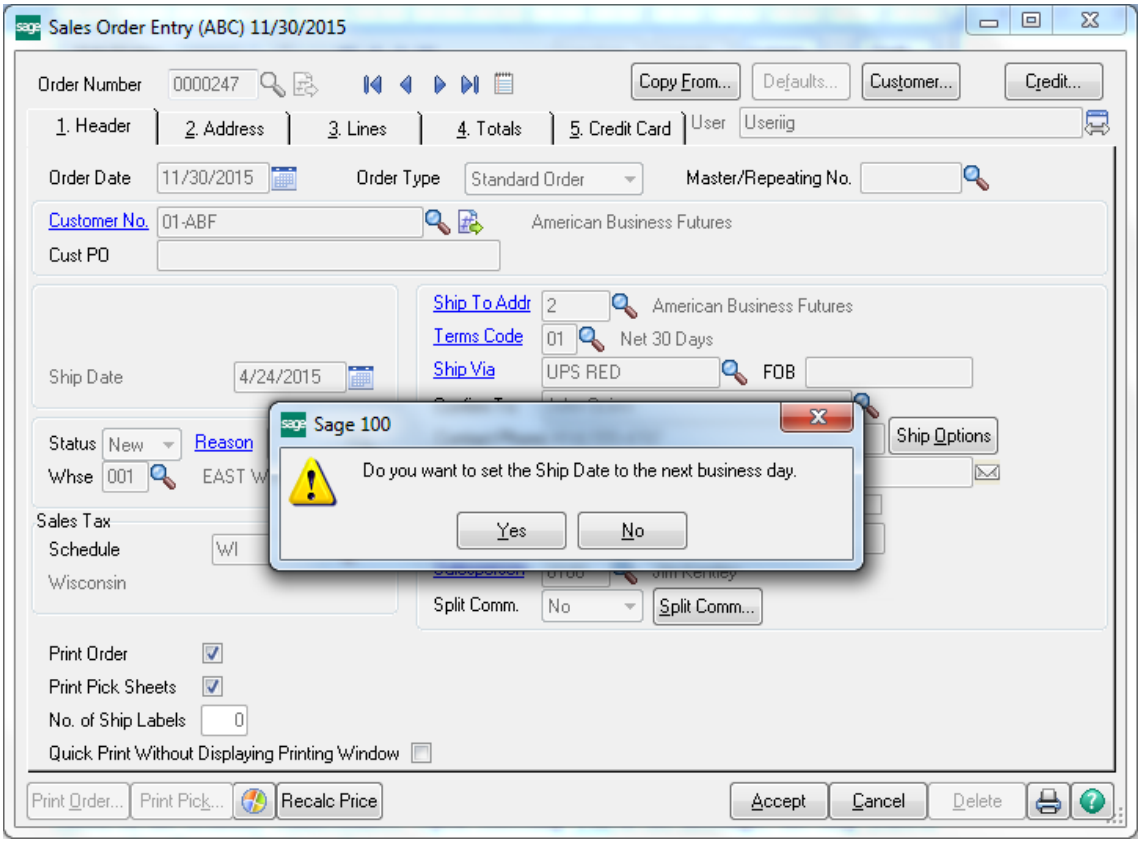
Lines for which the **Weekend** check box is selected are weekends. You can show/hide weekends by turning on/off the **Hide Weekends**.
Filtering can be done by months by selecting corresponding Month number.



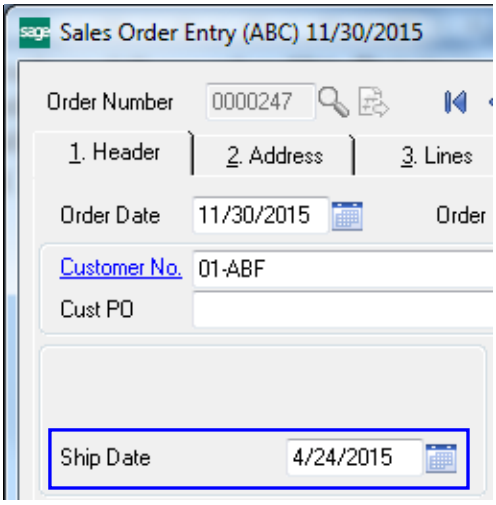
In the **Cut Off Time** field the end time of working day is fixed.
Click on the **Press for current Year** button to display the records of current Year and Month. The current date is taken from GL Options.

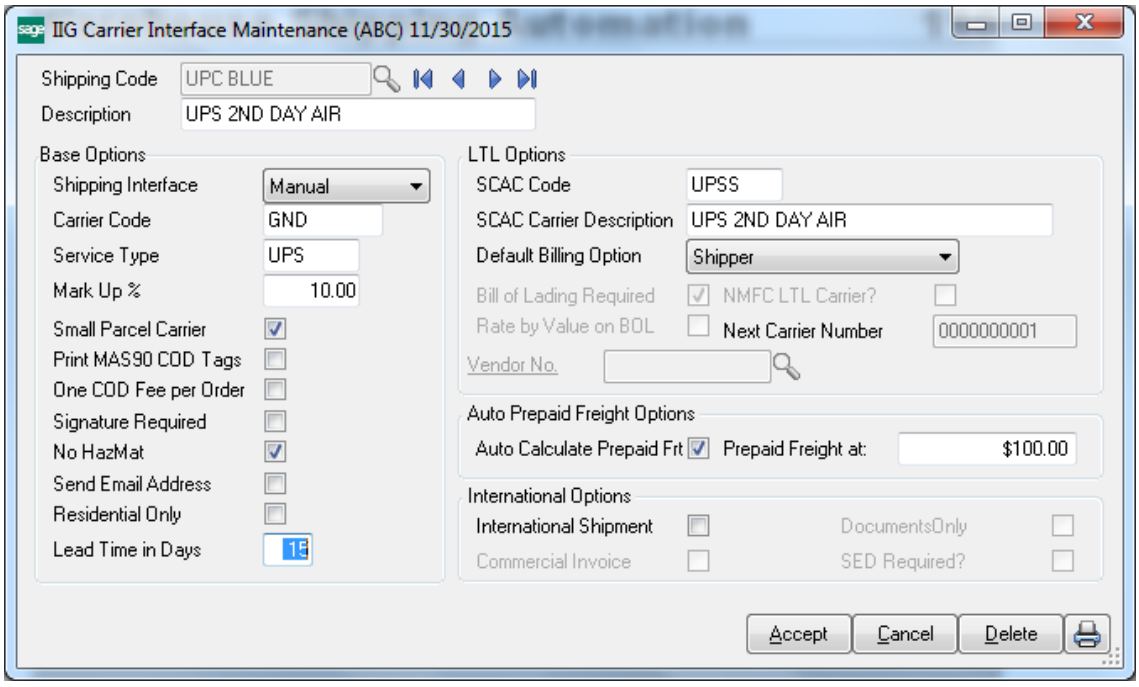
Sales Order Entry

Modification has been done is **Sales Order Entry** related to **Holiday Maintenance**. If a **Ship Date** is entered on the **Header** tab which is specified as holiday in **IIG Holiday Maintenance** a message is displayed asking to set the Ship Date to the next business day or not.



If the **Calculate Ship Date from Ship Via Code** check box is selected in the **Shipping Automation Options** the ship date change logic works as follows: when **Ship Date** is entered in **Sales Order Entr**y, that date is increased with the number of days which has been specified in the **Lead Time in Days** field. Only after, that checking is performed based on the Holiday Maintenance. Upon selecting Yes in the message, the Ship Date is changed to the next business day.





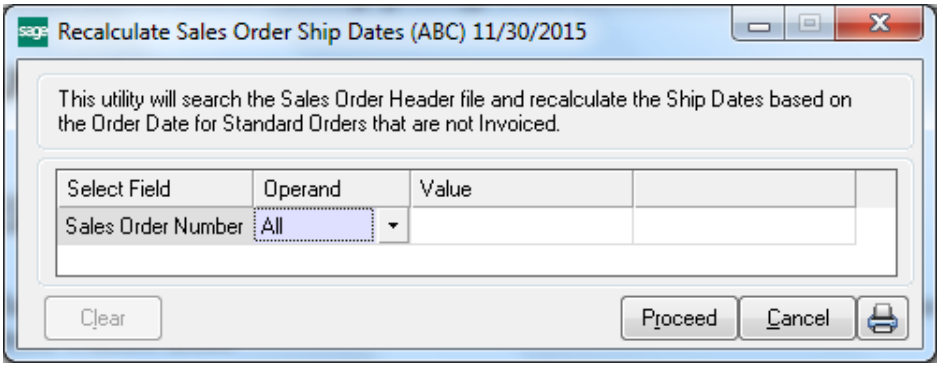
If 0 is set in the **Lead Time in Days** field, and the Order is created after the working day has been fixed (the hour specified in the **Cut Off Time** field in **IIG Holiday Maintenance**), 1 day is added to the ship date and after that holiday checking is performed.

*Note: The **Ship Date** will not be recalculated when **Ship Via** field becomes blank.*

Utilities

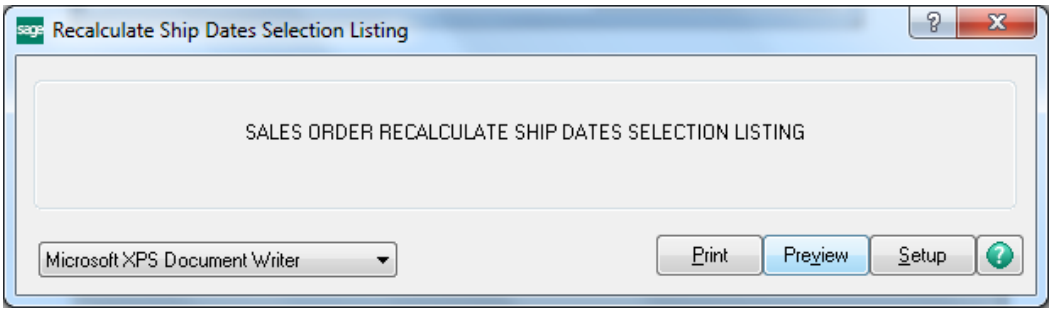
IIG Recalculate Sales Order Ship Date Utility

The **IIG Recalculate Sales Order Ship Date Utility** has been added under the Sales Order Utilities menu.

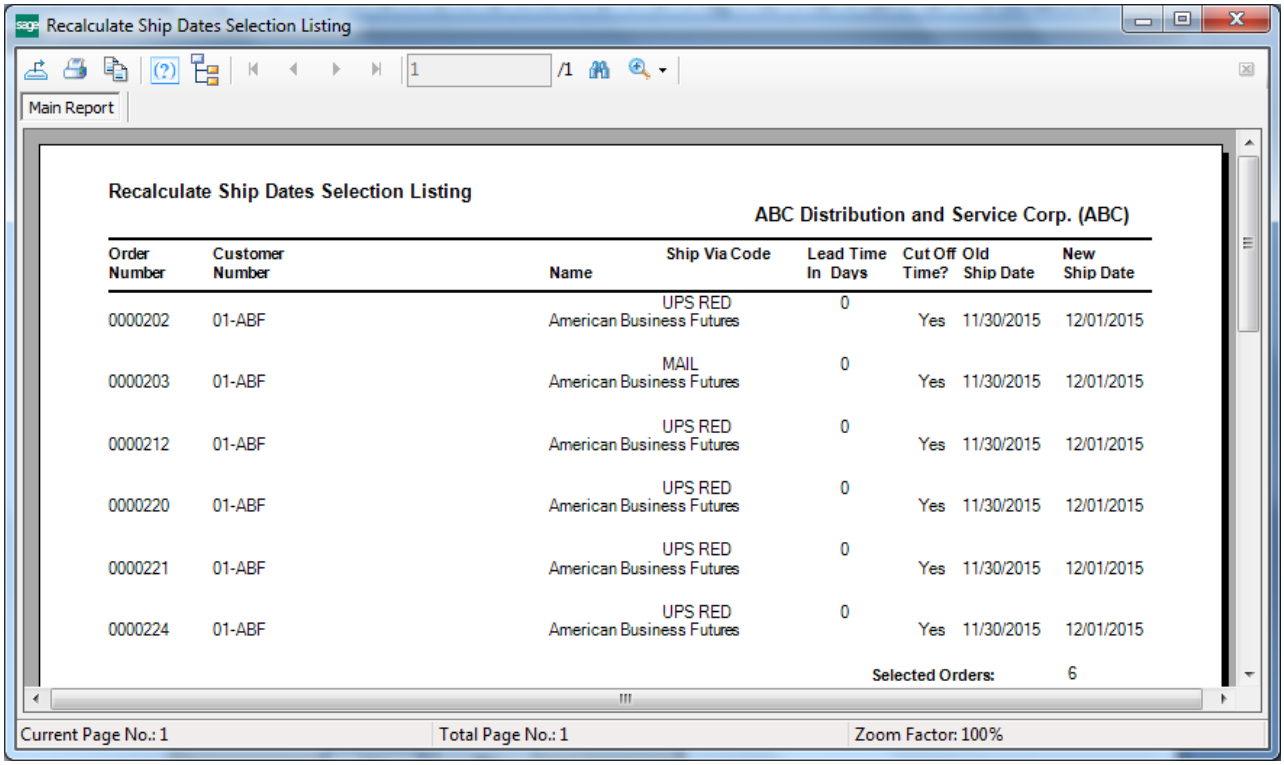


Select the Sales Order(s) for which you want the Utility to work and click the **Proceed** button. Scanning will be performed through the Sales Order Header file and Ship Dates will be recalculated based on the Order Date for Standard Orders that are not invoiced.

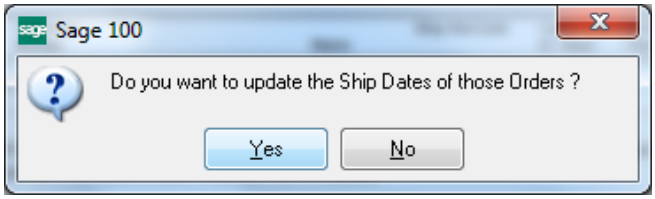
Click the **Print** button.



The report displays the Orders that are being updated with their old and new Ship Dates.

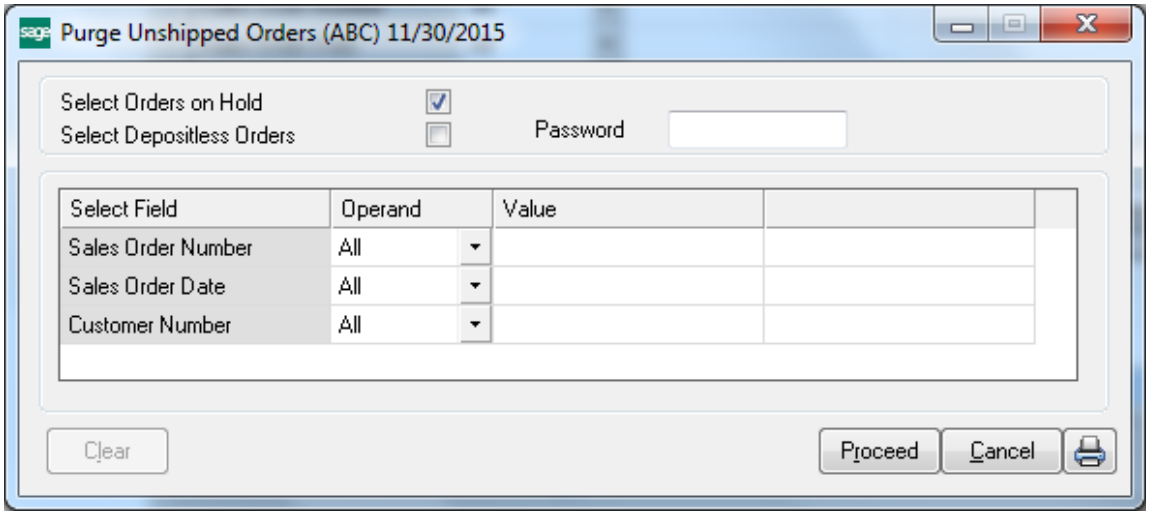


After closing the report the following message box will be displayed:

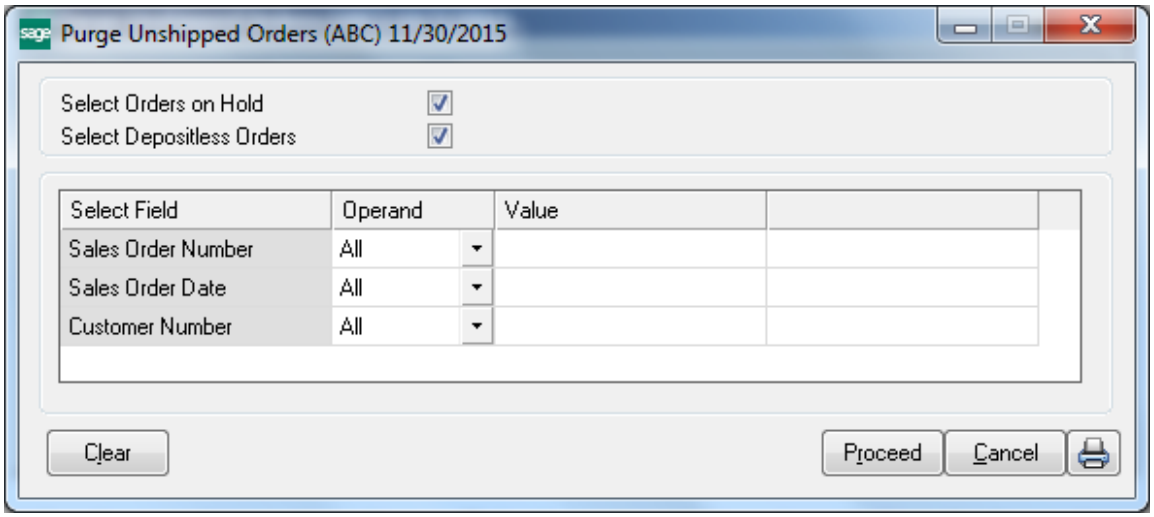


Purge Unshipped Sales Orders

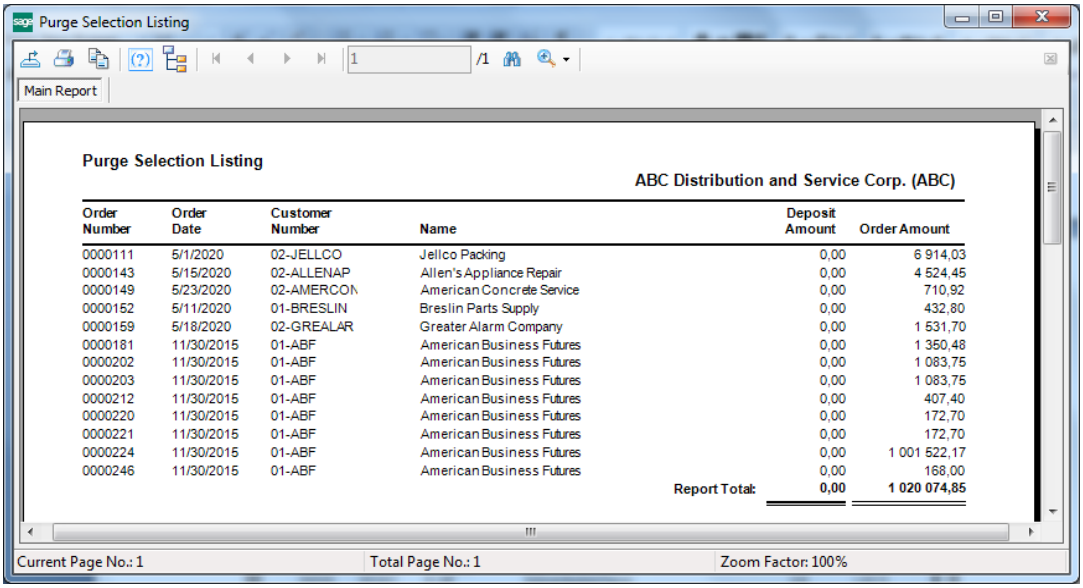
The **Purge Unshipped Sales Orders** program has been added to the **Sales Order Utilities** menu to allow removing sales orders.
The **Select Orders on Hold** and **Select Depositless Orders** options are additional filters applied to the selection.
Select Depositless Orders – if unchecked, allows selecting also Sales Orders with Deposit Amount. In this case password entry is required.



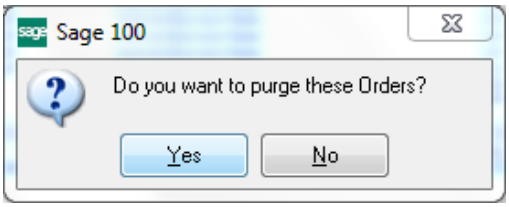
Press Proceed to load the Sales Orders meeting current selection criteria:



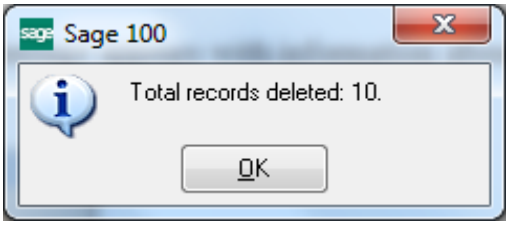
After the records are selected, press **Print** button to print/preview the list of orders to be removed.



After printing the list of Orders a prompt appears allowing the user to confirm the deletion of records:



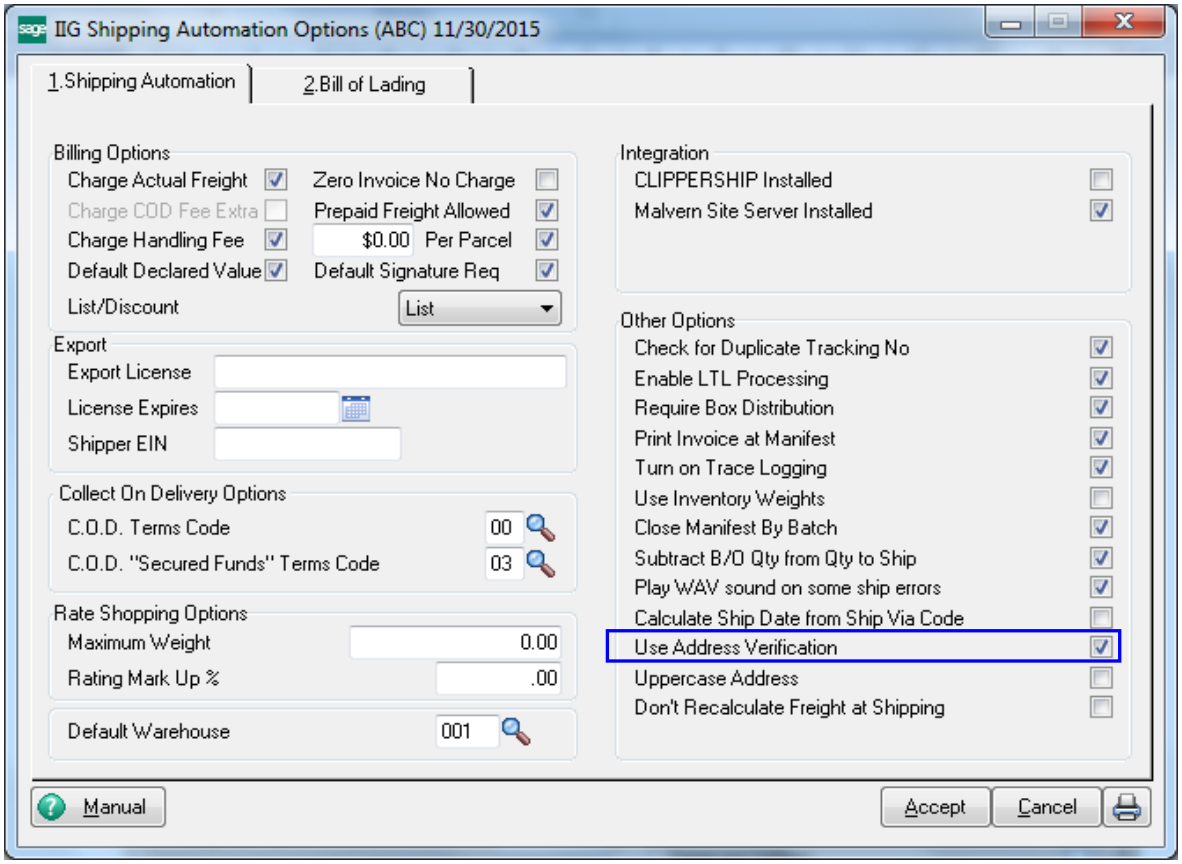
At the end of the process a message appears with information about the number of records removed:



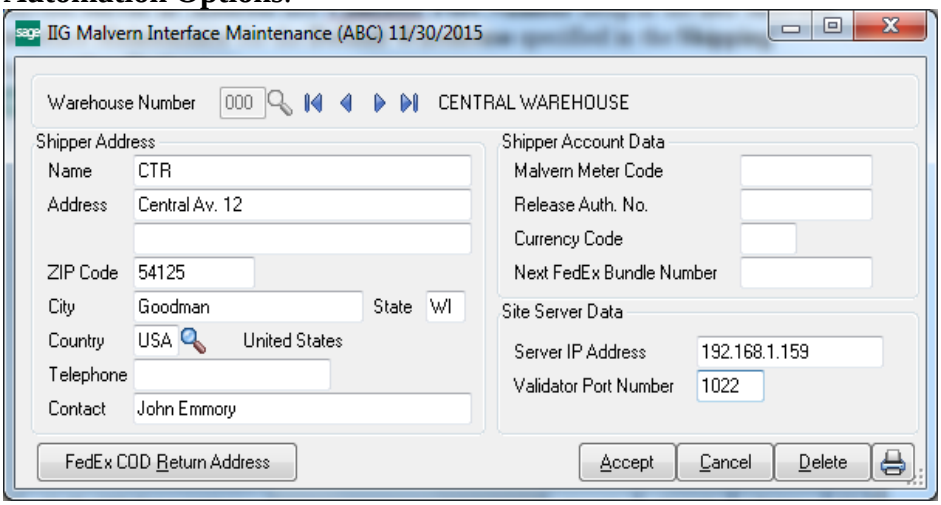
Address Verification

Malvern Interface Maintenance

If the **Use Address Verification** option is turned on in the **IIG Shipping Automation Options,** address verification will process in the Customer Maintenance, Customer Ship-To Address Maintenance, Sales Order and Invoice Data Entries.

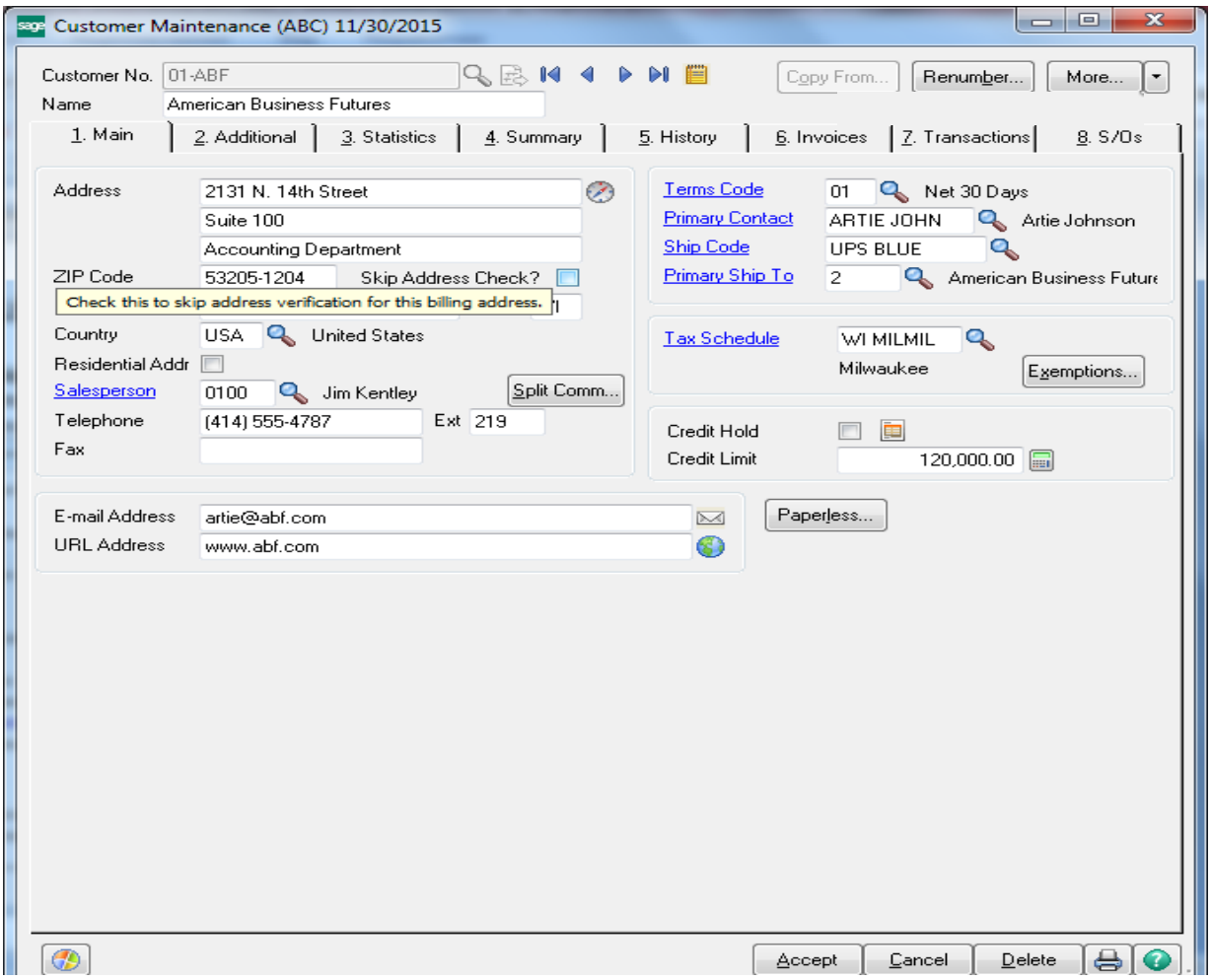


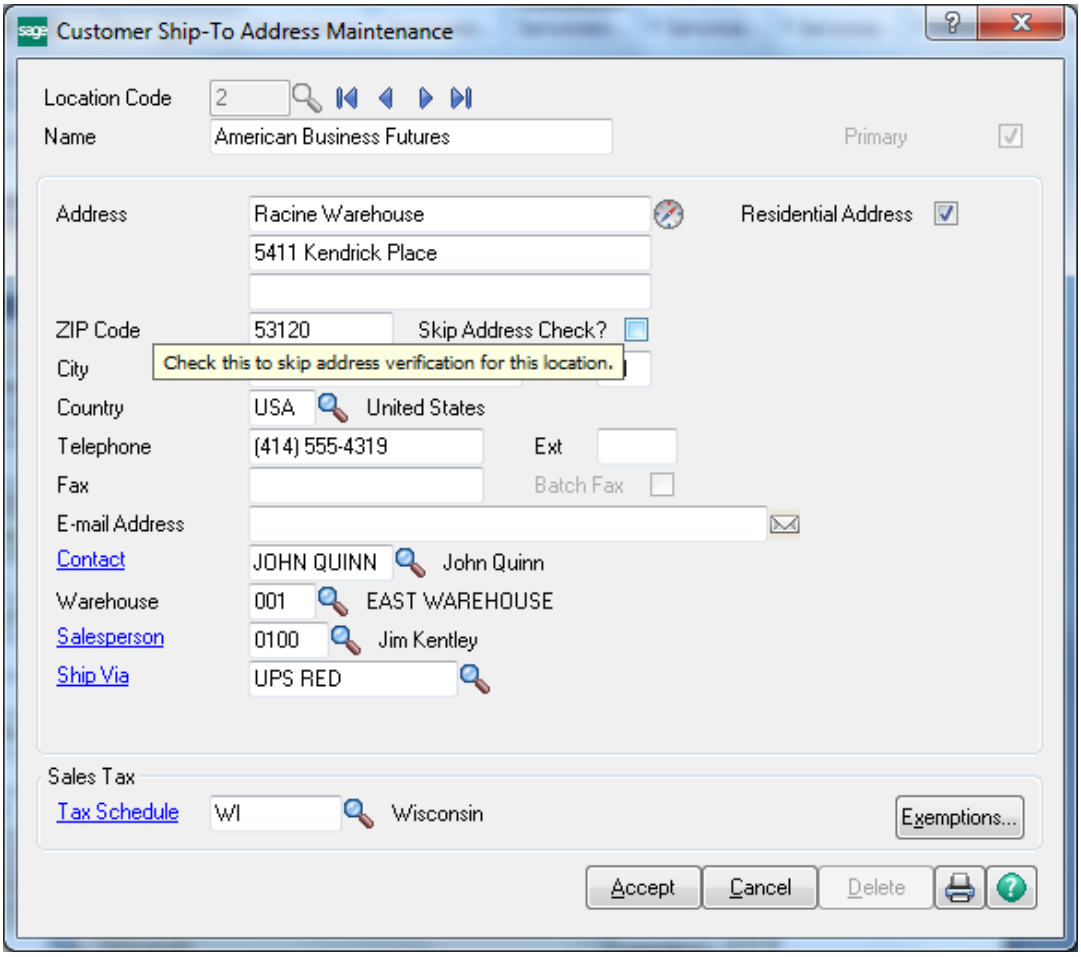
In order to have Address Verification processed normally it is necessary to have the Malvern **Server IP Address** and **Validator Port Number** setup in the **IIG Malvern Interface Maintenance** for the **Default Warehouse** specified in the **Shipping Automation Options**.



Skip Address Check

The **Skip Address Check?** option is available on the Address tab of Customer Maintenance, Sales Order and Invoice Data Entries as well as on the Customer Ship- To Address Maintenance.

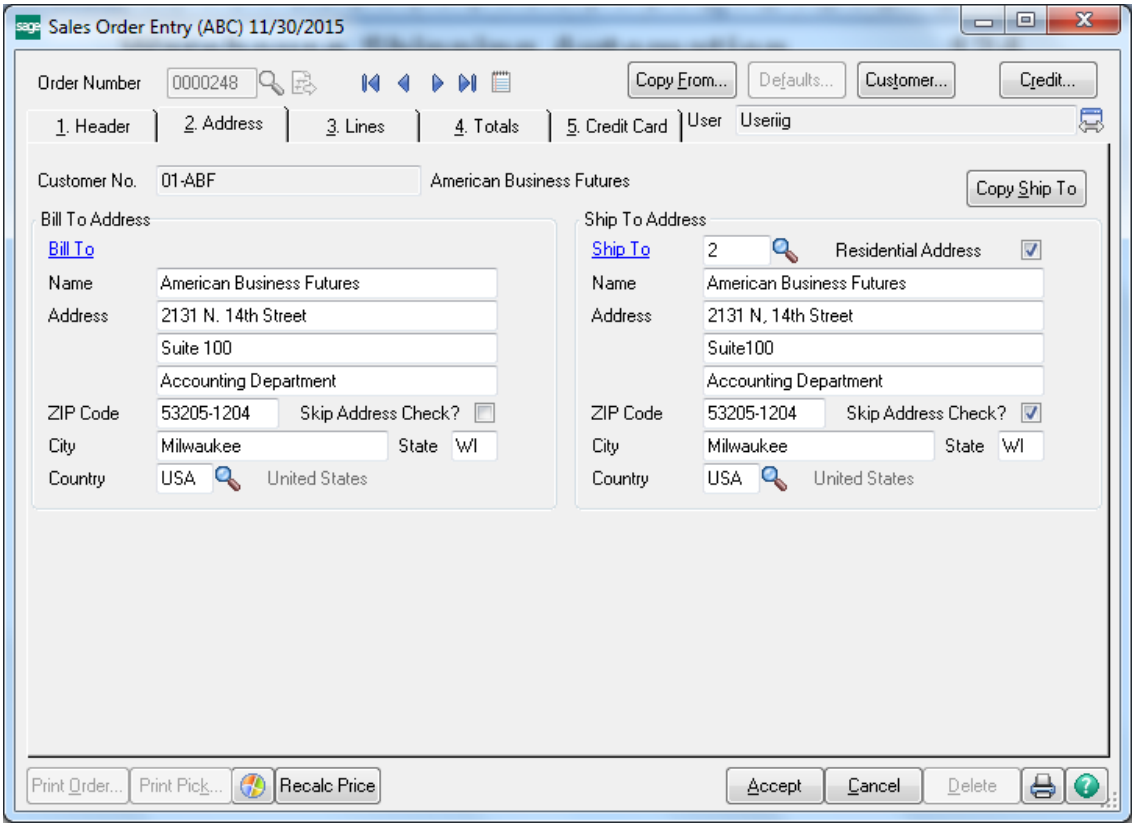


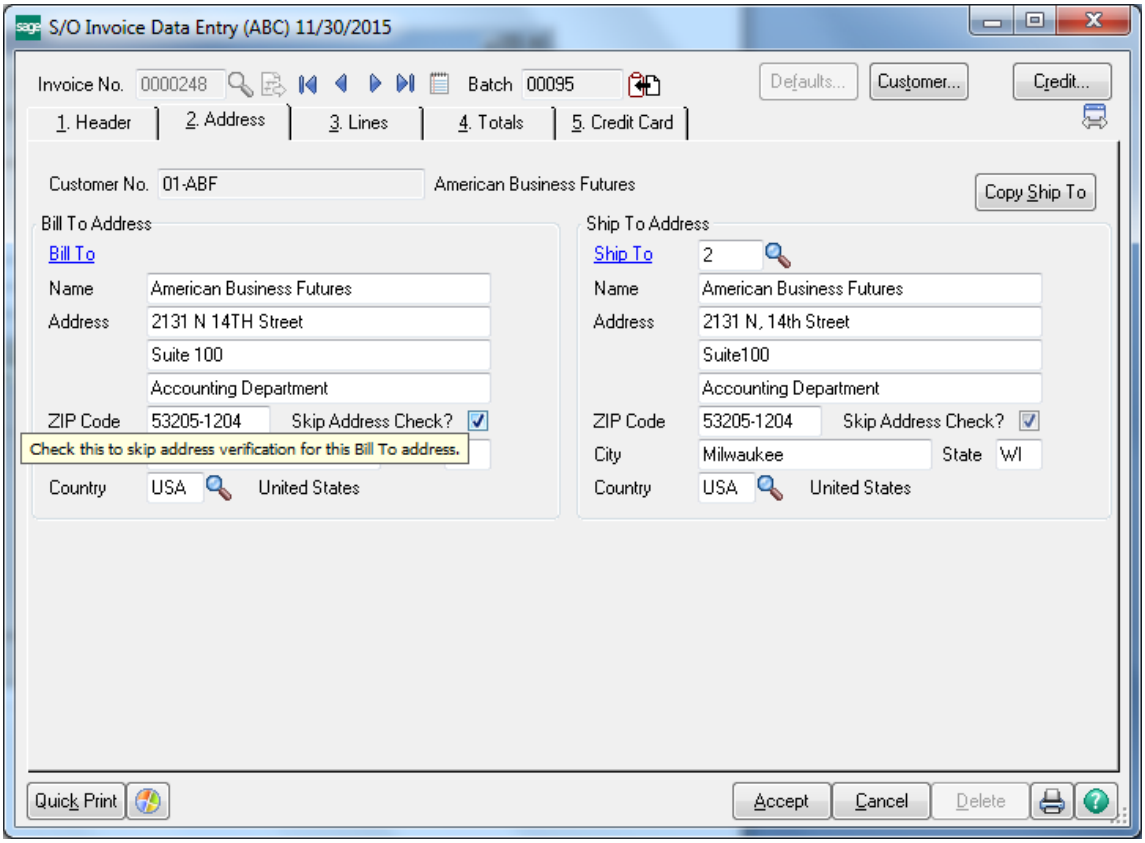


The **"Skip Address Check"** flag is automatically set to "Y" if in a result of address verification:

- anything is changed on the address segment t (address lines, city, zip code,…). In this case the entry will not be accepted and the focus will fall on the Address tab to allow the user to see what has been changed.
- Nothing is changed on the address segment.

The **"Skip Address Check"** flag is set to "N" if during entry something is changed in the address segment (including customer number change or ship to address change) so that to validate the address upon clicking Accept.

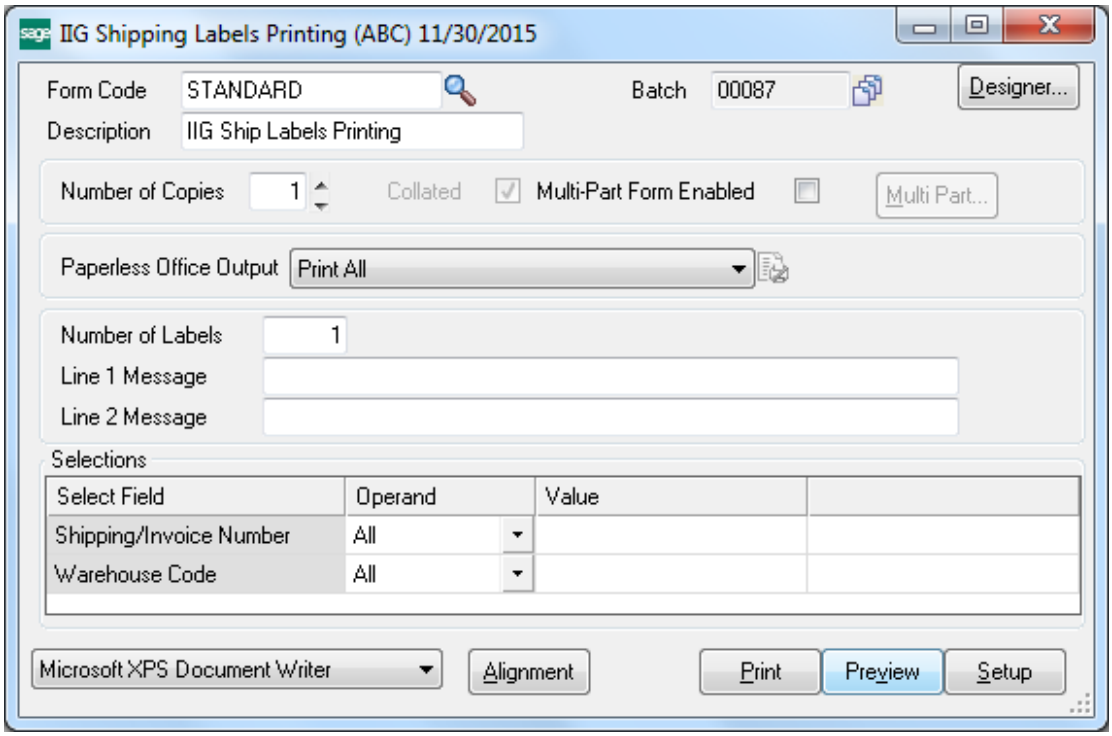

Sales Order Entry (ABC) 11/30/2015
Order Number 0000248
Copy From... Defaults... Customer... Credit...
1. Header 2. Address 3. Lines 4. Totals 5. Credit Card User Useriig
Customer No. 01-ABF American Business Futures
Copy Ship To
Bill To Address
Bill To
Name American Business Futures
Address 2131 N. 14th Street
Suite 100
Accounting Department
ZIP Code 53205-1204 Skip Address Check?
City Milwaukee State WI
Country USA United States
Ship To Address
Ship To 2 Residential Address
Name American Business Futures
Address 2131 N, 14th Street
Suite100
Accounting Department
ZIP Code 53205-1204 Skip Address Check?
City Milwaukee State WI
Country USA United States
Print Order... Print Pick... Recalc Price
Accept Cancel Delete


S/O Invoice Data Entry (ABC) 11/30/2015
Invoice No. 0000248 Batch 00095
Defaults... Customer... Credit...
1. Header 2. Address 3. Lines 4. Totals 5. Credit Card
Customer No. 01-ABF American Business Futures
Copy Ship To
Bill To Address
Bill To
Name American Business Futures
Address 2131 N 14TH Street
Suite 100
Accounting Department
ZIP Code 53205-1204 Skip Address Check?
Check this to skip address verification for this Bill To address.
Country USA United States
Ship To Address
Ship To 2
Name American Business Futures
Address 2131 N, 14th Street
Suite100
Accounting Department
ZIP Code 53205-1204 Skip Address Check?
City Milwaukee State WI
Country USA United States
Quick Print
Accept Cancel Delete

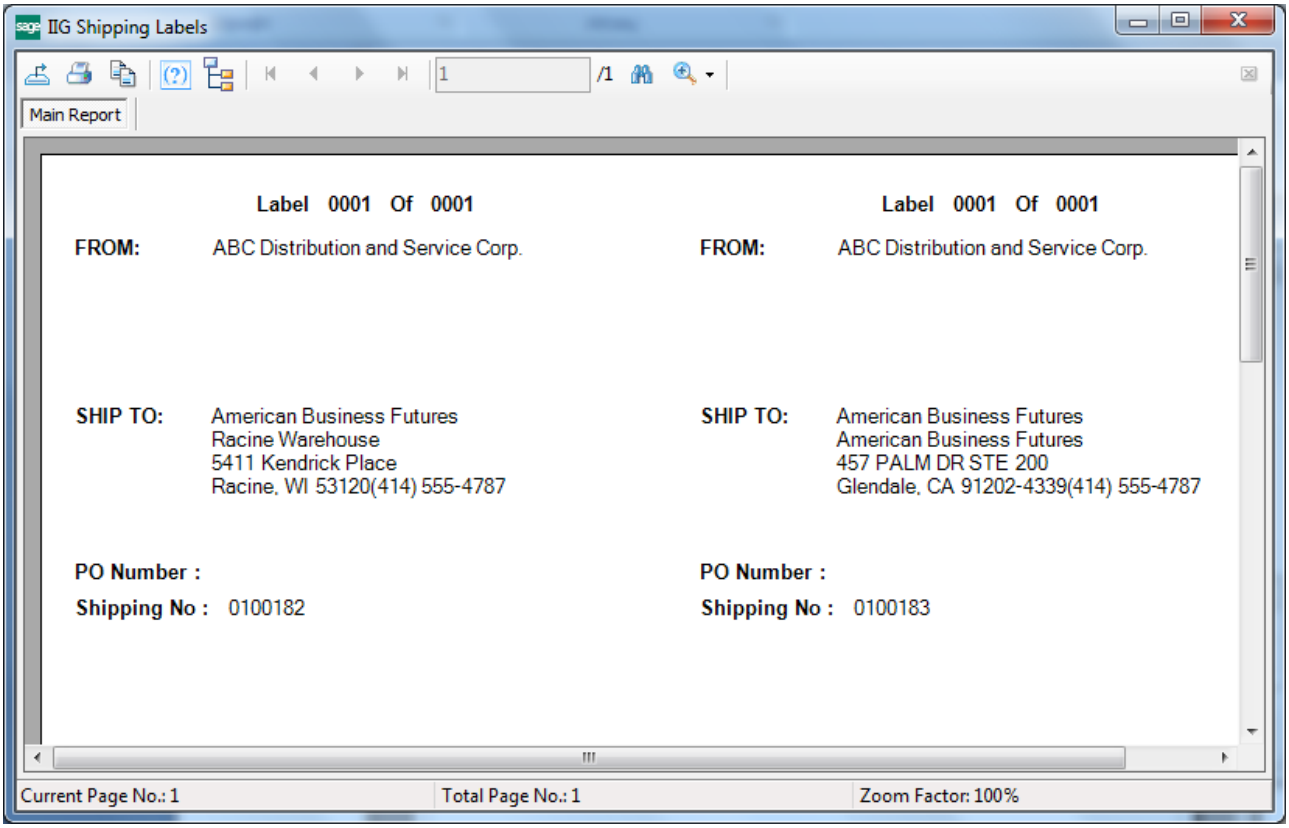
Printings

IIG Shipping Label Printing

The **IIG Shipping Label Printing** program has been added under the **Shipping** menu of the **Sales Order** module to enable **Shipping Labels** printing**.**



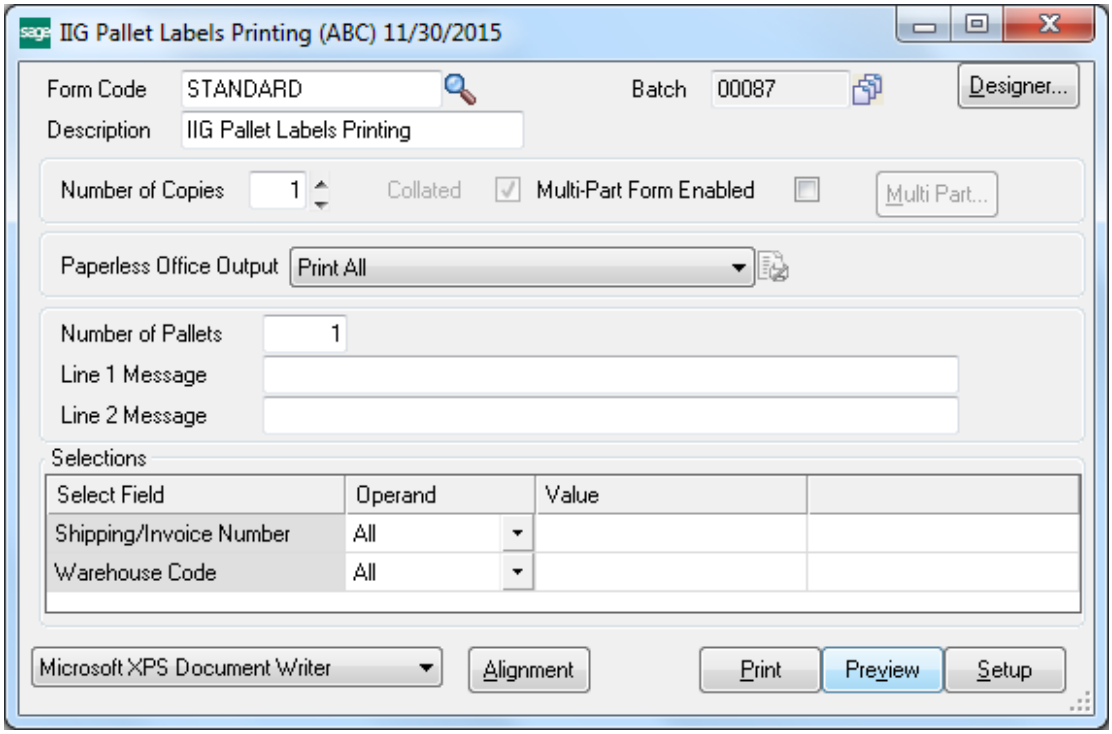
Selections by **Shipping/Invoice** number and **Warehouse Code** are available.
Here is an example of printout:



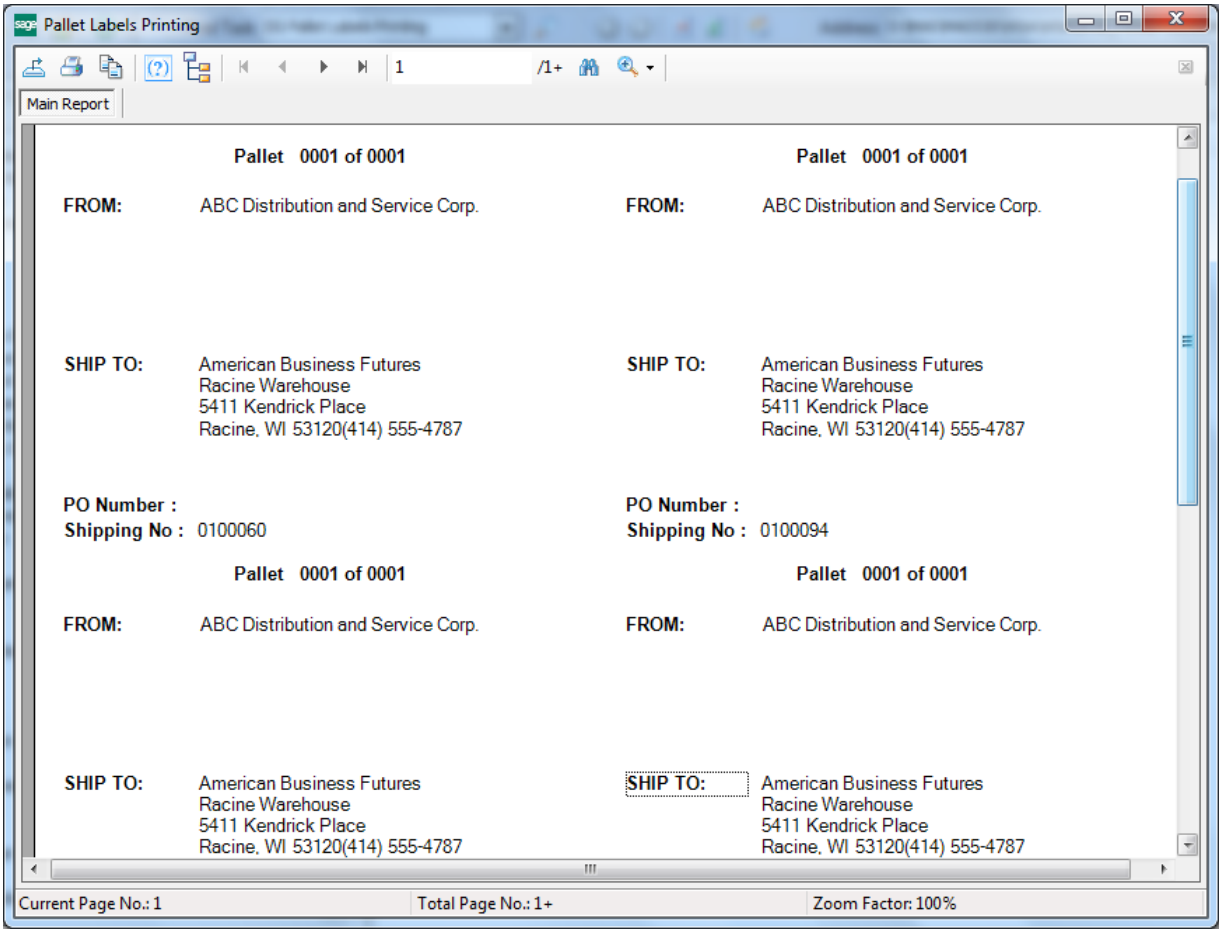
*Note: Paperless Office is provided for **IIG Shipping Label Printing.** It will work only if the **PDF Directory** field is specified and Invoice is selected as **Document** in the **Form Maintenance** of PL module.*

IIG Pallet Labels Printing

The **IIG Pallet Label Printing** program has been added under the **Shipping** menu of the **Sales Order** module to enable **Pallet Labels** printing**.**



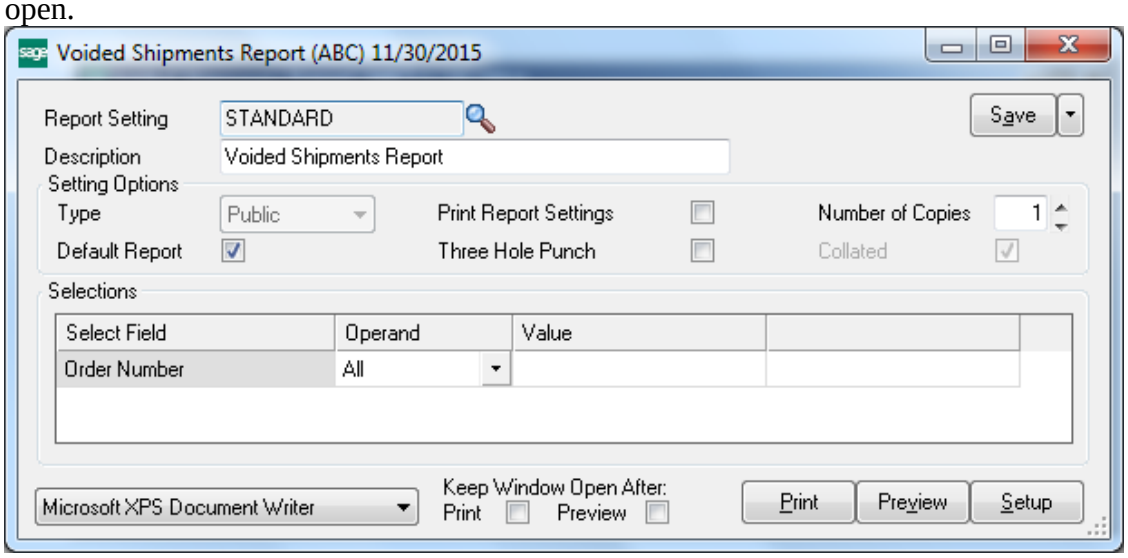
Selections by **Shipping/Invoice** number and **Warehouse Code** are available.
Here is an example of printout:



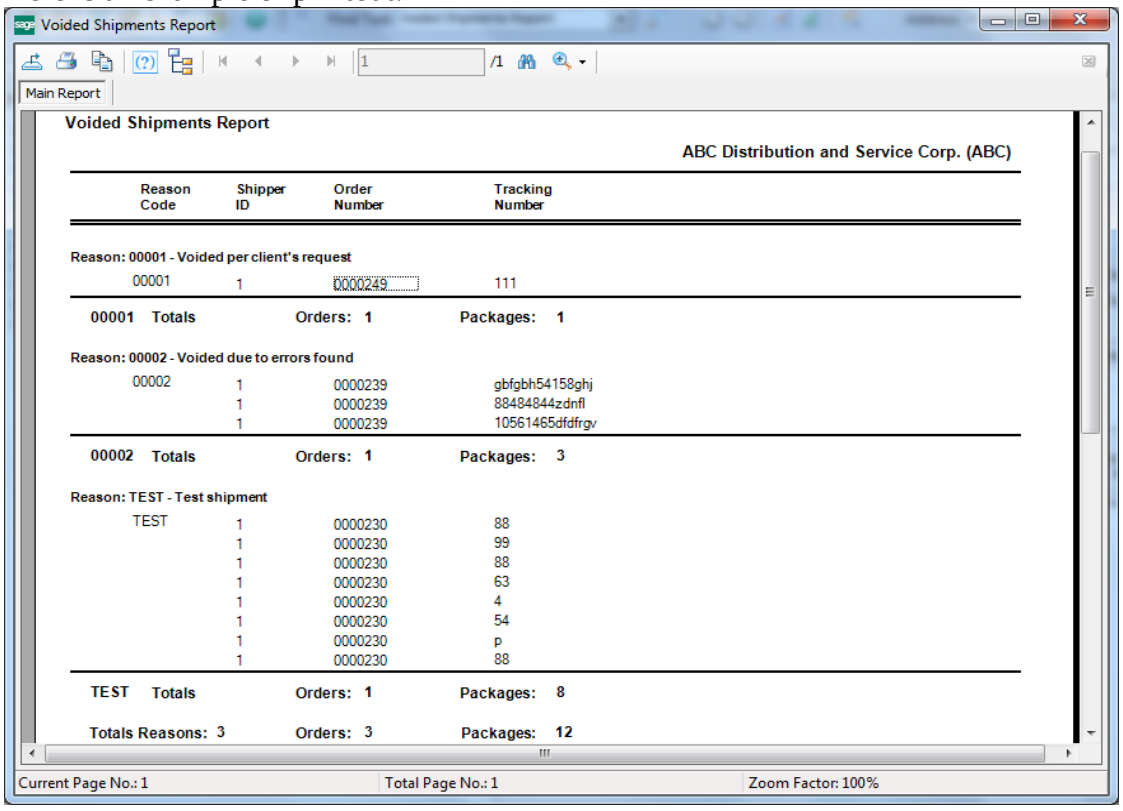
Note: Paperless Office is provided for **IIG Pallet Label Printing.** It will work only if the **PDF Directory** field is specified and Invoice is selected as **Document** in the **Form Maintenance** of PL module.

Voided Shipments Report

The **Voided Shipments Report** has been added to the **Reports** menu of the **Sales Order** module to allow printing the shipments that have been voided while the IIG Manifest is open.

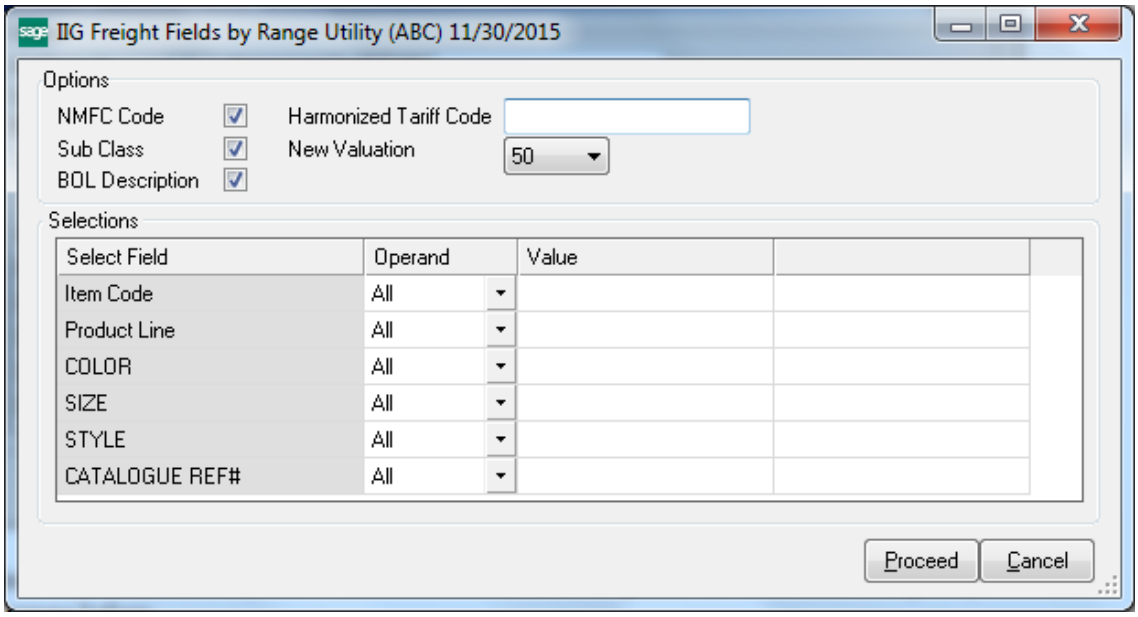


After the Manifest is closed no data is available for printing.
Here is an example of printout:



IIG Freight Fields Update Utility

The **IIG Freight Fields Update Utility** menu item has been added to the Inventory Management Utilities.



Select the **NMFC Code, Sub Class** or/and **BOL Description** check boxes and specify the range below.

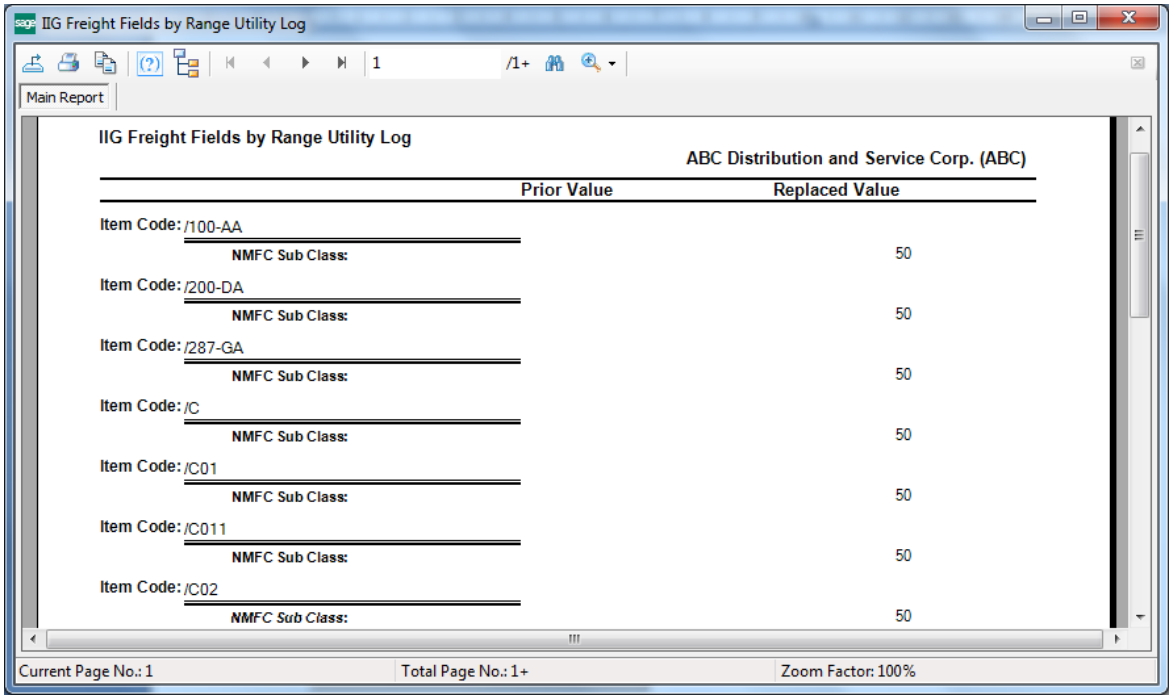
NMFC Code – makes the field uppercased.

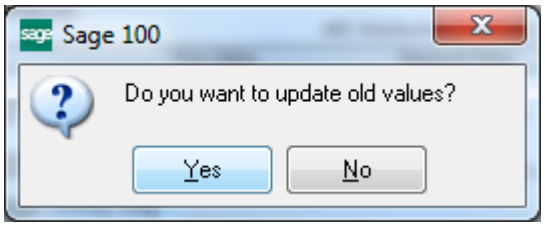
Sub Class – If the number specified in the Sub Class field does not belong to the fixed values, the program changes it to the one specified here. Here is the list of the values: "50|55|60|65|70|77.5|85|92.5|100|110|125|150|175|200|250|300|400|500|".

BOL Description – Makes the Bill of Lading (BOL) description field uppercased, and limits to 30 characters. If blank, no change occurs to the item's BOL description field.

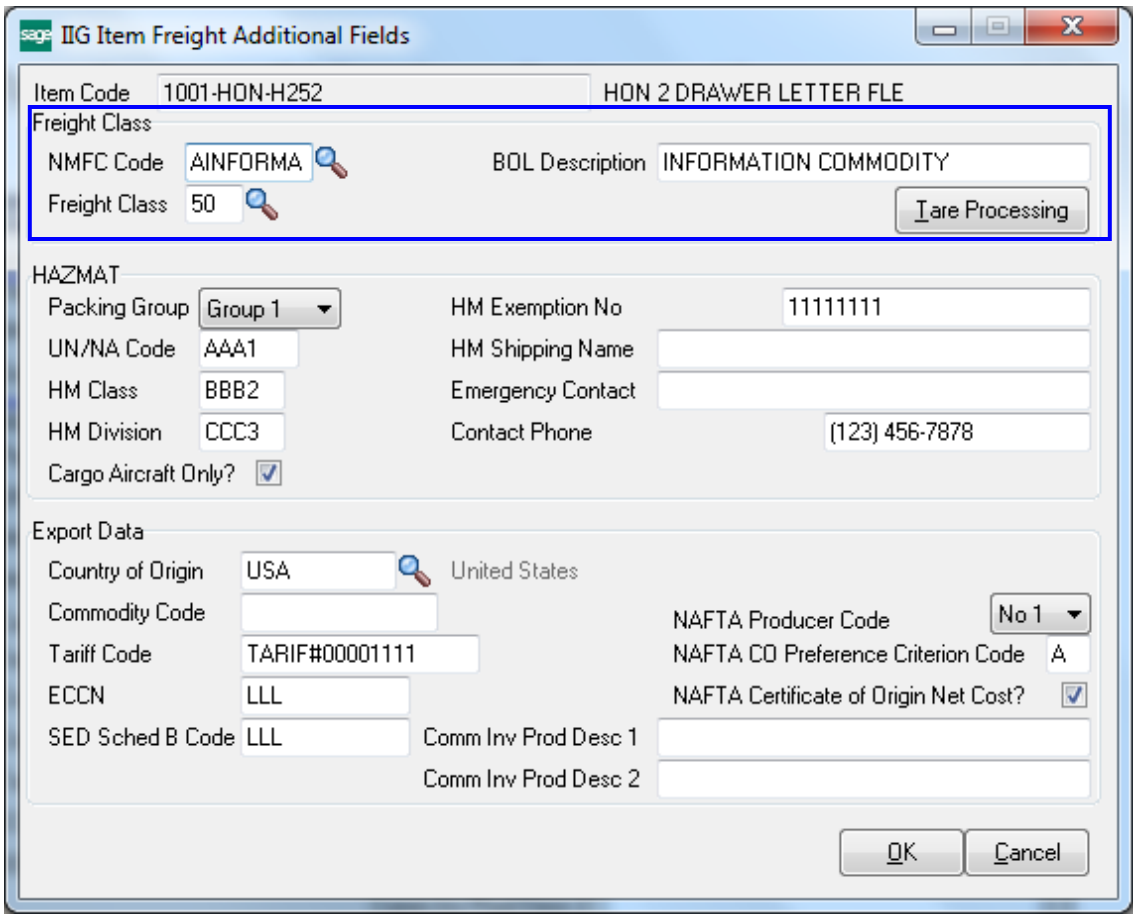
Harmonized Tariff Code – Enter the Harmonized Tariff Code for specified item(s). Harmonized Tariff Code field uppercased, and limits to 15 characters. If blank, no change occurs to the item's Harmonized Tariff Code field.
Upon clicking the **Proceed** button the IIG Freight Fields by Range Utility Log printing screen is opened allowing the user to print/preview the changes prior to applying them.

IIG Freight Fields by Range Utility Log
INVENTORY MANAGEMENT IIG FREIGHT FIELDS BY RANGE UTILITY LOG
Microsoft XPS Document Writer
Print
Preview
Setup


IIG Freight Fields by Range Utility Log
Main Report
IIG Freight Fields by Range Utility Log
ABC Distribution and Service Corp. (ABC)
Prior Value
Replaced Value
Item Code: /100-AA
NMFC Sub Class: 50
Item Code: /200-DA
NMFC Sub Class: 50
Item Code: /287-GA
NMFC Sub Class: 50
Item Code: /C
NMFC Sub Class: 50
Item Code: /C01
NMFC Sub Class: 50
Item Code: /C011
NMFC Sub Class: 50
Item Code: /C02
NMFC Sub Class: 50
Current Page No.: 1
Total Page No.: 1+
Zoom Factor: 100%


Sage 100
Do you want to update old values?
Yes
No

Select **Yes** to update the Item Freight additional fields' old values with the desired ones. Open the **IIG Item Freight Additional Fields** screen from **Item Maintenance** to see the updated values.



Appendix A: Clippership Carrier List*

Carrier Code	Carrier Description
A01	Airborne Express
A02	Airborne Express Letter
A03	Airborne Second Day
A04	Airborne Second Day Letter
A05	Airborne NAS
A06	Airborne NAS Letter
A07	Airborne Deferred
A08	Airborne Deferred Letter
A09	Airborne Express Zone
A10	Airborne Express Letter Zone
A11	Airborne Second Day Zone
A12	Airborne Second Day Letter Zone
A13	Airborne NAS Zone
A14	Airborne NAS Letter Zone
A15	Airborne Deferred Zone
A16	Airborne Deferred Letter Zone
B01	BAX Global Overnight
B02	BAX Global Overnight Letter
B03	BAX Global Second Day
B04	BAX Global Deferred
D01	DHL Worldwide Priority Express (Non-Doc)
D02	DHL Int'l Document Service (Package)
D03	DHL Int'l Document Service (Exp-Doc)
D04	DHL USA Overnight (Package)
D05	DHL USA Overnight (Exp-Doc)
F01	FedEx Priority Overnight
F02	FedEx Priority Overnight Letter
F03	FedEx Priority Overnight Pak
F04	FedEx Priority Overnight Box
F05	FedEx Priority Overnight Tube
F06	FedEx Standard Overnight
F07	FedEx Standard Overnight Letter
F08	FedEx Standard Overnight Pak
F09	FedEx Standard Overnight Box
F10	FedEx Standard Overnight Tube
F11	FedEx 2 Day
F14	FedEx Express Saver
F15	FedEx Overnight Freight (1 Day)
F16	FedEx Economy 2 Day Freight (2 Day)
F17	FedEx ES Distance Based Freight (3 Day)
F18	FedEx First Overnight
F19	FedEx First Overnight Letter
F20	FedEx 2 Day Letter
F21	FedEx 2 Day Pak
F60	FedEx International First Letter
F61	FedEx International First Pak
F62	FedEx International First
F63	FedEx International Priority Letter

*For all codes, enter a "C" (minus quotes) in the Service Type field.

Carrier Code	Carrier Description	
F64	FedEx International Priority Pak	*For all codes, enter a “C”
F65	FedEx International Priority	(minus quotes) in the Service
F69	FedEx International Economy	Type field.
F71	FedEx International Priority 10KG Box	
F72	FedEx International Priority 25KG Box	
P01	USPS First Class Regular	
P02	USPS First Class Presort	
P03	USPS First Class Priority	
P04	USPS Express (PO to Address)	
P05	USPS First Class Priority Flat Rate	
P06	USPS Express (PO to Address) Flat Rate	
P32	USPS Standard A Bulk	
P41	USPS Standard B Machinable	
P42	USPS Standard B Non-Machinable	
P43	USPS Standard B Intra-BMC	
P44	USPS Standard B Destination BMC	
P45	USPS Standard B Special	
P46	USPS Standard B Library Rate	
P47	USPS Bound Printed Matter (single)	
P48	USPS Bound Printed Matter (bulk)	
P60	USPS International Air Letter	
P61	USPS International Air Small Packet	
P62	USPS International Air Printed Matter	
P63	USPS International Air Parcel Post	
P64	USPS International Air Books/Music	
P65	USPS International Air Periodicals	
P66	USPS International Air Prnt. Mtr. M-Bag	
P67	USPS International Air Bks/Music M-Bag	
P68	USPS International Air Periodicals M-Bag	
P69	USPS International Surf Small Packet	
P70	USPS International Surf Printed Matter	
P71	USPS International Surf Parcel Post	
P72	USPS International Surf Books/Music	
P73	USPS International Surf Periodicals	
P74	USPS International Surf Prnt. Mtr. M-Bag	
P75	USPS International Surf Bks/Music M-Bag	
P76	USPS International Surf Periodical M-Bag	
P77	USPS International Custom Express	
P78	USPS International Demand Express	
P79	USPS International Global Priority Std	
P80	USPS International Global Priority Small	
P81	USPS International Global Priority Large	
R01	RPS Prepaid Air	
R02	RPS Prepaid Ground	
R04	RPS Prepaid Canada	
R06	RPS Collect Air	
R07	RPS Collect Ground	
R09	RPS Collect Canada	

Carrier Code	Carrier Description
R13	RPS Prepaid Ground Mexico
R17	RPS Multiweight Ground
R18	RPS Multiweight Air
R19	RPS Prepaid Europe
R20	RPS Multiweight Europe
R21	RPS Multiweight Mexico
R22	RPS Prepaid 3-Day
R23	RPS Collect 3-Day
R24	RPS Multiweight 3-Day
S01	Shipped With Other Goods (post shipment)
S02	Shipped With Other Goods (pre shipment)
U01	UPS Next Day Air
U02	UPS Next Day Air Letter
U07	UPS 2nd Day Air
U08	UPS 2nd Day Air Letter
U11	UPS Ground
U16	UPS GroundSaver
U20	UPS Hundredweight Ground
U21	UPS 3 Day Select
U24	UPS Hundredweight 3 Day Select
U25	UPS Hundredweight 2nd Day Air
U26	UPS Hundredweight Next Day Air
U35	UPS 2nd Day Air A.M.
U36	UPS 2nd Day Air Letter A.M.
U43	UPS Next Day Air Saver
U44	UPS Next Day Air Saver Letter
U45	UPS Hundredweight 2nd Day Air A.M.
U46	UPS Hundredweight Next Day Air Saver
U48	UPS Shipment Standard Service to Can
U49	UPS Shipment Express Service Intl
U54	UPS Shipment Expedited Service Intl
U60	UPS Early A.M.
U61	UPS Early A.M. Letter
U63	UPS Shipment Express Plus Service Intl
U64	UPS Express Service Intl 10KG Box
U65	UPS Express Service Intl 25KG Box
U66	UPS Express Plus Service Intl 10KG Box
U67	UPS Express Plus Service Intl 25KG Box
U68	UPS Express Service Intl Letter
U69	UPS Express Plus Service Intl Letter

*For all codes, enter a "C" (minus quotes) in the Service Type field

Appendix B: Malvern Carrier Setup

Note: *You must purchase and configure each carrier code that you will be using. Do not set up codes that you have not purchased as the Malvern server will reject the transaction.*

Carrier Codes

Carrier	Code
DHL International	DHL
DHL Globmail	GBM
Eastern Connection	ENC
FedEx	FDX
FedEx SmartPost	FSP
Golden State Overnight	GSO
Landmark	LDM
Lasership	LSR
Lone Star Overnight	LSO
Less Than Truckload	LTL
Newgistics	NGS
Norco Delivery	NOR
OnTrac	CON
SpeeDee Delivery	SPE
United Parcel Service	UPS
UPS Mail Innovations	UMI
US Postal Service	USP

Domestic Service Level Codes

Carrier	Code	Description
DHL	EXP	DHL Express
	NAS	DHL Next Day Afternoon
	SDS	DHL 2nd Day Air
	GDS	DHL Ground
FDX	FOV	FedEx First Overnight
	PRT	FedEx Priority Overnight
	STD	FedEx Standard Overnight
	ECO	FedEx Economy
	XSV	FedEx Express Saver
	GND	FedEx Ground
	HOM	FedEx Home Delivery
		➢ Express Freight Services

FDX	FRO	FedEx 1Day Freight
	FRE	FedEx 2Day Freight
	FRX	FedEx 3Day Freight
	FRZ	FedEx Economy Freight
	FFO	First Overnight Freight
	FFP	Freight Priority
	FFE	Freight Economy
FSP	PPT	Parcel
	STD	Standard A
	BPM	Bound Printed Matter
	MED	Media Mail
GSO	PDS	Priority Delivery Service
	EPA	Early Priority Service
	NPS	Noon Priority Service
	SDS	Saturday Delivery Service
	ESS	Early Saturday Service
	CPS	California Parcel Service
LDM	STD	Standard
	EXP	Express
LSR	GND	Ground
LSO	PRE	Priority Early
	PRB	Priority Basic
	PRS	Priority Saturday
	ECO	Economy Overnight
	GND	Deferred End of Day
LTL	GND	LTL/TL Ground. LTL carriers require the SCAC code.
NGS	PPS	Parcel Select
	STD	Standard
NOR	NDO	Next Day Overnight
	EON	Early Overnight
	MON	Morning Overnight
	SON	Saturday Overnight
	OON	One Overnight
	NDR	Next Day Remote
	2DR	2nd Day Remote
CON	CTS	CalTrac Service
	GDS	Sunrise Gold Service
	SRS	Sunrise Service
	HVW	Heavyweight
SPE	GND	SpeeDee Ground
UPS	EAM	UPS Next Day Early A.M.
	1DY	UPS Next Day Air
	1SV	UPS Next Day Saver
	2AM	UPS 2nd Day Air Early AM
	2DY	UPS 2nd Day Air
	3DY	UPS 3-Day Select

UPS	GND	UPS Ground
	SPS	UPS SurePost
	SPM	UPS SurePost Media
	SPB	UPS SurePost BPM
UMI	PCS	Parcels
	FLT	Flats
	BPM	Bound Printed Matter
	MED	Media Mail.
USP	1CL	First Class Mail
	BPM	Bound Printed Matter
	EXP	Express Mail
	LIB	Library
	MED	Media Mail
	PPT	Parcel Post
	PRT	Priority Mail

International Service Level Codes

Carrier	Code	Description
DHL	IXP	DHL International Express
FDX	PRT	FedEx Priority Overnight
	ECO	FedEx 2-Day
	GND	FedEx Ground (to Canada)
		➢ Expedited Freight services
	FRY	FedEx Priority Freight
	FRZ	FedEx Economy Freight
GBM	BPR	Business Priority
	BST	Business Standard
	PPR	Parcel Priority
	PST	Parcel Standard
	PTR	Parcel Direct
	PDE	Parcel Direct Express
	PKT	Packet Plus
	PKP	Packet Priority
	PKS	Packet Standard
LDM	STD	Standard
	EXP	Express (Canada only)
UMI	GPM	Priority Mail International
	AML	Economy International
UPS	STD	UPS Standard to Canada
	STM	UPS Standard to Mexico
	XPD	UPS Worldwide Expedited
	XPS	UPS Worldwide Saver

UPS	XPR	UPS Worldwide Express
	XPP	UPS Worldwide Express Plus
USP	GGN	Global Express Guaranteed
	EXP	Express Mail International
	GPM	Priority Mail International
	AML	First-Class Mail International

*** see Malvern Manual 3.11, pages 58-59 **

Appendix C: Setting Up Thermal Label Printers

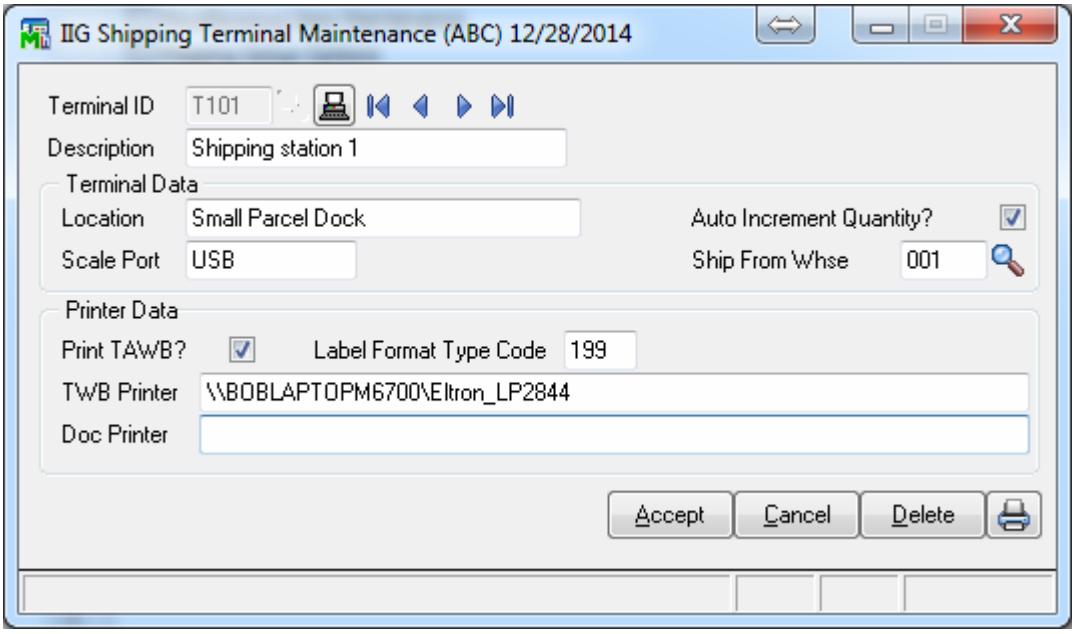
UNC Method

Where the thermal printer is run from a print server or is an IP based printer, you can use the UNC path to print to the thermal printer. To use this, obtain the UNC share from your network administrator of the printer. It must be shared with full rights to the users authorized to access this printer resource. If the printer is connected to the shipping workstation it must be shared with full rights for any user.

Steps to set up:

1. Install the Thermal Label printer using the device driver provided by the manufacturer.
2. Share this printer. We recommend that you change the share name to remove spaces and shorten. Good: *eltron_lp2844*. Bad: *Eltron LP2844 on Shipping 2*.
3. From the workstation that will be the shipping station select the Shipping Terminal Maintenance from the Sales Order Setup menu.
4. Click on the button to load the current terminal ID.
5. Enter the description, location, scale port (if used), auto increment, and ship from warehouse information.
6. Check Print TAWB, set the label format code.
7. Enter the printer UNC share for the TWB printer.
8. Enter the printer UNC for the doc printer if Malvern will be printing international documentation. This will be shared laser printer that Malvern should have access to.

Typical shares: \\192.168.1.201\eltron_lp2844
\\workstationshare\printer_sharename



Note: *Due to the steadily increasing Windows security updates, this can fail without warning. Windows does a silent share disconnect that can lead to the UNC share failing with an error 15. Below are links related to this issue.*

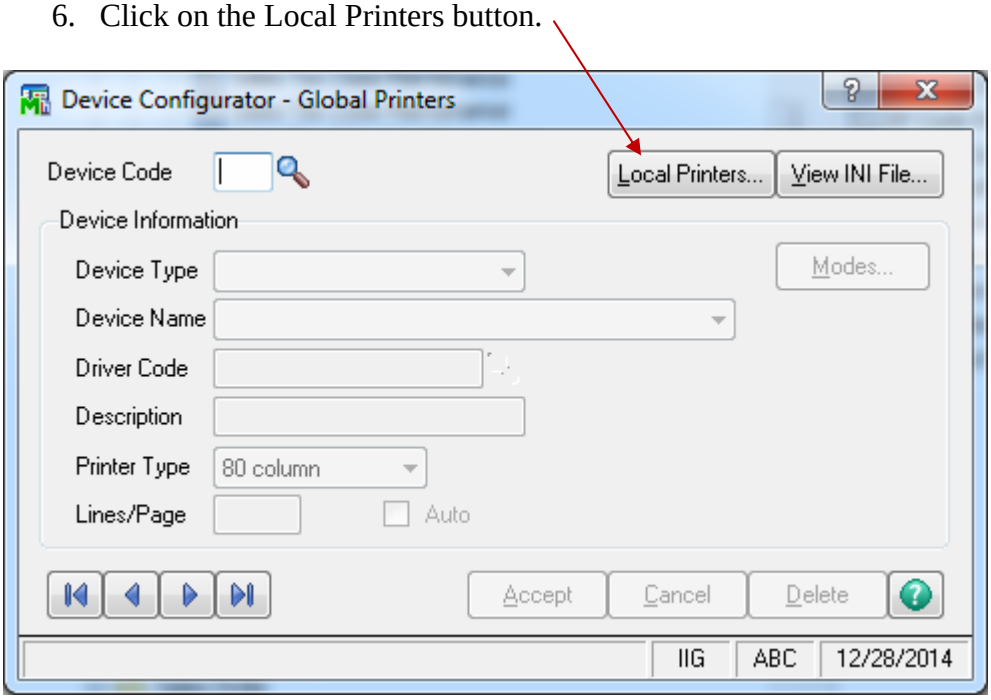
http://blogs.msdn.com/b/oldnewthing/archive/2011/02/23/10132889.aspx
http://support.microsoft.com/default.aspx?scid=kb;en-us;Q297684
http://technet.microsoft.com/library/Cc960471

Device Configurator Method

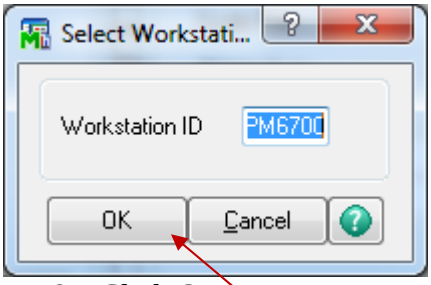
This is the recommended method to reliably configure the thermal label printer for the shipping station, particularly if the printer is directly connected to the shipping station.

Steps to set up:

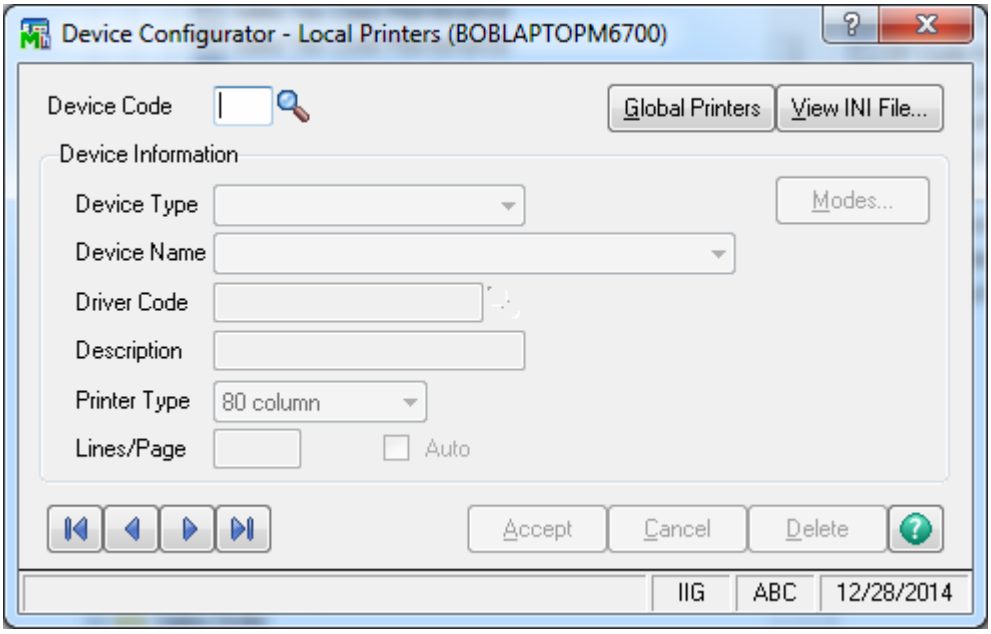
1. From the workstation that will be the shipping station select the Shipping Terminal Maintenance from the Sales Order Setup menu.
2. Click on the button to load the current terminal ID.
3. Enter the description, location, scale port (if used), auto increment, and ship from warehouse information.
4. Check Print TAWB, set the label format code.
5. Leave this dialog open and select the Device Configurator from the Library Master Setup menu.
6. Click on the Local Printers button.



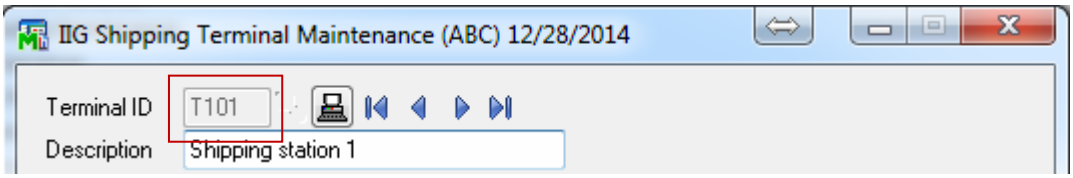
7. The Select Workstation ID will display.



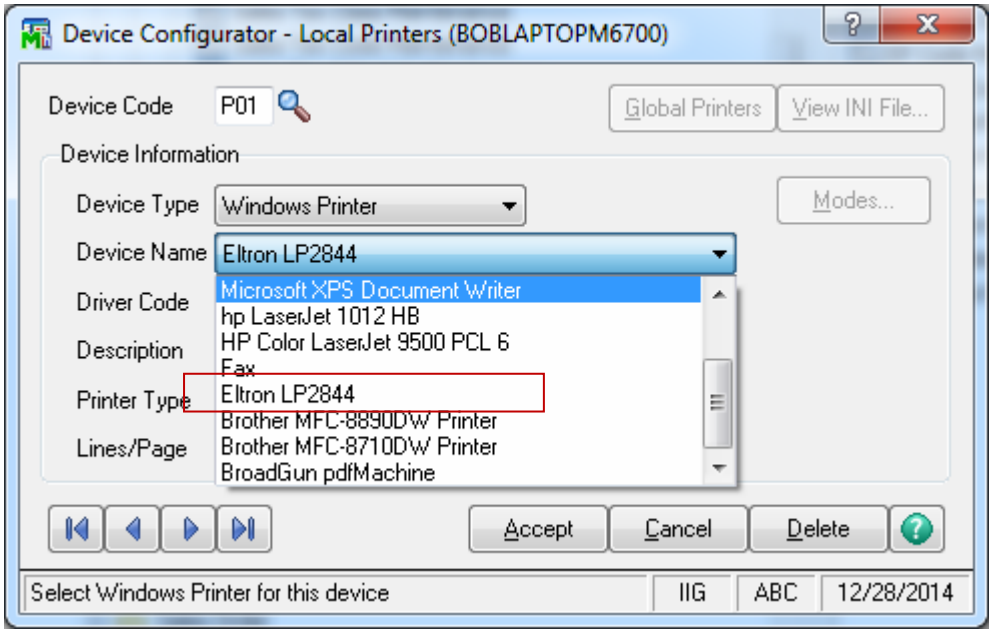
8. Click OK.



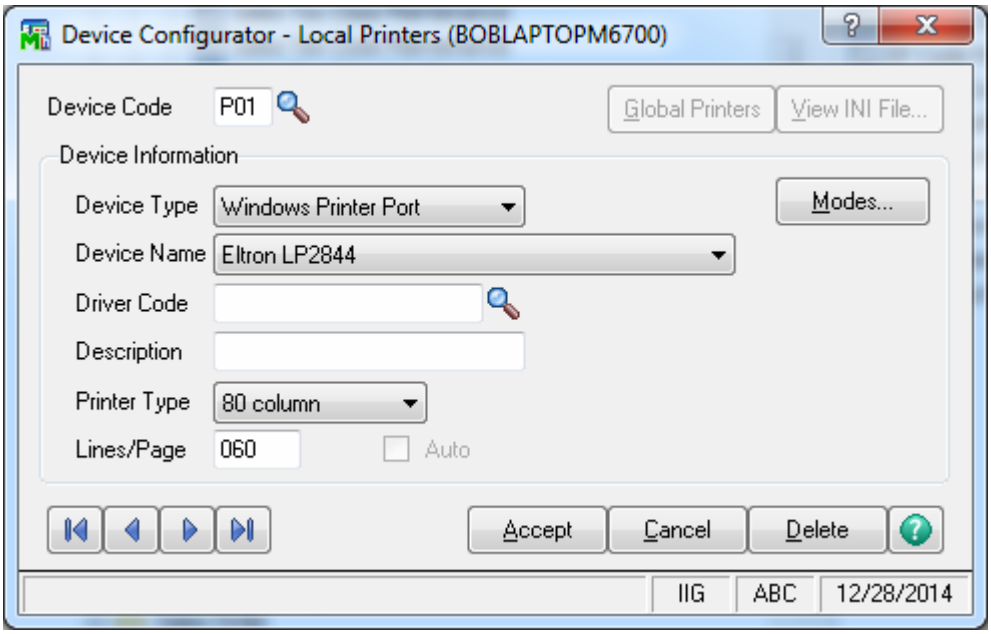
9. Refer back to the IIG Shipping Terminal Maintenance screen for the terminal ID.



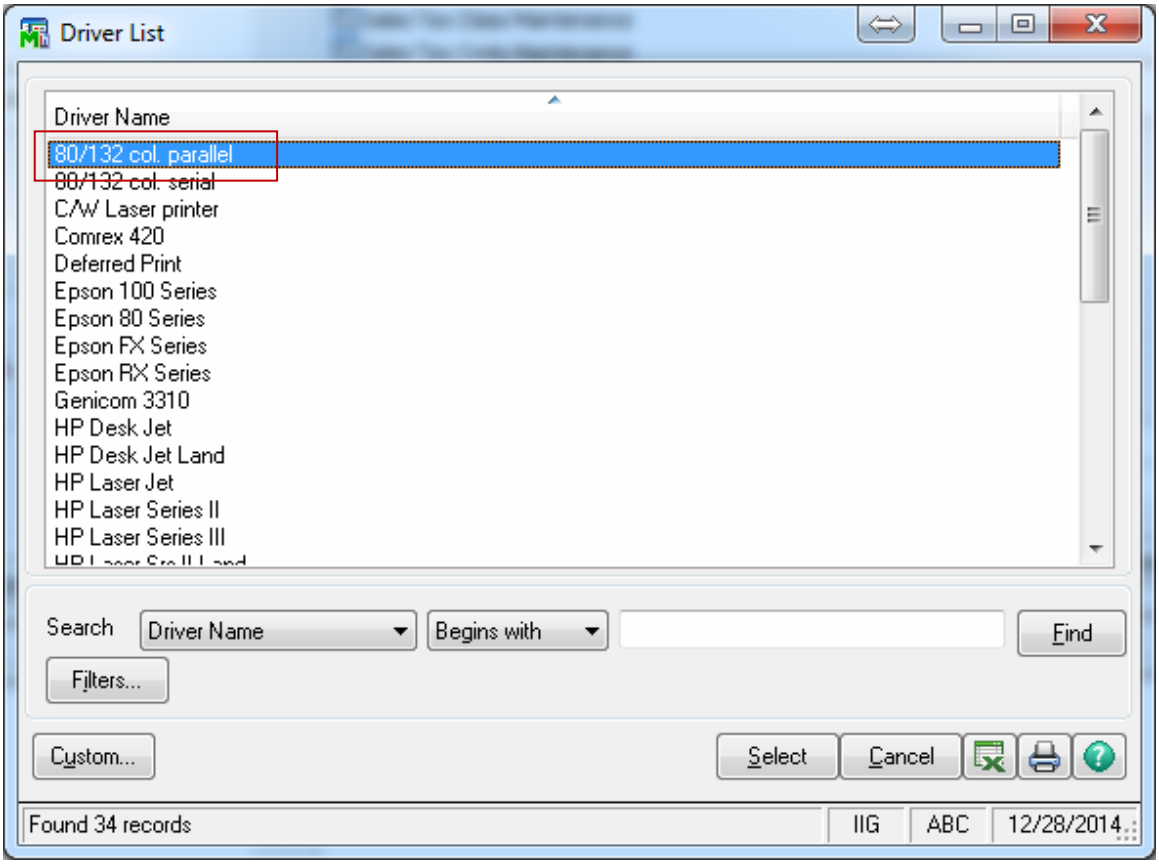
10. We normally recommend that you would build the printer ID using the last two digits of the terminal ID. In this example we would use P01 as the new printer ID. However, due to some of the vagaries on how Sage assigns terminal IDs, you will need to adjust under certain circumstances. Printer IDs must be unique in the system if they are not a share global resource. So for the following terminal IDs use the following printer IDs:
    a. T101-T199 – P01-P99
    b. T201-T299 – PA1-PA9
    c. T301-T399 – PB1-PB9
    d. T401-T445 – PC1-PC9
11. Enter the selected printer ID in the Device Code field.
12. In the Device Type, select *Windows Printer Port* in the drop down list.
13. In the Device Name drop list you should be able to see the thermal label printer installed.



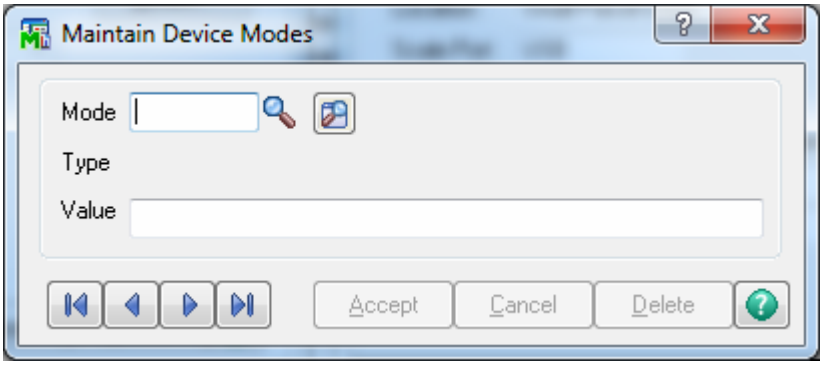
14. Select the printer. In this case it will be the *Eltron LP2844*.



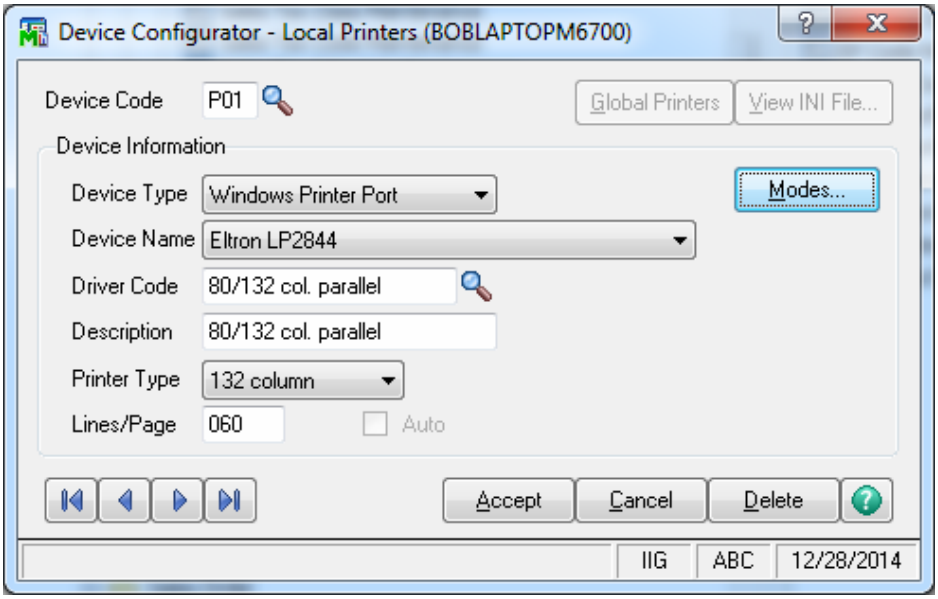
15. Using the Driver code lookup, select *80/132 col parallel*.


Driver List
Driver Name
80/132 col. parallel
80/132 col. serial
C/W Laser printer
Comrex 420
Deferred Print
Epson 100 Series
Epson 80 Series
Epson FX Series
Epson RX Series
Genicom 3310
HP Desk Jet
HP Desk Jet Land
HP Laser Jet
HP Laser Series II
HP Laser Series III
Search
Driver Name
Begins with
Find
Filters...
Custom...
Select
Cancel
Found 34 records
IIG
ABC
12/28/2014

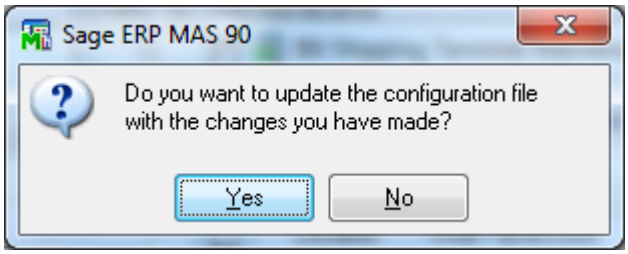
16. Leave the **Description** field as is.
17. Change the **Printer Type** to *132 Column.*
18. Leave the **Lines/Page** at *060.*
19. Click on the **Modes…** button which will open the **Maintain Device Modes** screen.



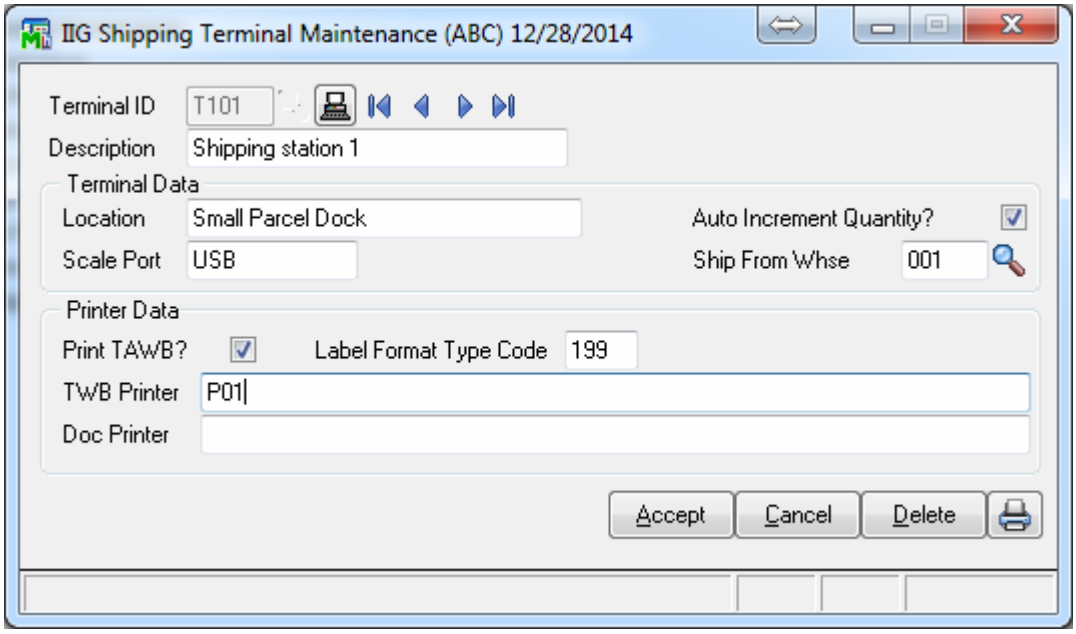
20. Use the lookup or the beginning button to select the *CP* record. From this record make the following changes by steping through each record.
    a. *CP* – change the **Value** field to *20* and click **Accept.** Go to the next record.
    b. *CPCOLS* – Leave at *255*. Skip to the next record.
    c. *CR* – No change. Skip to the next record.
    d. *SP* – Change the **Value** field to *20* and click **Accept.** Go to the next record.
    e. *SPCOLS* – Change the **Value** field to *255* and click **Accept.**
    f. Click the button to close this dialog.
21. The Device Configurator screen should look similar to this:



22. Click **Accept** to write the printer configurator record. The program will switch back into the Global printer mode.
23. Click on the to exit this screen. The program will display this message:



24. Click **Yes** to update the configuration screen.
25. Switch back over to the IIG Terminal Maintenance screen.
26. Enter the printer ID you just created. In this example it is P01.



27. Click **Accept** and close this screen. The workstation is now configured to use the printer associated with P01.