

Shipping Center

Note, orders must be in completed status before shipping them or no record will be created in the UPS import/export file.

The **Shipping Center** allows you to prepare your orders for shipping, print Packing Lists, modify the order, and create Back Orders for items you are unable to ship now.

✚ From the **ADVANTAGE** main screen, select **Production**, then **Shipping Center**:



✚ **ADVANTAGE** brings up the **Shipping Center** screen:

Shipping Center [Close]

Shipping To One Location | Distribution Create/Edit | Shipping to Multiple Locations

ORDER # [] TERMS: []

	Product	Qty Ordered	Qty Shipped	Max Allowed
*				

Customer []
 Contact []
 Phone [] EXT []
 FAX []

Select Shipping Address | Add Shipping Address

TRACKING INFO

Tracking Numbers (double-click to see status)

Import UPS | Shipping Charge [] \$0.00

UPDATE UPS | Save | Labels | Print Back Order Invoice

Email Notification | Preview

Notification | Print | pl01 packing list.rpt | # Copies [] 1

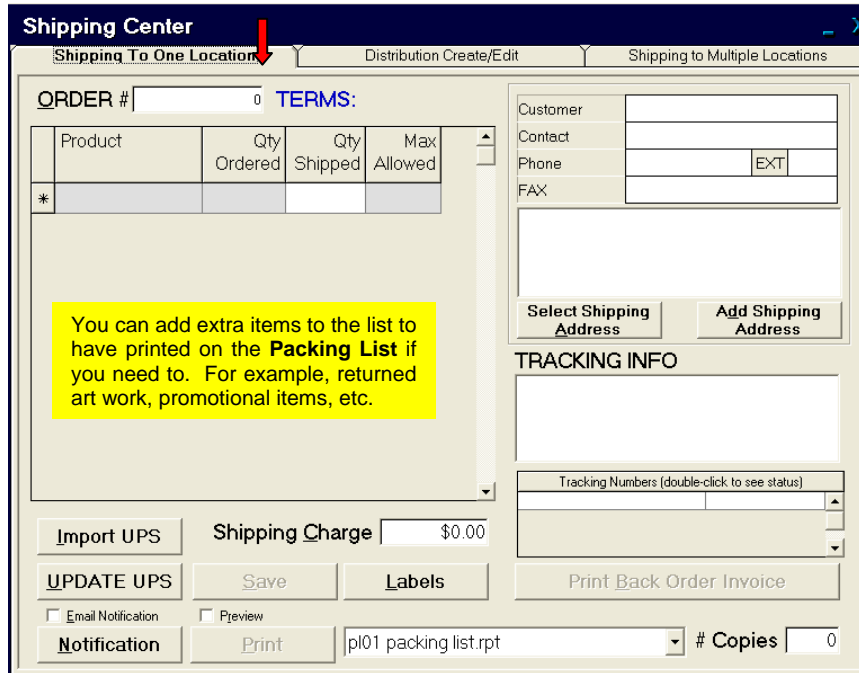
Activity Advantage Software Documentation

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Revised: 3/20/07

Basic Shipping Information

- Click the **Shipping to One Location** tab. Be sure you know the invoice number before you begin:



Shipping Center

Shipping To One Location | Distribution Create/Edit | Shipping to Multiple Locations

ORDER # | 0 | TERMS:

Product	Qty Ordered	Qty Shipped	Max Allowed
*			

You can add extra items to the list to have printed on the **Packing List** if you need to. For example, returned art work, promotional items, etc.

Customer: []
 Contact: []
 Phone: [] EXT: []
 FAX: []

Select Shipping Address | Add Shipping Address

TRACKING INFO

Tracking Numbers (double-click to see status)

Shipping Charge: \$0.00

Import UPS | UPDATE UPS | Save | Labels | Print Back Order Invoice

Email Notification | Preview | Notification | Print | pl01 packing list.rpt | # Copies: 0

- Order #** - enter the invoice number for the order you are shipping
- TERMS** for the invoice are displayed automatically
- ADVANTAGE** automatically fills in the invoice product information

Product	Qty Ordered	Qty Shipped	Max Allowed
Edge	2	2	
Scotch-2	4	4	
Cabinet-W 4x8	1	1	
Poly 3/16"	1	1	
10" Extrusion	1	1	
*			

Products shown in gray are the products that will be listed on the invoice.

Assembly items, shown in pink, are shown here so they can be shipped, but they will not be printed on the invoice.

- Product** – **ADVANTAGE** lists each product or Assembly part here so your shipper can send a complete order
- Qty Ordered** – Quantity ordered is the quantity to be shipped, and is filled in by **ADVANTAGE**
- Qty Shipped** – also filled in by **ADVANTAGE**, but you can change it
- Max Allowed** – the maximum quantity of this product's run that the customer agrees to buy, if good quality -- **Overs**
- Shipping Charge** – enter the actual shipping charges to be printed on and added to the invoice

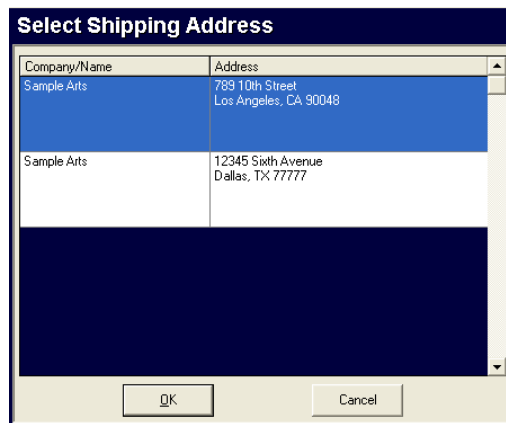
- The default **Shipping Address** is displayed automatically:



A form with the following fields:

Customer	Sample Arts	
Contact		
Phone		EXT
FAX		
789 10th Street Los Angeles, CA 90048		
Select Shipping Address		Add Shipping Address

- If the customer has more than one shipping address and you wish to use a different one, click **Select Shipping Address** to choose another address:



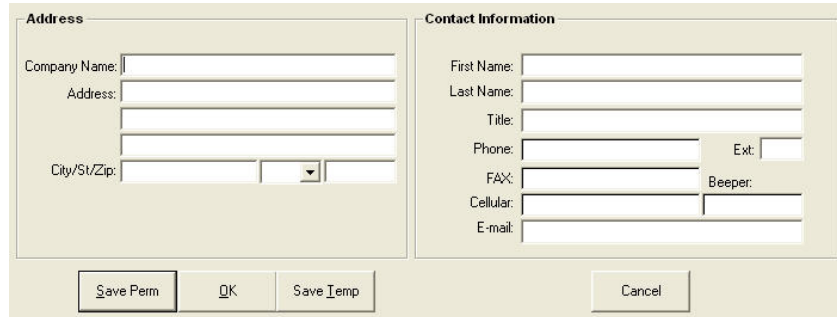
Select Shipping Address

Company/Name	Address
Sample Arts	789 10th Street Los Angeles, CA 90048
Sample Arts	12345 Sixth Avenue Dallas, TX 77777

Buttons: **OK**, **Cancel**

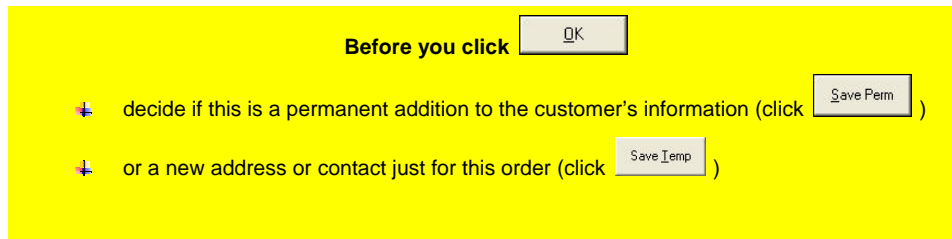
- Highlight the address you want, then click **OK**.


You can also add a new shipping address and/or contact by clicking :





The screenshot shows a form with two main sections: "Address" and "Contact Information". The "Address" section includes fields for "Company Name", "Address" (two lines), and "City/St/Zip" (with a dropdown menu). The "Contact Information" section includes fields for "First Name", "Last Name", "Title", "Phone" (with an "Ext." field), "FAX", "Cellular", "E-mail", and "Beeper". At the bottom of the form are buttons for "Save Perm", "OK", "Save Temp", and "Cancel".

Address is the *company* information; **Contact Information** is about the *person*



Before you click 

- + decide if this is a permanent addition to the customer's information (click )
- + or a new address or contact just for this order (click )

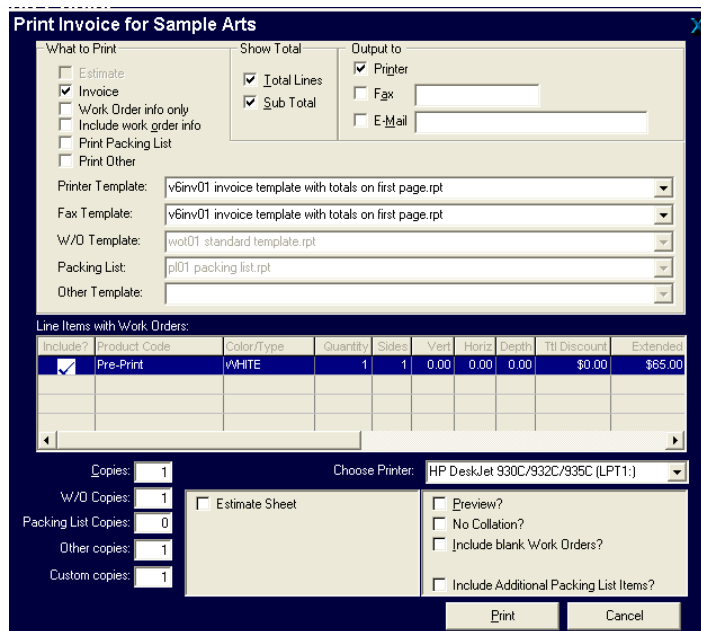
When you have completed the shipping information, click 

Backorders

- When you click after entering the basic shipping information, **ADVANTAGE** checks to see if any items will be backordered. If **Qty Shipped** is less than **Qty Ordered**, there is a backorder.
- If there is a backorder, **ADVANTAGE** automatically creates a *new invoice* for the backordered item(s)

The **Backorder Invoice** becomes part of **Work In Process**, while the **original order** is moved to **Accounts Receivable**.

- You will need to print the **Backorder Invoice** to get the new Invoice number
- Click
- ADVANTAGE** brings up the **Backorder Print Invoice** Screen



Print Invoice for Sample Arts

What to Print: Estimate, Invoice, Work Order info only, Include work order info, Print Packing List, Print Other

Show Total: Total Lines, Sub Total

Output to: Printer, Fax, E-Mail

Printer Template: v6inv01 invoice template with totals on first page.rpt
 Fax Template: v6inv01 invoice template with totals on first page.rpt
 W/O Template: woi01 standard template.rpt
 Packing List: pl01 packing list.rpt
 Other Template:

Include?	Product Code	Color/Type	Quantity	Sides	Vert	Horiz	Depth	TI Discount	Extended
<input checked="" type="checkbox"/>	Pre-Print	WHITE	1	1	0.00	0.00	0.00	\$0.00	\$65.00


Copies: 1, W/O Copies: 1, Packing List Copies: 0, Other copies: 1, Custom copies: 1

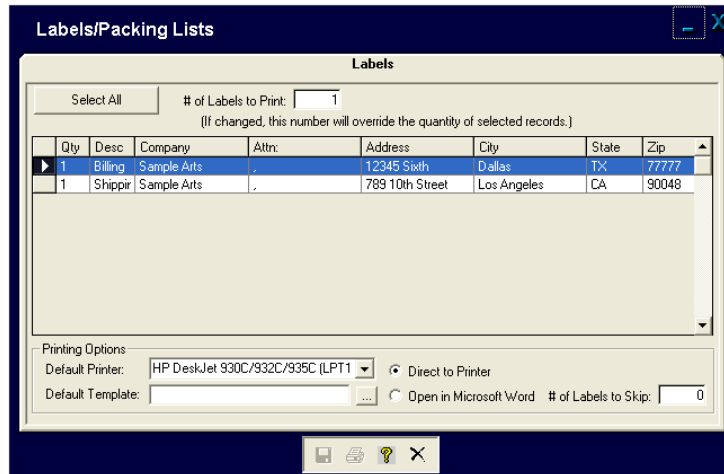
Choose Printer: HP DeskJet 930C/932C/935C (LPT1:)




Estimate Sheet, Preview?, No Collation?, Include blank Work Orders?, Include Additional Packing List Items?

- ADVANTAGE** enters the information for you
- Click to send the **Backorder Invoice** to the printer

Print Shipping Labels



- To print the shipping labels from the **Shipping Center**, click 
- ADVANTAGE** brings up the shipping label window:



- Select which address(es) you want printed on the label or click 
- Qty** - enter the number of labels to print for each address
- # of Labels to Print** – if changed, will override **Qty**
- Printing Options** – use the drop down menu  to select a different printer, or the  button to select a different template

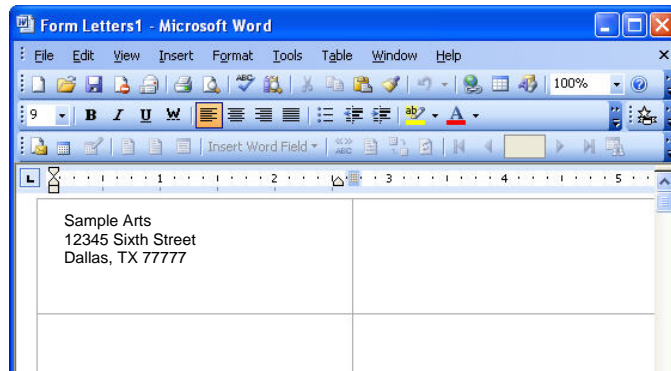


ADVANTAGE uses Microsoft Word's standard label templates, or you can create your own template in Word.

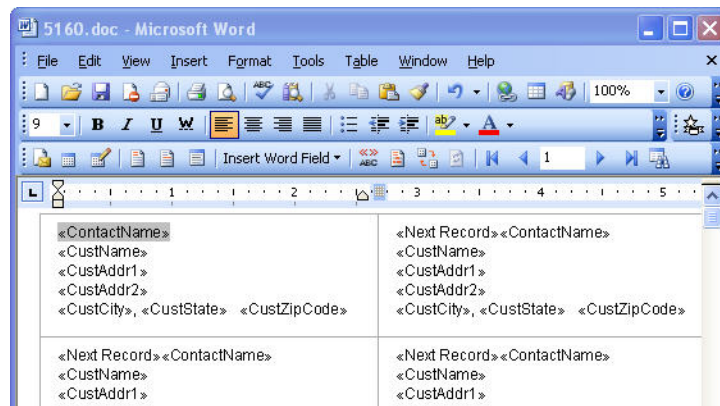
- To print, select **Direct to Printer**, then the print button 
- To *preview*, select the **Open in Microsoft Word** option, then the print  button

Use # of Labels to Skip when you are printing on a partial sheet of label paper.

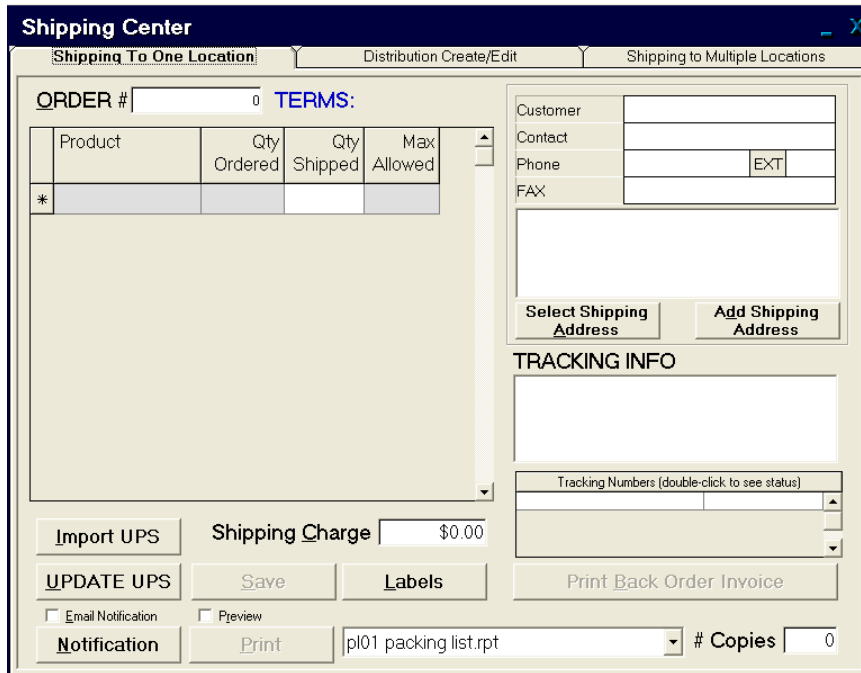
- ✚ **ADVANTAGE** open MS Word with the addresses you picked entered on the selected template



- ✚ Print the label(s) from Word, then close the Word window
- ✚ Also close the Word formatted template without saving and close the label window in **ADVANTAGE**





Print Packing List




- ✚ **Email Notification** – check the box if you want **ADVANTAGE** to send an email to the customer when you print the **Packing List**
- ✚ To enter the email message you are sending, click **Notification**
- ✚ **ADVANTAGE** brings up the **E-Mail Notification** text window with your saved default message. If you want to change the message, just type it in the window and click **OK**.
- ✚ **# Copies** – enter the number of copies of the Packing List you want printed

It is good practice to print two copies of the **Packing List**. One you send with the order, the other you give to your Accountant or Bookkeeper so your records can be properly maintained.

- ✚ Use the drop down menu  to select the **Packing List** document, and, if you want to send it to the printer, click **Print**
- ✚ If you want to preview the **Packing List** before it is printed, check the **Preview** box  **Preview**



Click **Print** and **ADVANTAGE** brings up the **Packing List** for your review:

 5025 Arapaho Rd. Suite 220 Dallas, TX 75248 Phone: (214) 555-9874 Fax: (214) 555-6458		Packing List	
Sold To:		P.O. #: 1000	
Sample Arts		Invoice Number: 1001	
Attn:		Backorder Invoice Number: 1001	
12345 Sixth Avenue		Order Date: 7/19/07	
Dallas, TX 77777		Ship Via:	
Phone: Ext:		Ship Date: 7/19/07	
Fax:		Ship To:	
Sample Arts		Attn:	
12345 Sixth Avenue		Dallas, TX 77777	
Phone: Ext:		Phone: Ext:	
Fax:		Fax:	
Dist. #:	Item: Description:	Quantity Backordered:	Quantity Shipped:
135736604	Pre-Print	1.00	0.00
135736284	Install-3 3 Hour Installation	0.00	1.00
135736284	8-Color	0.00	1.00

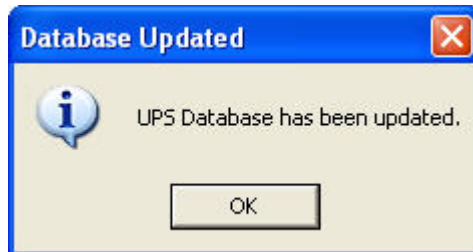
Notice the **Backorder Invoice Number** is printed on the **Packing List**, and the product that is backordered is shown as such. Also, the pink (**Assembly**) items did not print.

Tie-in with UPS WorldShip®

ADVANTAGE allows you to update UPS WorldShip® with your **Shipping** information, and it allows you to import tracking information from WorldShip®.

*From **ADVANTAGE***

- ✚ At the end of each day, click from the **Shipping Center** screen to send your shipping information to WorldShip®. **Do not** enter an invoice number, just open **Shipping Center** and click the **Update UPS** button.
- ✚ **ADVANTAGE** creates a file that can be *imported into WorldShip®*. The file includes
 - ✚ Invoice Number
 - ✚ Customer Name
 - ✚ Contact Name
 - ✚ Phone Number
 - ✚ Address (lines 1, 2, and 3)
 - ✚ City, State, Zip
 - ✚ Customer Number
- ✚ Click when the WorldShip® database is updated successfully





In WorldShip®

- ✚ Click **UPS Online Connect**
- ✚ Select **Batch Import**
- ✚ Highlight **ADVANTAGE Shipping Center**
- ✚ Check **Delete existing records before import**

If you don't check **Delete existing records before import**, you will get duplicate information.

- ✚ **DO NOT** check **Process shipments automatically**

You need to edit each shipment separately so you can enter the correct shipping method, weight, etc.

- ✚ Click

- ✚ Click to delete all records

WorldShip® will tell you how many records it is importing.

- ✚ Click

- ✚ Click

- ✚ Click

- ✚ Under **Imported Shipments** are the invoices that are in **WIP/Completed** in **ADVANTAGE**.

- ✚ Click on a customer name to see the details


This **Invoice Number** is in the **Misc.** box next to **Ref1**.

- ✚ From the **menu**, select **Activities**
- ✚ Select **Edit / Reconcile Shipment** to make your changes and process the shipment


From WorldShip® to ADVANTAGE In Worldship®

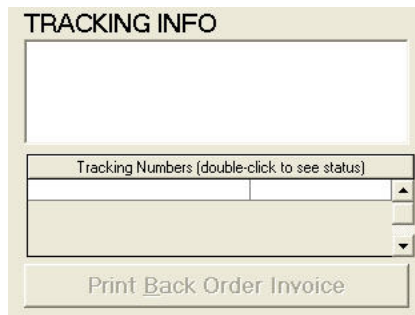
- ✚ Click **UPS Online Connect**
- ✚ Select **Batch Export**
- ✚ Highlight **Export to ADVANTAGE**
- ✚ Choose the export dates. The **export start date** will usually be the date of your last export.
- ✚ Click 

WorldShip® tells you the number of records to be exported.

- ✚ Click 
- ✚ Click 

In ADVANTAGE

- ✚ To import the tracking information, click . This puts tracking numbers in the **Invoice Notes**.
- ✚ Tracking information will be displayed for the *invoice* in the **Tracking Information** section



TRACKING INFO

Tracking Numbers (double-click to see status)	
	▲
	▼

Print Back Order Invoice

- ✚ Double click on the tracking information to check on the status in WorldShip®
- ✚ Double click a tracking number will show you the status also