Shipping Flows

Overview

Produmex WMS offers two flows on the Mobile Client to load goods and shipping orders for customers:

- Shipping Flow: Goods can be loaded and shipped from a loading dock.
- Bulk shipping Flow: Goods can be loaded and shipped directly from the silo/tank. No picking or packing is required.

Configuration

1. Set automatic shipping/no shipping

If the *Automatic shipping* option is enabled for the shipping type of the sales order line, the picklist created for that line is automatically shipped, and the picklist status is automatically converted to *Shipped* after the packing/picking.

If the *Customer collect* option is enabled for the shipping type of the sales order line, the picklist created for that line is not shipped, and the picklist status is automatically converted to *Shipped* after the customer collected it.

2. Set sales delivery settings

Configure the sales delivery settings on the Sales delivery note generator.

> Be aware if the user enables ***Copy text lines from order to delivery? (Y/N)*** on the **Sales Delivery Note Generator**, the added text lines on the Sales Order have multiple options for how they are inherited on the Delivery.

3. License plate

Based on the following settings, the user might have to select the license plate number of the vehicle after loading:

- To enable this setting globally, check the *Select license plate when loading* checkbox on the 'General' tab of the Organizational Structure.
- To enable this setting for a shipping type only, check the *Ask license plate during shipping?* option for the given shipping type.

4. Driver name

Based on the following settings, the user might have to select the name of the driver after loading:

- To enable this setting globally, check the *Select driver when loading* checkbox on the General tab of the Organizational Structure.

- To enable this setting for a shipping type only, check the *Ask driver name during shipping?* option for the given shipping type.

5. Trailer number

Based on the following settings, the user might have to select the trailer number after loading:

- To enable this setting globally, check the 'Select trailer number when loading' checkbox on the 'General' tab of the Organizational Structure.
- To enable this setting for a shipping type only, check the 'Ask trailer number during shipping?' option for the given shipping type.

6. Tracking number

In order to allow to enter a tracking number after the loading, enable the *Ask tracking number during shipping?* option for the shipping type.

Shipping Flow

Workflow



- Select dock
- Select input type
- Identify logistic unit
- Shipping
- Extra steps

1. Initiate flow

On the Mobile Client go to Sales > Shipping.

2. Select dock

Select the dock where the loading will take place. Every dock that can be used for loading is listed.

3. Select the input type

After the selection of the loading dock, select the input of the loading and shipping:

1. **Route**: Loading and shipping based on a route. Multiple picklists for various customers and addresses can be consolidated into a route. The loading order is defined by the route sequence.
2. **Picklist**: Loading and shipping based on a single picklist. A picklist can be generated for one or more sales order for the same customer.

3. **Wave**: Loading and shipping based on a wave of picklists. A picklist wave can contain multiple picklists for various customers.
4. **Customer**: Loading and shipping multiple picklists for a single customer.

4. Identify and load the logistic units

4.1. Shipping based on a route

Select a route

Select the route from the list. Routes that verify the following criteria are listed:

- The status of the route is 'Released'
- The status of the picklists on the route is 'Packed'
- If the *Allow loading of ready logistic units on not fully packed pick lists?* option is set to true on the Sales delivery note generator, a route is listed if there is at least one logistic unit packed for a picklist on the route.
- The route is assigned to the selected dock

The following information is displayed on the screen:

1. Route date
2. Route number
3. Route description (Template code)



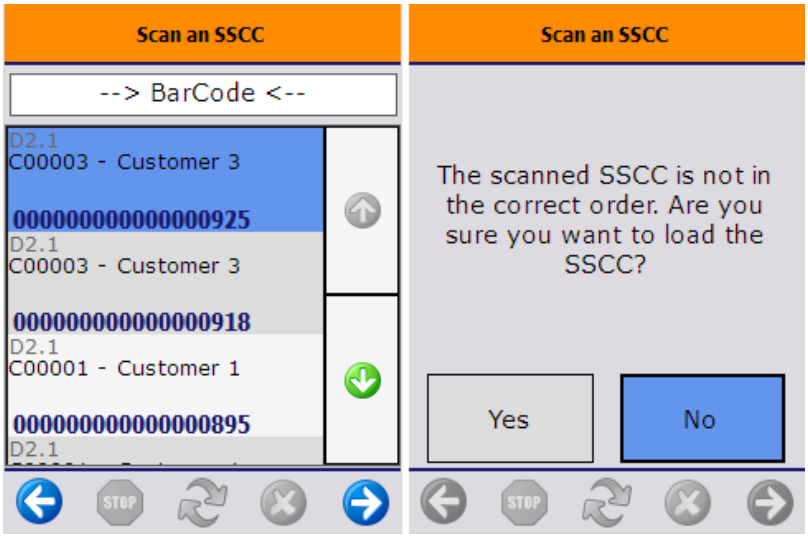
Scan SSCC

On the next screen every logistic unit that has been packed for the route, but is not yet loaded, is listed. Produmex WMS orders the logistic units in the reverse order of delivery. The SSCC's are sorted by the following:

- Route sequence number of the picklist (descending)
- LUID (descending)



It is possible to load the logistic units in a different order, but a warning will appear on the screen. Tap Yes to load the scanned logistic unit anyway.



When shipping based on a route, it is not possible to skip logistic units from the shipping. It is also not possible to ship a partial LUID regardless of the *Allow shipping of partial LUID? (Y/N)* setting on the Sales delivery note generator.

If the *Allow to load all SSCC's in one time? (Y/N)* option is enabled on the Sales delivery note generator, an additional `Load all SSCC's` button is displayed on the screen as long as no SSCC is loaded for the selected route. Tap this button to load every SSCC that is listed on the screen without scanning the barcodes. After the user acknowledges the *The sscc has been loaded.* message, the system proceeds to the Shipping step.

4.2. Shipping based on picklist

Select picklist

Select the picklist from the list. Picklists verifying the following criteria are listed:

- The picklist is not on a route.
- The picklist is on the selected dock.
- The picklist status is 'Packed' or 'Partially Delivered'
- If the *Allow loading of ready logistic units on not fully packed picklists?* option is set to true on the Sales delivery note generator, a picklist will be listed if there is at least one logistic unit packed for it.

The picklist status will not be *Packed* or *Partially Delivered* in the following scenarios:

- The *Automatic shipping* option is enabled for the shipping type
- The *Customer collect* option is enabled for the shipping type
- The *Use for Production?* option is enabled for the Produmex Picklist type of the picklist

On the screen the following information is displayed:

1. [Shipping ID]
2. Picklist number
3. Customer name - address



Scan the SSCC

On the next screen logistic units that verify the following criteria are listed:

- was picked for the selected picklist
- are ready for shipping
- not yet loaded

If the *Group similar picklists? (Y/N)* option is enabled on the Sales delivery note generator, the system will also list the logistic units packed for other picklists that were generated for the same customer and delivery address. All those SSCCs can be loaded as well.

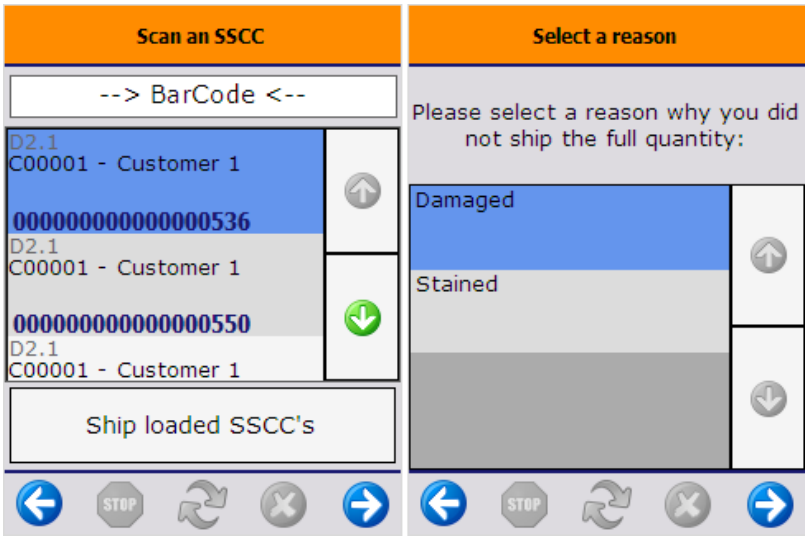
Scan the SSCC to load the logistic unit. When shipping based on a picklist, the loading sequence is not determined. Tap OK to acknowledge the *The sscc has been loaded* message.

> If the *Allow to load all SSCC's in one time? (Y/N)* option is enabled on the Sales delivery note generator, an additional `Load all SSCC's` button is displayed on the screen as long as no SSCC is loaded for the selected picklist, customer address or wave.
>
> Tap this button to load every SSCC that is listed on the screen without scanning the barcodes. After the user acknowledges the *The sscc has been loaded.* message, the system proceeds to the Shipping step.

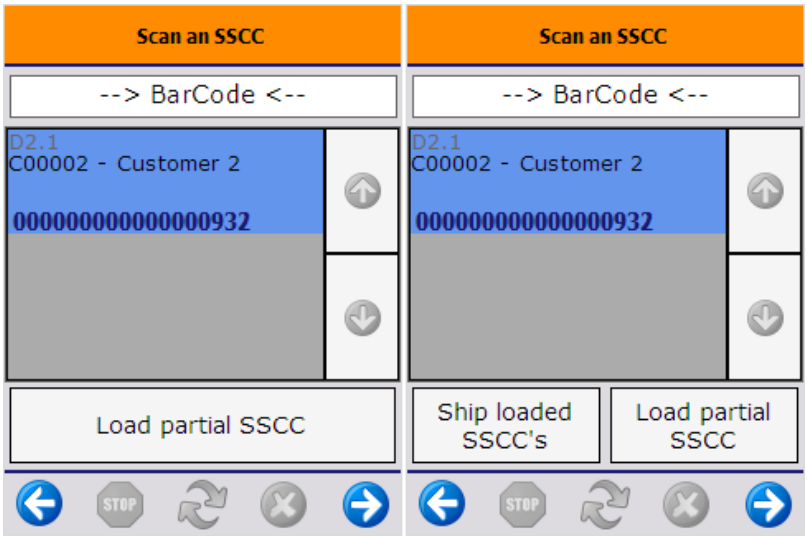


Scan the next SSCC on the list until every logistic unit is loaded.

When there are SSCC's that cannot be loaded, Tap the `Ship loaded SSCC's` button. The loaded logistic units will be shipped while the remaining SSCC's will be skipped. On the next screen the user must select a reason why the full quantity has not been shipped. Every reason that can be used for shipping can be selected.

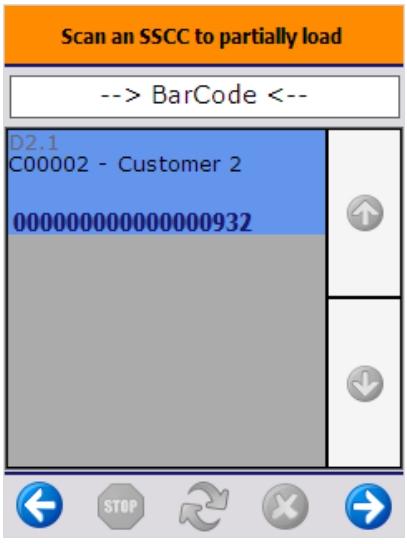


If the *Allow shipping of partial LUID? (Y/N)* option is enabled on the Sales delivery note generator, an additional `Load partial SSCC` button is displayed on the screen.



Tap the button to load an SSCC partially. On the next screen scan the SSCC.

Every SSCC that was picked for the selected picklist, are ready for the shipping but not yet loaded are listed on the screen and can be scanned.



On the next screen select the item to load. Every item on the scanned SSCC is listed. Products with different batch number or best before date will be listed on separate lines.

Displayed information:

1. Loading dock
2. Available quantity
3. Item description
4. SSCC number
5. Batch number
6. Best before date

Then enter the number of items to load. The quantity to load cannot exceed the quantity on the logistic unit. For more information about entering the quantity in Produmex WMS please see: Screens for entering additional information.

After the quantity is added the partial SSCC is loaded. Tap OK to acknowledge the message.



4.3. Shipping based on a wave

Select the wave

Scan the wave or select it from the list.

Every wave that contains at least one picklist that verifies the following criteria are listed:

- the status of the picklists in the wave is ‘Packed’ or ‘Partially Delivered’
- there is at least one picklist that is not on a route
- there is at least one picklist that is on the selected dock

If the wave contains picklists for various customers:
1. Wave number
2. [Shipping ID] Picklist number, for each picklist in the wave

If the wave contains only picklists for the same customer and ship to address:

3. Card code- Customer name – Shipping address

Scan SSCC
On the next screen logistic units that verify the following criteria are listed:

- was packed for a picklist from the wave
- are ready for shipping
- not yet loaded

For more information see Shipping based on a picklist

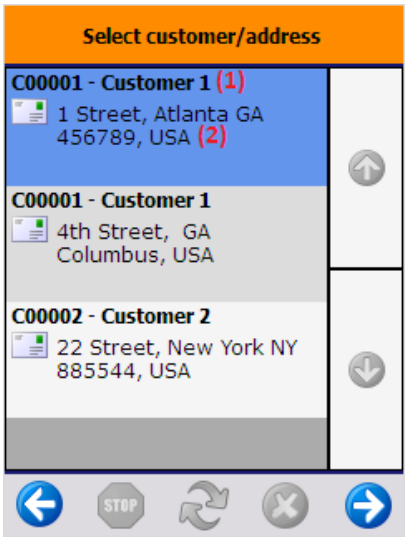
4.4. Shipping based on a Customer

Select a customer

Select a customer from the list. Only customers that have a packed SSCC that is not on a route is listed. Customers with different shipping address are listed on a separate line.

Displayed information on the screen:

1. Customer code - Customer name
2. Shipping address



Scan SSCC
On the next screen logistic units that verify the following criteria are listed:

- was packed for the selected customer and address
- are ready for shipping
- not yet loaded

For more information about the loading process see Shipping based on a picklist

5. Shipping

After every SSCC is loaded or the user has tapped the `Ship loaded SSCCs` button, the logistic units are shipped and the delivery document is created.

Note:

- Items with different description on the sales order, even if using the same itemcode, are not consolidated on the delivery document.
- When the invoices are generated automatically via the Mobile Client, the down payment request information is not being pulled through.
- When shipping multiple SSCCs of a customer with different shipping addresses, the system changes the address to the default address of the customer in the delivery note.
- After completing the picking process on the Mobile Client and perfoming shipping, the Sales Employee data of the Sales Order line and the A/R Reserve Invoice line are copied to the Delivery document line. The data is also copied with consolidated picking.

Multiple sales deliveries can be created for a single sales order in the following scenarios:

- Multiple picklists have been generated and the *'Group similar picklists?'* option is not set to true on the Sales delivery note generator. Otherwise picklist for the same customer and delivery address will be grouped during the shipping.
- Multiple picklists have been generated and the picklists are picked/packed/shipped separately on different times.

Multiple sales deliveries can be created for a single picklist in the following scenario:

- There are multiple sales orders on the picklist and the *Group sales orders for the same customer to 1 delivery?* option is not enabled on the Sales delivery note generator.

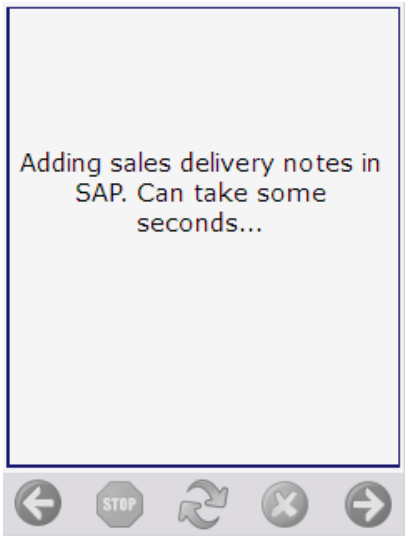
A single sales delivery can be created for multiple sales orders with the same customer and delivery address in the following scenarios:

- During the picking the picklists were picked onto the same SSCC.
- The **"Group sales orders for the same customer to 1 delivery? (Y/N)"** setting can be a base on the Extension Parameter Sales delivery note generator, the setting determines whether to group the items or not.
- The Group Sales Delivery setting can modify the grouping options, the setting has three values:
  - **Y** - If it is set to Yes, all items packed onto the same LUID will be included in one delivery.
  - **N** - If it is set to No, items on the same LUID will be split across multiple deliveries.
  - **C** - **Note:** Take company setting. If it is set to the take company setting, then the **"Group sales orders for the same customer to 1 delivery? (Y/N)"** setting on the the Sales delivery note generator determines the grouping.

The grouping has the following scenarios:

Sales Delivery Note Generator = Company setting (C):
If company setting is **Yes**: → items are grouped.
If company setting is **No**: → items are not grouped.

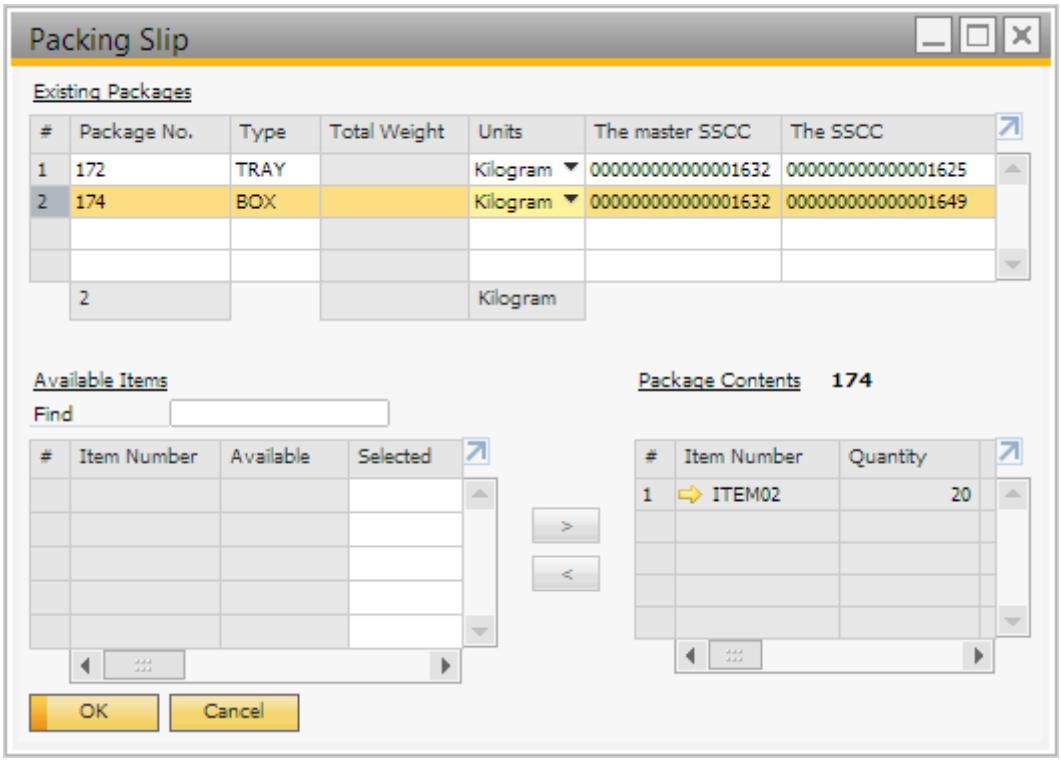
Group Sales Delivery = Business Partner Master Data setting:
Group Sales Delivery = **Yes**: → Items are grouped into one delivery.
Group Sales Delivery = **No**: → Items are split into separate deliveries.



If the *Use Pmx sales shipping?* option is set to true on the Sales delivery note generator, instead of an SBO sales delivery note, a PMX sales shipping note will be created. The picklist(s) will remain open and the stock will remain on the dock until the SBO delivery note is created.

In order to create an SBO delivery note from a PMX sales shipping note, go to the Open Documents Report from the Produmex module in SAP Business One and select *PMX Sales Shipping* as the document type. Select the document(s), click the `Create sales delivery` button to create the SBO delivery note.

If the *Fill packing info in delivery? (Y/N)* option is enabled on the Sales Delivery Note Generator, the master SSCC and the SSCC number is added to the Packing Slip when the delivery note is created. The Package No. is the LUID of the (sub)logistic unit.



6. Print document

When an SBO delivery note is created, the *Shipping: Sales delivery note created event (300)* print event is triggered.
When a PMX sales shipping note is created, the *Shipping: PMX sales shipping created event (303)* print event is triggered.
The default reports for both print events are:

- DefaultSalesDeliveryBySSCC.rpt
- DefaultSalesDeliveryBySalesOrder.rpt

When shipping based on a picklist / wave / customer, the *Shipping: Picklist shipped event (302)* print event is also triggered and the picklist is printed.

When shipping based on a route, the *Shipping: Route shipped event (301)* print event is also triggered and the Route Document is printed. The default report for the print event is the DefaultRouteDocument.rpt.

7. Useful information & Extra steps

7.1. Moving packed Logistic Units before Shipping

It is possible to use the **Move Order** flow and **Ad Hoc Move** flow on the Mobile Client, to move already packed logistic units. Packed Logistic Units are usually locked and normally moving these units are not suggested, but in some cases moving them are necessary.

There are some cases when a packed (and locked) logistic unit must be moved to a specified location e.g.: Stock is currently at a **“default”** Shipping Dock as **“Packed”** SSCCs, which is a temporary location for packed pallets. The next step is to move the stock to the actual Shipping Dock, where the

truck will be loaded with the **“Packed”** SSCCs.

After that, continue with the sipping process: **Sales/Shipping**

When you are at the **“Select a Shipping Dock”** step, you need to enter the original dock location that is contained in the Picklist. For example, if the stock was originally at “dock A” and you moved it to “dock B”, the Picklist will contains the following information “Storage Loc.: dock A”.

On the **“Select a Shipping Dock”** screen, select the original source location, then select the Picklist. After that, on the **“Scan an SSCC”** screen, you will see the actual location where you can find the stock.



Move Order
If the original location has limited space, the packed units should be relocated to a more spacious area or positioned closer to the dock for loading. This move can be planned ahead using a **Move Order**.

Limitation for Move Order: To move the packed and locked SSCCs with a **Move Order**, ensure that every item’s status on the Picklist is “Packed” if the Picklist line contains multiple LUIDs. **If any item is not in packed status, the Move Order cannot be processed.**

**Please note that during the shipping process, you must select the original dock location (the location where the stock was initially stored, as indicated in the Picklist). **

7.2. Select a license plate

Based on the shipping type and the General settings configurations, you may have to take the following extra steps before creating the delivery document.

Note: When automatic shipping is started, you are not allowed to leave the process. On the first extra information screen (it can be driver's name, license plate, trailer number, tracking number) the back button is disabled.

Select the license plate from the list. Every license plate defined in the License plate (PMX_LIPL) user table can be selected. It is also possible to enter a license plate that is not defined in the user table.



The license plate will be added to the 'The license plate' UDF on the sales delivery document and the A/R invoice.



7.3. Select a driver

Select the driver from the list. Every driver defined in the Drivers (PMX_DRIV) user table can be selected. It is also possible to enter a driver who is not defined in the user table.



The driver name will be added to the 'The name of the driver' UDF on the sales delivery document and the A/R invoice.



7.4. Select a trailer number

Select the trailer number from the list. Every trailer number defined in the List of selectable trailer numbers (PMX_TRNR) user table can be selected. It is also possible to enter a trailer number that is not defined in the user table.

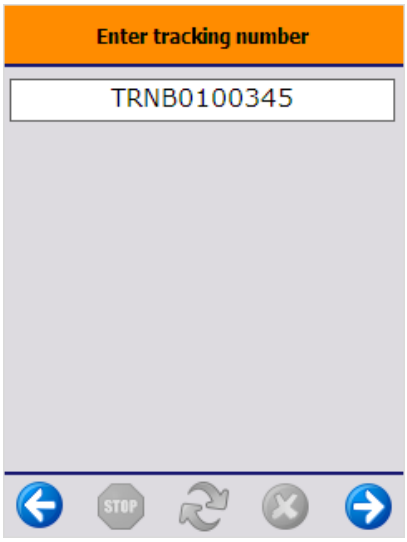


The trailer number will be added to the 'The trailer number' UDF on the sales delivery document and the A/R invoice.



7.5. Enter a tracking number

Enter the tracking number.



Bulk Shipping Flow

Workflow

- Select a sales order
- Select a product
- Select a location
- Enter the number of items
- Add more products
- Delivery booked
- Extra steps

1. Select a sales order

Select a sales order from the list. The list can be filtered based on the sales order number. Every open sales order that contains an item stored in a silo/tank location is listed.

Displayed information:

- Customer card code
- Customer name
- Due date
- Sales order DocEntry
- Sales order document number
- Customer Reference Number
- Pick and pack remarks
- Picklist type
- Object type

2. Select a product

Select a product from the list. Every product with open quantity on the sales order is listed.
Displayed information:

- Item code and description
- Sales order number, Customer code and description
- Open quantity

3. Select a location

Scan the location or select it from the list. Only silo/tank locations where the item is stored are listed and can be scanned.

4. Enter the number of items

Add the quantity to ship. For more information about adding quantity in Produmex WMS please see: Screens for entering additional information.
If there is a *'Default quantity on logistic unit'* value defined on the Produmex Inventory tab of the Item Master Data, the number of items value is automatically filled.

- If the open quantity on the sales order is less than the *'Default quantity on logistic unit value'*, the screen will be populated with the open quantity.
- If the open quantity on the sales order is greater than the *'Default quantity on logistic unit value'*, the screen will be populated with the default quantity on the logistic unit value.

5. Add more products

If there are items with open quantity on the selected sales order the system will ask whether to add more products to this delivery or not.

- Tap Yes to add more products. The system will go back to the *Select a product* screen.
- Tap No to finish the shipping.

6. Delivery booked

If there are no more products with open quantity on the sales order or the user selected no to add more products, the delivery will be booked.

Note:

- When shipping with the Bulk shipping flow, always an SAP Business One delivery note will be generated, regardless of the *'Use Pmx sales shipping?'* setting on the Sales delivery note generator.
- When the invoices are generated automatically via the Mobile Client, the down payment request information is not being pulled through.

Based on the shipping type and/or general settings, the user may have to take the Extra steps.

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