

Ship Methods

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Overview

The Ship Method can be used on any of your Sales documents (Quote, Sales Order, Ship Doc) to signify the method in which the goods are going to be shipped.

Once added, these new Ship Methods will be available to you in the *Ship Method drop-down* list when creating your [Sales Orders](#), [Quotes](#), [Purchase Orders](#), and [Ship Docs](#). You can also setup a *default Ship Method for each Customer* on the *Customers form*.

Adding a Ship Method

To access the Discount settings, click on the *Gear* icon near the upper-right corner of the screen. Under the General section, click on **Profile Lists**. On the Profile Lists, under the **Shipping** section, click on **Ship Method**.

- Enter the Shipping Method *Name*.
- Select if the Shipping Method is *Active*.
- Choose the *Other Charge Item Type* associated with the Shipping Method from the drop-down.
 - An item "Shipping" must be created as an Other Charge type Item and is used for accounting purposes. This Other Charge type Item allows that fee to flow through to your accounting software. The "shipping" item will be used to mark and identify specific freight charges associated with their shipping.

Creating an Other Charge Item

From Admin > Profile Lists > Item Group select the green + button to the right of records and create your Other Charge Group with the necessary information and select the green Save button in the upper right hand corner

OrderTime

Home Sales Purchasing Production Warehouse Reports

Admin > Profile Lists > Item Group

Item Group

Active Status

Active Inactive Both

Records +

- Assembly Group x
- BOM x
- Handling Fee x
- Jobs Group x
- Kits Group x
- Non-inv Group x
- Other Charge Group x
- Parts Group x
- Repair Items Group x
- Service Parts Sales x
- Services Group x

Total Records: 11

Other Charge Group

Name:

Short Name:

Item Type:

Is default:

Active:

Default Accounts

Income Account:

Expense Account:

UOM Set:

Is Sold:

Is Used:

Is Purchased:

Item Cost Type:

Max Discount %:

- From Create New > Items and create your Shipping Method Items

OrderTime

Home Sales Purchasing Production Warehouse Reports

Home > Items > Item

Create New

Open Full List

Recent Records

- 1833
- 28
- 30
- Kevin's Shot Spot
- 22
- 24
- Solinco Blackout 300 XTD
- 26
- 20

Add

To create a new item, start by selecting an item group.

Assembly Group

- Assembly Group
- BOM
- Handling Fee
- Jobs Group
- Kits Group
- Non-inv Group
- Other Charge Group
- Parts Group
- Repair Items Group
- Service Parts Sales
- Services Group
- Style

Next >>

- Here is an example of the Item shipping methods from my test account

<input type="checkbox"/>	25	Racquet Shipping UPS Next Day Air	OtherCharge	Other Charge Group	Racquet shipping of \$35.00 per UPS Next Day Air	EA	35.00	Racquet shipping of \$35.00 per UPS Next Day Air	Freight	Freight	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	114	Racquet Shipping UPS Ground	OtherCharge	Other Charge Group	Racquet shipping \$15 UPS Ground	EA	0.00	Racquet shipping \$15 UPS Ground	Freight	Inventory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	117	Racquet Shipping FedEx	OtherCharge	Other Charge Group	Racquet shipping of \$35.00 per FedEx	EA	35.00	Racquet shipping of \$35.00 per FedEx	Freight	Freight	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Here is how the Ship Method information will now present:

The screenshot shows the OrderTime interface. At the top, there is a navigation bar with 'Home', 'Sales', 'Purchasing', 'Production', 'Warehouse', and 'Reports'. Below this is a breadcrumb trail: 'Admin > Profile Lists > Ship Methods'. The main heading is 'Ship Method'. On the left, there is a sidebar with 'Active Status' (Active selected), 'Records' (listing FedEx Standard, UPS Ground, and UPS Next Day Air), and 'Total Records: 3'. The main content area is titled 'UPS Ground' and contains the following fields: 'Name' (UPS Ground), 'Active' (checked), 'Price' (with a dropdown menu open showing 'Other Charge Item', 'Racquet Shipping UPS Next Day Air', 'Racquet Shipping UPS Ground', 'Abbey Test', 'Racquet Shipping FedEx', and 'US'), 'Service Name', 'Destination Type', 'Assign estimated rate to the document' (checked), and 'Markup' (2.5%).

- Enter the flat-rate *Price* of the shipping method.
 - If you need to assign a shipping fee associated with this service, enter the desired amount.

Rate Shopping

The setting below is tied to how you will set up your shipping rates, you can select the type of carrier, destination and whether or not you want to add an additional percentage.

- Select the *Service Name* you would like to associate with the new Shipping Method (*UPS*, *FedEx* or *USPS*).
- Select the *Destination Type* for the Shipping Method. Available Destinations for your Shipping Method are *Domestic (US)*, *International (Int'l)* or *Canadian (CA)* shipments.
- Click on the **"Assign estimated rate to the document"**
 - This function will charge your customer the amount the Shipping Carrier.
 - If you select this function, the *Markup* section below can be used to add an additional percentage to what the carrier charges.
- Finally you will enter the *Shipping Method Markup*.
- Click on **Save** when done.

Important: You will need to complete this process for each shipping method used by your company. If you use five shipping carriers with different rates and services, then you must create a record for each one of them.

Ship Method

Active Status
 Active Inactive Both

Records +

- Fedx +
- UPS +
- USPS +
- Will Call2 +

Total Records: 4

Name

Active

Other Charge Item


Price

Service Name

Destination Type

Assign estimated rate to the document

Markup %

 When syncing with accounting, Order Time uses the *Item* to add the shipping costs to your invoices. The Item listed must be of type *Other Charge*.