

# Company Preferences - Shipping

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## Shipping

Under shipping company preference, you will be able to manage shipping options and setting up UCC-128 codes (unique shipper identifier).

The Shipping Preferences are divided into two tabs: General and Packages

Under the **General** tab you can set the following Shipping Preferences:

- Automatically set the Quantity when creating a Ship Doc from a Sales Order. Leave unchecked to manually set the Quantity.
  - When Auto Filling, skip items with lot/serial # tracking
  - Allocate inventory from bins/lot or serial numbers with the smallest availability first.
- Deny shipping quantities greater than ordered.
- Allow new line items that were not on the original order to be added to Ship Docs.
- Prevent shipping partial kits.
- Enable Signature Capture
- Once shipped, line items with 0 quantity shipped should remain on the ship doc.
- Default Location for Customer Returns - (Dropdown)
- When creating a return, use the customers ship to address instead of the return location

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### When creating Ship Docs from a Sales Order:

- Use the sales order's promise date as the ship doc Date.
  - Allow the ship doc Date to be back dated.
- Add the items to an unshipped Ship Doc having the same Customer & Location.
- Add the items to an unshipped Ship Doc from the same Sales Order.
- Always create a new Ship Doc.
- Only while the ship doc is in a Processing status.

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### Other

- Hide markup on shipping estimator
- Prevent a user from printing twice when the Ship Doc is already marked as printed. (Hint: create a Role exception for Printed so certain users cannot check the box)
- Transfer shipping charges to the first ship doc only from a sales order.

- Add Open Sales Order Items to Ship Docs
- Return Selected Items from Ship Doc
- Use the posting date (date shipped) instead of the Ship Doc's date when updating the Sales Order's Date Shipped field.
- Do not reset the Posting Date on a ship doc when the status is reverted.
- Update the sales order shipped date when the ship doc is re-shipped
- Show available on ship doc line item.

## Status Change After Printing

- Ship Docs - (Dropdown)
- Transfers - (Dropdown)

## Status Change After Batch Fulfillment - (Dropdown)

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General Packages

Shipping - General

- ☒ Automatically set the Quantity when creating a Ship Doc from a Sales Order. Leave unchecked to manually set the Quantity.
  - ☐ When auto filling, skip items with lot/serial # tracking
  - ☐ Allocate inventory from bins/lot or serial numbers with the smallest availability first.
  - ☐ Deny shipping quantities greater than ordered.
  - ☐ Allow new line items that were not on the original order to be added to Ship Docs
  - ☐ Prevent shipping partial kits
  - ☒ Enable signature capture
  - ☒ Once shipped, line items with 0 quantity shipped should remain on the ship doc.
- Default Return Bin ▼
- ☒ When creating the return, use the customer's ship to address instead of the return location.

When creating Ship Docs from Sales Orders:

- ☒ Use the sales order's promise date as the ship doc Date
  - ☐ Allow the ship doc Date to be back dated.
- ☐ Add the items to an unshipped Ship Doc having the same Customer & Location
- ☒ Add the items to an unshipped Ship Doc from the same Sales Order
- ☐ Always create a new Ship Doc
- ☒ Only while the ship doc is in a Processing status.

Under the **Packages** tab you will have the option to trace your packages by using UCC-128 codes.

- Enter your extension digit for generating UCC-128 code.
- Enter your company prefix for generating UCC-128 code. **Note:** Company code is provided by the UCC organization.
- Auto generate packages when creating a Ship Doc from a Sales Order
- Auto generate UCC codes while adding packages
- Allow auto packaging on Ship Docs
- Automatically add item weights for packages

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Packages

Extension Digit for generating UCC-128 codes:1

Company Prefix for generating UCC-128 codes (6-9 digits):0002267

☐ Auto generate packages when creating a Ship Doc from a Sales Order

☐ Auto generate UCC codes while adding packages

☐ Allow auto packaging on Ship Docs

☒ Automatically add item weights for packages.

Click **Save** when done.

The UCC-128 (GS1-128) label is a critical piece of the EDI puzzle. The labels can be applied to both pallet shipments and individual cartons. Each label has information about the origin, destination, and contents of the shipment.