Managing Shipping and Receiving

Last Modified on 09/14/2021 10:13 am EDT

> This guide explains how shipping logs are organized and how system preferences can assist with managing the information. It is intended for general users.

You can create shipment logs to record the movement of items in and out of your facility, even if the goods are not categorized as inventory items.

Note: When inventory integration is active, shipments linked to purchases and orders will affect inventory balances. Therefore, it is important to set up and follow a *best practices* policy for shipping and receiving. As a general rule, it is always advisable to record your shipments according to reality. By logging shipments accurately, inventory levels within aACE will be maintained and audits can be conducted more efficiently. (Read more about setting up inventory tracking (http://aace5.knowledgeowl.com/help/setting-up-inventory).)

Shipment Types

Shipments types are distinguished based on whether they're related to purchases (https://aace5.knowledgeowl.com/help/working-with-purchases) or orders (http://aace5.knowledgeowl.com/help/orders):

- Purchases
  - Incoming — Logs items coming in from your vendors
  - Incoming Return — Logs items you are returning to your vendors
- Orders
  - Outgoing — Logs items going out to your customers
  - Outgoing Return — Logs item your customers are returning to you

Shipping Automation

aACE can automatically generate shipping logs when certain events occur. Read more about shipping automation settings (https://aace5.knowledgeowl.com/help/automation-settings-for-shipping).

Shipment Delivery Dates

aACE can automatically provide an estimated delivery date for most shipments. In addition, you can set system preferences to automatically update that delivery date: Navigate from Main Menu > Accounting > Preferences > Data Entry > Date Management section > 'Update Shipment Delivery Date to today when shipped/received'.

Marking this flag causes aACE to update the Delivery Date field to reflect the date when your staff marks a shipment as shipped or received. This can help you identify shipments based on when they were shipped.

Gathering Data to Report on Shipping

In addition to the Shipping Log module, the System Logs module can help give insight on your shipping processes. For example, system administrators can search this module for the log entry generated each time a user marked a shipment as "Shipped":

1. Navigate from **Main Menu** > **System Admin** > **System Logs**.
2. Enter the desired **Log Date/Time** range.
   Note: Using search operators (https://aace5.knowledgeowl.com/help/using-search-operators-for-better-results) to constrain the dates is helpful here.
3. In the Module Record ID field, enter "**Ship**".
4. In the Log Entry field, enter "**Shipped**".