

# Create New Shipments

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This guide is intended for Duggal Visual Solutions general users specifically. Information herein may contain customizations and particulars specific to the Duggal aACE system. Click this [link](https://aace5.knowledgeowl.com/help) (<https://aace5.knowledgeowl.com/help>) for the General aACE Software aACE 5 Knowledge Base.

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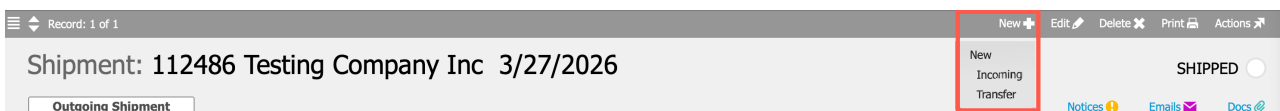
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## Create New Shipment

You cannot create an Outgoing Shipment record directly from the Shipments module. Only Inventory Incoming and Transfer types of Shipments can be created using the New button. All outgoing Shipments must be related to an Order.



To create a Shipment, in the Order module, go to the Management tab. Select the Shipping subtab.

In the upper left corner of the Shipments list, click the [+] icon. You have two options. Select either Ship To Customer or Ship To [Blank To].

Record: 5 of 55    New +    Edit    Delete X    Print    Actions

### Order: 861660 Testing Company Inc 11/24/2025

OPEN

Production Order    **Management**    Job Costs & Approvals    Notices !    Emails    Docs

Overview    Billing    Procurement    Fulfillment    **Shipping**    Assets

#### Shipments

Shipment	Ship Date	Title	Type	PO	Courier Service	Courier Tracking #	Cost	Invoice	Value	Installation	Status
> 111887	11/24/25	Testing Company	OUT		Duggal Truck		0.00	340.00	0.00	0.00	

#### Shipments

New

**Ship To Customer**

Ship To [Blank To]

A new Shipment window appears.

If you selected Ship To Customer, the new Shipment is auto-populated with the address information set in the Order's Ship To area, including the Order's Ship To Company and Contact.

### Shipment: 112487    Testing Company Inc    3/30/2026    PENDING

Outgoing Shipment    Notices !    Emails    Docs

#### Shipped To

Company >    Contact >

Testing Company Inc    John Q Public

Order >    Packing Requirements    FOB

881406

Description

Prod Value	Pack Value	Ship Cost	SugShipPrice	Install Value
0.00	0.00	0.00	0.00	0.00

#### Shipment Info

Courier Account #    Courier Service    Saturday Delivery  Yes  No

Package Type    L    W    H    Weight

0    x    0    x    0    0

Courier Tracking #    Ship Time    Ship Date

03/30/26

Package IDs    Ref 01    Ref 02    Ref 03

#### Shipping Address

Testing Company Inc  
John Q Public  
100 Broadway  
New York, NY 10005

Phone    Email Address    Notify X

(555) 555-5555    mp@acesoft.com

Duties Payer    Duties Payer Account #

#### Packing List

Line Item	Line Item Code	Description	Packing List Notes	Order	Exp Qty >>	Quantity	Weight	Ref #(s) %
-----------	----------------	-------------	--------------------	-------	------------	----------	--------	------------

If you selected Ship To [Blank To], all fields in the new Shipment, with the exception of the Order number, are blank.

### Shipment: 112488    Title    3/30/2026    PENDING

Outgoing Shipment    Notices !    Emails    Docs

#### Shipped To

Company >    Contact >

Order >    Packing Requirements    FOB

881406

Description

Prod Value	Pack Value	Ship Cost	SugShipPrice	Install Value
0.00	0.00	0.00	0.00	0.00

#### Shipment Info

Courier Account #    Courier Service    Saturday Delivery  Yes  No

Package Type    L    W    H    Weight

0    x    0    x    0    0

Courier Tracking #    Ship Time    Ship Date

03/30/26

Package IDs    Ref 01    Ref 02    Ref 03

#### Shipping Address

Phone    Email Address    Notify

Duties Payer    Duties Payer Account #

#### Packing List

Line Item	Line Item Code	Description	Packing List Notes	Order	Exp Qty >>	Quantity	Weight	Ref #(s) %
-----------	----------------	-------------	--------------------	-------	------------	----------	--------	------------

## The Shipped To Address

The ShippedTo address may be viewed and edited by clicking into the Address field. In Edit mode all fields are completely editable.

Shipment: 112487    Testing Company Inc    3/30/2026    PENDING

Outgoing Shipment

**Shipped To**

Company > Testing Company Inc    Contact > John Q Public

Order >    Packing Requirements    FOB

881406

Description

Prod Value	Pack Value	Ship Cost	SugShipPrice	Install Value
0.00	0.00	0.00	0.00	0.00

**Shipment Info**

Addresses: Testing Company Inc

Attn

Package Type: 100 Broadway

Street

Courier Tracking #

Street

Package IDs: New York NY 10005

USA American

**Shipping Address**

Testing Company Inc  
John Q Public  
100 Broadway  
New York, NY 10005

Phone: (555) 555-5555    Email Address: mp@acesoft.com

Duties Payer    Duties Payer Account #

**Packing List**

Line Item	Line Item Code	Description	Packing List Notes	Order	Exp Qty	Quantity	Weight	Ref # (s)
-----------	----------------	-------------	--------------------	-------	---------	----------	--------	-----------

Also, the Company's Shipping Address Location List can be selected from in the Addresses drop down. [\[See Creating Company Locations\]](https://aace5.knowledgeowl.com/help/company-locations-list) (<https://aace5.knowledgeowl.com/help/company-locations-list>)

Shipment: 112487    Testing Company Inc    3/30/2026    PENDING

Outgoing Shipment

**Shipped To**

Company > Testing Company Inc    Contact > John Q Public

Order >    Packing Requirements    FOB

881406

Description

Prod Value	Pack Value	Ship Cost	SugShipPrice	Install Value
0.00	0.00	0.00	0.00	0.00

**Shipment Info**

Addresses: Aulani - Attn Customer Service

Testing C Broadway - 100 Broadway

DisneyLand - Concierge

Attn

Package Type: 100 Broadway

Street

Courier Tracking #

Street

Package IDs: New York NY 10005

USA American

**Shipping Address**

Testing Company Inc  
John Q Public  
100 Broadway  
New York, NY 10005

Phone: (555) 555-5555    Email Address: mp@acesoft.com

Duties Payer    Duties Payer Account #

**Packing List**

Line Item	Line Item Code	Description	Packing List Notes	Order	Exp Qty	Quantity	Weight	Ref # (s)
-----------	----------------	-------------	--------------------	-------	---------	----------	--------	-----------

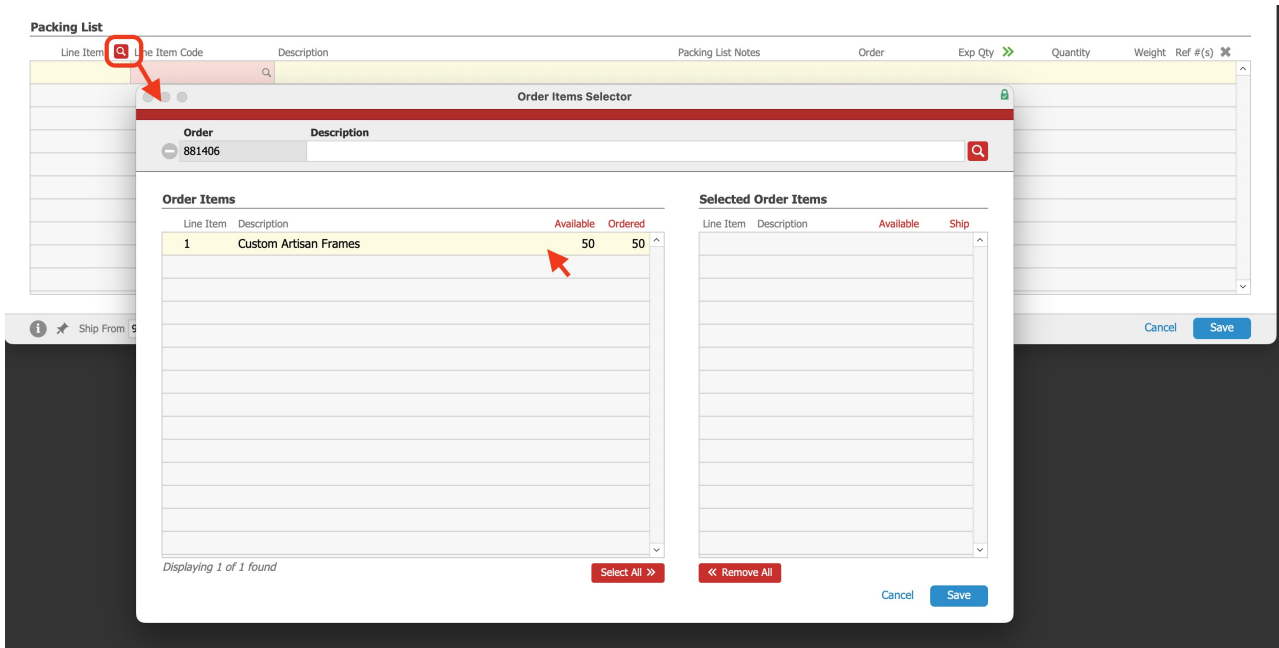
## Packing List

The Packing List is initially empty. Click on the red magnifying glass icon to display the Order Items Selector.

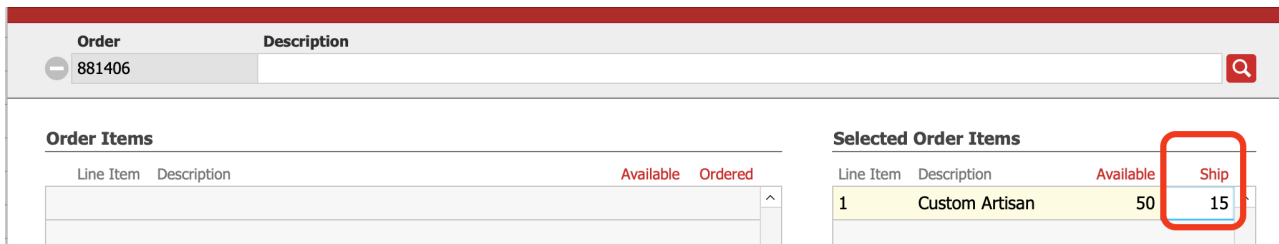
Here you can see the available Order Items. Click on each to add them to the Packing List's "Selected order Items".

*NOTE: Shipping Line Items from the order cannot be put into a Shipment record. The costs associated to the Shipment should be managed using the Ship Cost and SugShipPrice fields. See*

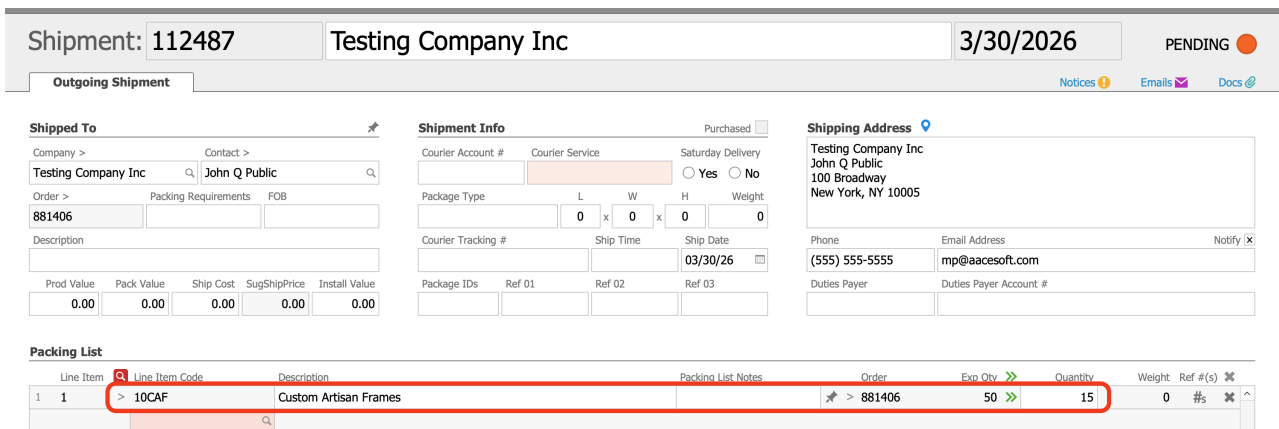
The Shipping Cost Field section below.



Once selected, the Ship quantity can be entered.



When all desired items are selected, click Save. The Packing List portal will be populated.



Additional editing of quantities can be done within the portal.

Also, undesired Line Items can be removed by clicking the [x] on the far right of the Line.


**Packing List**

Line Item	Line Item Code	Description	Order	Purchase Order	Exp Qty	Quantity	Weight	Ref #(s)	
1	> WFSV	Stair Construction _HL_20th &	> 861575		4	4	0	#5	✕
2	> WFSV	Area Closed_HL_20 & 26thSt_12x18"	> 861575		4	4	0	#5	✕
3	> WFBMT	Stairs closed, detour sign closest	> 861575		4	4	0	#5	✕
4	> FLB	White Dibond 12" x 18"	> 861575		4	4	0	#5	✕
5	> BRCRB	Packing	> 861575		1	1	0	#5	✕
6	> BVAN1	Manhattan Small Van Delivery	> 861575		1	1	0	#5	✕
7	> DSI	Installation	> 861575		1	1	0	#5	✕

## Courier Selection

Select the desired Courier Service. [\[See Courier Service Setup for more on Courier Services\]](https://aace5.knowledgeowl.com/help/shipping-preferences-and-configuration)  
<https://aace5.knowledgeowl.com/help/shipping-preferences-and-configuration>

If FedEx or UPS Courier Service is selected, the NRG icon appears once the record is Saved. Clicking on the NRG icon will open the related NRG window.

**Shipment Info**  Purchased

Courier Account # \_\_\_\_\_ Courier Service **FedEx Ground** Saturday Delivery  Yes  No

Package Type **Package** L **6** x W **6** x H **6** Weight **6**

Courier Tracking # \_\_\_\_\_ Ship Time \_\_\_\_\_ Ship Date \_\_\_\_\_

**NRG Connection Testing can only be done in the Dev Server instance. The TRIAL server does not have an active NRG connection.**

[\[See NRG Integration for more on FedEx and UPS systems integration\]](https://aace5.knowledgeowl.com/help/nrg-shipping-fedex-ups-integration)  
<https://aace5.knowledgeowl.com/help/nrg-shipping-fedex-ups-integration>

[\[See Transmitting to NRG for more on creating and managing FedEx and UPS shipments\]](https://aace5.knowledgeowl.com/help/transmit-to-fedex-ups-via-nrg)  
<https://aace5.knowledgeowl.com/help/transmit-to-fedex-ups-via-nrg>

**Shipment Info** Purchased

Courier Account #  Courier Service **FedEx Ground** Saturday Delivery  Yes  No

Package Type  Always Express Van

Your Packaging  Duggal Truck ght 50

Courier Tracking #  Duggal Van

Package IDs  FedEx 1 Day Freight

Ref C  FedEx 2 Day

ID 123  FedEx 2 Day Freight

102  FedEx 3 Day Freight

FedEx Express Saver

**FedEx Ground**

First Overnight

Ground Home Delivery

International Economy

NeedItNow Van

Priority Overnight

Standard Overnight

Setting the desired Shipping Dept at the bottom of the window will place the Shipment record in the correct department's queue.

Ship From	Assigned By	Assigned To	Tracking Status
710-250	Matthew Pelfrey	Matthew Pelfrey	
710-100	SHIPPING		
710-200	SHIPPING - HAMPTONS 200		
710-230	SHIPPING - HAMPTONS 230		
710-250	SHIPPING - B25		
710-303	SHIPPING - B303		
710-432	SHIPPING - 43W24		
710-500	SHIPPING - B500		
710-800	SHIPPING - PNW		
710-850	SHIPPING - CALI		

### The Shipping Cost Field

The Shipping Cost field will be populated by the NRG FedEx/UPS engine, if the Shipment is transmitted to NRG. For other couriers, a quoted freight shipment for example, the Cost field may be populated manually. Based on how the Courier Service was set up, [\[See Courier Service Setup for more on Courier Services\]](https://aace5.knowledgeowl.com/help/shipping-preferences-and-configuration/) (https://aace5.knowledgeowl.com/help/shipping-preferences-and-configuration), the price of the Shipment that is to be charged to the customer is populated in the "SugShipPrice" (suggested shipping price) field as:

1. A % Mark-up on the Cost field (ex. FedEd and UPS)
2. A % Margin on the Cost field (not currently in use)
3. A set Fixed Price, regardless the entry in the Cost field (ex. Duggal Trucks and Vans)

### Shipped To

Company >		Contact >		
Testing Company Inc		John Q Public		
Order >	Packing Requirements	FOB		
881398				
Description				
Prod Value	Pack Value	Ship Cost	SugShipPrice	Install Value
600.00	0.00	11.00	12.10	0.00

## The Order's Management Tab

### The Shipping Tab View

The Price ("Invoice") and Cost are displayed per Shipment in the Order's Shipment List.

Record: 1 of 1
New + Edit Delete ✕ Print 🖨 Actions ↗

**Order: 861575 PROJECT: 20/26th St. Construction Closure Signage 08/05/2025**
OPEN ●

Production Order Management Job Costs & Approvals
Notices ! Emails ✉ Docs 📄

Overview Billing Procurement Fulfillment Shipping Assets

**Shipments**

Shipment	Ship Date	Title	Type	PO	Courier Service	Courier Tracking #	Cost	Invoice	Value	Installation	Status
> 111853	11/12/25	PROJECT: 20/26th	OUT		FedEx Ground		12.00	15.00	1,814.56	0.00	📍 ○
Shipments							12.00	15.00	1,814.56	0.00	

**Non-Receiving POs** (e.g. drop shipments)

PO	Date	Title	Vendor	Req By	Act Shipping Cost	Inv Shipping	Tracking Status	Status
POs						0.00		
Total Cost						12.00		


### The Overview Tab View

In the Management tab > Overview subtab, the user can view the Line Item Quantities Shipped as well as the Values Shipped.

Record: 1 of 1														New + Edit Delete ✕ Print 🖨 Actions ↗											
Order: 861575 PROJECT: 20/26th St. Construction Closure Signage 08/05/2025														OPEN ●											
Production Order														Management		Job Costs & Approvals		Notices 📢		Emails ✉		Docs 📄			
Overview														Billing		Procurement		Fulfillment		Shipping		Assets		Exclude Order from Commissions (EC)	
														Quantity		Value									
Order Item Description	EC	BO	DS	SO	Ord	Proc	Prd	Invoiced	Shipped	Ordered	Shipped	Invoiced	Remain												
Stair Construction	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4		0/4	0/4	4/4	554.56	554.56	0.00	554.56												
Area Closed_HL_20 &	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4		0/4	0/4	4/4	150.00	150.00	0.00	150.00												
Stairs closed, detour sign	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4		0/4	0/4	4/4	180.00	180.00	0.00	180.00												
White Dibond 12" x 18"	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4		0/4	0/4	4/4	360.00	360.00	0.00	360.00												
Packing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1		0/1	0/1	1/1	25.00	25.00	0.00	25.00												
Manhattan Small Van	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1		0/1	0/1	1/1	95.00	95.00	0.00	95.00												
Installation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1		0/1	0/1	1/1	450.00	450.00	0.00	450.00												
										Subtotal	1,814.56	1,814.56	0.00	1,814.56											
										Adjustment	0.00		0.00	0.00											
										Total	1,814.56		0.00	1,814.56											
										Tax	0.00		0.00	0.00											
										Grand Total	1,814.56		0.00	1,814.56											
										Order Balance				1,814.56											
										A/R Balance				0.00											
										Payment Due				1,814.56											

### The Shipment Value Fields

By default, the Prod Value (Production Item Value) will equal the quantity in the packing list multiplied by the order's line item unit price, but the value can be overwritten. When overwritten, the number appears in *italics*. Packing and Installation activity may have different tax treatment, so their values are summed separately from "production item" values. These values also may be overridden.

**Shipped To** 

Company >  Contact >

Order >  Packing Requirements  FOB

Description

Prod Value	Pack Value	Ship Cost	SugShipPrice	Install Value
<i>600.00</i>	0.00	11.00	12.10	0.00

By overriding a Value field, the value of the Shipment that is used as the base for tax calculations is changed from the default of a sum of the Packing Slip Line Item Values, to the

new value.

This feature can be used for more complicated distributions that are difficult to accurately break apart from the way an Order's Line Items were written. The user can assign a single line item for the packing List and populate the Value field, even if several line items are actually shipped.

## Shipment effects on Tax Calculations

Shipment records are used to determine sales tax liability. But they are not the only determinant of rates and amounts. The article [Sales Tax Scenarios](https://aace5.knowledgeowl.com/help/sales-tax-scenarios) (<https://aace5.knowledgeowl.com/help/sales-tax-scenarios>) details different Order and Shipping Scenarios having different effects on the Sales Tax calculation.

Order Items														Schedule	Override	Go to Last Line Item	View Ship/Install Lines Only
#s	Line Item	Rev	Dept	Line Item Code	Desc.	Final Width	Height	Print	Originals	Each	Sq Ft	Unit Price	Unit Adj	Total	Tax		
1	1	Submit	310-5	> DCP14	Digit	11 x 14		X	1	2	1.07	50.00	0.00	100.00	DEF	X	
2	2	Submit	710-1	> FEDEX	Fede			X	1	1		12.50	0.00	12.50	DEF	X	

<b>Estimate Provided?</b>												Subtotal	112.50	100%		
<input type="radio"/> Yes <input checked="" type="radio"/> No												Adjustment	0.00			
<b>Sales</b>												Total	112.50	100%		
Lead >	Sales Priority	Likely Value										Tax	DEF	9.05	Exempt	
	Normal	100.00%										Grand Total		121.55	84%	
Campaign >	Type	Route	Source										Payment Due		121.55	
	Production	---	---													

<b>Fulfillment</b>					
Ffmt Priority	Start Date	Ship Date	Ship Time		
Normal	11/24/25	11/28/25	10:00 PM		
Job >	Sales Approved to Invoice		<input type="checkbox"/>		
861656	Order Needs Estimate		<input type="checkbox"/>		