

Duplicate to Import [Draft]

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Duplicate to Import

[Packing List Methods](https://sites.google.com/duggal.com/duggal-wiki/aace-shipping/distribution-lists/duplicate-to-import#h.ddvn0ax8d04m) (https://sites.google.com/duggal.com/duggal-wiki/aace-shipping/distribution-lists/duplicate-to-import#h.ddvn0ax8d04m)

[Duplicate to Import](https://sites.google.com/duggal.com/duggal-wiki/aace-shipping/distribution-lists/duplicate-to-import#h.9qplxka1ohi1) (https://sites.google.com/duggal.com/duggal-wiki/aace-shipping/distribution-lists/duplicate-to-import#h.9qplxka1ohi1)

[Shipments List Views](https://sites.google.com/duggal.com/duggal-wiki/aace-shipping/distribution-lists/duplicate-to-import#h.ivihvr2fv8a9) (https://sites.google.com/duggal.com/duggal-wiki/aace-shipping/distribution-lists/duplicate-to-import#h.ivihvr2fv8a9)

[Validations for Shipment Declared Value](https://sites.google.com/duggal.com/duggal-wiki/aace-shipping/distribution-lists/duplicate-to-import#h.xy3vu446w4oe) (https://sites.google.com/duggal.com/duggal-wiki/aace-shipping/distribution-lists/duplicate-to-import#h.xy3vu446w4oe)

A distribution list of addresses can be imported into an aACE Order by using a related Shipment's Duplicate to Import Action.

See [Preparing Excel for Import](https://www.google.com/url?q=https%3A%2F%2Fsites.google.com%2Fduggal.com%2Fduggal-wiki%2Faace-shipping%2Fdistribution-lists%2Fpreparing-excel-for-import&sa=D&sntz=1&usg=AOvVaw1cL1Bj58eFm4bGrJ_b9-ic) (https://www.google.com/url?q=https%3A%2F%2Fsites.google.com%2Fduggal.com%2Fduggal-wiki%2Faace-shipping%2Fdistribution-lists%2Fpreparing-excel-for-import&sa=D&sntz=1&usg=AOvVaw1cL1Bj58eFm4bGrJ_b9-ic) for instructions on formatting an Excel Sheet for importing to aACE Shipments.

First, create a Shipment from the Order (If using an address from the distribution list, remember to remove it from the import list, else you will have a duplicate created. If not using an address from the distribution list, remember to delete the original shipment after the import.)

Packing List Methods

The Shipment's Packing List will automatically be populated by all currently un-shipped order line items (if the underlying codes were set to have "shipping enabled"). Remove Line items from the List by clicking the X on the far right of each row. The Quantities shipped may also be edited.

Order: 668252 EILEEN FISHER

Shipment: 89921 EILEEN FISHER

PENDING

Overview Billing Procurement Fulfillment

Shipments

New Shipment

Shipment Address

Company > EILEEN FISHER
Contact > Jesse Whiting
Shipping Terms FOB Value 0.00
Order > 668252
Purchase Order >
Invoice >

2 Bridge Street
Suite 230
Irvington NY 10533
USA American

Description

Package IDs

Packing List

Line Item Code	Description	Order	Purchase Order	Exp Qty	Quantity	Weight	Ref #s
1 > BHWRETPP	Prep files, show PDFs for approval	> 668252		1	1	0	#s
2 > POC	Print on 2nd surface cling - 30 x 3.3208	> 668252		8	8	0	#s
3 > POC	Print on 2nd surface cling - 40 x 4.277	> 668252		5	5	0	#s
4 > POC	Print on 2nd surface cling - 50 x 5.233	> 668252		32	32	0	#s
5 > POC	Print on 2nd surface cling - 60 x 6.189	> 668252		14	14	0	#s
6 > POC	Print on 2nd surface cling - 80 x 8.101	> 668252		5	5	0	#s
7 > WFI	Print on insight heavy canvas - 39.35 x 29.25	> 668252		3	3	0	#s
8 > WFI	Duo - Print on insight heavy canvas - 29.35 x 39.25	> 668252		10	10	0	#s
9 > WFI	Single - Print on insight heavy canvas - 29.35 x 39.25	> 668252		3	3	0	#s
10 > WFI	Duo - Print on insight heavy canvas - 40.875 x 57.75	> 668252		36	36	0	#s
11 > WFI	Single - Print on insight heavy canvas - 40.875 x 57.75	> 668252		9	9	0	#s
12 > WFI	Duo - Print on insight heavy canvas - 50 x 67	> 668252		11	11	0	#s
13 > WFI	Single - Print on insight heavy canvas - 50 x 67	> 668252		4	4	0	#s
14 > WFI	Print on insight heavy canvas - 50 x 38	> 668252		2	2	0	#s
15 > 10CAF	1" diameter dowels w. eyehooks - 50" long	> 668252		17	17	0	#s
16 > BFDTPK24	Packing and Handling - 57 Locations	> 668252		57	57	0	#s
17 > DIST	Distribution Code	> 668252		57	57	0	#s

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

PO	Date	Title

Shipping Log

Record: 1 of 1

New Edit Delete Print Actions

Shipment: 89921 EILEEN FISHER 6/25/2019

PENDING

Outgoing Shipment

Notices Emails Docs

Shipped To

Company > EILEEN FISHER
Contact > Jesse Whiting
Shipping Terms FOB Value 0.00
Order > 668252
Purchase Order >
Invoice >

Residential

Shipment Info

Courier Service FedEx Ground
Courier Account #
Shipping Cost 0.00
Package Type L W H Weight
Your Packaging 0 x 0 x 0 0
Courier Tracking #
Ship Date 06/25/19

Purchased

Description

Package IDs

Packing List

Line Item Code	Description	Order	Purchase Order	Quantity	Weight	Ref #s
1 > DIST	Distribution Code	> 668252		1	0	#s

Dept 715-1 Assigned By Matthew Pelfrey Assigned To Matthew Pelfrey Tracking Status

There are two methods in how to set up aACE Shipment Packing Lists.

1. Assign the Actual Line Items that are in the package.
2. Assign a "dummy" line item (see the code DIST used below) to the Packing List and enter a value (representing the value of the entire shipment) in the Declared Value field. Tax calculations will use this value rather than the sum of the Packing List Line Item Values.

Duplicate to Import

Regardless which Packing List method used, next populate the Shipment’s other fields. Fill in the Courier Service and other relevant Shipment Info fields.

Once the Shipment is populated and saved, go to the Actions drop down menu and select Duplicate to Import.

Record: 2 of 2

New Edit Delete Print

Actions

Shipment: 89858 Testing Company Inc 5/6/2019

SHI

Outgoing Shipment

Notices Emails

Shipped To

Residential

Company > Testing Company Inc

Contact > John Q Public

Shipping Terms FOB

Value 25.00

Order > 668230

Purchase Order >

Invoice >

Shipment Info

Purchased

Courier Service FedEx Ground

Courier Account #

Shipping Cost 0.00

Package Type

L 0 x W 0 x H 0

Weight 0

Courier Tracking #

Delivery Date 05/06/19

Description

Package IDs

Duplicate Shipment

Duplicate to Import

Transmit Shipment

Update Transmitted Shipment

Packing List

Line	Item Code	Description	Order	Purchase Order	Quantity	Weight	Ref #(s)
1	> DCP14	Digital C Print 11X14 GLOSSY	> 668230		1	0	#s

In the pop-up Message window, select Step 1 to download the template.

Populate the template and save the file.

Message

Duplicating to import shipments requires the following steps:

1) Download the template worksheet

2) Populate your worksheet with data to import

3) Import the saved worksheet

Step 1

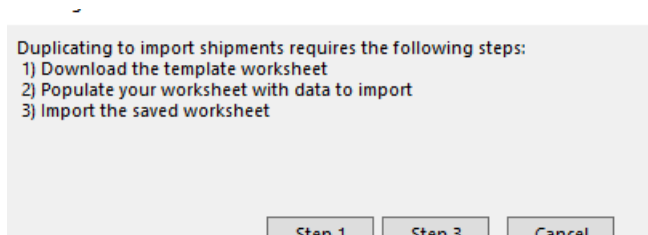
Step 3

Cancel

Shipping Addr Title								
A	B	C	D	E	F	G	H	I
1	Shipping Addr Title	Shipping Addr Line 1	Shipping Addr Line 2	Shipping Addr City	Shipping Addr State	Shipping Addr Postal Code	Shipping Addr Country	Do Tax
2								Declared Value
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								

Next, go back to the Actions drop down menu in the Shipment and select Duplicate to Import again.

In the pop-up Message window, select Step 3 this time to import the address file.

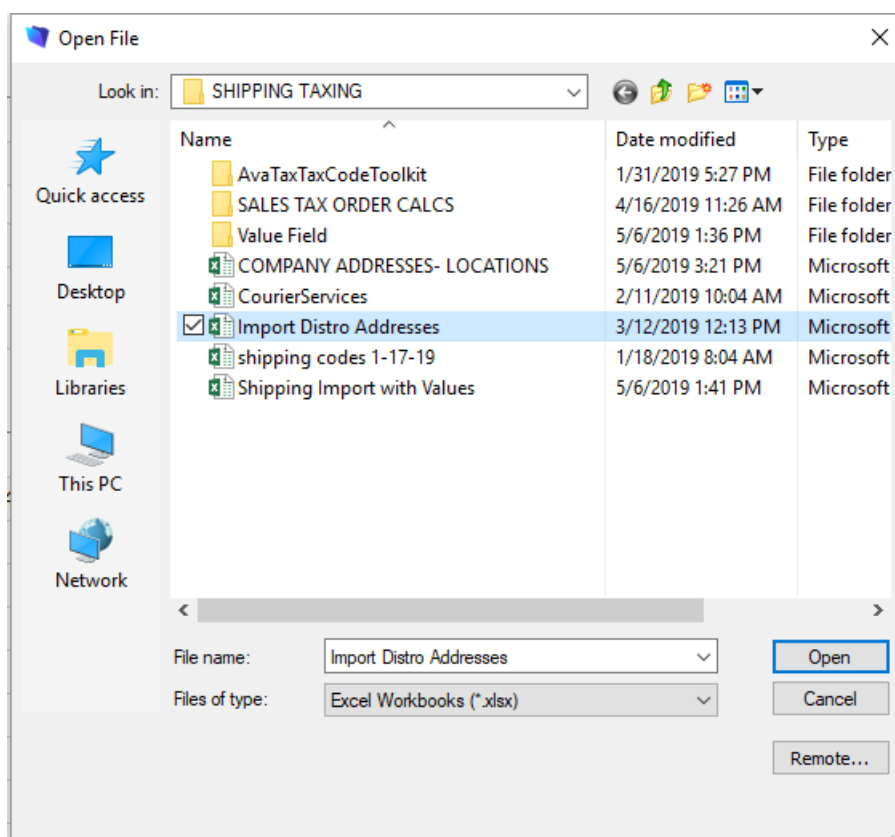


In the Import Field Mapping window, check **Don't import first record (contains field names)**

Select **Arrange By: Matching Names**

Review that Fields are matched.

Click OK.



Import Field Mapping

Source: Shipping Import with Values.xlsx Target: Current Table ("ShippingLog|Cache" v

Source Fields	Target Fields
Shipping Addr Title	⇒ Shipping Addr Title
Shipping Addr Line 1	⇒ Shipping Addr Line 1
Shipping Addr Line 2	⇒ Shipping Addr Line 2
Shipping Addr City	⇒ Shipping Addr City
Shipping Addr State	⇒ Shipping Addr State
Shipping Addr Postal Code	⇒ Shipping Addr Postal Code
Shipping Addr Country	⇒ Shipping Addr Country
Do Tax	⇒ Do Tax
Declared Value	⇒ Declared Value
	— Shipping Rec ID
	— _RES_1
	— Order Rec ID
	— Company Abbr
	— Company Rec ID

<< >> Field Names Arrange by: matching names

Import Action

☒ Add new records
☐ Update existing records in found set
☐ Update matching records in found set

☐ Add remaining data as new records
☒ Don't import first record (contains field names)

Field Mapping

⇒ Import this field
 — Don't import this field
 ≡ Match records based on this field
 ✗ Target cannot receive data

Manage Database...

OK Cancel

Import Options

☒ Perform auto-enter options while importing (modification date, serial number, lookups, etc.)

Import values in repeating fields by

☒ Keeping them in the original record
☐ Splitting them into separate records

☐ Preserve external container storage

Import Cancel

Import Summary

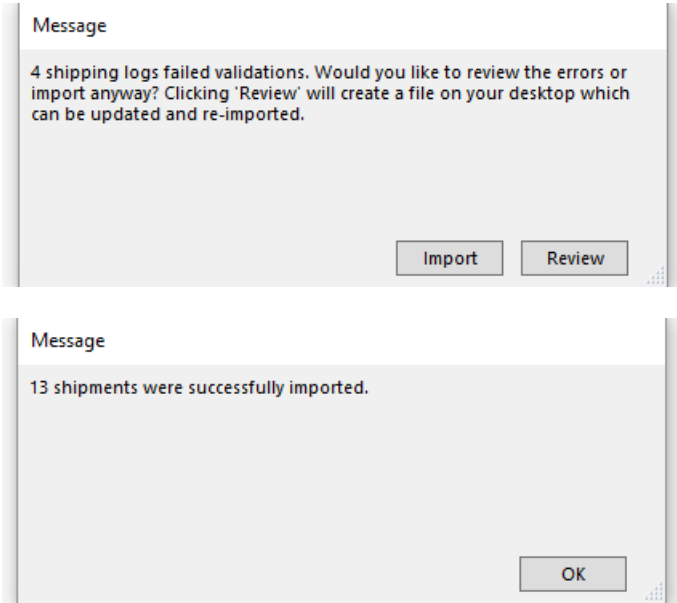
Import Records Summary:

Total records added / updated: 13
 Total records skipped due to errors: 0
 Total fields skipped due to errors: 0
 Table created: <none>

OK

If no validation problems are discovered, a successful message window will appear. If validation errors are encountered, an error message appears with an option to ignore and Import anyway, or to Review.

Clicking review will download another file to the user’s desktop with an error column at the far right detailing the validation issue.



Shipments List Views

Upon successful import, the Shipments will populate the window.

Note: the Shipment Address, Title, and Value can be imported. All other fields are duplicated from the original.

Record: 9 of 9											
New + Edit ✎ Delete ✕ Print 🖨 Actions ⚙											
Shipments											
											🔍
➤	Shipment	Title	Rec Type	Asgn	Company	Courier Service	Tracking #	Cost	Date	Tracking Status	Status
>	89859	FIFTH AVENUE	✈ OUT	MP	Testing Company	Duggal VanSmall-		0.00	05/06/19		PENDING
>	89860	WEST BROADWAY	✈ OUT	MP	Testing Company	Duggal VanSmall-		0.00	05/06/19		PENDING
>	89861	COLUMBUS CIRCLE	✈ OUT	MP	Testing Company	Duggal VanSmall-		0.00	05/06/19		PENDING
>	89862	MADISON AVENUE	✈ OUT	MP	Testing Company	Duggal VanSmall-		0.00	05/06/19		PENDING
>	89863	COLUMBUS AVENUE	✈ OUT	MP	Testing Company	Duggal VanSmall-		0.00	05/06/19		PENDING
>	89864	IRVINGTON	✈ OUT	MP	Testing Company	Duggal VanSmall-		0.00	05/06/19		PENDING
>	89865	WHITE PLAINS	✈ OUT	MP	Testing Company	Duggal VanSmall-		0.00	05/06/19		PENDING
>	89866	BROOKLYN	✈ OUT	MP	Testing Company	Duggal VanSmall-		0.00	05/06/19		PENDING
>	89867	EAST HAMPTON	✈ OUT	MP	Testing Company	Duggal VanSmall-		0.00	05/06/19		PENDING
List Totals								0.00			

If using an address from the distribution list, remember to remove it from the import list, else you will have a duplicate created.

If not using an address from the distribution list, remember to delete the original shipment after the import.

Order: 668252 EILEEN FISHER 06/24/2019

OPEN

Production Order Management Job Costs & Approvals

Overview Billing Procurement Fulfillment Shipping Assets (YAG)

Shipments

Shipment	Ship Date	Title	Type	Courier Service	Courier Tracking #	Cost	Tax Shipment	Tracking Status	Status
> 89921	06/25/19	EILEEN FISHER	OUT	FedEx Ground		0.00	0.00		PENDING

Record: 1 of 58

Shipment: 89921 EILEEN FISHER 6/25/2019

Outgoing Shipment

Shipped To

Company > EILEEN FISHER
Contact > Jesse Whiting
Shipping Terms > FOB
Value > 0.00
Order > 668252
Purchase Order >
Invoice >

Shipment Info

Courier Service > FedEx Ground
Package Type >
Your Package >
Courier Tracking >

Packing List

Line	Item Code	Description
1	DIST	Distribution Code

Message

Delete this shipment?

Delete Cancel

After importing the distribution list, Shipments may be deleted while they are in a Pending status. Once Shipped, they need to be Voided instead.

Shipping Log

Record: 1 of 56

Shipments

Shipment	Title	Rec Type	Asgn	Company	Courier Service	Tracking #	Cost	Date	Status
> 89980	HINGHAM	OUT	MP	EILEEN FISHER	FedEx Ground		0.00	06/25/19	PENDING
> 89981	BOSTON	OUT	MP	EILEEN FISHER	FedEx Ground		0.00	06/25/19	PENDING
> 89982	CHESTNUT HILL	OUT	MP	EILEEN FISHER	FedEx Ground		0.00	06/25/19	PENDING
> 89983	WELLESLEY	OUT	MP	EILEEN FISHER	FedEx Ground		0.00	06/25/19	PENDING
> 89984	GREENWICH	OUT	MP	EILEEN FISHER	FedEx Ground		0.00	06/25/19	PENDING
> 89985	WESTPORT	OUT	MP	EILEEN FISHER	FedEx Ground		0.00	06/25/19	PENDING
> 89986	FIFTH AVENUE	OUT	MP	EILEEN FISHER	FedEx Ground		0.00	06/25/19	PENDING
> 89987	WEST BROADWAY	OUT	MP	EILEEN FISHER	FedEx Ground		0.00	06/25/19	PENDING
> 89988	COLUMBUS	OUT	MP	EILEEN FISHER	FedEx Ground		0.00	06/25/19	PENDING
> 89989	MADISON AVENUE	OUT	MP	EILEEN FISHER	FedEx Ground		0.00	06/25/19	PENDING
> 89990	COLUMBUS AVE	OUT	MP	EILEEN FISHER	FedEx Ground		0.00	06/25/19	PENDING
> 89991	IRVINGTON	OUT	MP	EILEEN FISHER	FedEx Ground		0.00	06/25/19	PENDING
> 89992	WHITE PLAINS	OUT	MP	EILEEN FISHER	FedEx Ground		0.00	06/25/19	PENDING
> 89993	BROOKLYN	OUT	MP	EILEEN FISHER	FedEx Ground		0.00	06/25/19	PENDING
> 89994	EAST HAMPTON	OUT	MP	EILEEN FISHER	FedEx Ground		0.00	06/25/19	PENDING
> 89995	ARDMORE	OUT	MP	EILEEN FISHER	FedEx Ground		0.00	06/25/19	PENDING
> 89996	KING OF PRUSSIA	OUT	MP	EILEEN FISHER	FedEx Ground		0.00	06/25/19	PENDING
> 89997	CHEVY CHASE	OUT	MP	EILEEN FISHER	FedEx Ground		0.00	06/25/19	PENDING
> 89998	MCLEAN	OUT	MP	EILEEN FISHER	FedEx Ground		0.00	06/25/19	PENDING
> 89999	CHARLOTTE	OUT	MP	EILEEN FISHER	FedEx Ground		0.00	06/25/19	PENDING
> 90000	WINTER PARK	OUT	MP	EILEEN FISHER	FedEx Ground		0.00	06/25/19	PENDING
> 90001	PALM BEACH	OUT	MP	EILEEN FISHER	FedEx Ground		0.00	06/25/19	PENDING
> 90002	SANIBEL ISLAND	OUT	MP	EILEEN FISHER	FedEx Ground		0.00	06/25/19	PENDING

Actions

- Send Notice Re: List
- Mark Shipments in List as Shipped/Received
- Mark Shipments in List as Void
- Delete Shipments in List
- Reassign Shipments in List
- Update Tracking Status for List
- Update Purchased Flag for List
- Transmit Shipments in List
- Import Outgoing Shipments

Message

Delete all of the pending shipments in this list? Please type 'DELETE' into the box provided.

delete

Cancel Delete

Record: 10 of 200

New + Edit Delete X Print Actions

Order: 668230 Testing Company Inc 05/06/2019

OPEN

Production Order

Management

Job Costs & Approvals

Notices

Emails

Docs

Overview

Billing

Procurement

Fulfillment

Shipping

Assets (YAG)

Shipments

Shipment	Delivery Date	Title	Type	Courier Service	Courier Tracking #	Cost	Inv Shipping	Tracking Status	Status
> 89857	05/06/19	Testing Company Inc	OUT	Duggal VanSmall- Manh		0.00	125.00		
> 89858	05/06/19	Testing Company Inc	OUT	FedEx Ground		0.00	0.00		
> 89859	05/06/19	FIFTH AVENUE	OUT	Duggal VanSmall- Manh		0.00	125.00		
> 89860	05/06/19	WEST BROADWAY	OUT	Duggal VanSmall- Manh		0.00	125.00		
> 89861	05/06/19	COLUMBUS CIRCLE	OUT	Duggal VanSmall- Manh		0.00	125.00		
> 89862	05/06/19	MADISON AVENUE	OUT	Duggal VanSmall- Manh		0.00	125.00		
> 89863	05/06/19	COLUMBUS AVENUE	OUT	Duggal VanSmall- Manh		0.00	125.00		
> 89864	05/06/19	IRVINGTON	OUT	Duggal VanSmall- Manh		0.00	125.00		
> 89865	05/06/19	WHITE PLAINS	OUT	Duggal VanSmall- Manh		0.00	125.00		
> 89866	05/06/19	BROOKLYN	OUT	Duggal VanSmall- Manh		0.00	125.00		
> 89867	05/06/19	EAST HAMPTON	OUT	Duggal VanSmall- Manh		0.00	125.00		

Validations for Shipment Declared Value

The user must be careful in using the Declared Value field. Upon marking a Shipment “Shipped”, a validation occurs that checks if the total value assigned to the Shipments is greater than the sum of values of the underlying Order’s Line Items.

Also, if values are assigned to Shipped Shipments, the Order’s Line Item value Subtotal will not be allowed to be reduced below the Total Shipped Shipment value.

Record: 3 of 11

New + Edit Delete X Print Actions

Shipment: 89859 FIFTH AVENUE 5/6/2019

PENDING

Outgoing Shipment

Notices

Emails

Docs

Shipped To

Residential ☐

Company >

Testing Company Inc

Contact >

John Q Public

Shipping Terms

FOB

Tax

Value

263.50

Order >

Purchase Order >

Invoice >

Shipment Info

Purchased ☐

Courier Service

Duggal VanSmall- Manh

Courier Account #

Shipping Cost

0.00

Package Type

L

W

H

Weight

10

x

10

x

10

5

Package

Courier Tracking #

Delivery Date

05/06/19

Description

Package IDs

Shipping List

Line Item Code	Description	Order	Purchase Order	Quantity	Weight	Ref #s
> DCP14	Digital C Print 11X14 GLOSSY	> 668230		1	0	#s

Message

This shipment could not be marked as shipped for the following reasons:
- Item #1: The declared value exceeds the order item total.

OK

