Ship Management [DRAFT]

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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) for the General aACE Software aACE 5 Knowledge Base.
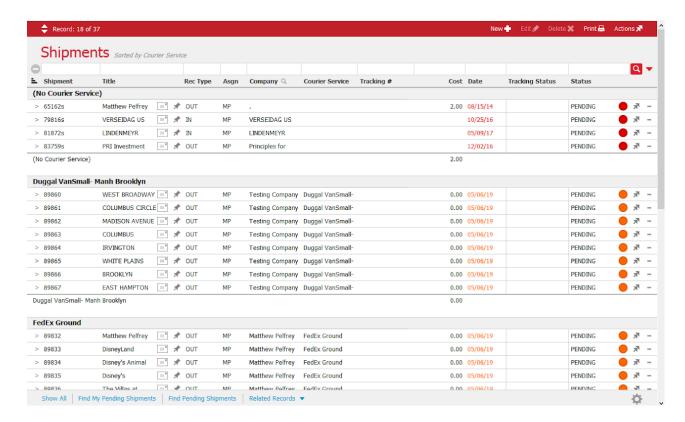
aACE Shipment Lists

An Alternative Approach: Submit Shipments to BKJobs
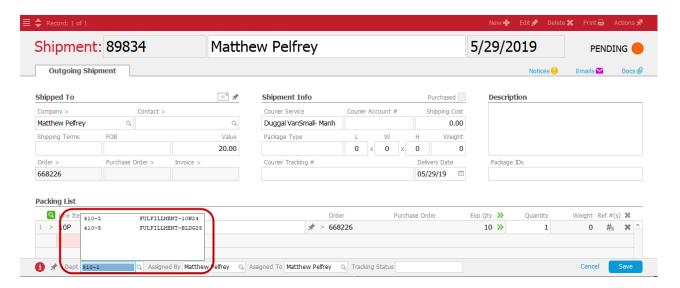
aACE Shipment Lists

The Shipping Departments can review and action a queue of Shipments via the aACE Shipments List View.

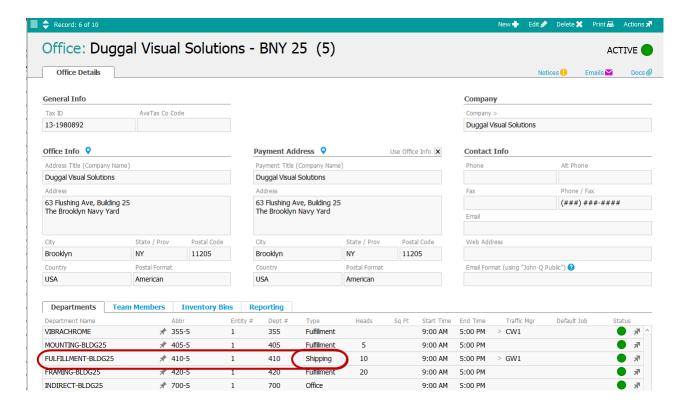The List can be sorted by and constrained to the column headers.

To generate a list of Shipments to action, shipping personnel can search for Pending Shipments Assigned to that Dept's Manager with a particular Ship Date. The resulting list can then be sorted by Courier Service.

Shipments need to be Assigned to a particular **Shipping Department**. These show in a drop-down list at the bottom of the record.
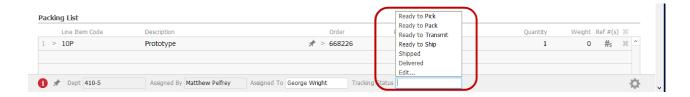

The Drop-Down List is populated by all **Departments** that are a **Type= Shipping** in the Office module.

Once the Department is selected, the Assigned To is populated by that Department's manager.

Lastly, the user should enter a status to tell the Shipping Department what to do when they come across this record.

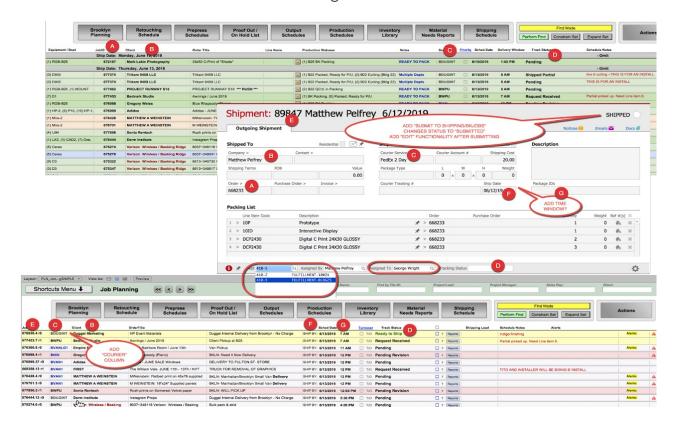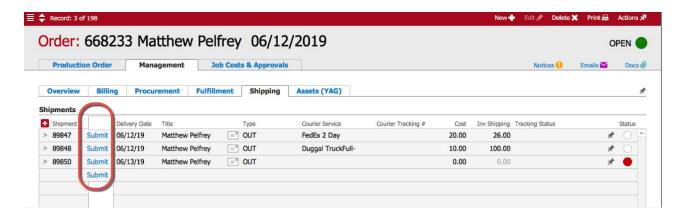# An Alternative Approach: Submit Shipments to BKJobs

Current State:

Currently (June 14, 2019), Shipping Lines in Orders are listed and managed in BKJobs . Line items using Shipping Codes are added to Orders. Information is entered in the Line Item Note (text field) then submitted to BKJobs. Submitted Lines then populate the Job Planning and Ship Needs Reports, where they are managed.

Shipping information is manually copied and pasted to actual labels and/or FedEx and UPS systems as required.

Proposal:

1. Retire the use of Shipping Line Items in Orders.
2. Re-build/ map Shipment Line Item interfaces to receive aACE Shipment record information in place of the Shipping Line Items
    1. clicking on field "C" Courier Service will open an aACE window with that Shipment Record, all Shipments for that Order will populate the List View of that new window.
3. Create a Submit/ Edit functionality in Shipments (like Order Line Items(Jobs) are connected to BKJobs). Clicking Submit will populate/update a record in BKJOBS and freeze editability in the aACE record.
    1. Add a preference in Shipments to allow certain users (in Shipping) the ability to edit Submitted Shipments.
    2. Add a Record Status of SUBMITTED. The fields are locked for all users except with the above preference.
    3. All changes are Logged.
4. Add a Time Window field to the Shipment record
5. Add a Courier column to the Job Planning table

The workflow would look something like:

- Orderwriter writes Order
- Orderwriter adds a Shipment record, enters Shipping address, Ship Date and Time and Courier information
- Orderwriter submits Jobs to BKJobs
- Orderwriter submits Shipment to BKJobs. Shipment Record Status is changed to Submitted.
- Shipping Dept reviews Queue.
- Shipping Dept accesses aACE Shipment record(s), Transmits to NRG (Third Party system for generating UPS and FedEx Labels). Shipment Record Status is changed to Transmitted.
- (For non-UPS/FedEx Couriers, the quoted cost is entered by the Shipping Dept into the Cost fiedl of the Order. A label is Printed and the Shipment is marked "Shipped"
- Sales Tax is automatically recalculated based on Line Item value, shipping address, and the Shipment Declared Value field once the Shipment is "Shipped"
- The Shipping record receives Tracking number, Status and Cost from NRG (or Cost is manually entered).
- Price to Client is auto-generated and sums to the Shipping subtotal in the Order.
- "Shipped" Shipment records fall off the BKJobs lists.