

Automated Shipping Acknowledgement



Shipping Acknowledgement

- Automatically send an email to customer advising of shipping details, including tracking information.
- Reduce the number of customer calls for ‘Has my order shipped?’ or ‘What is my tracking number?’.
- Advise that ‘Will-Call’ order is ready.



Features

- Shipping Ack. automatically sent upon user selecting 'Post' from within the "Shipping" screen.
- Ability to set specific customers to never receive acknowledgements.



Features

- Hierarchy evaluated to determine email recipient. First 'hit' of an email address will be used.
 - Value assigned in “Customer -> Document Settings”
 - Sales Order ‘Ordered By’ contact.
 - Shipping Location.
 - Not Sent



Content

- The Acknowledgement form can be designed to include and display data however you desire.
- 'Data' is being pulled from the 'invoice' record that was created when user selected 'Post' .



Content

- Useful information to include:
 - **Date Shipped**
 - **PO#**
 - **Item#**
 - **Qty**
 - **Carrier and Service**
 - **Tracking#**
 - **Number of Packages**



Sample Output

Source Associates Inc

2573 Scott Blvd, Santa Clara, CA 95050

Phone: 408-970-0128

Fax: 408-970-0147

Shipping Notice

Order # 2108413

Acct #: YCCAB

Bill To: YC CABLE USA INC
44601 NOBEL DR
FREMONT, CA 94538-
United States

Ship To: YC CABLE USA INC

44601 NOBEL DR
FREMONT, CA 94538
United States

Contact: AMINA HASSAN

Order Date

9/15/2009

Terms of Sale

NET 30

Purchase Order

9851

Shipment Method

UPS Ground

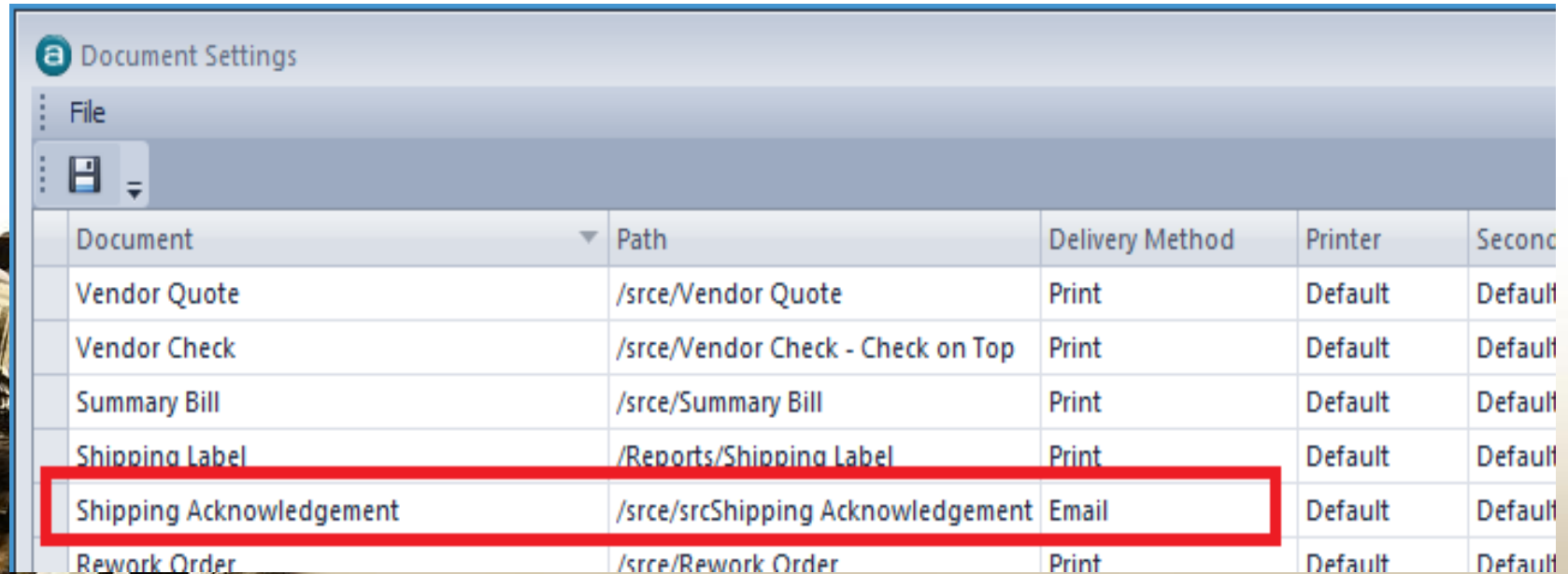
Your order will ship today via: **UPS Ground**

Tracking#: **1Z9505630340530231**

Ln	Qty	Item Number	Description	Ship Qty	UOM	Qty BO
1	500.00	611429-24RED PTR-W142924-R	UL1429 24AWG(19) RED	500.00	FT	0.00

Setup

- Define global “Document Settings” to enable email processing of this form.
 - Document = ‘Shipping Acknowledgement’
 - Delivery Method = “Email”



The screenshot shows a software interface titled "Document Settings". It features a menu bar with "File" and a save icon. Below is a table with columns: Document, Path, Delivery Method, Printer, and Second. The row for "Shipping Acknowledgement" is highlighted with a red border. The "Delivery Method" for this document is set to "Email".

Document	Path	Delivery Method	Printer	Second
Vendor Quote	/srce/Vendor Quote	Print	Default	Default
Vendor Check	/srce/Vendor Check - Check on Top	Print	Default	Default
Summary Bill	/srce/Summary Bill	Print	Default	Default
Shipping Label	/Reports/Shipping Label	Print	Default	Default
Shipping Acknowledgement	/srce/srcShipping Acknowledgement	Email	Default	Default
Rework Order	/srce/Rework Order	Print	Default	Default

Setup

(Optional) Customer Options

- Disable acknowledgement.
 - Document = ‘Shipping Acknowledgement’
 - Delivery Method = “Do Not Send”
- Send ALL acknowledgements to a specific email address.
 - Document = ‘Shipping Acknowledgement’
 - Delivery Method = “Email”
 - Email Address = 1 or more addresses.



Setup

Customer Document Settings

File Edit

Document	Path	Delivery Method	Printer	Email Address	F
Shipping Acknowl...	Not Overridden	Do Not Send	(Default)		
*					

Customer Document Settings

File Edit

Document	Path	Delivery Method	Printer	Email Address
Shipping Acknowl...	Not Overridden	Email	(Default)	xxxxx@gmail.com
*				



Setup

- Customer 'Shipping' location of Primary and/or Secondary.
 - **Email Address = 1 or more addresses.**
- Customer Contacts
 - **Define 1 or more addresses for contacts.**
 - **Predefined or created during order entry.**



Setup

The image displays two SAP windows side-by-side. The top window is titled "Customer Maintenance" and shows a menu bar with "File", "Edit", "Actions", and "Maintenance". Below the menu is a toolbar with icons for file operations and a dropdown menu with options like "Locations ...", "Items ...", "Contacts ...", and "Document Settings ...". The main area is divided into "General" and "Billing Information" sections. The "General" section shows "Account Number" as "MONCAB" and "Name" as "MONSTER CABLE PRO". The "Billing Information" section shows "Address" as "455 VALLEY DRIVE" and "ATTN: ACCTS PAYABLE", with "City" as "BRISBANE", "State" as "CA", and "Zip" as "94005". It also lists "Phone Number" as "415-468-0311" and "Fax Number" as "415-468-0311".

The bottom window is titled "Customer Location Maintenance" and has a menu bar with "File" and "Edit". It features a table with columns "Line", "Ref...", "Name", "Comment", "Active", and "Date A...". The table contains two rows: Row 1 with "Line" 1, "Name" "ROMERO & MCN...", and "Active" unchecked; Row 2 with "Line" 2, "Ref..." "CEVA", "Name" "CEVA LOGISTIC 67...", "Active" checked, and "Date A..." "7/14/20...". Below the table are "General" and "Shipping Information" sections. The "General" section includes "Territory" (A2), "Taxable" (unchecked), "Tax Exempt Num" (SRBH19662...), "Taxing Entity 1" (1-CA), "Taxing Entity 2" (2-37), "Taxing Entity 3", "Taxing Entity 4", "Default One Time" (unchecked), and "Include In Mailin". The "Shipping Information" section shows "Address" as "C/O MONSTER CABL..." and "9475 NICOLA TESLA C...", "City" as "SA...", "State" as "CA", and "Zip" as "92...". It also lists "Phone Number" as "415-840-2000" and "Fax Number" as "415-468-0192".

Annotations include a red arrow pointing from the "Customer Maintenance" title bar to the "Email Address" field in the "Shipping Information" section of the "Customer Location Maintenance" window. A blue arrow points from the "Customer Location Maintenance" title bar to the "Email Address" field in the "Shipping Information" section of the "Customer Maintenance" window. Both "Email Address" fields are highlighted with red and blue boxes, respectively.



Review Hierarchy

1. Value assigned in “Customer -> Document Settings” or “Do Not Send”
2. Sales Order ‘Ordered By’ contact.
3. Shipping Location assigned to sales order.
4. Not Sent

