

Pack & Ship User Guide

Version 4.1.150.303



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Introduction

TrueCommerce Pack & Ship is a guided order fulfillment application that enables businesses to retrieve, package, and ship product orders as cost effectively and reliably as possible. It walks users through all aspects of the packing and shipping process:

- Retrieve orders via multi-channel sales and order management services
- Prepare packages according to order guidelines
- Select a carrier with the best combined shipping rate, shipping method, and/or delivery time
- Track deliveries and performance details
- Print carrier labels, manifests, and other reports.

Pack & Ship comprises following key application components.

Shipping	Guides and verifies your steps for receiving orders, preparing packages, selecting carrier services, and dispatching shipments.
Orders	Provides visibility for managing all your incoming orders.
Shipment History	Provides visibility for tracking packages, retrieving ship details, and handling incomplete or pending shipments.
Close Carriers	Prepares end-of-day close reports (manifests) for selected carriers.

To get started using Pack & Ship refer to the [Pack & Ship Overview](#) on page 15.

About this User Guide

The purpose of this user guide is to describe the common functions and features in Pack & Ship for preparing packages for shipment. This document is intended for the end-user and it describes the functionality to which they would normally have access.

Implementation consultants, installers, and system administrators should also go over this material to become familiar with basic concepts and functionality prior to configuring their system.

The content provided in this guide does not cover full details for the integration of Pack & Ship with another software application. Consult that application's documentation for instructions specific to your implementation. In addition, depending on your user role or license, you may not have access to all of the functionality described in this guide. Contact your system administrator to ensure you have all the permission settings necessary to perform your work.



NOTE

Applications that run in TrueCommerce Foundry are optimized for use on multiple devices. For example, in this documentation 'click' may refer to the same action as 'tap' or 'touch' whether your device is equipped with a track pad, touch screen, or mouse-operated user interface.

Additional Documentation

TrueCommerce Foundry is a responsive workspace environment that serves as principal login and user interface for the deployment of multiple integrated applications. For information about the features that are common to all TrueCommerce applications, click the ? button to access [Online Help](#).

Pack & Ship integrates with other TrueCommerce products installed in Foundry and it is advised that you consult to their documentation to become familiar with those applications as well.

Navigating this PDF

This PDF is designed for onscreen viewing with built-in search and navigation capabilities. Use **Adobe Acrobat® Reader** to take full advantage of the following interactive features:

Bookmarks

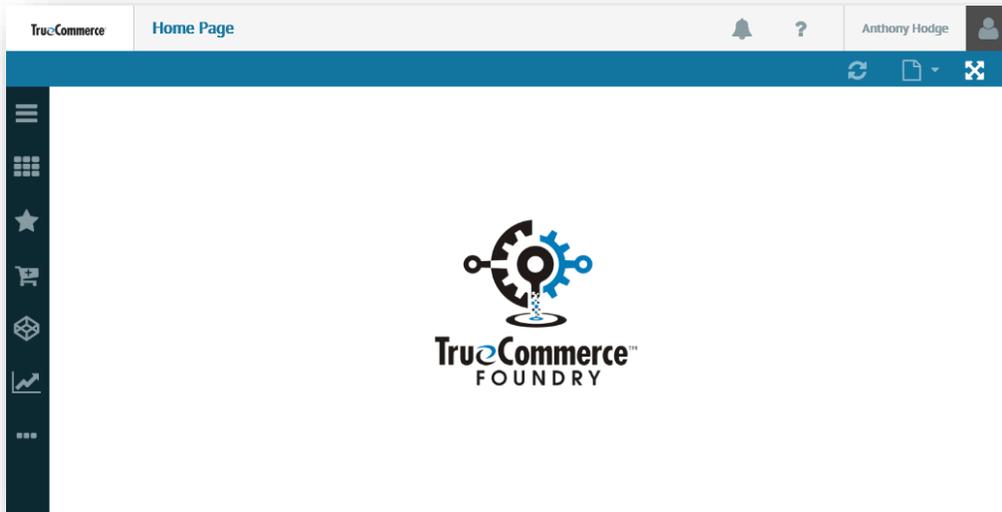
The bookmarks panel is a clickable table of contents that is available to you anywhere in the document. Click the  button on the left side of the page to activate the bookmarks panel.

Cross-References / Hyperlinks

Blue *hyperlinks* appear in the text wherever one topic references another. They also appear in generated lists, such as in the table of contents. Use the **Alt + Left Arrow** shortcut in Acrobat Reader to jump back to previous hyperlinks.

Before you Begin

Pack & Ship runs in TrueCommerce Foundry. This section explains features of the Foundry platform and user interface that are common to all TrueCommerce applications.



Responsive Design

Applications that run in Foundry are optimized for multiple screen sizes via mobile phone, tablet, or desktop. The layout may be adjusted, where practical, based on the size and capabilities of the device. For example, on a phone, you may see content in a single column view; a tablet might show the same content in two columns. This also changes when devices are rotated to landscape mode.

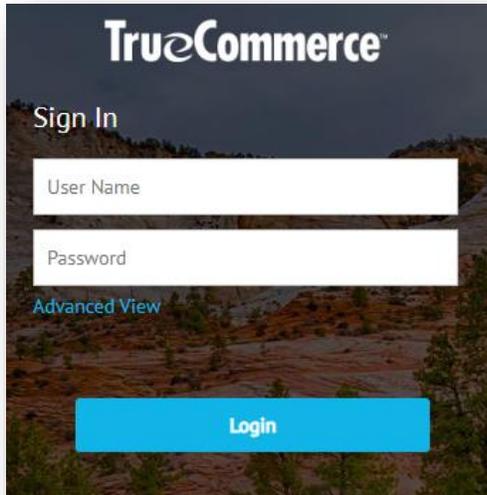


NOTE

In this documentation, 'click' refers to the same action as 'tap' or 'touch' whether your device is equipped with trackpad, touch screen, or mouse-operated user interface.

Logging In / Logging Out

In order to access Pack & Ship, you must first launch TrueCommerce Foundry in your browser via the common **Sign In** prompt. You need to be an authorized user to log into Foundry. Consult your system administrator to obtain the necessary domain information and user credentials.



The image shows the TrueCommerce Sign In page. At the top, the TrueCommerce logo is displayed. Below it, the text "Sign In" is centered. There are two input fields: "User Name" and "Password". Below the "Password" field, there is a link for "Advanced View". At the bottom of the form is a blue "Login" button.

Your user profile should already be set up with authorizations for application and data access.

Most users only need to enter their **User Name** and **Password** via the basic **Sign In** prompt, as depicted on the left. If other credentials are required for your tenant, click **Advanced View** for an expanded list of login options.

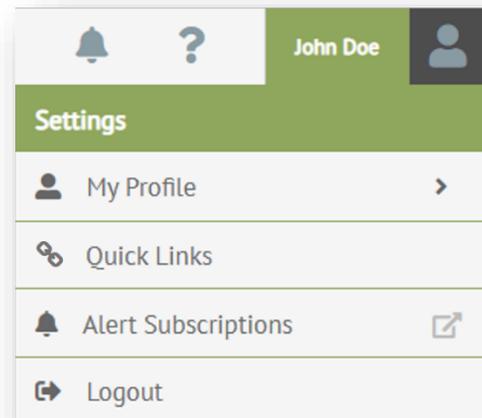
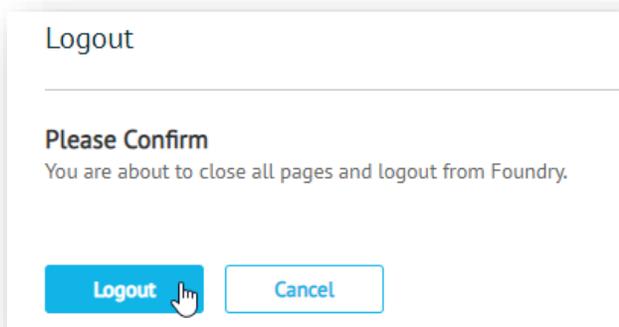
Once you have entered all your login details, click the **Login** button to launch Foundry.

When Foundry displays, it will contain all the applications to which you have access. If application components are missing from the menu, contact your system administrator to ensure the correct authorizations are in place.

Save all changes to your work before attempting to close a Foundry session. You should also check the [Spaces Menu](#) to see if there are any active application pages containing unfinished work.

To log out of Foundry, click on your user name in the header bar and select **Logout** from the drop-down menu.

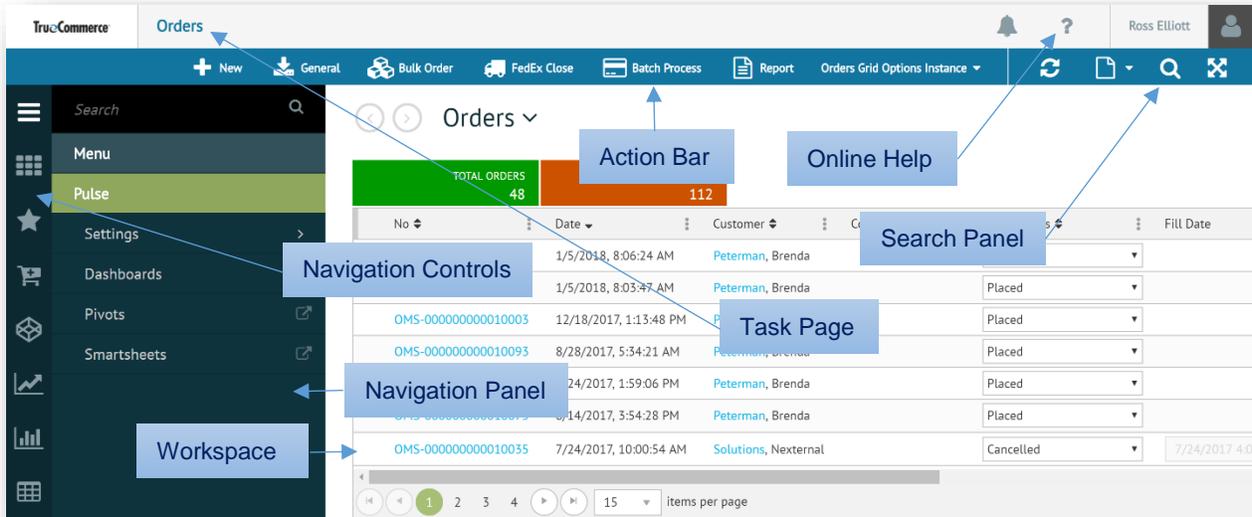
You are prompted to confirm that you intend to close all application pages that are currently open in Foundry.

The image shows a "Logout" confirmation dialog box. The title is "Logout". Below the title is a horizontal line. The text "Please Confirm" is displayed, followed by "You are about to close all pages and logout from Foundry." At the bottom, there are two buttons: a blue "Logout" button with a hand cursor over it, and a white "Cancel" button with a blue border.

About the User Interface

After successful logon, TrueCommerce Foundry displays in your browser. This is the common platform and user interface for all your TrueCommerce applications and task pages.



Common Functionality

The layout and controls you see on each task page are dependent on the application; however, the overall navigation and display functionality will be the same no matter which application is running in the platform. Key features of the user interface include:

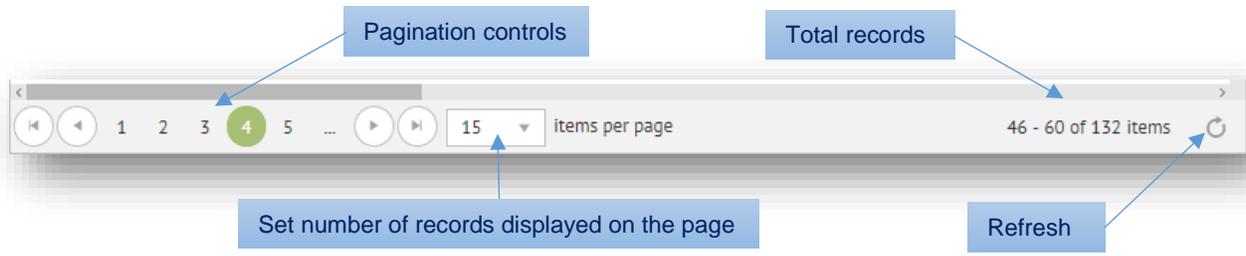
- The Foundry  navigation control opens the main **Menu** for access to your applications.
- Each menu link opens to a different task page under the selected application.
- A  symbol to the right of a menu link indicates a drop-down menu to more links.
- You can only work on one task page at a time in the Foundry workspace, but active pages may be saved to the background while you work on other pages.
- Click the  button next to the menu link to save a page to the background. Use the [Spaces Menu](#) to retrieve previously opened pages.
- You can also set up  **Favorites** and *quick links* in the navigation panel for quick access to the pages you work with the most.
- The action bar contains all your application-specific buttons and controls.
- The  and  symbols on the action bar indicate a drop-down menu to more controls.
- If you need more room to work in a task page, use the  toggle to hide the navigation panel and page header from the Foundry workspace.
- To search, filter and organize what you see on a task page, click the  button. This invokes the [Search Panel](#), described on page 12.
- Depending on the application, you may be [Working with Grid Data](#) to find the information you need.
- Event-triggered notifications are signaled by the on-screen  control. Application-specific notifications may appear as ‘toast messages’ at the bottom of your screen.
- To read more about Foundry, click the  button to invoke the [Online Help](#) menu.

Working with Grid Data

Some applications use the grid format for displaying, creating and editing data on the page. Foundry's interactive grids include several useful controls to help you find and organize your data quickly so that your most important information is always visible and easily accessible.

Basic Navigation

The grid offers full navigational mobility to scroll through records vertically and view data horizontally using the standard mechanisms available to your user interface or device. Use the following controls on the pagination bar at the bottom of the grid to select pages and change page size.



You can customize the grid to show more records (which requires horizontal scrolling to view) or break them up into smaller pages (which requires pagination controls to view). Page size can be set to any number of records; however, reducing the number of records per page might be faster for reloading records when refreshing the grid. You can decide which page size is right for the best system performance.

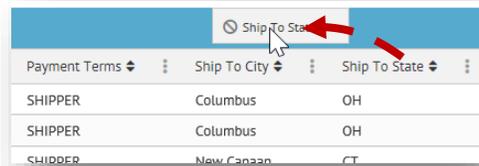
Filtering provides another powerful way for you to organize the number of records displayed. For more information, see [Search Panel](#) on page 12.

Customizing Columns

Following are some quick methods for customizing the display of columns and the data elements within a selected column to suit your preferences.

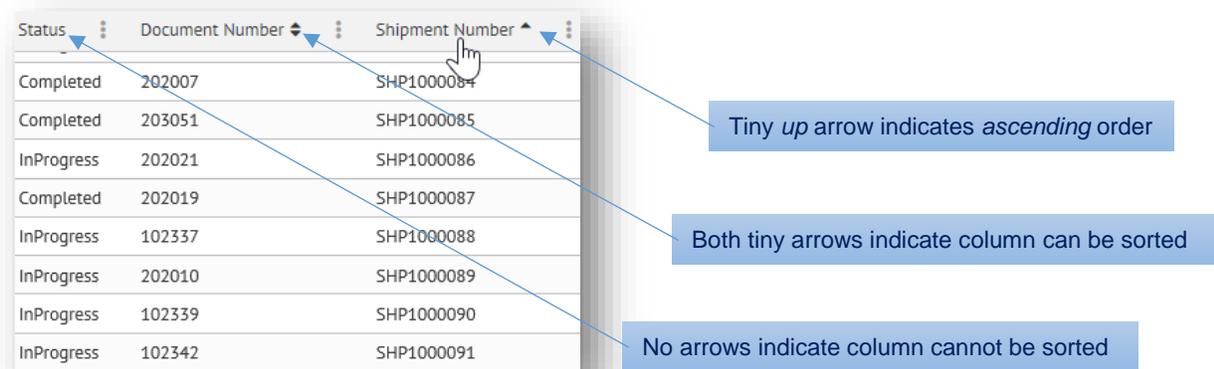
Rearrange Columns

To rearrange, simply click and hold a column heading and then drag and drop the entire column to a different place horizontally on the grid.



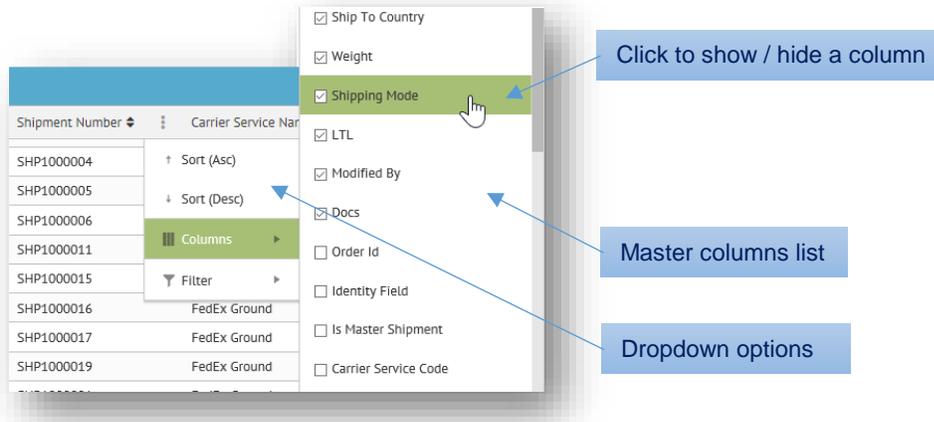
Sort Records by Column

Tiny up/down arrows to the right of a column heading indicate that a sort can be applied to the column selected. Click once on the column heading to sort all records in the grid based on the contents of that column. Click again to toggle between ascending and descending sort order.



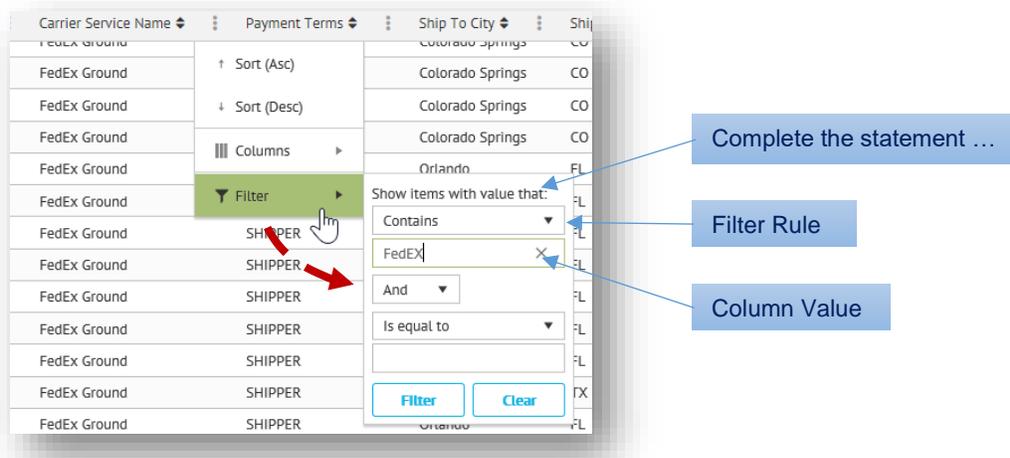
Show / Hide Columns

There is a simple way to hide (or show) columns on the grid. Click any  symbol between the column headings and then click  **Columns** from the dropdown options. This opens the master columns list for displaying columns on the grid. Only the columns selected on the master list will be displayed on the grid.



Column Filter

If hundreds (possibly thousands) of records are loaded into your grid, it might be difficult (and slow) to scroll through all the data. Setting a column filter, allows you to focus only on the record(s) you need by hiding everything else on the grid. Click any  symbol between the column headings and then click  **Filter** from the dropdown options. This invokes the menu for applying a quick filter based on that column.



There are several different rules available for defining how values are interpreted and used in the filter statement **“Show items with value that”**.

To set a column filter, complete the statement by selecting the rules and search criteria in the menu:

- The filter is based on two sets of rules and column values (data elements) which together complete the filtering statement. You can complete the statement using just one or a combination of both.
- There will be different rules available from the drop-down field depending on if the column contains alphanumeric, numeric or date values. These rules are generally self-explanatory.
- Column values can be from any records on the grid, not just what is currently displayed on the page.
- Once your criteria is in place, click the **Filter** button to apply the filter.
- To reset the column filter, click the **Clear** button.
- Column filtering can be applied on its own or in addition to the [Search Panel](#).

Saving Grid Settings

Lock in your grid settings by clicking  **Save Configuration** via menu dropdown on the grid control bar. Use  **Reset Configuration** to restore the grid to default settings.

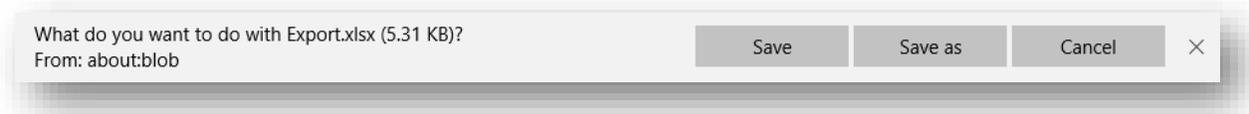
Selecting Records

Simply double-click on a record to make it editable. To select a range of records, highlight the first record, hold down the **Shift** key, and then click on the last record. To select multiple (but not consecutive) records, hold down the **Ctrl** key while clicking on the individual records you want to include. Note that these selection and editing options could be disabled for certain grids.

Export

Grids may include functionality that allows you to export and download their contents to an XLSX file. You can choose to export all available data, or filter the grid via the [Search Panel](#).

To export grid data, select the  **Export** menu option. Depending on your browser settings, the exported file may be downloaded immediately or you may be presented with other save options.

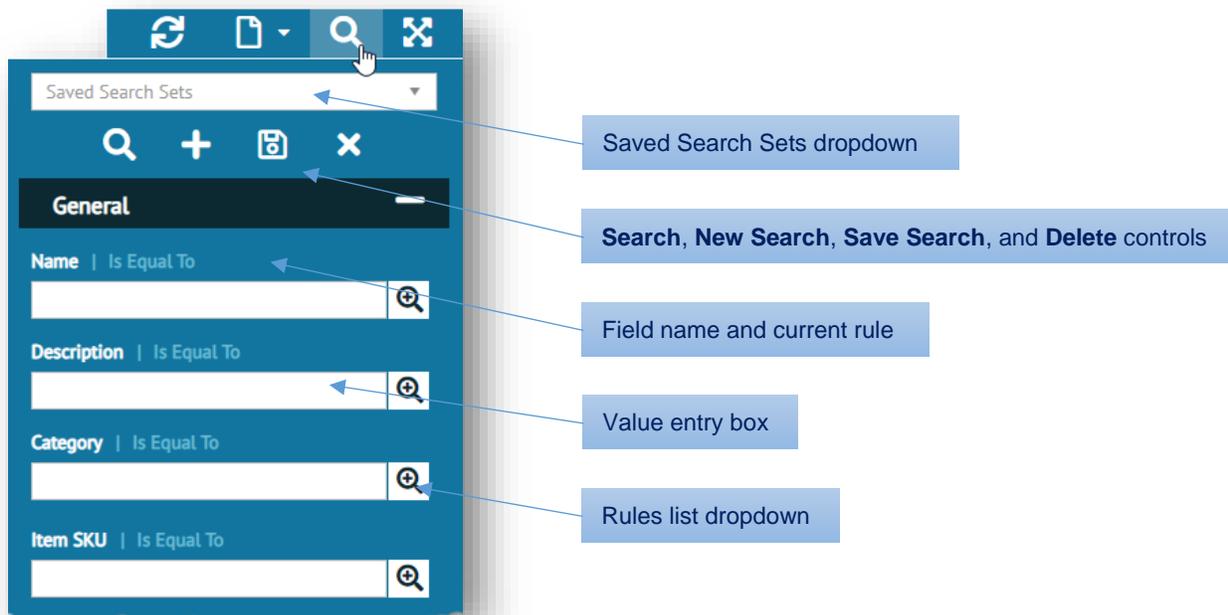


Search Panel

To help manage large amounts of data, some applications may be equipped with a collapsible search panel that allows you to customize which data you want displayed on the task page based on specified values and rules.

This feature (also known as filtering) is an effective way to find something quickly, reduce the number of records displayed, and to organize your data into logical groupings and workflow. After you set up your search criteria, you have the option to save those settings for reuse whenever you need them.

If your page includes this feature, use the  control on the workspace action bar to expand/collapse the search panel on the right side of the workspace.



The panel comprises a menu of search fields that match searchable information in the application's workspace. The types of values that can be entered in a search field depend on the values defined in the application; either alphanumeric, numeric or date values.

Performing a Search

Following are the steps for defining search criteria using one or more search fields:

1. Determine which data you wish to search, and then locate the matching fields in the search panel.
2. Use the value entry box below the field name to enter your search criteria based on field type. Some fields have preset values where you must select from dropdown options instead.
3. If needed, click the  button next to the search field to apply rules (as shown on the right). The options available in the rules drop-down list depend on if the data elements are alphanumeric, numeric or date values.
4. Click the  option inside the search panel to start the search using the current settings.



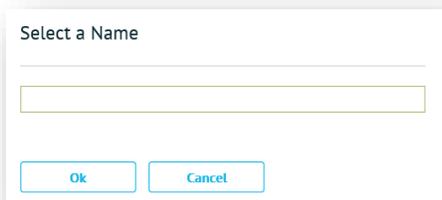
For most searches, it is enough to enter your search criteria in a single field. However, you have the option to use multiple fields to refine your search settings; for example, depending on the data, you might enter a combination of names with dates or locations.

Starting a New Search

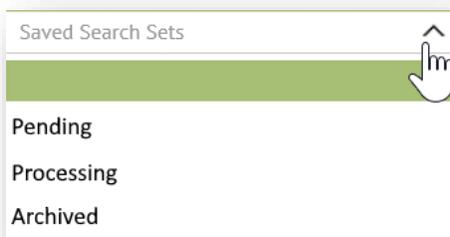
For best results, remember to use the  option to clear all settings before you start a new search. If you do not reset your data using this option, any new search criteria will be applied *in addition to the previous search*.

Using Saved Search Settings

To record the current settings for future use, click the  option. When the **Select a Name** dialog appears, enter a name for your saved search and click **OK**.



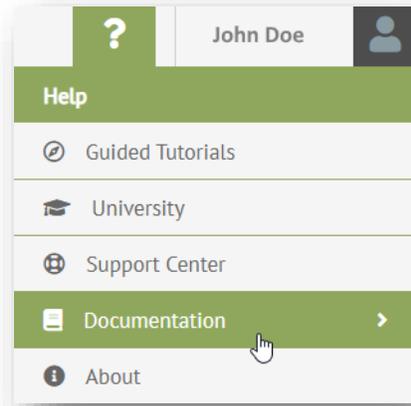
To reuse settings, select a named search from the **Saved Search Sets** dropdown. This populates search fields with previously recorded values so that you can locate or filter your data the same way every time.



Online Help

For help with the platform and applications during your Foundry session, click the **?** button, and then select **Documentation > Foundry User Interface** in the drop-down menu.

A variety of documentation and training options are available depending on your implementation and the TrueCommerce applications licensed under your tenant ID, including:



Guided Tutorials - walk you through the actual steps, showing where to click or type, as you perform live tasks in Foundry and within your applications.

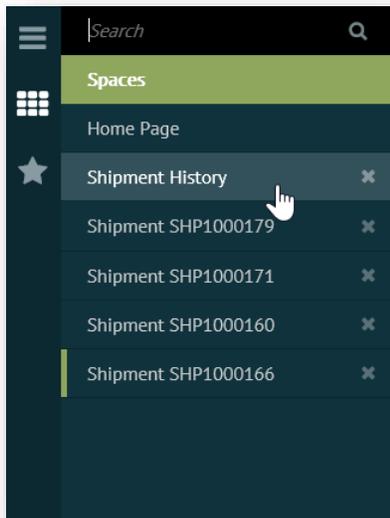
University - opens the official TrueCommerce training site in a new browser tab.

Support Center - displays recent support notifications and instructions on how to contact TrueCommerce Support.

Documentation - invokes a drop-down menu with links to Foundry Help and any other documentation that was provided with your applications.

About - launches the **About** dialog showing version information about the applications running under your tenant in Foundry.

Spaces Menu



Use the **Spaces** menu to locate and retrieve previously opened shipments.

Pack & Ship adds new spaces (active pages) for every shipment you start in the [Shipping](#) workcenter and these are maintained in a 'ready state' throughout your Foundry session.

Note that Pack & Ship **Orders**, **Shipment History**, and **Close Carriers** pages can be added to this menu using the [+](#) button on the menu link. In addition, if you filtered the [Shipment History](#) or [Orders](#) grid before exiting, they will resume where you left off, displaying the same records, with the same filter settings applied.

To remove extraneous or unwanted pages from the **Spaces** menu, simply click the **X** button to the right of the selected link.

See *favorites* and *quick links* in Foundry's [Online Help](#) for other handy navigation tricks.

Pack & Ship Overview



TrueCommerce Pack & Ship is an order fulfillment system that consolidates a variety of tasks (package processing, label and report printing, and shipment tracking) into a single comprehensive solution. This section introduces you to the various Pack & Ship tools for managing your shipping workflow.

Navigating Pack & Ship

The key application components for **Pack & Ship** are listed under the Foundry **Menu**. Select **Shipping**, for [Shipping Packages](#), **Orders** to manage your [Incoming Orders](#), **Shipment History** to track your [Active and Completed Shipments](#), and **Close Carriers** to generate an [End of Day Close](#).

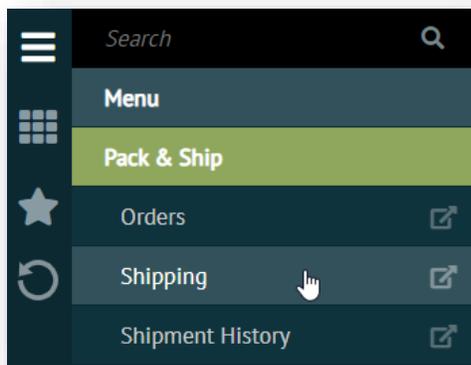
To monitor your Pack & Ship order and shipping metrics go to **Pulse > Dashboards** via the Foundry **Menu**. Refer to the *TrueCommerce Pulse User Guide* for more information about Pulse.



TIP

Use the [Spaces Menu](#) to keep pages open (in a ready state) if you need to switch between your active shipments and any other applications you are working with.

Shipping Packages



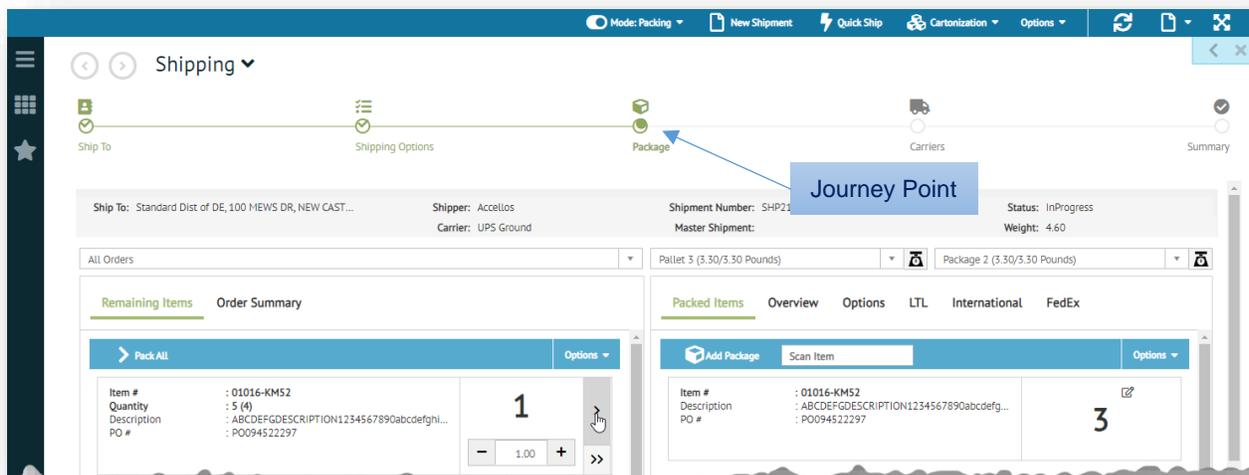
To begin packing and shipping your products, select **Pack & Ship > Shipping** via the Foundry **Menu**.

This launches the main [Shipping](#) workcenter that will guide you through the tasks of addressing, packaging, and dispatching your shipments.

The tasks you can perform depends on which **Mode** is selected before you start. Pack & Ship [Mode Processes](#) are discussed later in this section.

Most of the time you will be following the [Order-Based Shipping](#) process described on page 16.

Following is an example of the **Shipping** workcenter at the **Package** stage in the guided process.



Modes

Task pages in the guided process can be adjusted to suit your preferred method of shipping. Use the **Mode** switch on the [Shipping Action Bar](#) to select one of the following:

Mode Processes

Mode	Guided Process
 Shipping	<i>Manual process, where packages are assembled outside of Pack & Ship. Ship To addresses and Shipping Options are usually entered manually, but may be derived from order details. At the Package stage, items are assumed to be packed, so the weight and dimensions are all that are needed before you select a Carriers option to Send Shipment.</i>
 Packing	<i>Default process, started from the Add Orders fly out panel. Ship To addresses and Shipping Options are derived from the selected order. At the Package stage, the contents, weight, and dimensions of each package are recorded before you select a Carriers option to Send Shipment. For more on this process, see Order-Based Shipping below.</i>
 Full Case Packing	<i>Identical process to  Packing mode (Order-Based Shipping) except each item is a quantity of the <i>same product</i> represented as a single item (case) per package.</i>
 Master Shipment	<i>Multiple smaller shipments are consolidated (based on feasibility) before selecting an option from Carriers to Send Shipment.</i>

Order-Based Shipping

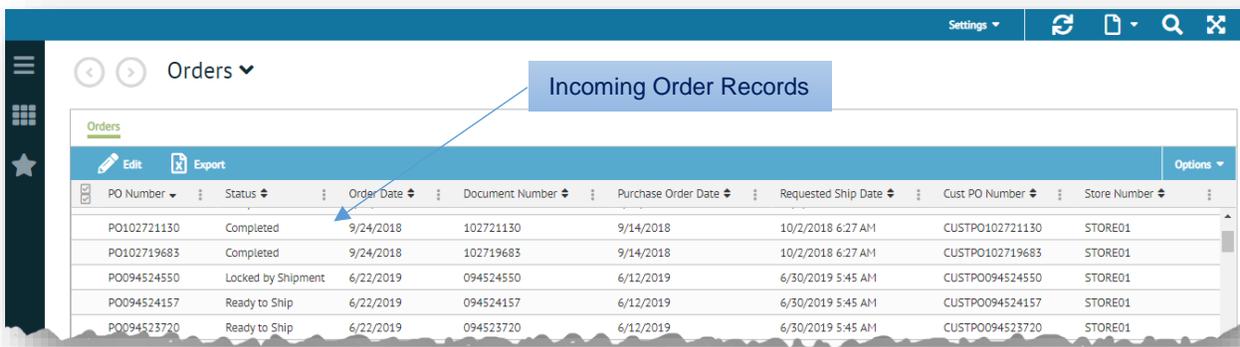
The [Shipping](#) workcenter is usually set to  **Packing** mode, where the guided process walks you through your shipping routine based on orders received from within your Pack & Ship integration scheme. Following is a brief overview of the order-based shipping process:

[Receive Order](#) > [Select Order](#) > [Assemble Packages](#) > [Select Carrier](#) > [Dispatch Shipment](#)

Detailed instructions for these steps are provided under [Packing Mode](#) on page 34.

Receive Order

Incoming product orders arrive in Pack & Ship seamlessly via your preferred multi-channel (Amazon, Shopify, EDI, etc.) order management gateway.



PO Number	Status	Order Date	Document Number	Purchase Order Date	Requested Ship Date	Cust PO Number	Store Number
PO102721130	Completed	9/24/2018	102721130	9/14/2018	10/2/2018 6:27 AM	CUSTPO102721130	STORE01
PO102719683	Completed	9/24/2018	102719683	9/14/2018	10/2/2018 6:27 AM	CUSTPO102719683	STORE01
PO094524550	Locked by Shipment	6/22/2019	094524550	6/12/2019	6/30/2019 5:45 AM	CUSTPO094524550	STORE01
PO094524157	Ready to Ship	6/22/2019	094524157	6/12/2019	6/30/2019 5:45 AM	CUSTPO094524157	STORE01
PO094523720	Ready to Ship	6/22/2019	094523720	6/12/2019	6/30/2019 5:45 AM	CUSTPO094523720	STORE01

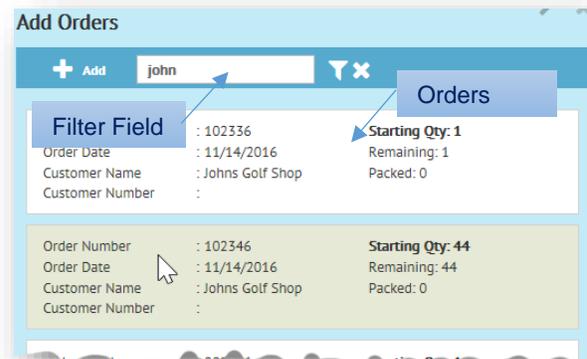
Orders that are **Ready to Ship** are listed in the Pack & Ship [Orders](#) grid and will be available for selection from the **Add Orders** fly out panel in the [Shipping](#) workcenter, described on page 25.

Select Order

When the workcenter is set to [Packing Mode](#), you can begin a new shipment by selecting one or more orders from the **Add Orders** fly out panel to the right.

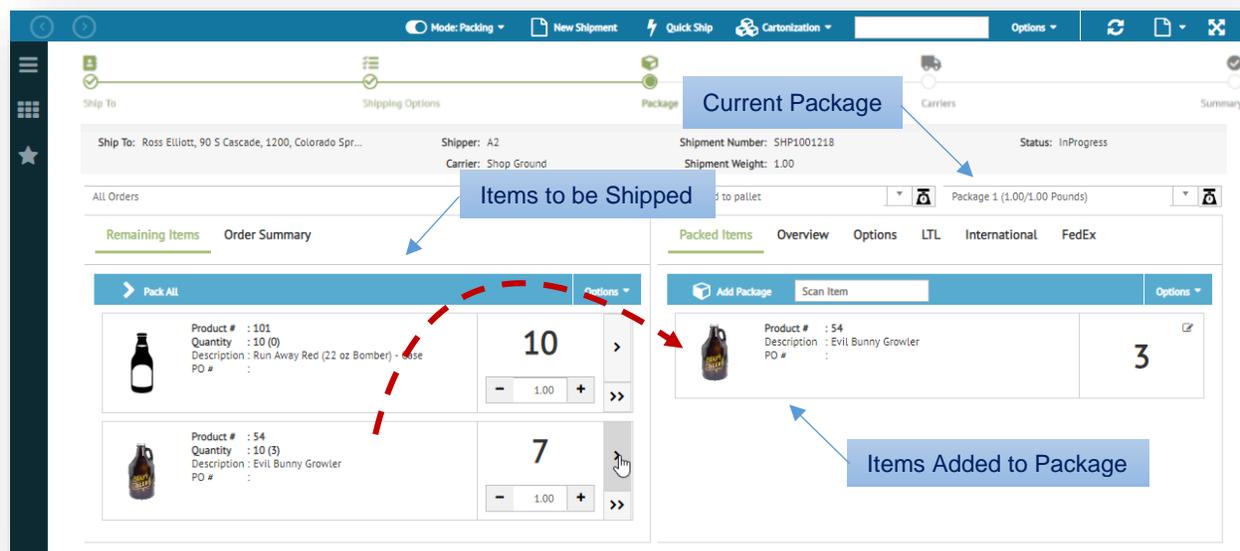
Use the panel filter field to selected specific orders from the list.

Highlight one or more orders and click **+ Add** to start packing the items listed in each order. Your system may also be set up to add orders directly via bar code scanner.



Assemble Packages

Once an order has been selected, focus shifts to [Adding a Package](#). The **Package** stage in the process involves selecting items from the order for packing. The [Package](#) tasks in Pack & Ship match you step for step as you assemble, and then record the weight and dimensions of each complete package.



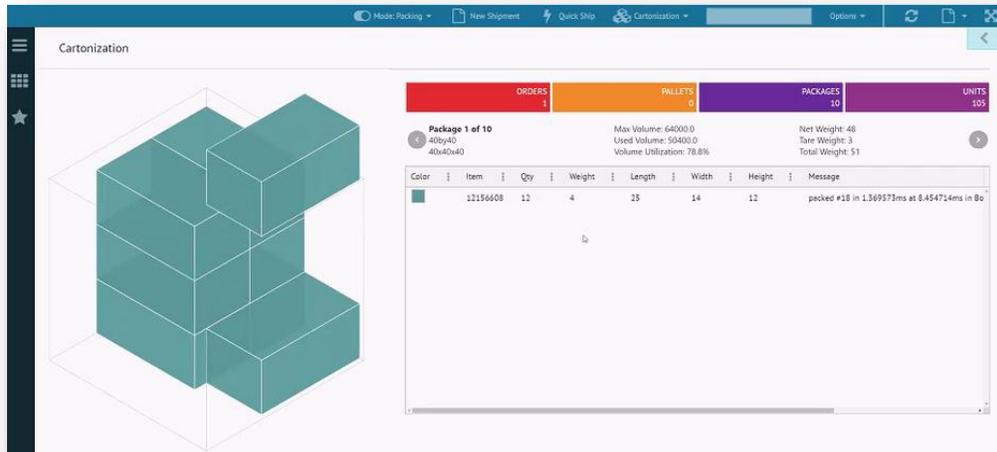
Package contents may be recorded automatically if you are equipped with a [Barcode Scanner](#) at the packing station. The order may include special packaging instructions (carton type, dimensions, and maximum weight) to handle certain items. Large orders can also be added to [Pallets](#).

Packing Utilities

Other packing utilities (separately licensed) may be available on the [Shipping Action Bar](#) to help speed up the packing process.

The **Quick Ship** control automatically packs everything from the order into a *single package* and completes the shipment using the carrier service defined in the order. See [Quick Ship](#) on page 40.

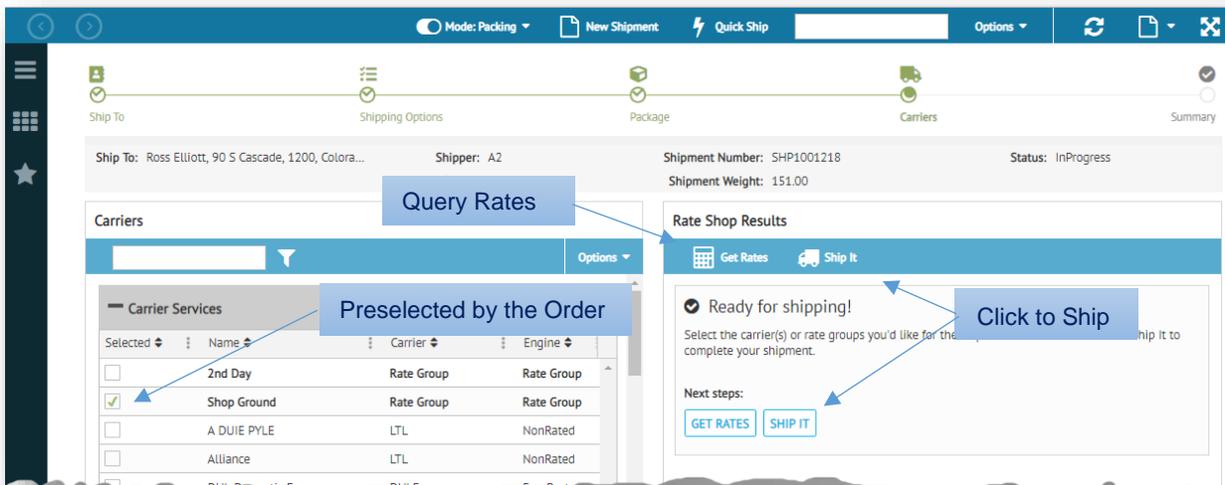
The **Cartonization** control has functionality that automatically calculates precise details of the packaging required to fulfill an order based on product size and quantity.



For more details about this separately licensed option, see [Cartonization](#) on page 40.

Select Carrier

Once all your orders are packed and ready for shipment in the **Package** stage, the next step is to **GO TO CARRIERS**. Services and rates under [Carriers](#) may already be set up in your shipping rules, or preselected by the order. The **Carriers** stage allows you to override presets if required.



NOTE

Up to this stage in the process, you have the ability to move freely between task pages in the [Shipping](#) workcenter for editing purposes. You cannot make changes once the shipment is sent.

Dispatch Shipment

Click **Ship It** to [Send Shipment](#), as well as print labels, generate reports, and distribute any email messages or alerts that have been configured in your shipping rules.

A final **Summary** page displays in the [Shipping](#) workcenter for you to review details of the completed shipment. This is for reference purposes only. No further changes can be made at this point.

The screenshot displays the 'Shipping' workcenter. At the top, there's a progress bar with steps: Ship To, Shipping Options, Package, Carriers, and Summary. Below this, key shipment details are shown: Ship To: Ross Elliott, 90 S Cascade, 1200, Colorado S...; Shipper: A2; Carrier: FedEx Ground; Shipment Number: SHP1001264; Status: Completed; Weight: 20.75. A summary row indicates 1 ORDERS, 0 PALLETS, 3 PACKAGES, 10 UNITS, and a duration of 13 hrs 55 mins. The 'Shipment Cost Breakdown' section shows a 'Prepaid' payment term, with a 'Discount' of (\$46.88), a 'Discounted Rate' of \$37.92, and a 'Published Rate' of \$84.80. The 'Additional Information' section lists the creator (Josh.Wayne@truecommerce.com), creation date (8/16/2019, 2:43:08 PM), and modifier (Josh.Wayne@truecommerce.com, 8/16/2019, 2:45:16 PM).

You can check the status and track the shipment via [Shipment History](#), page 57.

Incoming Orders

If you have permissions To manage your incoming orders, select **Pack & Ship > Orders** via the Foundry **Menu**.

The screenshot shows the 'Orders' grid in the 'Pack & Ship' workcenter. The left sidebar menu has 'Pack & Ship' selected, and 'Orders' is highlighted. The main area displays a table of orders with columns for Status, Order Date, PO Number, Document Number, Requested Ship Date, Purchase Order Date, and Cust PO Number. The table contains 10 rows of data, including 'Ready to Ship' and 'Locked by Shipment' orders. At the bottom, there are navigation controls and a '100 Items per page' indicator.

Status	Order Date	PO Number	Document Number	Requested Ship Date	Purchase Order Date	Cust PO Number
Ready to Ship	6/22/2019	PO094522767	094522767	6/30/2019	6/12/2019	CUSTPO094522767
Ready to Ship	11/30/2018	PO065843817	065843817	12/8/2018	11/20/2018	CUSTPO065843817
Ready to Ship	2/23/2020	PO080812603	080812603	3/2/2020	2/13/2020	CUSTPO080812603
Ready to Ship	6/22/2019	PO094523250	094523250	6/30/2019	6/12/2019	CUSTPO094523250
Ready to Ship	6/22/2019	PO074726573	074726573	6/30/2019	6/12/2019	CUSTPO074726573
Locked by Shipment	2/23/2020	PO080805693	080805693	3/2/2020	2/13/2020	CUSTPO080805693
Ready to Ship	8/4/2019	PO081446143	081446143	8/12/2019	7/25/2019	CUSTPO081446143
Ready to Ship	2/23/2020	PO080800413	080800413	3/2/2020	2/13/2020	CUSTPO080800413
Ready to Ship	4/30/2019	PO085814353	085814353	5/8/2019	4/20/2019	CUSTPO085814353
Ready to Ship	2/23/2020	PO080804850	080804850	3/2/2020	2/13/2020	CUSTPO080804850

Orders that are **Ready to Ship** in the Pack & Ship [Orders](#) will be available for selection from the **Add Orders** flyout panel in the [Shipping](#) workcenter. You can check order status, create order groups, batch ship, and start the shipment of a selected orders directly from this grid.

Active and Completed Shipments

To view all your active and archived shipment records, select **Pack & Ship > Shipment History** via the Foundry **Menu**. This is where you can check out carrier tracking information for selected shipments.

Shipper	Ship Date	Status	Shipment Number	Manifest Status	Type	Order Number	Shipping Mode
Accellos	10/30/2019	InProgress	SHP21001216	No Manifest	Shipment	094524550	Packing
Accellos	3/26/2020	InProgress	SHP21001255	No Manifest	Shipment	094522297	Packing
Accellos	3/23/2020	InProgress	SHP21001254	No Manifest	Shipment	094521830	Packing
Accellos	3/30/2020	Completed	SHP21001259	No Manifest	Shipment	090202817	Packing
Accellos	3/13/2020	InProgress	SHP21001251	No Manifest	Shipment	084609937	Packing
Accellos	10/10/2019	Completed	SHP21001209	No Manifest	Shipment	081959603	Packing
Accellos	3/31/2020	Completed	SHP21001213	No Manifest	Shipment	081446697	Packing
Accellos	11/14/2019	Void	SHP21001217	No Manifest	Shipment	081445550	Packing
Accellos	10/10/2019	Completed	SHP21001212	No Manifest	Shipment	081141407	Full Case Packing
Accellos	2/28/2020	InProgress	SHP21001231	No Manifest	Shipment	081141407	Packing
Accellos	3/31/2020	InProgress	SHP21001262	No Manifest	Shipment	080805693	Packing
Accellos	2/28/2020	InProgress	SHP21001232	No Manifest	Shipment	080752770	Packing
Accellos	3/9/2020	InProgress	SHP21001245	No Manifest	Shipment	074727357	Packing

From the [Shipment History](#), users can also make adjustments to shipments that are pending or on hold.

End of Day Close

When your carriers require you to generate and print a manifest for end of the day close, in most cases you can do so using the Pack & Ship [Close Carriers](#) feature described on page 62.

Select **Pack & Ship > Close Carriers** via the Foundry **Menu**.

Initial Configurations



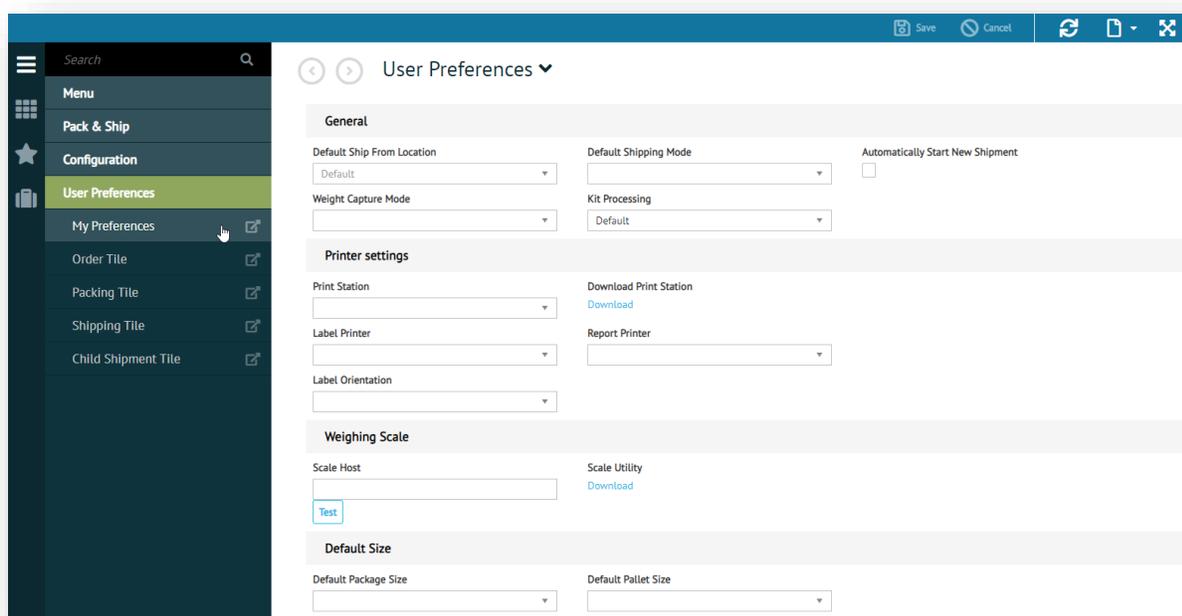
If you need to adjust a few of your Pack & Ship settings and configuration, select **Pack & Ship > Configuration > User Preferences** via the Foundry **Menu**.

- [My Preferences](#), below
- [Tile Configuration](#), page 22

Depending on your role, you may need to obtain specific user permissions from your system administrator in order to complete some of these configuration tasks.

My Preferences

From this configuration page, you can identify your default ‘ship from’ location and initial shipping mode as well as set up printers, scales, and sizes specific to your Pack & Ship session.



General

Your defaults are set up under the collapsible **+** **General** section, as outlined below.

General Field Descriptions

Field	Description
Default Ship From Location	Determines from where the shipment is to be initiated. Use the drop-down list to select a Shipper ID, which is generated from the rating engine server configuration.
Default Shipping Mode	Sets the initial mode in Pack & Ship, either Shipping , Packing , or Full Case Packing .
Automatically Start New Shipment	Check box to indicate that the Shipping workcenter begins at a new shipment as soon as it is launched from the Pack & Ship menu.

Field	Description
Weight Capture Mode	Sets how weight is received, either Use Calculated Weight , Scale Weight , Prompt for Weight , or Prompt for Weight - Exclude Child Packages .
Kit Processing	Sets Pack & Ship kit packing behavior to Default (no kitting), Master Item , or Component Item .

Printer Settings

The ability to produce labels, manifests and other types of reports is very important in a shipping operation, so each Pack & Ship user should ensure their **+** **Printer Settings** point to the correct printers before they complete shipments. Every computer used to access Pack & Ship must have a print station installed and configured if you plan to print from it. Contact your system administrator to determine which printers are available for use with Pack & Ship. See also ([Printing Labels and Reports](#), page 62).

Weighing Scale

The **+** **Weighing Scale** section configures the scale to be used with Pack & Ship and allows you to test it. Contact your system administrator to determine which scales are available for use with Pack & Ship.

Default Size

Use these fields to set default package and pallet sizes for the start of a shipment.

Tile Configuration

In the [Shipping](#) workcenter, the details about specific orders, products, and packages are displayed inside separate boxes on the task page, known as 'tiles.' Depending on your role, you may have the ability to configure how the information is displayed on these tiles. If you do not have access to change your tile details, consult your system administrator.

To access tile configuration pages, select **Menu > Pack & Ship > Configuration > User Preferences**.

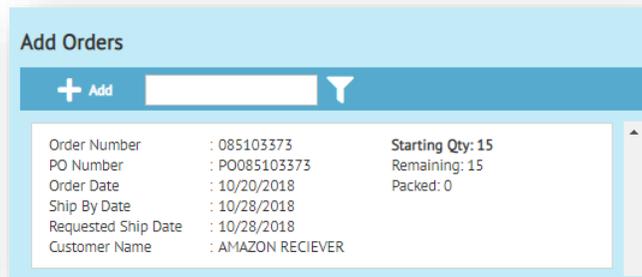
Tile Descriptions

Tiles contain a summary of the details assembled during ship, pack and order processing. Following are some examples of the different tiles used in Pack & Ship and how they might be configured.

Order Tile

Order tiles are displayed on the **Add Orders** fly out panel of the [Shipping](#) workcenter. Make adjustments to display the most relevant details and/or to allow more tiles to fit on the panel.

Complete order details can also be viewed in the Pack & Ship [Orders](#) grid.



Packing Tile

This tile displays on the **Package** page of the [Shipping](#) workcenter for each product in an order. You can change which details are listed and whether or not to include the product image.



Shipping Tile

This tile displays on the  **Package** page of the [Shipping](#) workcenter for each package in the shipment. You can adjust which package details are listed and whether or not to include an image.



Changing Tile Details

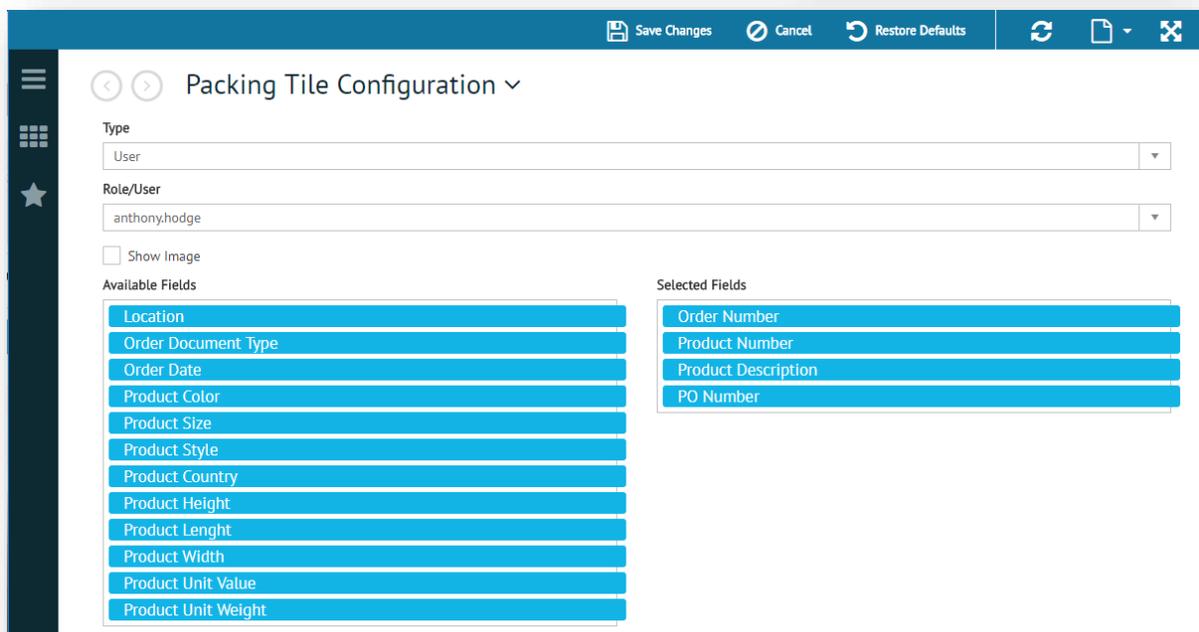
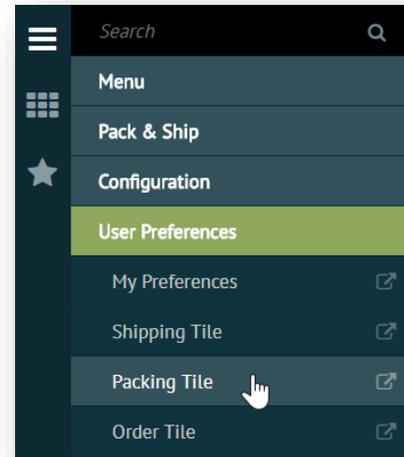
Each tile configuration page lists all the items of information that can be displayed in a tile.

Following are the steps for adjusting how details are displayed within a tile. Note that the instructions are the same for configuring Shipping, Packing, Order and Child Shipment tiles.

1. Select **Pack & Ship > Configuration > User Preferences** via the Foundry  **Menu**.
2. Select the tile configuration you want to change (**Shipping Tile, Packing Tile, or Order Tile**).

This opens the configuration page for the tile selected. Refer to the **Packing Tile Configuration** example below.

On a tile's configuration page, **Available Fields** are listed on the left. **Selected Fields** lists all the fields that are currently displayed (in use) by the tile.

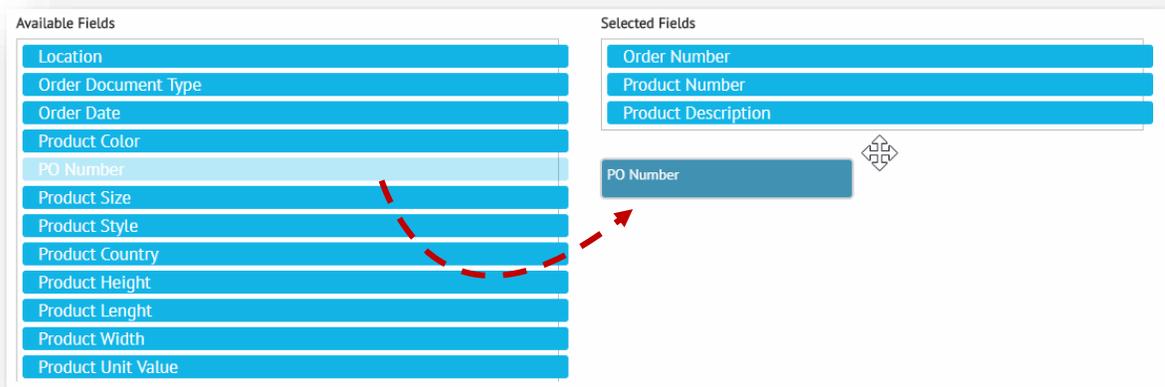


3. Select the **Show Image** check box if you want to include an image with the tile (Shipping and Packing tiles only, if images are available).

4. To configure tile details, do one of the following:

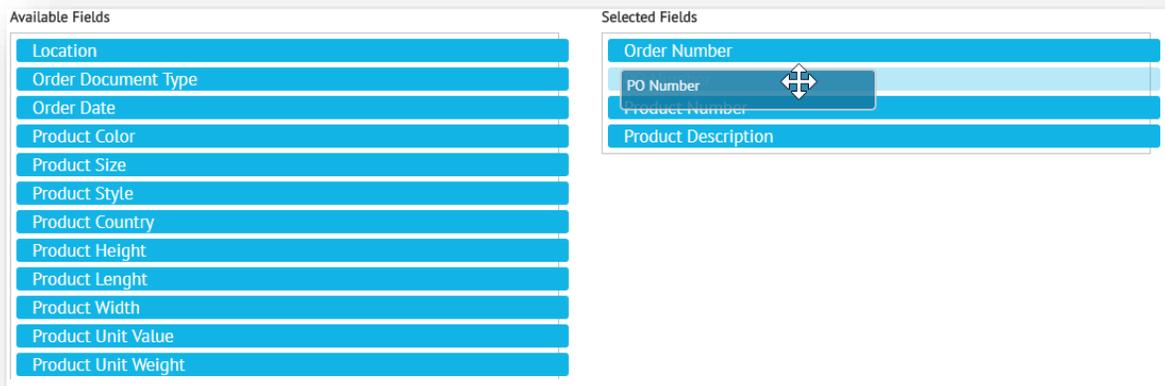
If you want to add a field to the items displayed ...

Select a field from the **Available Fields** list and drag it to the **Selected Fields** List.



If you want to change the order of displayed items...

Drag the selected field and drop it into the desired position.



If you made a mistake and wish to reset your changes ...

Click  **Cancel** on the action bar.

5. When you are finished, click  **Save** on the action bar to save your changes. The above changes will be reflected in the (Shipping, Packing or Order) tile when you perform tasks in Pack & Ship.

Restoring Default Settings

You can restore the default settings at any time by means of the  **Restore Default** control.



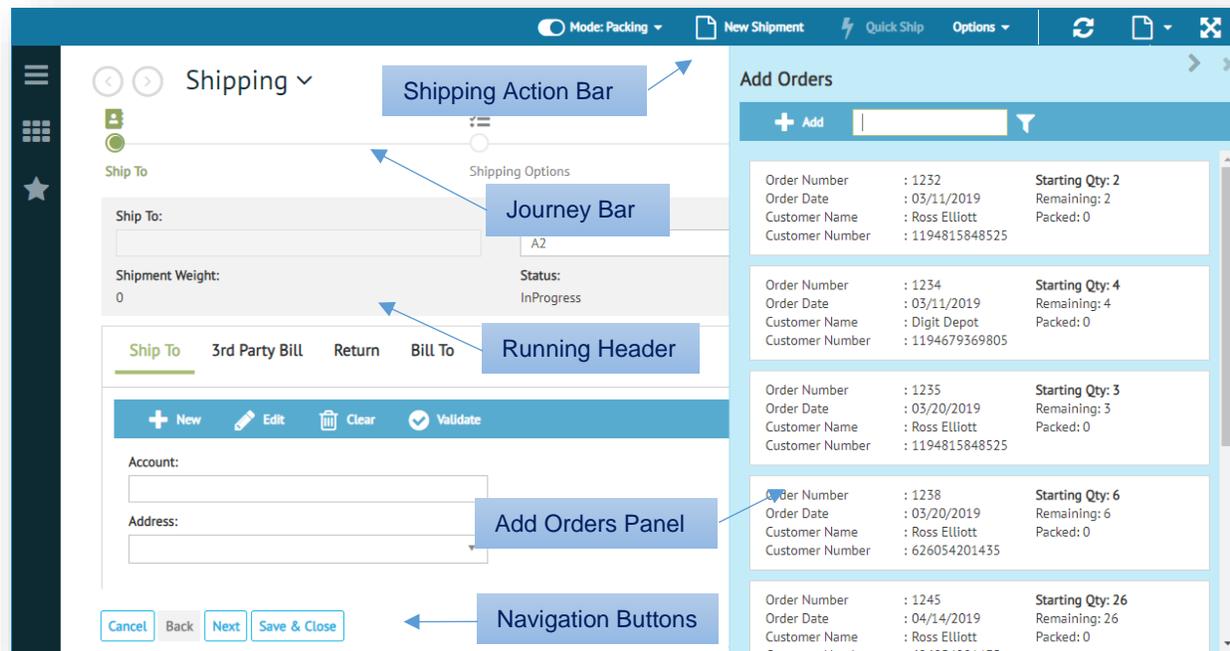
NOTE

If you have a specific role, and it has specific display settings, these changes do not override defaults set by the system administrator. This simply restores to that role's default settings.

Shipping



The main **Shipping** workcenter in Pack & Ship is where you enter addresses, prepare packages, and choose a carrier to dispatch your shipments. Select **Pack & Ship > Shipping** via the Foundry .



From here, you can ship packages based on orders from within your Pack & Ship integration ([Packing Mode](#)) as well as those received manually from an outside source ([Shipping Mode](#)). These options are outlined in the [Pack & Ship Overview](#) on page 16.

Journey Bar

The journey bar on the **Shipping** workcenter tracks each stage in the shipping process. You can click on a journey point to open the associated task page:

-  **Ship To** Set the destination (account, address, billing, as well as other contact information). See [Ship To](#), page 27.
-  **Shipping Options** Provide administrative or carrier details that may be required for the shipment. See [Shipping Options](#), page 31.
-  **Package** Process packages in the shipment. In [Packing Mode](#), this also means adding items to each package based on your order details. See [Package](#), page 34.
-  **Carriers** Select a carrier service based on calculated shipping rates. See [Carriers](#), page 47.
-  **Summary** After you click  **Ship It**, review a summary of the completed shipment.

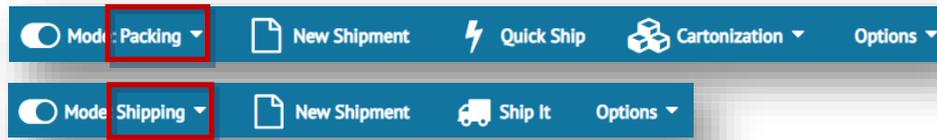
You can also use the **Next** / **Back** navigation buttons to access task pages during the shipping process. Note that changes are saved automatically between task pages before you complete the shipment.

Click **Save & Close** if you want to exit the current shipment. You can resume where you left off by selecting the shipment in [Shipment History](#). The shipments you are working on will also be saved to the [Spaces Menu](#) for quick access during your Pack & Ship session.

If you choose to **Cancel** the current shipment, your changes will be deleted and all orders will be returned to the **Add Orders** queue to start a new shipment.

Shipping Action Bar

Controls listed on the action bar may change depending on the mode and at different stages in the process.



- Mode** Sets the workcenter to **Shipping**, **Packing**, **Full Case Packing**, or **Master Shipment** mode. See [Mode](#) in the [Pack & Ship Overview](#), page 15
- New Shipment** Starts a new shipment with the option to save or cancel the current shipment.
- Ship It** Completes the shipment using current settings (**Shipping** mode only).
- Quick Ship** Completes the shipment from current order details (**Packing** mode only).
- Cartonization** Calculates optimum packing for a selected order (**Packing** mode only).
- Options** ▾ Dropdown menu options:
 - Save Shipment** Saves all changes to the current shipment
 - Import XML** Imports contents of an XML file
 - Export XML** Exports current shipment to an XML file
 - Cancel Shipment** Cancels all changes to the current shipment
 - Delete Orders** Deletes orders from the current shipment

Header

The running header maintains a summary of core shipment details across all stages of the shipping process. You can manually edit the **Shipper** field, but other details are populated based on the contents of each task page.

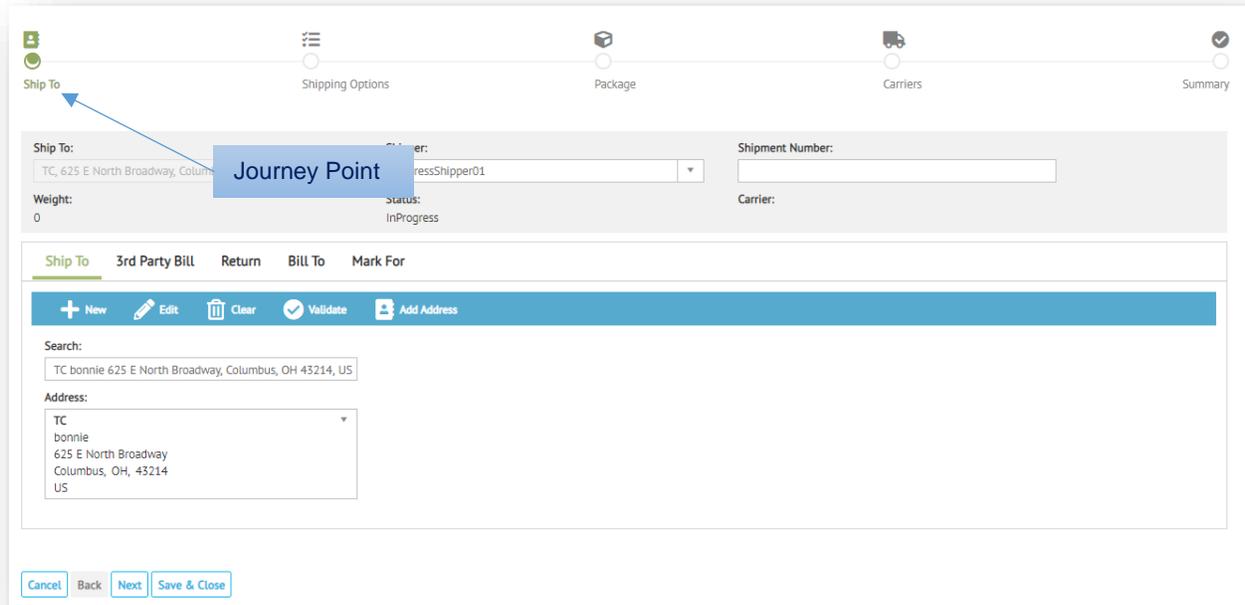
Ship To: Nexternal, 199 Elm Street, New Canaan, CT 06	Shipper: A2	Shipment Number: SHP1000181
Shipment Weight: 34.22	Status: Completed	Carrier: UPS Ground

Header Field Descriptions

Field	Description
Ship To	<i>Automatic</i> – Shipment recipient as defined in your Ship To details.
Shipper	<i>Mandatory</i> – Company or individual who initiates shipment. In this field, you can select the Shipper ID from the drop-down list (if want it to be different than the default).
Shipment Number	<i>Automatic</i> – Internal tracking number used to identify the order.
Shipment Weight	<i>Automatic</i> – Total weight of the shipment as entered via the Package tab.
Status	<i>Automatic</i> – Current status of the shipment; either In-Progress , Hold or Ready to Ship .
Carrier	<i>Automatic</i> – Carrier assigned to the shipment via the Carriers tab.

Ship To

You begin the shipping process by entering your destination and contact information on the  **Ship To** page of the [Shipping](#) workcenter.



Use this task page to identify the [Address Details](#) associated with the shipment. If needed, you can enter additional addresses under the following tabs:

- [3rd Party Bill](#), page 29
- [Return](#), page 30
- [Bill To](#), page 30
- [Mark For](#), page 30

Once the following  **Ship To** information is in place, click **Next** to advance to [Shipping Options](#).



NOTE

When you select an order via the **Add Orders** panel, the  **Ship To** page is filled in automatically; although you have the option to edit / override addresses if necessary.

Address Details

The address details on this task page can be pulled in from preexisting records, or you can add or edit new information when required. Use [Address Validation](#) (if licensed and configured) to double check the address before you continue with the shipment

Options for editing and validating addresses are described in the sections that follow.

Existing Addresses

The quickest method for entering an address is to select from the list of existing contacts:

1. In the **Search** field, start typing in the company or address details. Pack & Ship will leverage your integrated data services to complete the account information.
2. Select one of the addresses listed in the dropdown to automatically populate the **Ship To** text boxes.



Optionally, you can click **Edit** on the address menu bar if you wish to make temporary changes to the selected address information. Click **Clear** if you need to empty text boxes and start again. Note that the **Ship To** account is added automatically to the running **Header** for the shipment once it is selected.

New Addresses

1. Click **+ New** on the address menu bar if you need to enter a **new Ship To** address.
2. Type in the address information for the account destination. Complete the fields as described in the table that follows. Click **Clear** if you need to empty text boxes and start again.

Address Field Descriptions

Field	Description
Company	Company name of recipient
Address 1	Destination number and street name
Address2 Address3	More specific information pertaining to Address1 (apartment, floor, suite, unit, or separate building number)
City	Destination city (automatically populated via Postal Code)
State	Destination state (automatically populated via Postal Code)
Postal Code	Destination zip code (autocompletes as your start typing)
Contact	Name of recipient
Phone	Phone number of recipient
Email	Email address of recipient

Address Validation

Validation is a separately licensed feature in Pack & Ship that allows you to validate any of the addresses associated with a shipment. Select the  **Validate** control on the address menu bar to check correctness of the details currently displayed.

A pop up message confirms when the validation is successful.



 Address validation succeeded.

Address Validation

Destination Address

Error
address: Address not found

Address	Suggestion	
4340 Manitou Ave Apt. 5 Manitou Springs, Colorado 80829 United States	4340 Manitou Ave Apt. 5 Manitou Springs, CO 80829 US	Update

[Dismiss](#)

If validation results in failure, this launches a dialog that displays the original address details alongside suggested address details, as shown on the left.

Click the **Update** button to accept the suggested details and change the address.

Click the **Dismiss** button if you wish the address to remain 'as-is' using the original details.

3rd Party Bill

If required, use the **3rd Party Bill** tab (selected within the [Ship To](#) panel) to set the address of a 3rd party who will be billed for the shipment.

As with your [Ship To](#) information, you will have the option to select from a previously created list or to enter new account/contact information.

Refer to the instructions under [Address Details](#) for field descriptions and the steps to enter or change address/contact details.

[Ship To](#) **[3rd Party Bill](#)** [Return](#) [Bill To](#) [Mark For](#)

[+ New](#) [Edit](#) [Clear](#) [Validate](#)

Account:

Address:
 Geoff Ellis
 768 Cinque Terra St.
 San Diego, CA, 92121
 US

Contact:

Return

Use the **Return** tab (selected within the [Ship To](#) panel) to set a return address.

As with your **Ship To** information, you will have the option to select from a previously created list or to enter new account/contact information.

Refer to the instructions under [Address Details](#) for field descriptions and the steps to enter or change address/contact details.

Ship To 3rd Party Bill **Return** Bill To Mark For

+ New Edit Clear Validate

Account:
Highlump Columbus

Address:
 Highlump Columbus
 230 West St
 Columbus, OH, 43215
 US

Contact:
 Shipping
 8003283271
 josh@highjump.com

Bill To

Use the **Mark For** tab (selected within the [Ship To](#) panel) to set a different billing address than the one listed for the Ship To account.

As with your **Ship To** information, you will have the option to select from a previously created list or to enter new account/contact information.

Refer to the instructions under [Address Details](#) for field descriptions and the steps to enter or change address/contact details.

Ship To 3rd Party Bill Return **Bill To** Mark For

+ New Edit Clear Validate

Account:

Address:

Contact:

Mark For

Use the **Mark For** tab (selected within the [Ship To](#) panel) to identify the final destination for packages that are to be shipped upon receipt (*cross-dock* scenario).

As with your **Ship To** information, you will have the option to select from a previously created list or to enter new account/contact information.

Refer to the instructions under [Address Details](#) for field descriptions and the steps to enter or change address/contact details.

Ship To 3rd Party Bill Return Bill To **Mark For**

+ New Edit Clear Validate

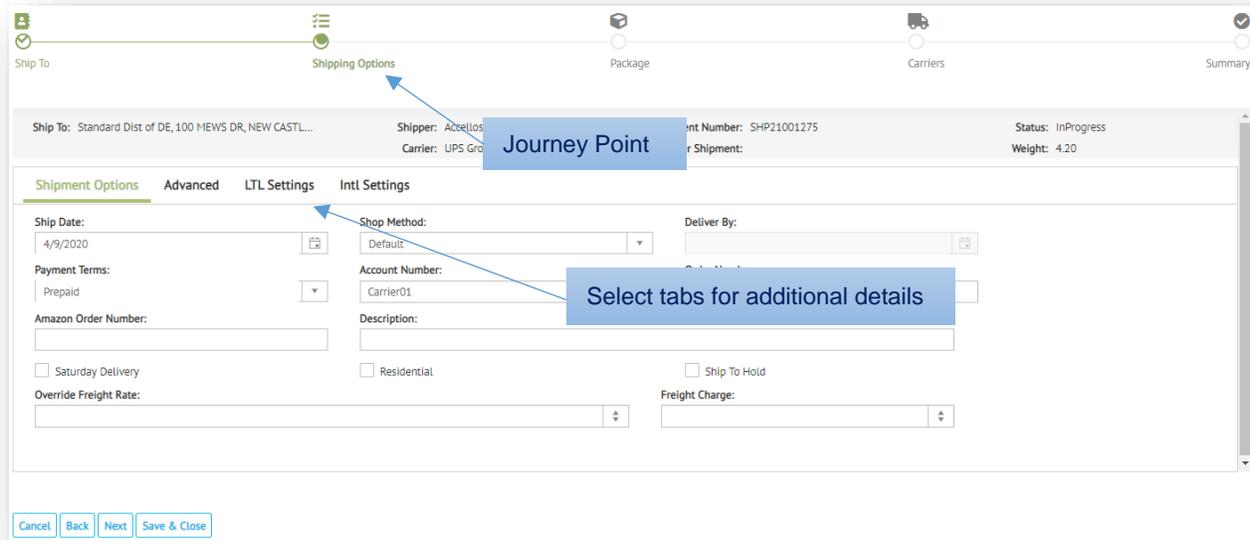
Account:

Address:

Contact:

Shipping Options

Basic instructions, shipping preferences, and special carrier requirements are entered on the  **Shipping Options** page of the [Shipping](#) workcenter.



If needed, you can enter additional details under the following tabs:

- [Advanced](#), page 32
- [LTL Settings](#), page 33
- [Intl Settings](#), page 33

Once the following  **Shipping Options** are completed, click **Next** to advance to the [Package](#) page.



NOTE

When you select an order via the **Add Orders** panel,  **Shipping Options** are filled in automatically; although you can edit / override this page if necessary.

Shipping Options Field Descriptions

Field	Description
Ship Date	Date that you want to start shipping. Calendar drop-down provided.
Shop Method	Constraints in which to ship based on speed, cost, etc.
Deliver By	Date that you want the shipment received. Calendar drop-down provided.
Account Number	If not prepaying freight, the account number to which to bill freight.
Order Number	Order number or invoice number.
Amazon Order Number	Generated externally
Description	Short description of the shipment.
Saturday Delivery	Check box to indicate that Saturday delivery (as well as Sunday and holiday, where supported) are allowed; may result in an additional charge.

Field	Description
Payment Terms	<p>Definition of who pays freight charges (including shipping, duty, and VAT). If you need any additional payment terms beyond what is available here, contact TrueCommerce Customer Support. Drop-down options include:</p> <p>Prepaid ~ Freight charges for the shipment are paid by the shipper.</p> <p>Freight Collect ~ Called "Freight Collect" for UPS or "Bill Consignee" for FedEx. All freight charges are billed to the consignee/recipient. You will need to know the consignee's account number.</p> <p>Third Party ~ Shipping paid by a 3rd party; VAT paid by the consignee/recipient.</p> <p>Bill Recipient ~ Called "Consignee Billing" for UPS and "Freight Collect" for FedEx; all freight charges are billed to con-signee/recipient, but do not require the account number.</p>
Residential	Check box indicating that the customer location is in a place of residence rather than at a commercial address.
Ship to Hold	<p>Check box to indicate that the shipment is will be set to Hold status when order is shipped. In Hold status, the shipment is not on the carrier manifest for the day yet, but the user gets a tracking number and carrier label up front.</p> <p>This is often used if the user does not know the final weight of the cartons. When the final weight is known, the user can edit the shipment, adjust the weight fields, and complete the shipment. See Hold Shipment.</p>
Override Freight Rate	Rate override if you are using a carrier that is not configured in Pack & Ship or you want to charge the customer to something different from what was returned from the rating engine.

Advanced

The **Advanced** tab (selected under [Shipping Options](#)) provides supplementary details that may be required to define the type of goods, shipping preferences, return labels, reference numbers, delivery instructions, and any alerts and flags set up for your Pack & Ship implementation.

The screenshot displays the 'Advanced' configuration tab for shipping options. It includes the following elements:

- Navigation:** 'Shipment Options', 'Advanced' (selected), 'LTL Settings', and 'Intl Settings'.
- Alerts and Pickup Options:**
 - FedEx Priority Alert
 - FedEx Priority Alert Plus
 - Carrier Alert: Shipped
 - Inside Pickup
 - Alcohol
 - Print Return Labels
 - Carrier Alert: Exception
 - Saturday Pickup
 - Carrier Alert: Delivered
 - Documents Only
- Text Fields:**
 - Priority Alert Description 1: [Text Input]
 - Priority Alert Description 2: [Text Input]
 - Location Reference: [Text Input]
 - Reference 1: [Text Input]
 - Reference 2: [Text Input]
- Dropdown Menus:**
 - Dimension UOM: [Inches]
 - Labels Type: [Default]

LTL Settings

This tab (selected under [Shipping Options](#)) provides settings in preparation for LTL (less than load) truck shipments. Some details, such as the PRO number, are provided automatically based on your [Carrier Services](#) selection for an LTL shipment. Where you need to enter LTL settings manually, fill in all the relevant fields as described in the table that follows. Otherwise, you may skip this section.

The screenshot shows the 'LTL Settings' tab selected. The interface includes the following fields and options:

- PRO Number:** An empty text input field.
- Trailer Number:** An empty text input field.
- BOL Number:** A text input field containing the value '0000000010001424'.
- Special Instructions:** A large empty text area.
- Seal Number:** An empty text input field.
- Accessorial:** A list of checkboxes:
 - Appointment Delivery
 - Inside Delivery
 - Liftgate Delivery
 - Residential

Intl Settings

For US export shipments (generally including US territories), additional information under the **Intl Settings** tab (selected under [Shipping Options](#)) will be required for your shipment. If you are shipping goods internationally, fill in relevant fields as described in the table that follows. Otherwise, you may skip this section.

The screenshot shows the 'Intl Settings' tab selected. The interface includes the following fields and options:

- Reason For Export:** An empty text input field.
- Terms Of Sale:** An empty text input field.
- Sender EIN:** An empty text input field.
- Ship To EIN:** An empty text input field.
- Broker:** A dropdown menu with 'A N DERINGER INC' selected.
- Export Filing Number:** An empty text input field.
- Commodity Value:** Two empty text input fields, each with a small up/down arrow icon to its right.
- Currency Code:** An empty text input field.

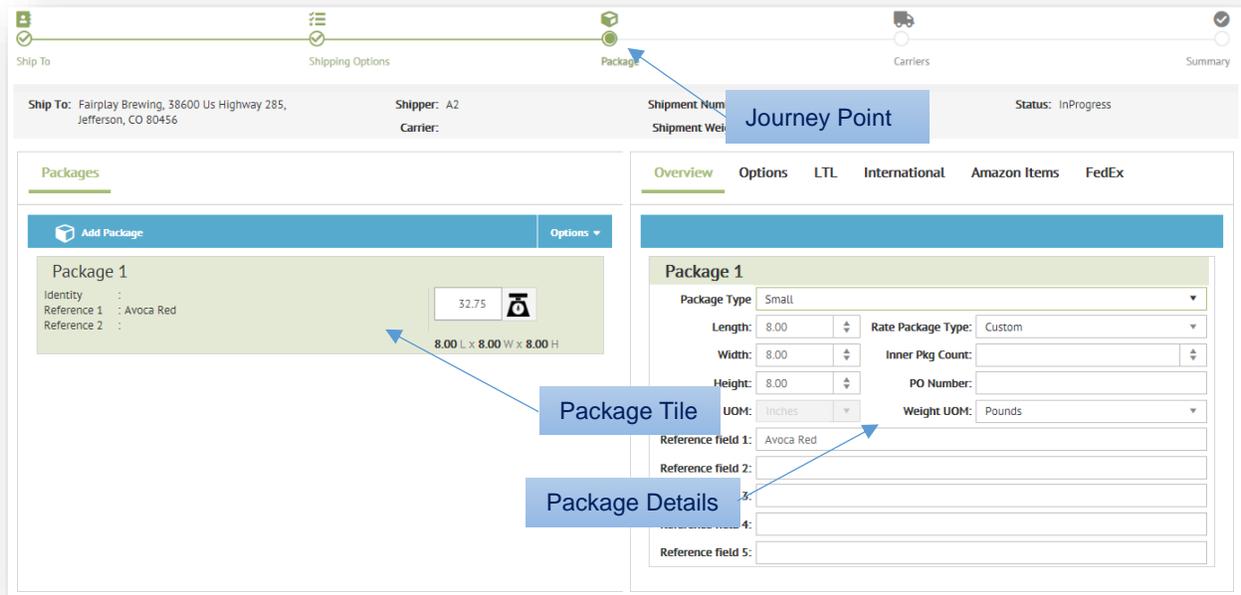
Package

The  **Package** page of the [Shipping](#) workcenter is where you record package information for the shipment such as quantity, weight and dimensions. The other details you need to process a package will depend on which  **Mode** setting has been selected on the [Shipping Action Bar](#):

- [Shipping Mode](#) to ship packages that are assembled outside of Pack & Ship, described below
- [Packing Mode](#) to ship packages based on orders from within Pack & Ship, described on page 36.

Shipping Mode

If you have orders that were generated outside your Pack & Ship integration scheme, you will want to ship your packages under  **Shipping** mode. This is only for *manual orders*, where Pack & Ship does not record the contents of the package prior to shipping.



The left-side panel of the split workspace lists package tiles representing separate packages in your shipment. The adjacent panel is used to enter dimensions and other package details prior to shipment.

See [Adding a Package](#), [Copying a Package](#), and [Removing a Package](#) under  **Shipping** mode.

At any time during the preparation of a shipment, you can add, edit, or remove packages. Shipment status must be **InProgress** (as indicated in the running [Header](#)). If a shipment shows **Hold** status, package weight and dimensions can be updated but packages cannot be added or removed.

Note that the  **Quick Ship** and  **Cartonization** controls are only available in [Packing Mode](#), page 36.

Adding a Package

The first package tile is ready to start as soon as you open the  **Package** task page. Package processing under  **Shipping** mode is described below.

To add a package:

1. Click the  button on the currently select package tile. This retrieves the weight of the associated package via electronic scale and adds it to the tile.

Note that this button is only active when your system is connected to a supported USB or wireless scale. If a scale is not connected, you can enter the weight manually in the text field.

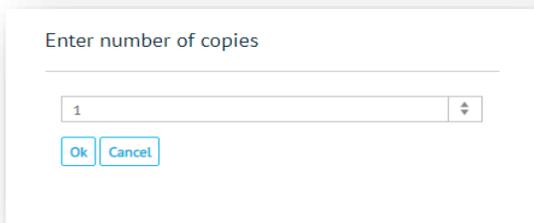
2. On the right side panel, enter package details in the [Overview](#) including package type, dimensions, rate, and inner package count as per the [Overview Field Descriptions](#) on page 42.
3. If further details are required, select the [Options](#), [LTL](#), [International](#), and/or [Carrier-Specific Settings](#) tabs. Refer to [Package Details](#) for more information about these tabs
4. If there are no other packages in this shipment, click **Next** to save package details and advance to the [Carriers](#) task page.
Otherwise, click  **Add Package** to save details about the current package and start a new package tile for the shipment.
5. Repeat this process from Step 1 until all packages are recorded for the shipment.

Copying a Package

If your shipment has multiple packages of similar weight and dimensions, you can speed up the shipping process by *cloning* existing package tiles. If your packages are identical, then no editing is required. The details of the cloned tile will become the starting point in which to record new packages for the shipment.

To clone a package:

1. **Left Side** > Select the package tile you want as your original.
2. **Left Side** > Click the **Options** ▼ dropdown and select  **Clone Package**.
This invokes the **Enter Number of Copies** dialog.



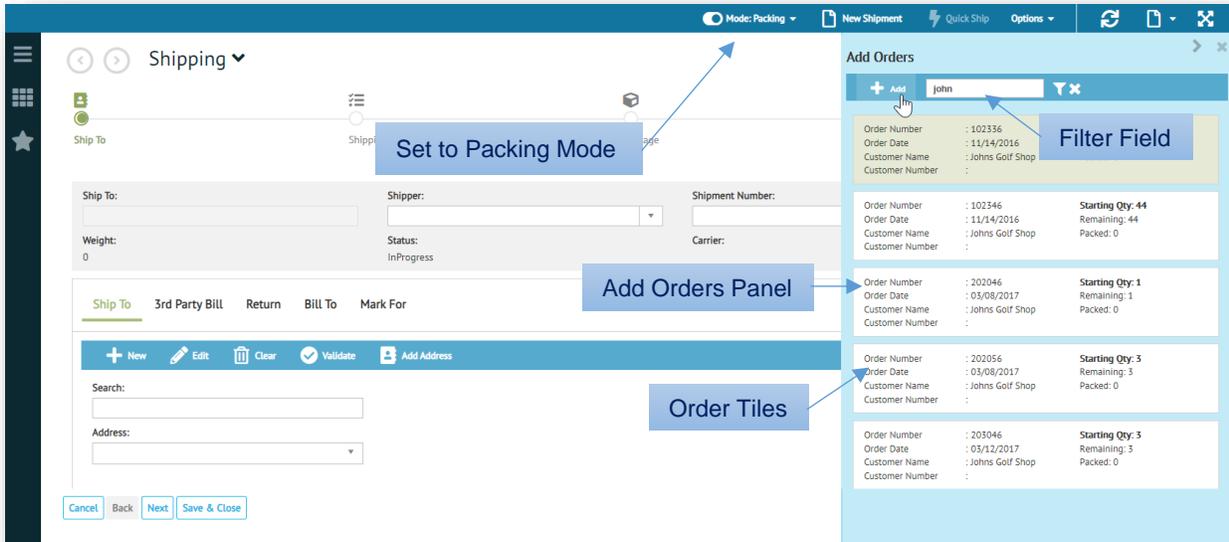
3. Enter how many package tiles you want to create from the original you selected and then click **OK**.
The new tiles will be added to the shipment.
4. Optionally, you can select the newly created tiles to makes changes to package weight, dimensions, and other details as described previously under [Adding a Package](#).

Removing a Package

To remove a package from a shipment, select a package tile on the left side panel and click **X Delete Package** under the **Options** ▼ dropdown.

Packing Mode

To ship from orders that are retrieved through Pack & Ship integration, ensure the **Mode** switch is set to **Packing** (or **Full Case Packing**). This is only for [Order-Based Shipping](#), where your ordered items are packed and recorded within Pack & Ship prior to shipping.



Note that **Packing** is usually the default setting in [My Preferences](#); however, the two versions of packing mode are virtually identical except for one key difference:

Packing Functionality and behavior assume ordered items can represent *different products* and that they will be sharing one or more packages together.

Full Case Packing Functionality and behavior assume ordered items represent a quantity of the *same product* and there is only one item (case) per package.

The two main steps for a **Packing** mode shipment involve [Adding an Order](#) and then [Packing the Order](#). You can [Change or Remove Packages](#) or add them to [Pallets](#) at any time during the preparation of the shipment. Depending on your Pack & Ship implementation, you may also have access the [Quick Ship](#) and [Cartonization](#) utilities described at the end of this section.

Adding an Order

Package processing under **Packing** mode begins by adding orders to a new shipment.

To add orders to a shipment:

1. Highlight one or more order tiles in the **Add Order** panel. Use the **Y** filter field on the menu bar to narrow down the number of tiles listed. Note that [Order Tile](#) details are configurable by the user.
2. Click **+ Add** on the menu bar to add the highlighted orders. Orders can also be added using a barcode scanner at your packing station.

The **Add Order** panel collapses and focus shifts to [Adding a Package](#), described next.



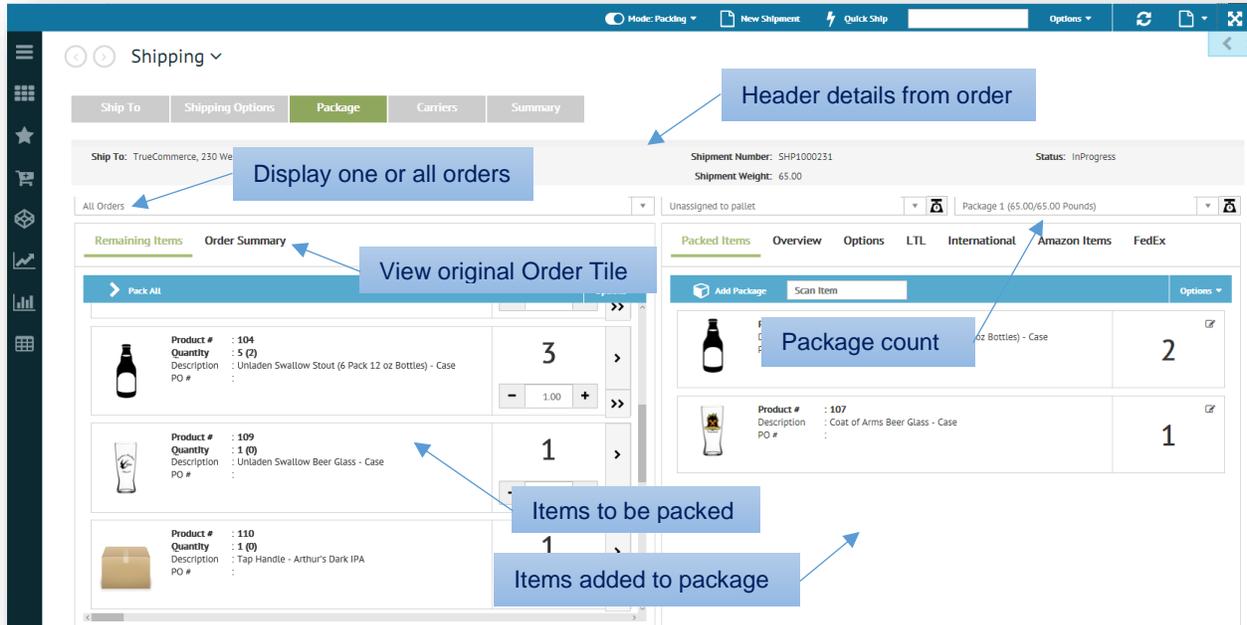
TIP

If you enter the exact order number in the search field, this will immediately add that order to the shipment and advance you directly to the **Package** task page.

In **Packing** mode, [Ship To](#) addresses and [Shipping Options](#) are filled in automatically from the order, although you can click back using the [Journey Bar](#) if you need to edit / override that information.

Packing the Order

After [Adding an Order](#), the  **Package** task page will be used to record the items being packed and to process each package in the shipment. What you are doing here should match your work at the packing station step for step to ensure correct quantities are going into each box.



Product tiles on the **Remaining Items** side of the split workspace list all the items in each order. The adjacent panel shows your **Packed Items** as well as other details about the package. Items are transferred from side to the other until each package is full and ready to ship.

To add items to packages:

1. Choose a method for packing:

Use a Barcode Scanner ...

Scan each item as you place them inside the box at your packing station. See [Barcode Scanner](#) on page 38.

Use the Packing Controls ...

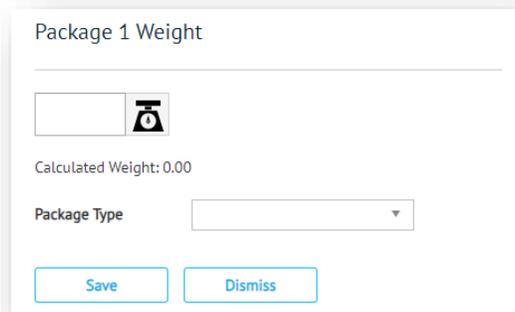
Click the **>** button to add a single item or click **>>** to pack the entire quantity from the currently selected product tile. See [Packing Controls](#) on page 38.

When all items of the same product are packed, the product tile is removed from the **Remaining Items** panel. Repeat this step for any remaining products until the package is full.

2. Select the **Overview** tab to enter the package type, dimensions, rate, and inner package count as per the [Overview Field Descriptions](#) on page 42.

Depending on your Pack & Ship integration, some package details may be filled in by the order.

3. For special requirements, refer to the [Options](#), [LTL](#), [International](#), and/or [Carrier-Specific Settings](#) tabs.
4. If your scale is connected to Pack & Ship, the package and shipment weights are calculated automatically. Otherwise, you can click the  button, which invokes a dialog to enter the weight manually for the package.
5. When the package is complete, click  **Add Package** if you need to add more packages to the shipment.



You will receive notification once you have packed all the items from all the orders in the shipment.

✔ Congratulations! All Items have been packed.

Move on to the Carriers tab to select how these items will be shipped and find the best rates available. Once you have made your selection(s) and completed this shipment, the related labels and reports will be printed.

Next steps:

GO TO CARRIERS
SELECT MORE ORDERS

6. Select an option:

GO TO CARRIERS

To save package details and advance to the [Carriers](#) task page.

SELECT MORE ORDERS

To keep the shipment open and return to [Adding an Order](#).

To reopen an existing package, click the package count field and select from the dropdown options. You can [Change or Remove Packages](#) at any time before you complete the shipment.

Barcode Scanner

Your packing station may be equipped to use a USB or wireless barcode scanner. The automated approach is ideal for rapid and/or repetitive packing, and provides verification to help ensure correct quantities are going into the box.

The scanning process automatically reduces the **Remaining Items** count and then increases the **Packed Items** count by the same quantity until the package is full. However, you may need to adjust [Packing Controls](#) directly when you have unusual or complex packing requirements.

Packing Controls

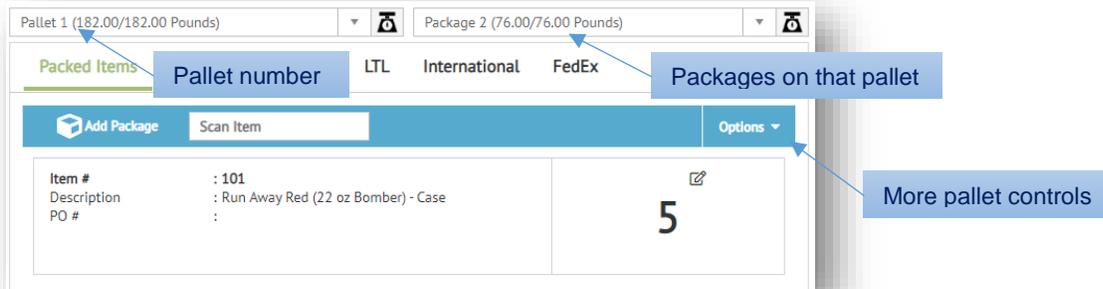
Use the controls on the product tile to assemble your package contents.

- Clicking the **>** button packs the number of items indicated in the *preset quantity* of a product. Essentially, this is the same function as using the scanner to pack items.
- Quantities other than a single item in the preset quantity field are configured in advance. This would indicate that the products are supposed to be sold in sets of two or three, by the dozen, and so on.
- To override the preset quantity, use **-** / **+** buttons to decrease or increase the quantity (not exceeding the item count remaining). The color of the field changes to yellow to indicate when there is an override.
- Use the **>>** button to pack the remaining item count for a selected product tile.
- **Reverse Controls.** The item count on the **Packed Items** side includes the editing button for editing. This allows you to use the same controls in reverse to *unpack* the currently open package.
- Clicking the **> Pack All** control adds all items from all products in the order. This empties the **Remaining Items** side and packs *everything* into the currently open package.

Pallets

In some cases, the ordered items may be so large and bulky, or require so many packages, that it is more practical for them to be collected on a pallet. The process for [Packing the Order](#) is exactly the same, except packages are assigned to pallets before they are shipped.

For non-pallet shipments, the pallet count field should say 'Unassigned to pallet'. This means the currently open package stands alone. Once you start using pallets, the currently open package will belong to whatever pallet number is showing in the pallet count field.



Use the **Options** ▾ dropdown on the **Packed_Items** side of the of the split workspace to add, change or delete pallets in the shipment.

- 📦 **Add Pallet** Adds a new empty pallet to the pallet count. At this point, the next packages you create will be added to that pallet, as described on the next page.
- ⏪ **Change Pallet** Switches the current package to the pallet of your choosing. This feature also allows you to start a new pallet, as described on the next page
- ✖ **Delete Pallet** Deletes the currently open pallet, which also unpacks and deletes all the packages on that pallet.
- 📄 **Clone Pallet** Creates one or more new pallets based on the currently open pallet. This allows for quick package/pallet assembly when the shipment contains a large number of the same items. Note that the order must have enough items remaining in each matching product to create the clone.

Ensure the proper pallet number is showing in the pallet count field before you start to add packages. However, you can reopen packages and use the **⏪ Change Pallet** feature to switch between pallets at any time before you complete the shipment.

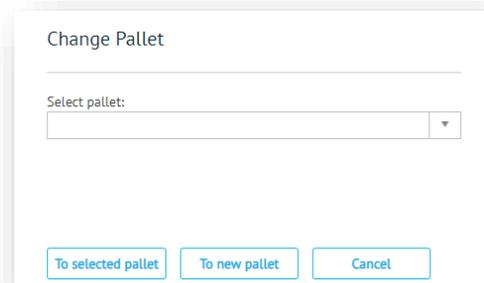
To add a pallet:

1. If required, start the shipment by [Adding an Order](#) and advance to the **📦 Package** task page.
2. On the **Packed_Items** side of the of the split workspace, click the **Options** ▾ dropdown.
3. Select **📦 Add Pallet** to start a new pallet.
4. Click **📦 Add Package** to add a package to the new pallet. Refer to [Packing the Order](#) on page 37.

To add the current package to a pallet:

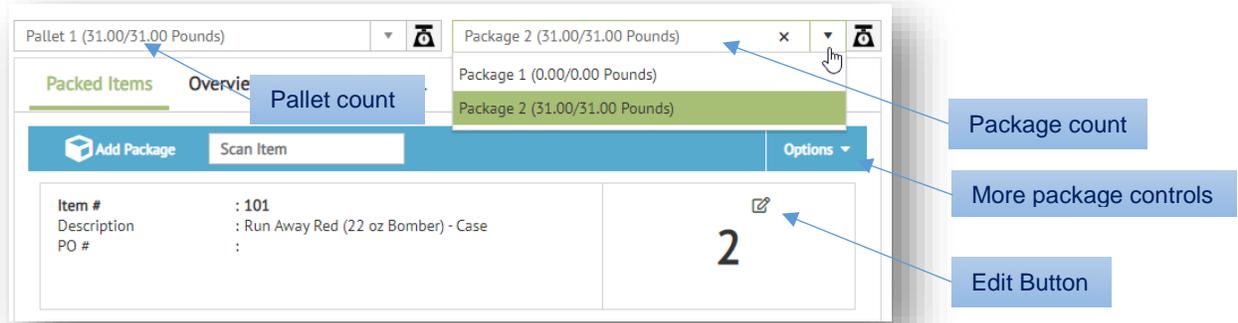
Packages do not need to be complete to be added to pallets.

1. Click the **Options** ▾ dropdown.
2. Click **⏪ Change Pallet** to invoke the **Change Pallet** dialog.
3. If you need to add/move the package to an existing pallet, select a pallet from the dropdown and click the **To Selected pallet** button.
4. If you need to start a new pallet before adding the package, click the **To new pallet** button.



Change or Remove Packages

You can reopen selected packages to make changes any time before you complete the shipment. Select the  editing button to unpack items from a package using the [Packing Controls](#) in reverse.



Clicking the  button next to the dropdown fields launches a dialog to override the weight setting. If you work with [Pallets](#), you can change or remove pallets, as well as switch packages between pallets.

Use the **Options** ▼ dropdown on the **Packed Items** side of the of the split workspace to access more controls for handling your packages.

Clone Package

Automatically creates one or more new packages based on the contents of the currently open package. Note that the order must have enough items remaining in each matching product to create the clone.

Unpack This Package

Removes the contents of the currently open package and sends those items back to the **Remaining Items** side of the workspace.

Delete Package

Deletes the currently open package and sends the items it contained back to the **Remaining Items** side of the workspace.

Quick Ship

Some implementations may be configured for shipping orders via the  **Quick Ship** control on the [Shipping Action Bar](#). This separately licensed feature is essentially a shortcut for shipping simple and consistent order types. It places all items into a *single package* and processes the shipment automatically via the carrier service named in the order. No other steps are required.

Note that  **Quick Ship** only applies to orders that have been predefined for this option; otherwise, you still need to complete [Packing the Order](#) and select a [Carriers](#) option to complete the shipment. For complete details about this feature, speak with your TrueCommerce representative.

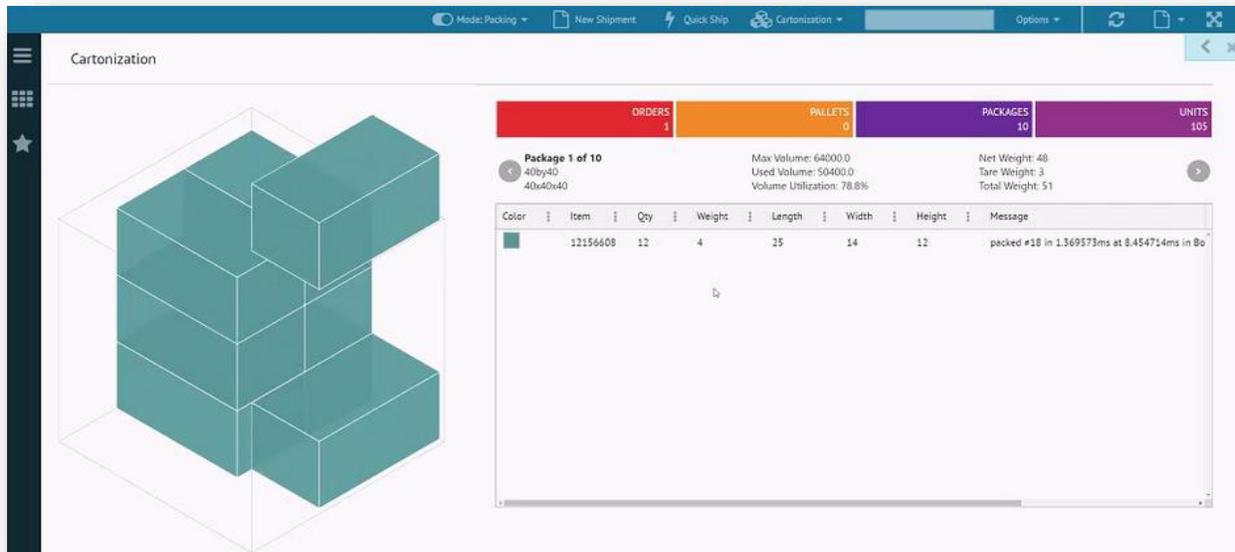
Cartonization

Some implementations may include  **Cartonization** on the [Shipping Action Bar](#). This separately licensed feature automatically determines the most effective method for packing all the items in an order.

Select  **Cartonize** from the dropdown menu to match the most appropriate box sizes at your facility to the size and number of products in the order. Use the  **Palletize** option when needed for much larger shipments. The following will factored into the calculation when you evaluate the shipment, including:

- Complexities regarding product fragility and/or mixing concerns.
- Cost effectiveness of certain package types according to the pricing model of the selected carrier service. For example, it may be cheaper to pack items into multiple small boxes rather than a large heavy one.

Once calculated, details about the assembled packaging are displayed on the **Cartonization** page alongside a 3D image of the shipment, as illustrated below.



Select **OK** to continue packing the order based on the prescribed configuration. For information about licensing this feature, speak with your TrueCommerce representative.

Package Details

Before you continue with the shipment, ensure that all the required package details have been entered correctly for the appropriate categories. Use the following tabs on the right side of the split workspace.

- [Overview](#), page 41
- [Options](#), page 42
- [LTL](#), page 44
- [International](#), page 45
- [Carrier-Specific Settings](#), page 46

Overview

Package 1

Package Type: Small

Length: 8.00 | Rate Package Type: Custom

Width: 12.00 | Inner Pkg Count:

Height: 4.00 | PO Number:

Dimension UOM: Inche: | Weight UOM: Pounds

Reference field 1:

Reference field 2:

The **Overview** tab (under [Package](#)) covers the initial details about the package and its contents.

The information you need to fill in will vary according to the carrier requirements.

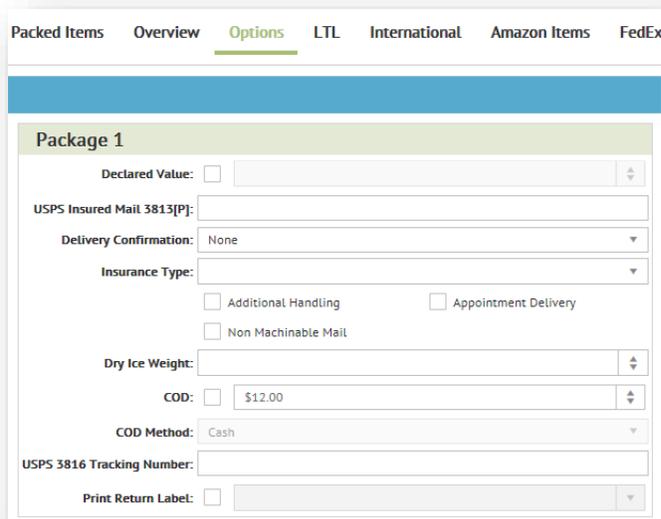
Note that some package details may be filled in automatically when [Adding an Order](#) via [Packing Mode](#), page 36.

Otherwise, to ensure accurate rating, fill in all the necessary details about the package according the field descriptions provided below.

Overview Field Descriptions

Field	Description
Package Type	<i>Mandatory</i> – Drop-down options for preset package types used to autofill the Length, Width, Height, Dimension UOM, Weight UOM, and Rate Package Type fields described below. Select the appropriate option that most accurately defines your package. The preset you select also warns against over packing, and helps to ensure you are receiving the most accurate shipping rates.
Length, Width, Height	Dimensions of the package based on the Dimension UOM .
Dimension UOM	SAE and Metric units of measure for the length, width, and height.
Rate Package Type	Name of the package type used by the carrier for rating purposes.
Inner Package Count	Number of units included in the package, for example, a 12-pack.
PO Number	Purchase order number on the order.
Weight UOM	<i>Mandatory</i> – Unit of measurement used by the scale. Select the measurement unit used for the package's weight. The drop-down will list different SAE and Metric options.
Reference Fields	Fields used to reference any relevant information about the package pertaining to a specific carrier. Carriers will have one or more reference fields to pass information along with each package. These help match up a transaction to an internal reference field or identifier. Depending on usage, the reference information may be printed on labels, uploaded for billing, or both. These fields will be carrier dependent and are usually configured at implementation.

Options



The **Options** tab (under [Package](#)) provides an extended list of details that may be required to prepare your packages for shipment.

Again, the information you need to fill in will vary according to the carrier requirements.

Some options may be configured at implementation. For a complete list of carrier supported options, contact your carrier agent or refer to their website.

Note that some of these may be filled in automatically when [Adding an Order](#) via [Packing Mode](#), page 36.

Fill in any optional details required for the package as described in the table below.

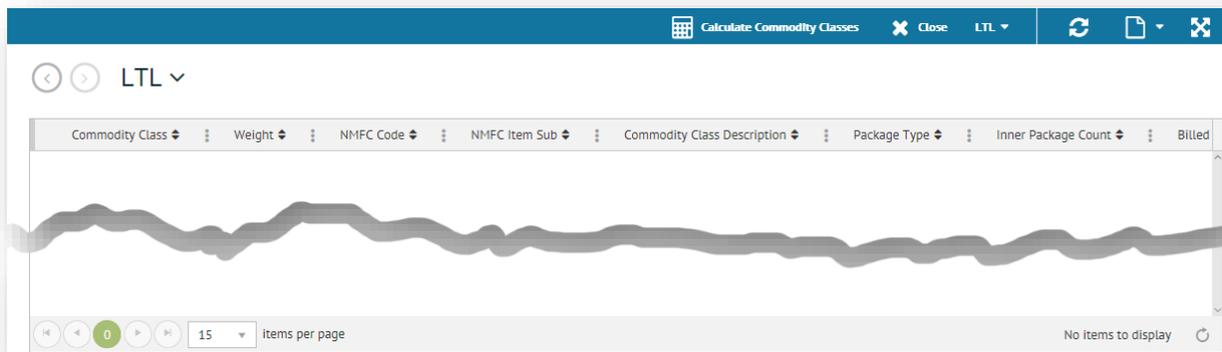
Options Field Descriptions

Field	Description
Declared Value	Check box to indicate that package has a declared value, which is important for international shipments and shipments that are insured. If selected, enter the value in dollars.
USPS Insured Mail 3813[P]	<p><i>Mandatory</i> – For USPS shipments with a Declared Value</p> <p>Retail insured mail service provides up to \$5,000 indemnity coverage for a lost, rifled, or damaged article, subject to the standards for the service and payment of the applicable fee.</p> <p>A bulk insurance discount is available for insured articles entered by authorized mail owners who meet the criteria (as defined in DMM 503.4.4.1) and have received the proper Postal Service authorization. Insured mail service provides the sender with a mailing receipt.</p> <p>For articles insured for more than \$200, the Postal Service maintains a delivery record (recipient's signature).</p> <p>Insured mail pieces are dispatched and handled in transit as ordinary mail.</p>
Delivery Confirmation	<p>Indication that some form of delivery confirmation is requested. Drop-down options may include None, Adult Signature, Delivery Confirmation, Signature Required, Verbal or FedEx Direct Signature Required</p> <p>If the package requires delivery confirmation, you should include a Name and Phone number in the following two text boxes.</p>
Insurance Type	<p>Drop-down options defining the type of insurance (if any):</p> <p><i>Blank</i> (Default) – An empty field triggers the automatic insured value provided by the shipping company if any and no additional coverage.</p> <p>Standard Declared Value – Allows you to declare the value and request additional protection from the carrier.</p> <p>FlexParcel Basic – Covers loss or damage to goods in transit up to selling price; for more information, see carrier's specific terms and conditions for additional details.</p> <p>Flex Parcel Expanded – Covers consequential claims as a result of loss or damage. Also covers items that are excluded from declared value; for example, the face value of phone cards. For more information, see carrier's specific terms and conditions for additional details.</p> <p>Flex Parcel Time In Transit – Covers delays in transit for time-sensitive or perishable goods; see carrier's specific terms and conditions for additional details.</p> <p>Endicia Insurance – Covers your item for up to \$10,000 against loss or damage.</p> <p>USPS Online Insurance – Covers your item for up to \$5,000 against loss or damage. The price is based on the declared value.</p>
Additional Handling	Check box to indicate that a handling fee applies, and will rate accordingly. Some packages, due to size, weight or other considerations, such as hazmat or freezer may require an additional handling fee.

Field	Description
Appointment Delivery	Check box to indicate that an appointment is required for delivery. An appointment delivery surcharge is usually applied.
Non Machinable Mail	Check box to indicate that package is not to be handled via sorting equipment. A delivery surcharge may apply.
Dry Ice Weight	Weight of the dry ice in the package, if applicable.
COD	Check box to indicate that package requires cash on delivery. You may want the carrier to attempt to collect funds for the parcel on delivery. If selected, enter the amount requested to be collected upon delivery of the parcel.
COD Method	Drop-down options include None, Cash, Check, Certified Funds Only, Any Payment Method, Certified Check, or Company Check.
USPS 3816 Tracking Number	USPS tracking number filled out at the shipping office.
Print Return Label	Check box to indicate that a return label is to be included. If selected, indicate which label format from the drop-down list of common carriers.

LTL

Select the **LTL** tab (under [Package](#)) to launch a new page for entering *less than load* shipping details. Note that these details apply to **LTL shipments only**.



For an LTL shipment, click **+ Add New Record** via the **LTL** dropdown on the action bar above the grid. This opens a new blank line in the **LTL** grid, where you can enter any pertinent information regarding the package as described in the table below.

Click **✓ Save** to save the new record. Click **✕ Close** to exit the grid and return to the **Package** panel.

LTL Field Descriptions

Field	Description
Commodity Class	Commodity class code. Select the applicable code from the drop-down list.
Weight	Weight based on commodity classes in the shipment.

Field	Description
NMFC Code	National Motor Freight Classification (NMFC) code assigned to freight. NMFC commodities are separated into different categories or class codes ranging from class 50 to 500 as a seven-digit identifier. The following factors determine the way a commodity is classified: <ul style="list-style-type: none"> • Density (the primary factor) • Value and liability • Storability and handling considerations • Susceptibility to damage Density is measured in pounds per cubic foot. To help with your calculation, click  Calculate Commodity Classes on the action bar.
NMFC Item	Subcode of the NMFC code.
Commodity Class Description	Short description of Commodity Class in the NMFC Code field; for example, if NMFC Code is 70, the description could be “Apparel / material woven bags”.
Package Type	Short description of the type of package. For example, pallet, multi-pack, carton, single item.
Inner Package Count	The number of units included in the package, for example, a 12-pack.

International

Select the **International** tab (under [Package](#)) to invoke a grid for entering the additional package information required for an international shipment. For US Export shipments (generally including US territories), these details are required for each item (individual commodity) in the shipment.



For an international shipment, click [+ Add New Record](#) via the **International** ▾ dropdown on the action bar above the grid. This opens a new blank line in the **International** grid, where you can fill in details about the package as described in the table below.

Click [✓ Save](#) to save the new record. Click [✕ Close](#) to exit the grid and return to the **Package** panel.

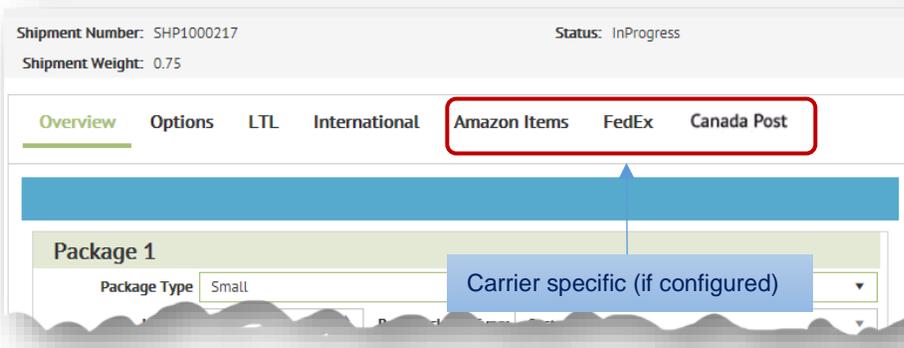
Intl Tab Field Descriptions

Field	Description
CI Description	Enter a description of item as would appear on Commercial Invoice (CI) or Shipper's Export Declaration (SED). For example, Toys.
Country of Manufacture	Enter the country in which the item was made. This is a two-letter abbreviation for the country. For example, the code for United States is US.

Field	Description
Harmonized Tariff Code	Enter the 10-digit Harmonized System (HS) number. Harmonized System (HS) numbers are used to classify products for customs purposes. By international agreement, most countries recognize the same first 6 "harmonized" digits. The U.S. defines products using 10-digit codes in its Harmonized Tariff Schedule (HTS). Schedule B Numbers are used to classify exported products in the United States and are based on the international HS system.
Quantity	Enter the numeric value the quantity of product; used in conjunction with Quantity UOM (unit of measure) field.
Quantity UOM	Unit of measure for the quantity of product. Shipper's Export Declaration (SED) UOM – Barrels, Carat Content, Kilogram, Square Centimeters, Content Ton, Curie, Clean Yield Kilogram, Dozen, Dozen Pieces, Dozen Pair, Fiber Meter, Gross Containers, Gram, Gross, Hundred, Kilogram, 1,000 Cubic Meters, Lilogram, Total Sugars, Liter, Meter, Square Meter, Cubic Meter, Millicurie, Pieces, Proof Liter, Pack, Pairs, Running Bales, Square, Ton, 1,000. Commercial Invoice (CI UOM) – Barrel, Bundle, Bag, Bunch, Box, Canister, Centimeter, Container, Crate, Case, Carton, Cylinder, Dozen, Each, Envelope, Feet, Kilogram, Kilograms, Pound, Pounds, Liter, Meter, Packet, Pallet, Piece, Pieces, Proof Liters, Package, Pair, Pairs, Roll, Set, Square Meters, Square Yards, Tube, Yard.
Unit Value	Commercial value of the item.
Unit Weight	Weight of a single item. Usually only required when EEI filing.

Carrier-Specific Settings

Depending on your system, you may have some extra tabs configured under [Package](#) details to cover any carrier-specific settings that were not included in the other tabs.

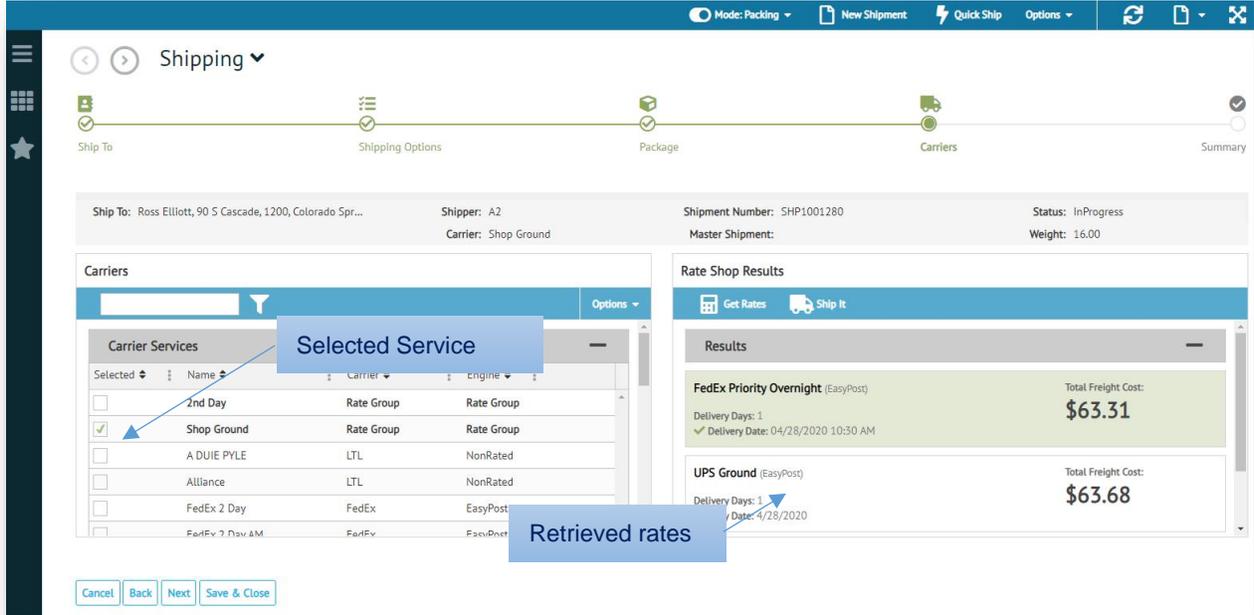


For example, the **Amazon Items** tab would be for adding **Seller SKU** and the **Quantity** of the items. The **FedEx** tab has a special field for entering **Admissibility Package Type**. For more information about your carrier-specific settings (if configured) consult your system administrator.

Carriers

Once your shipment details are in place, and all packages accounted for, you can advance to the  **Carriers** task page to determine how you want your orders to be shipped.

Use the [Carrier Services](#) side of the split workspace to select from the services available. Click **Get Rate** to calculate [Rate Shop Results](#) for each of the shipping services you selected.



The screenshot shows the Shipping task page with the following details:

- Ship To:** Ross Elliott, 90 S Cascade, 1200, Colorado Spr...
- Shipper:** A2
- Carrier:** Shop Ground
- Shipment Number:** SHP1001280
- Status:** InProgress
- Master Shipment:**
- Weight:** 16.00

The **Carriers** section displays a table of Carrier Services:

Selected	Name	Carrier	Engine
<input type="checkbox"/>	2nd Day	Rate Group	Rate Group
<input checked="" type="checkbox"/>	Shop Ground	Rate Group	Rate Group
<input type="checkbox"/>	A DUJIE PYLE	LTL	NonRated
<input type="checkbox"/>	Alliance	LTL	NonRated
<input type="checkbox"/>	FedEx 2 Day	FedEx	EasyPost
<input type="checkbox"/>	FedEx 2 Day AM	FedEx	EasyPost

The **Rate Shop Results** section shows the following results:

Results	Total Freight Cost:
FedEx Priority Overnight (EasyPost) Delivery Days: 1 ✓ Delivery Date: 04/28/2020 10:30 AM	\$63.31
UPS Ground (EasyPost) Delivery Days: 1 Date: 4/28/2020	\$63.68

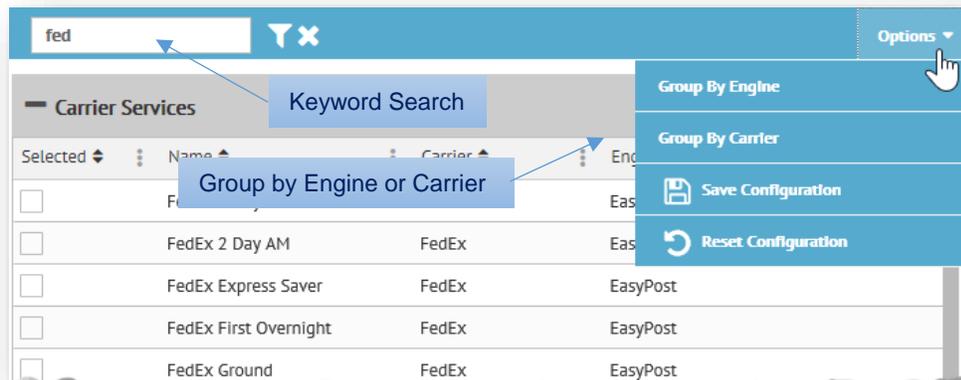
Annotations in the screenshot include:

- Selected Service:** Points to the 'Shop Ground' row in the Carrier Services table.
- Retrieved rates:** Points to the 'FedEx Priority Overnight' result in the Rate Shop Results section.

If you are working in [Packing Mode](#), the carrier may come preselected by the incoming order. You could simply [Send Shipment](#) without changes. Although, you may want to override the default setting to explore other options and/or compare pricing.

Carrier Services

Choose from the list of carrier services or **Rate Group** in this panel to retrieve associated prices in [Rate Shop Results](#). A **Rate Group** option retrieve rates for several services at the same time.



The screenshot shows the Carrier Services search and filter options:

- Keyword Search:** A search field containing 'fed' with a search icon.
- Options:** A dropdown menu with the following options:
 - Group By Engine
 - Group By Carrier
 - Save Configuration
 - Reset Configuration
- Group by Engine or Carrier:** A label pointing to the 'Carrier' column header in the table below.

Selected	Name	Carrier	Engine
<input type="checkbox"/>	FedEx 2 Day AM	FedEx	EasyPost
<input type="checkbox"/>	FedEx Express Saver	FedEx	EasyPost
<input type="checkbox"/>	FedEx First Overnight	FedEx	EasyPost
<input type="checkbox"/>	FedEx Ground	FedEx	EasyPost

Use the keyword search field and click  to locate specific carriers from the list. The criteria may be as simple as a single word (or even a partial word). Use the **Options**  dropdown to reorganize the options displayed under **Group by Engine** or **Group by Carrier**.

Rate Groups

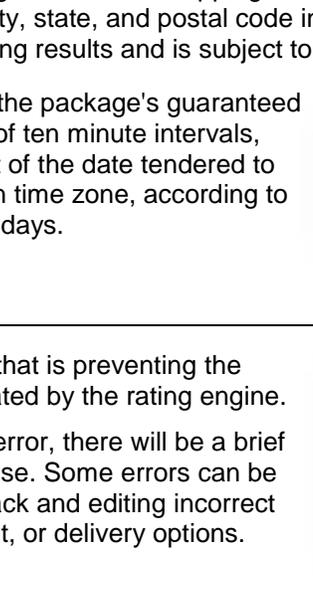
A **Rate Group** is a list of comparable and/or popular carrier services grouped together for quick selection. They save you the time of searching and selecting each service individually for every shipment. Rate groups are usually predefined under **Pack & Ship > Configuration > Shipping > Rate Shop Groups** by your implementation consultant or administrator.

Rate Shop Results

Use the **Results Shop Results** panel to determine the best pricing for the carrier service and the shipment information you entered. If you select a specific service, you will get a rate for that service alone. Selecting multiple services or [Rate Groups](#), returns rates for multiple services at the same time.

The get rate shop results:

1. Select checkboxes next to one or more carrier services or **Rate Group** listed under [Carrier Services](#) on the left side of the split workspace.
2. Click **Get Rates** or  **Get Rates** under **Rate Shop Results** on the right side panel.
This invokes the rating engine, which lists results based on the current shipment for each carrier service selected. Results are ordered from lowest to highest price, listing the [Commitment](#) and/or [Errors](#) where applicable. The first rate is highlighted in green.
3. Highlight the carrier service and rate from the results that best suits your price point requirements.
4. Select  **Ship It**. See [Send Shipment](#) on page 49 for further details.



Carrier Service	Total Freight Cost
FedEx Ground (EasyPost) Commitment: No Commitment ✓ Commitment Date:	\$22.70
UPS Ground (EasyPost) Default Rate Commitment: 02/08/2018 11:00 PM ✓ Commitment Date: 2/8/2018	\$23.94
FedEx Express Saver (EasyPost) Commitment: 02/08/2018 04:30 PM ✓ Commitment Date: 2/8/2018	\$46.14

Commitments

An important aspect of rating multi-carrier shipping is the comparison of service commitments by various carriers, using destination city, state, and postal code in their calculations. The published commitment date and time is listed in rating results and is subject to the terms and conditions of each carrier selected.

The commitment represent the package's guaranteed delivery time in increments of ten minute intervals, from the preceding midnight of the date tendered to the carrier, in the destination time zone, according to carrier-dependent business days.

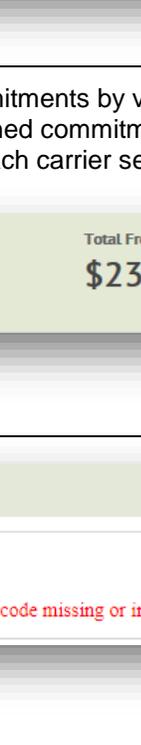


Carrier Service	Total Freight Cost
UPS Ground (EasyPost) Commitment: 02/08/2018 11:00 PM ✓ Commitment Date: 2/8/2018	\$23.94

Errors

Results may show an error that is preventing the carrier service from being rated by the rating engine.

When the result returns an error, there will be a brief message explaining the cause. Some errors can be easily corrected by going back and editing incorrect [Package](#) dimensions, weight, or delivery options.



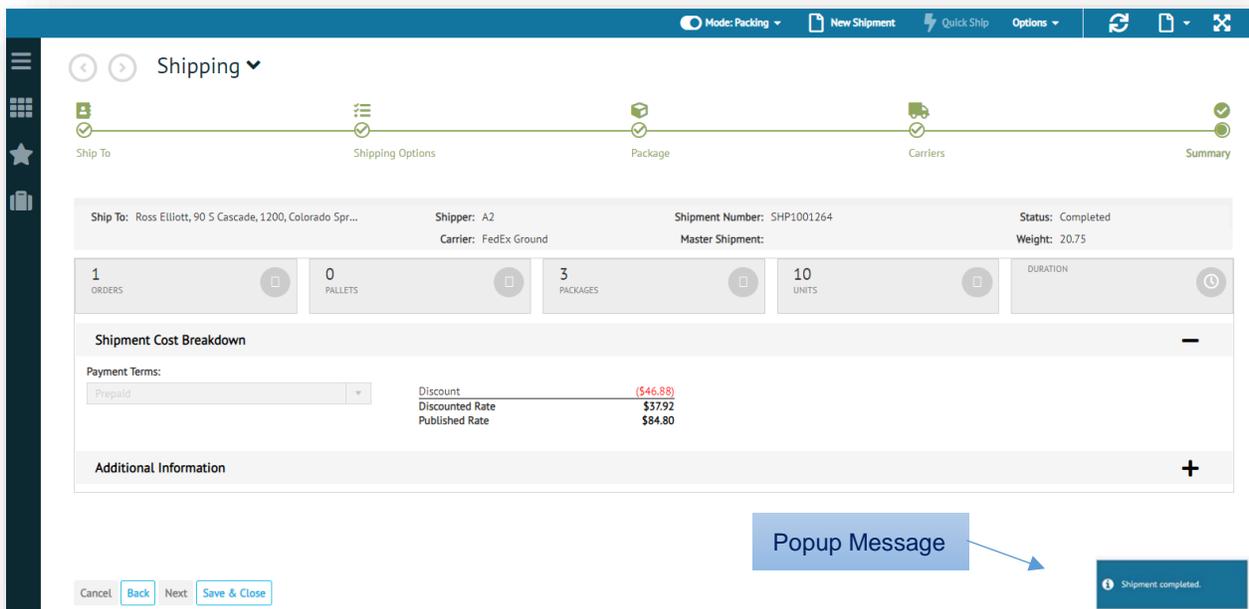
Carrier Service	Total Freight Cost
 FedEx Intl Economy (Express) 21: ERROR: [522] Destination country code missing or invalid	

Summary

The  **Summary** page of the [Shipping](#) workcenter displays once you decide to [Send Shipment](#), as described below. If you have reason to *delay completion* of the shipment at this point, you can opt to select [Hold Shipment](#) instead.

Send Shipment

If you are satisfied with selected carrier service and rating engine on the [Carriers](#) tab, click  **Ship It** on the **Rate Shop Results** menu bar to complete the shipment. A popup message indicates that the shipment has been completed, at which point the [Shipping](#) workcenter switches to a final  **Summary**.



Mode: Packing | New Shipment | Quick Ship | Options

Shipping

Ship To | Shipping Options | Package | Carriers | Summary

Ship To: Ross Elliott, 90 S Cascade, 1200, Colorado Spr... | Shipper: A2 | Shipment Number: SHP1001264 | Status: Completed | Weight: 20.75
Carrier: FedEx Ground | Master Shipment:

1	0	3	10	DURATION
ORDERS	PALLETS	PACKAGES	UNITS	

Shipment Cost Breakdown

Payment Terms: Prepaid

Discount	(\$46.88)
Discounted Rate	\$37.92
Published Rate	\$84.80

Additional Information

Cancel | Back | Next | Save & Close

Popup Message

Shipment completed.

Tracking number(s) are returned for the shipment; at which point, the shipment has been added to the carrier's manifest, final freight costs are returned, and no further changes can be made. Note that the shipment status can be verified under [Shipment](#), page 57.

Labels, packing lists, and other shipping reports print automatically where configured to do so. Advance shipment notifications (for EDI), alerts, or email notifications are sent out where configured to do so. You can also reprint labels at any time, as described under [Printing Labels and Reports](#), page 62.

Hold Shipment

There are certain situations where you may need to *hold* the shipment after rating. If you are waiting on certain package details, but you need to get a tracking number and print carrier labels using estimated weights or dimensions, the shipment can be left in 'Hold' status to be completed later.

For example, some organizations prefer to batch print a series of shipments using estimated weights and pack them at a later time. Variations in weight are usually caught at an end-of-line station, where the operator can verify the final weight and what actually is making it onto the trailer before cutoff time.

When you obtain the information you need, you can then select the shipment in [Shipment](#), which allows you to make adjustments for weight, dimensions, and other options before you [Send Shipment](#).

Refer to the instructions on the following page.

To hold the shipment:

1. Begin the shipment as usual following the [Shipping Mode](#) or [Packing Mode](#) methods described in previous sections.
2. **Important:** Ensure that the **Ship to Hold** check box is selected on the [Shipping Options](#) task page.
3. Select the carrier service you want on the [Carriers](#) task page.
4. Click  **Save Shipment** from the **Options** ▼ dropdown on the [Shipping Action Bar](#).
5. Click  **Ship It** (or  **Quick Ship**) to complete the shipment.

Upon successful completion, some details of the shipment will be greyed out and no longer editable. Tracking number(s) are returned for the shipment; however, because of the 'Hold' status the shipment is not included on the carrier manifest for the day.

6. Once the remaining information is known, you can select the shipment again via [Shipment](#) to make final adjustments.
7. When ready, the shipment can be sent out as described under [Send Shipment](#), at which point the status will move to 'Completed.'

Orders



The **Orders** grid provides a central location for you to manage all the order records coming through your Pack & Ship integration scheme. Your shipments usually begin by selecting orders in the [Shipping](#) workcenter. With the **Orders** grid, you have wider visibility to manage multiple orders at the same time, with added functionality to edit, group, print, and ship them directly.

To access your order records, select **Pack & Ship > Orders** via the Foundry **Menu**.

Progress	Status	Document Number	Order Date	Customer Order Number	Customer Number	Customer Name	Order Total	Carrier Service Code
In Progress		1256	5/31/2019	1256	189334814751	Josh Wayne	14.93	FirstPackage
Ready to Ship		1273		1273			22.41	Priority/Priority Mail
Ready to Ship		1272		1272			20.41	Priority/Priority Mail
Ready to Ship		1270	7/25/2019	1270			15.41	Priority/Priority Mail
In Progress		1269	7/22/2019	1269	1194815848525	Ross Elliott	654.41	Priority/Priority Mail
In Progress		1268	7/12/2019	1268	1194815848525	Ross Elliott	62.8	Priority/Priority Mail
Ready to Ship		1267	7/11/2019	1267	1194815848525	Ross Elliott	727.19	Priority/Priority Mail
Ready to Ship		1266	7/8/2019	1266	1194815848525	Ross Elliott	504.88	Priority/Priority Mail
Ready to Ship		1264	6/19/2019	1264	189334814751	Josh Wayne	15.41	Priority/Priority Mail
Ready to Ship		1262	6/12/2019	1262	189334814751	Josh Wayne	15.41	Priority/Priority Mail
In Progress		1258	6/11/2019	1258	1849745768525	Ross Elliott	62.8	Priority/Priority Mail
In Progress		1257	5/31/2019	1257	189334814751	Josh Wayne	20.41	Priority
In Progress		1255	5/28/2019	1255	626054201435	Ross Elliott	42.77	Priority
In Progress		1253	5/15/2019	1253	626054201435	Ross Elliott	37.78	Priority
In Progress		1250	5/10/2019	1250	626054201435	Ross Elliott	22.69	Priority



NOTE

Order records include links to additional panels of information. When you select an order, look for the button on the top right corner of the grid to access further details.

The following sections describe the information contained in your order records, as well as what you can do with your orders when you select them from this grid:

- [Order Details](#), outlining the contents of each order record, below
- [Order Tools](#), describing controls for managing and shipping orders from the grid, page 56

Grid Functionality

The grid format in TrueCommerce Foundry includes several built in controls to help you find and organize your data. See [Working with Grid Data](#) on page 10. Another way to find records quickly is to use the search control on the action bar. This opens a [Search Panel](#) to the right side of the grid. To [Export](#) order records, click **Export** on the grid control bar.

Order Details

The main **Orders** grid (illustrated above) provides relevant details about each order record at different stages in the fulfillment process. This section covers [Common Order Fields](#), how to access the [Underlying Details](#) of an order, and provides instructions for [Editing an Order](#) where applicable.

**NOTE**

Your orders will be configured differently than the examples in this documentation. Refer to the channel sources for the order field definitions specific to your Pack & Ship integration.

Common Order Fields

Field	Description
Status	Current stage in processing of an order. See Status Codes below.
Tags	User defined tags for organization purpose. See Tags below.
Order Date	Date set/changed via the  calendar control
PO Number	Purchase order number
Document Number	Order document number
Document Type	Order document type
Weight	Weight of items in order
Weight UoM	Unit of measure for the weight dimension
Requested Ship Date	Date set/changed via the  calendar control
Purchase Order Date	Date set/changed via the  calendar control
Store Number	Assigned store number
Department Number	Assigned department number
Customer Number	Customer's number
Customer Name	Customer's name
Shipper	Shipping company
Order Group	Unique group number if order was assigned to a group
Carrier Service Code	Carrier assigned service code
Ship By Date	Date set/changed via the  calendar control
Arrive By Date	Date set/changed via the  calendar control
Order Sub Total	Sub total amount prior to taxes, etc.
Order Total	Total amount for the order
Order Taxes	Total taxes for the order
Order Markups	Markup value for customer order
Freight Amount	Total cost for all containers charged by the Carrier service
Order Discounts	Total of carrier discounts included in the order
Carrier Account	Account number with shipping company
Freight Payment Method	Method used by service provider for freight payment

The [Underlying Details](#) of an order, such as item quantities and addresses, are discussed on page 53.

Status Codes

The status code determines if changes can be made when [Editing an Order](#).

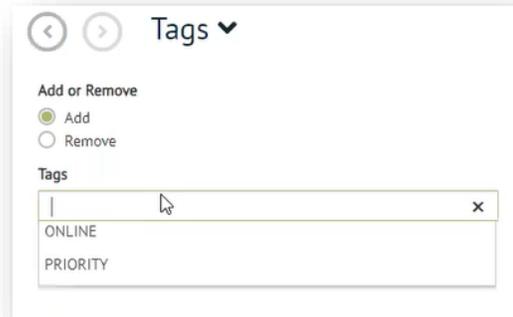
- Ready To Ship** Available and displayed in the **Add Orders** fly out panel of the [Shipping](#) workcenter
- In Progress** Selected and currently shipping
- Completed** Recently shipped. Display/Hide these records via the grid [Search Panel](#)
- Archived** Placed in the archive. Display/Hide these records via the grid [Search Panel](#)

Tags

You can add tags to your order records for quick reference and search purposes.

To add a tag to a selected order record, click  **Tags** on the grid control bar. This launches the **Tags** editor for adding, removing, and creating tags.

Select a tag from the dropdown options and then click  **Save** on the action bar.



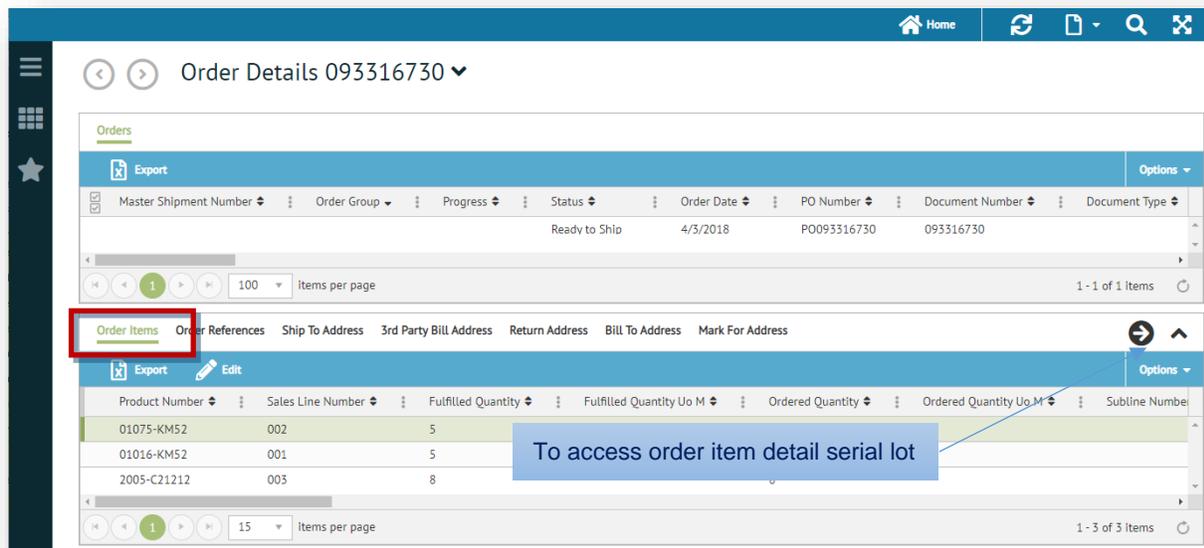
Underlying Details

In addition to the fields displayed on the main **Orders** grid, you can drill down to access further information about the order selected. Click the  button on the top right corner of the grid to open additional panels under [Order Items](#), [Order References](#), and the [Addresses](#) tabs, described below.

To exit the additional panels, click the  button at the top left of the page.

Order Items

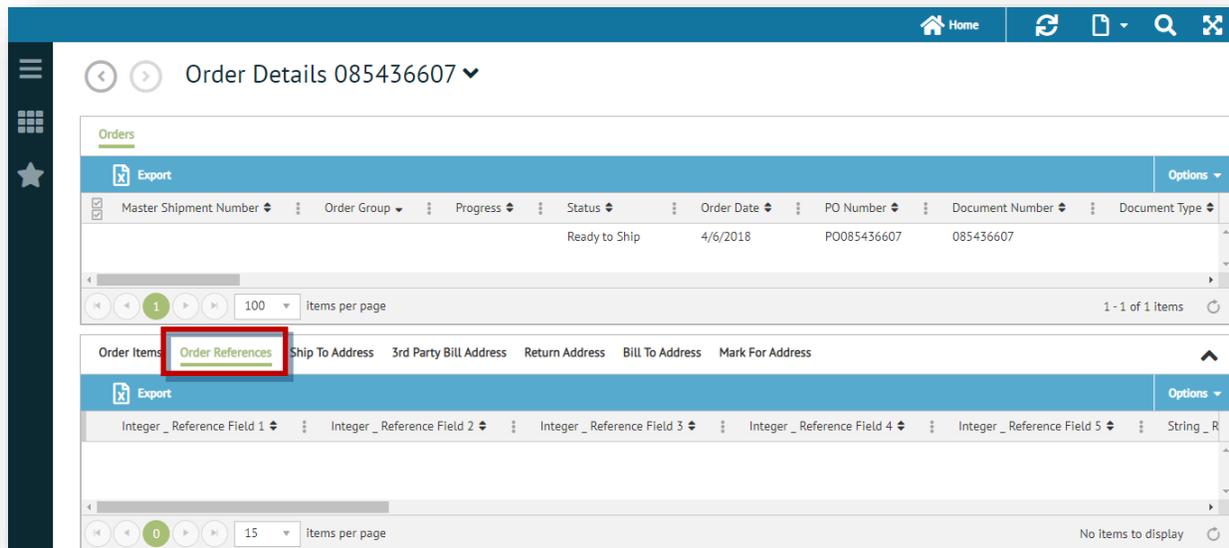
Orders  **Order Details**  **Order Items** — Select this tab on the **Order Details** page to see details of the products in the selected order. To [Export](#) these records, click  **Export** on the grid control bar.



To make changes to existing order items, double-click on a record to make it editable. Click  **Save** on the grid control bar to save your changes. To access detail serial lots associated with a selected order item, click the  button on the top right corner of the grid.

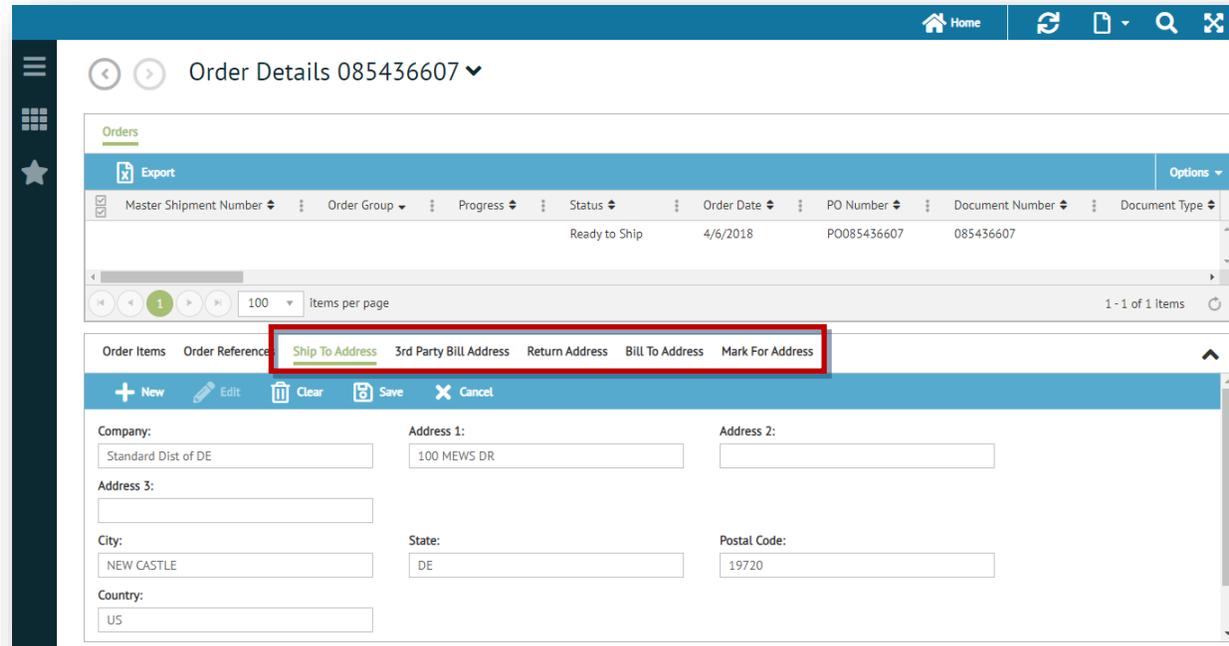
Order References

Orders → **Order Details** → **Order References** — Select this tab on the **Order Details** page to view or edit order references. To [Export](#) these records, click [Export](#) on the grid control bar.



Addresses

Orders → **Order Details** → **Ship To Address, etc.** — The remaining tabs on the **Order Details** page provide access to the different accounts and address records associated with an order.



Where:

- Ship To Address** Destination of order
- 3rd Party Bill Address** Recipient of shipping charges if other than the one listed for **Ship To**

Return Address	Location where products in the order can be returned by purchaser
Bill To Address	Recipient of charges if other than the one listed for Ship To
Mark For Address	Final destination for packages if Ship To is to be an intermediary location

**NOTE**

For more information about the different billing and delivery addresses used in Pack & Ship, see [Ship To](#) in the [Shipping](#) workcenter, page 27.

Select one of these tabs on the **Order Details** page to view or edit the associated address. To enter a new address under the selected tab, click **+ New** on the grid control bar. To make changes to the current address, click **Edit**. Click **Save** to save your changes.

Editing an Order

Depending on the order status, you may be able to edit details of an order prior to shipping.

To edit an order:

1. Highlight an order in the [Orders](#) grid where its status allows editing.
2. Click **Edit** on the grid control bar to launch the **Orders** editor.

3. Add or change any of the details for the selected order as per the descriptions listed under [Common Order Fields](#), on page 52.
4. Click the button to edit [Underlying Details](#) that are not on the main grid.
5. When you are finished with the editor, click **Save** on the action bar to save your changes and return to the main grid.

To delete a selected record, click **Delete** on the grid control bar. Click **Save** on the grid control bar to save your changes.

Order Tools

Along with the ability to organize and edit [Order Details](#), the **Orders** grid also includes many of the same tools for shipping orders that are available in the [Shipping](#) workcenter. The main difference here is that you will be able to work with multiple orders at the same time using the functionality of a grid.

- Locate specific orders quickly via the [Q](#) search control on the action bar. This opens the [Search Panel](#) on the right side of the grid.
- Filter, hide, and rearrange columns. See full instructions under [Working with Grid Data](#) on page 10.
- To select a range of orders, highlight the first record, hold down the **Shift** key, and then click on the last record.
- To select multiple (but not consecutive) orders, hold down the **Ctrl** key while clicking on various records in the grid.

Orders Action Bar

The following controls provide additional functionality for working with records in the **Orders** grid.



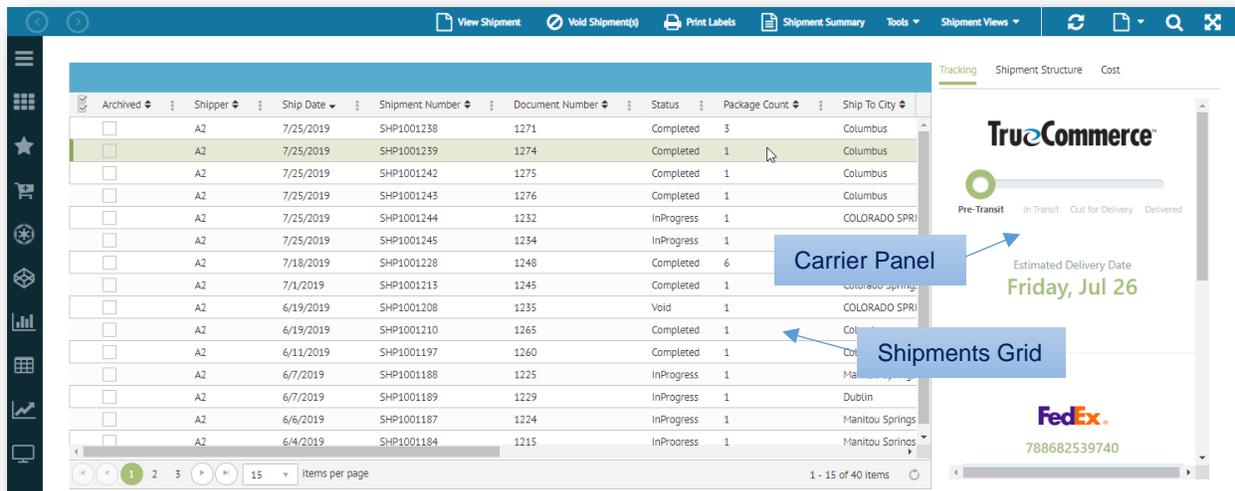
- Group** ▾ Dropdown menu options to add to or remove from a group. Use the [Add Group](#) option to consolidate multiple selected orders into a group to be shipped together.
- Print** Saves a PDF version of selected order details for download and printing.
- Batch Ship** ▾ Dropdown menu options for shipping multiple orders selected from the grid:
 - Packing** For batch packing via the [Quick Ship](#) utility
 - Full Case Packing** For batch full case packing via the [Quick Ship](#) utility
 - Cartonization** For batch packing via the [Cartonization](#) utility
- Ship** Opens the [Shipping](#) workcenter in [Packing Mode](#) to start a new shipment using the orders selected from the grid. To return to the **Orders** grid, click the button at the top left of the page.
- Settings** ▾ Dropdown menu options:
 - Save Default Search Set** Sets [Search Panel](#) filter settings as the default
 - Clear Default Search Set** Removes the default search set

Shipment History



Use Pack & Ship **Shipments History** to track and manage your shipments, both past and present. The [Shipment Fields](#) for each record in the grid contains relevant details about the shipment. Note that the information displayed and the ability to cancel or change a shipment depends on the [Shipment Status](#) field, page 58.

To access shipment records, select **Pack & Ship > Shipment History** via the Foundry **Menu**.



The records listed on the **Shipments** grid contain important details about your shipments that can be viewed at a glance. Click on specific records to perform the following:

- Look up the details of a completed shipment ([View Shipment](#), page 60)
- Make changes to pending shipments ([Edit Shipment](#), page 60)
- Void or remove selected shipments from the list ([Cancel Shipment\(s\)](#), page 61)
- Print labels and other documents for shipments ([Printing Labels and Reports](#), page 62)

Tracking Packages

You can check out the tracking number and status, as well as the structure and calculated cost of selected shipments via the [Carrier Panel](#) to the right of the grid.

Grid Functionality

The grid format in TrueCommerce Foundry includes several built in controls to help you find and organize your data. See [Working with Grid Data](#), on page 10. Another way to find records quickly is to use the search control on the action bar. This opens a [Search Panel](#) to the right side of the grid. To [Export](#) shipment records, click **Export** on the grid control bar.

Shipment Fields

Field	Description
Archived	Checkbox to indicate that this shipment is to be archived
Shipper	Party who initiates shipment
Ship Date	Date the shipment was started

Field	Description
Shipment Number	Generated shipment number
Order Number	Order associated with shipment
Status	Status indicator, as described under Shipment Status , described below
Manifest Status	Indicates if this shipment is included in an end-of-day manifest
Type	Indicates if this is a regular or master shipment (if configured)
Child Shipment	Indicates if this shipment belongs to a master shipment
Carrier Service Name	Assigned carrier service name (UPS Ground, Next Day Air ...)
Package Count	Number of packages in the shipment
Payment Terms	Party who pays freight charges.
Account Number	Frequent shippers will have an account number assigned per carrier
Ship To City	Destination city
Ship To State	Destination state or province
Ship To Country	Destination country
Weight	Total weight of the shipment
Shipping Mode	Set to either Shipping Mode or Packing Mode .
LTL	Checkbox to indicate that this shipment is deemed less than load.

Shipment Status

The status of a shipment determines if any further changes can be made once it has been saved in the system. The following table describes each status that may be placed on shipments.

Status Settings

Status	Description
InProgress	Indicates that the shipment was started, but then it was stopped and saved. You are able to re-open and finish the shipment at any time. See Editable below.
Ready To Ship	The shipment is set ready to be shipped. At this stage, no addresses can be changed. However, you can make some adjustments to package details, carrier service, the shipper, and the shipment number. See Editable below.
Hold	Indicates that shipping labels have been printed, a tracking number has been assigned, but the shipment is not yet included on a carrier manifest for the day. The carrier, ship date, commodity value, and dimension UOM can still be adjusted and sent, at which point the shipment will be added to the manifest, the final freight costs returned, and the status will move to Completed . See Editable below.
Completed	Either the shipment has been picked up already, or it has been added to a carrier manifest for the day. No further changes can be made. Tracking information, final freight costs, and carrier labels are provided. The only change possible is to <i>void</i> it. See Completed below.
Void	Shipment was removed from a carrier manifest and is no longer a valid shipment.
Error	Shipment has not completed successfully due to errors in the process.

Editable

Selecting shipments in [Shipment History](#) that show a status message that allows them to be changed will invoke the **Edit Shipment** and **Delete Shipment(s)** controls on the action bar.



The **Print Labels** control is greyed out to indicate that the shipment has not been completed, so there are no labels or reports available to be printed yet. The functionality available to most editable shipments would be covered by the [Shipping](#) workcenter discussed on page 25.

Completed

Selecting completed shipments in [Shipment History](#) will toggle the action bar to display **View Shipment**, **Void Shipment(s)**, and **Print Labels** controls.



Quick details and tracking information are provided on the carrier panel, described next. For other options, see [View Shipment](#) and Printing Labels and Reports.

Carrier Panel

When you click on a record, the panel to the right of the **Shipments** grid contains carrier generated information about the selected shipment. If the shipment is completed, you can follow delivery progress under the [Tracking](#) tab. Other shipment data is found under [Cost](#) and [Shipping Structure](#).

Archived	Shipper	Ship Date	Shipment Number	Document Number	Status	Carrier Service Name	Package Count	Payment
<input type="checkbox"/>	A2	7/26/2019	SHP1001250		InProgress			SHIPPER
<input type="checkbox"/>	A2	7/25/2019	SHP1001238	1271	Completed	FedEx Priority C		SHIPPER
<input type="checkbox"/>	A2	7/25/2019	SHP1001239	1274	Completed	FedEx Priority C		SHIPPER
<input type="checkbox"/>	A2	7/25/2019	SHP1001242	1275	Completed	FedEx Ground	1	SHIPPER
<input type="checkbox"/>	A2	7/25/2019	SHP1001243	1276			1	SHIPPER
<input type="checkbox"/>	A2	7/25/2019	SHP1001248				6	SHIPPER
<input type="checkbox"/>	A2	7/18/2019	SHP1001228	1248			6	SHIPPER
<input type="checkbox"/>	A2	7/1/2019	SHP1001213	1245	Completed	UPS Ground	1	SHIPPER
<input type="checkbox"/>	A2	6/19/2019	SHP1001208	1235	Void	UPS Ground	1	SHIPPER
<input type="checkbox"/>	A2	6/19/2019	SHP1001210	1265				SHIPPER
<input type="checkbox"/>	A2	6/11/2019	SHP1001197	1260				SHIPPER
<input type="checkbox"/>	A2	6/7/2019	SHP1001188	1225				SHIPPER
<input type="checkbox"/>	A2	6/7/2019	SHP1001189	1229	InProgress		1	SHIPPER
<input type="checkbox"/>	A2	6/6/2019	SHP1001187	1224	InProgress		1	SHIPPER
<input type="checkbox"/>	A2	6/4/2019	SHP1001184	1215	InProgress		1	SHIPPER

Carrier Panel (FedEx):

- Tracking Tab:** Selected tab for tracking information.
- Breadcrumb Bar:** Shows delivery progress: Pre-Transit, In Transit, Out for Delivery, Delivered.
- Carrier's Tracking Number:** 788680434412
- Scrolling Delivery Notes:** July 25, 2019, 12:31pm - Shipment information sent to FedEx

Tracking

The **Tracking** tab links to the carrier's site to provide a 'breadcrumb' trail on the delivery of a selected shipment. Refer to the example in the previous screen shot. Availability of this tab will depend on [Shipment Status](#). The carrier provides the estimated delivery date and tracking number. You can scroll down the panel to view notes detailing each stage of an active delivery.

Shipping Structure

To view carrier-specific details, highlight a completed shipment in the **Shipments** grid and select the **Shipping Structure** tab on the carrier panel.

Depending on the service selected for a shipment, tracking numbers listed under the **Shipping Structure** tab may show as active links to a carrier's tracking website. Clicking the link will open up a new browser tab for you to track your packages.

Cost

To view the calculated cost of a shipment, highlight a completed shipment in the **Shipments** grid and select the **Cost** tab on the carrier panel.

Depending on the service selected, cost details compare the discounted rate and the published rate, and calculates any discount on the shipment.

View Shipment

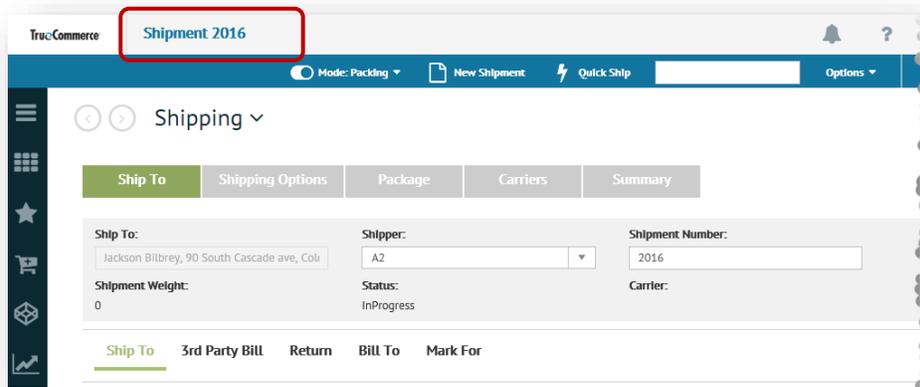
Pack & Ship [Shipment History](#) maintains important information about your completed shipments. The **Shipments** grid shows most of your key information at a glance, including dates, carrier services, number of packages, weights, and destinations. You can also click [View Shipment](#) on the action bar to open the [Summary](#) page of selected shipment in the [Shipping](#) workcenter.

Edit Shipment

As outlined under [Status Settings](#), shipments that are set to **InProgress**, **Hold**, or **Ready to Ship** will allow further adjustments.

Editing a Shipment

1. Highlight a shipment in [Shipment History](#) where the status is still [Editable](#).
2. Click [Edit Shipment](#) on the action bar. This launches the [Shipping](#) workcenter, showing all editable fields for the shipment selected. Note that when you edit a saved shipment, the *shipment number* displays above the page title bar as in the following example.



- Depending on the status, you can fill in missing details and/or make other adjustments prior to selecting a carrier service on the [Carriers](#) task page. as described on page 47.

Each time you work on a shipment, it will also add a link to the [Spaces Menu](#) for quick access. Click the  navigation control to view previously opened shipments and/or return to **Shipment History**.

Cancel Shipment(s)

Occasionally, you may need to cancel a shipment. **Shipment History** has two different functions that can be used to cancel shipments, depending on the [Shipment Status](#) and the desired result.

-  **Void Shipment(s)** Only available if selected shipment status is 'Hold' or 'Completed'. The shipment remains in the grid in 'Void' status, but is not actually shipped out.
-  **Delete Shipment(s)** Only available if selected shipment status is 'In Progress'. The shipment is removed from the grid.

To Void a Shipment:

- Highlight one or more shipments in [Shipment History](#) that are set to 'Hold' or 'Completed' status.
- Click  **Void Shipment(s)** on the **Shipments** action bar.
- A popup message will ask if you want to void the selected shipment(s). Click **Yes**.
The shipment is voided and is now set to 'Void' status in the grid.

To Delete a Shipment:

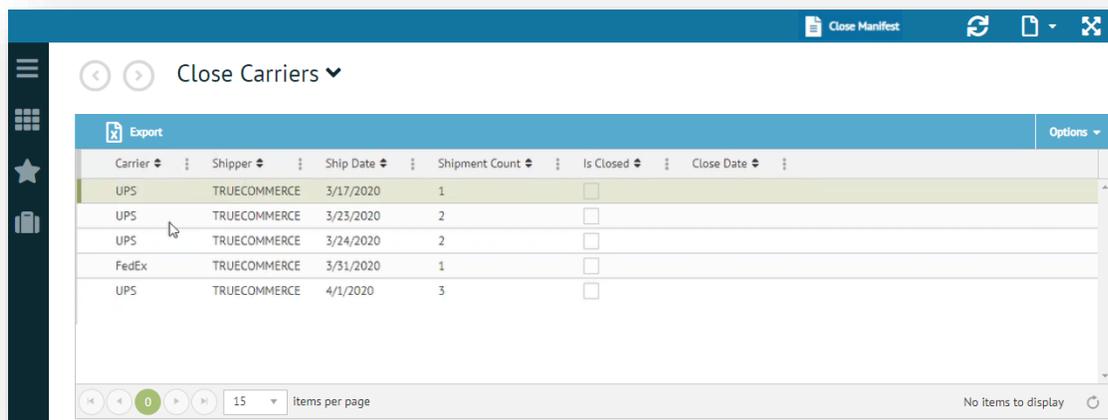
- Highlight one or more shipments in [Shipment History](#) that are set to 'In Progress' status.
- Click  **Delete Shipment(s)** on the **Shipments** action bar.
- A popup message will ask if you want to delete the selected shipment(s). Click **Yes**.
The shipment is deleted and removed from **Shipment History**.

Close Carriers



The Pack & Ship **Close Carriers** page can be used to close shipments and print the end of day report (manifest) for each carrier that requires one.

To access your end of day close records, select **Pack & Ship > Close Carriers** via the Foundry **Menu**.



A manifest may be required when you have a large number of packages to be picked up by the same carrier. This allows the carrier to accept all your packages at once by end of day close without the need to scan each label individually. Note that for USPS, manifests are also called SCAN forms.

Different carrier accounts have a different end of day close, and not all carriers require you to generate and/or print this type of report. In most cases, the date on the manifest must be the same date that you created package labels for the shipment. The manifest (along with package labels) will be a component of your carrier configuration in Pack & Ship.

Consult your system administrator for details about each carrier's daily manifest requirements, or contact the carrier for more information.

Close Carrier Fields

Field	Description
Carrier	Account that requires an end of day close (USPS, UPS, FedEx ...)
Shipper	Party who initiates the shipment
Ship Date	Date of the shipment
Shipment Count	Number of packages for this carrier
Is Closed	Check box to indicate that a manifest has been generated
Close Date	Date the shipment is closed

To generate a daily manifest:

1. Highlight a carrier record for the current shipment date.
2. Click  **Close Manifest** on the **Close Carriers** action bar.

A popup message will indicate that the manifest is printed and that the shipment is now closed for the day, for the carrier selected.

Printing Labels and Reports



The [Shipping](#) workcenter generates all required labels and reports as soon as you opt to [Send Shipment](#). These are sent automatically to the printers you identified under your [My Preferences](#), page 21.

What you need to print with Pack & Ship will depend on your configuration, carrier requirements, and the status of the shipment. Copies of some labels and reports may be printed manually via [Shipment History](#), but only if the selected shipment is set to 'Completed' or 'Hold' status.

Following are the types of shipping documents that can be printed via Pack & Ship:

- | | |
|----------------------------|---|
| Shipping labels | Printed automatically upon to Send Shipment based on the package information and carrier service selected in the Shipping workcenter. |
| Manifests | One-page documents printed via Close Carriers that may be required when you have several packages to be picked up by the same carrier. |
| Commercial Invoices | Configured for International shipments that need a customs declaration by the company exporting goods. |
| VICS BOL | Voluntary Interindustry Commerce Standards Bill of Lading configured for LTL shipments, as a requirement by some large retailers who use EDI. |

Consult your system administrator for more information about which types of labels and reports are configured for your carrier services, and to determine which printers are connected to Pack & Ship.