

HOW TO CHANGE AN ORDER'S SHIP METHOD

GENERAL NOTE

There are several ways to change the Ship Method for a Sales Order Shipment.

- Via the Sales Order
- Pending Shipments Register
- Trip

CHANGE THE SHIPMENT METHOD FOR A SHIPMENT THAT HAS ALREADY BEEN PICKED

Use this method to change the shipping method from one of the delivery ship methods to Will Call.

- If your order is a Counter order, look up the order from the Counter Sales option.
- If your order is a Regular/Standard order, look up the order from the Order Management, Sales Order option.
 1. From the Sales Order List, select the **Edit** option for the order's popup menu.
 2. On the Shipping & Billing page, you will see the shipment method. **NOTE:** If you change the shipping method here, it will only affect the shipments that have not yet been generated for the order, it will not change the shipping method on shipments that already exist for the order.
 3. Click **Continue Process**.
 4. On the Sales Order Items page, click **Continue**.
 5. On the Picking Ticket List page, Click the **Show All** button.
 6. Hover your cursor over the ticket# and select the **Enroll to Trip** option.
 7. Select the Will Call trip.
 8. Now you can Dispatch the order.

USING THE PENDING SHIPMENT REGISTER TO ENROLL A SHIPMENT INTO A TRIP

You can use the Pending Shipment Register to move a shipment from a Delivery Ship Method to Will Call or from Will Call to a Delivery Ship Method.

1. Select the **Warehousing** module, then select the **Shipping** submenu, then select the **Pending Shipment Register** option.
2. Find the order on either the Will Call tab or the Non-Will Call tab. OR, you can click the **Back to Lookup** button and search for the order.
3. Hover your cursor over the Order# and select the **Unenroll** option. The order will remain on the selected tab and the Trip number will show as 0.
4. Hover your cursor over the Order# a second time and select the **Enroll to Trip** option.

5. Select the appropriate Trip from the List. **Note:** If you enroll the shipment into the Will Call trip you will find your order on the Will Call tab. If you enroll a shipment that was on the Will Call tab to a Non Will Call trip, you will find the order on the Non Will Calls tab.

Note: Shipments should NOT be left in Trip 0 for any length of time.

Tip: To find all shipments enrolled in Trip 0 on either tab, click the Trip field heading to sort the list in Trip# order.

USING THE TRIP TO REMOVE A SHIPMENT FROM A TRIP AND ADD THE SHIPMENT TO ANOTHER TRIP

You can use the Trip option to remove a Shipment from a Trip, but this may take a little longer. You will need to know the Trip# for Will Call and the Trip# and Shipment# of the order beforehand.

- You can find the Will Call Trip# on the Will Call tab of the Pending Shipments Register.
- You can find the Trip and Shipment numbers on pick tickets or by looking at the Sales Order View option.
 1. Select the **Warehousing** module, then select the **Shipping** submenu, and then select the **Trips** option.
 2. Enter the Trip# the order is currently enrolled into on the Lookup page and click **Lookup**.
 3. Hover your cursor over the Trip# and click the **Shipments** option.
 4. Find your order/shipment, place your cursor on the Shipment's Doc Type field, and then select **Remove** from the popup menu.
 5. Click the **Exit** button.
 6. Enter the Trip# you want to add the shipment to and click **Lookup**.
 7. Hover your cursor over the Trip# and click the **Shipments** option.
 8. In the Search for Shipments section in the lower section of the shipments page, find your order and place a check in the box provided and click the **Add Shipments** button.
 9. Click the **Exit** button.
- To dispatch a Will Call shipment, do one of the following:
 - Dispatch through the Order's Edit option.
 - Dispatch via the Pending Shipments Register.
 - Use the Sales module, Counter submenu, Dispatch option.
- If your order is for delivery, the people responsible to manage Trips will complete the Trip process.