SOP CUSTOMER SHIPMENT AND RETURN

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TABLE OF CONTENTS

Aims 2

Procedure 2

Recording a Customer Shipment on the basis of a Sale Order 2

Results 3

Recording a Customer Shipment Manually 3

Recording a Customer Return 4

Results 5

AIMS

- To record the shipment of goods to a customer either on the basis of a sales order or manually.
- To record the return of goods from a customer, thus restoring the shipped goods to inventory.

Note: Standard Operating Procedures should be used as guidelines for customers (and their consultants) to develop their own operating procedures. As you will note, the following procedures are very specific, and customers are strongly advised not to use them without.

PROCEDURE

RECORDING A CUSTOMER SHIPMENT ON THE BASIS OF A SALE ORDER

1. Enter the Customer Shipments form.
2. Specify the Customer No. The Customer Name, Date and Doc. Number are filled in automatically.
3. In the General tab, the default Sending Warehouse appears, as defined for shipping documents in the Inv. Transaction Documents. Revise as needed.
4. Do on of the following:
   - To link the shipping document to a single sales order, click the References tab and select the Order from the Choose list. NOTE: The list displays all open orders from the customer in question with the appropriate status.
   - To link the document to multiple orders, enter the Sales Order for Shipment sub-level form and select the relevant orders. NOTE: The Order Column Choose list displays all open orders from the customer in question with the appropriate status.
   - To link the document to specific lines in one or more sales order, enter the Choose Order Items sub-level form after linking the relevant order(s), and flag desired lines in the Choose Item Column.
5. Enter the Shipped Items sub-level form. All of the selected items from the linked orders are displayed.
6. For each line, check the quantity appearing in the Warehouse Balance column, and do one of the following:
   - If the Balance is sufficient to supply the ordered quantity and you want to fill the entire order, flag the Approve Column. The value in the Balance to Ship column is then copied into the Quantity column. NOTE: By default, the system uses the lower of the two values in the Balance to Ship and Warehouse Balance column.
   - If the warehouse balance is not sufficient, or you do not want to ship the entire ordered quantity, fill in the Quantity column manually. If you specify a quantity larger than the available inventory balance, the system will display a warning regarding negative inventory.
   - To approve all lines in the order simultaneously, return to the upper-level form and run the Approve All Items program from the list of Direct Activations.

7. In the sub-level form, the Unit Price is taken from the linked order item, as can be seen in the Price Source column. You can revise the price as needed.
8. If the inventory is pallet controlled, specify the number of the Pallet from which to ship the current item.
9. Return to the upper-level form and change the Status to the next one defined in the BPM workflow for shipping documents.
10. To make revisions to the document after it is final, choose one of the following:
    - Select Reopen Document from the list of Direct Activations. The program returns the document to the Draft status. Make the necessary revisions and changes the status to the next one in the workflow.
    - Enter the Revision of Final Shipping Doc or Revision of Final Ship Doc Items form and make the necessary revisions. NOTE: You cannot update any columns that have been greyed out in these forms.
11. To print the document, select Print Shipping Document from the list of Direct Activations.

RESULTS

- An inventory transaction is recorded in the system even before the shipping document is finalised. The inventory balance in the sending warehouse is reduced according to the shipped quantity.
- The supply balance in the linked sales order is updated automatically, and any order items that have been fully supplied as a result are flagged as Closed. If all items in the order are now fully supplied, the order itself is flagged as Closed.

RECORDING A CUSTOMER SHIPMENT MANUALLY

1. Enter the Customer Shipment form.
2. Specify the Customer No. the Customer Name, Date and Document No. are filled in Automatically.
3. In the General tab, the default Sending Warehouse appears, as defined for shipping documents in the Inv Transactions Documents form. Revise as needed.
4. Enter the Shipped Items sub-level form.
5. For each shipped item, specify the Part Number and Quantity.
6. If the part is listed in the Base Price List, or if the customer is linked to a specific price list, the Unit Price appears automatically, and the source us displayed in the Price Source column. If no price appears, record it manually.
7. If the inventory is pallet controlled, specify the number of the pallet from which to ship the current item.
8. Return to the upper-level form and change the status to the next one defined in the BPM workflow for shipping documents.
9. To make revisions to the document after it is final, choose one of the following options:

- Select Reopen Document from the list of Direct Activations. The program returns the document to the "Draft" status. Make the necessary revisions and change the status to the next one in the workflow.
- Enter the Revisions of Final Shipping Doc or Revisions of Final Ship Doc Items form and make the necessary revisions. NOTE: You cannot update any columns that have been greyed out in these forms.

10. To print the document, select Print Shipping Document from the list of Direct Activations.

RECORDING A CUSTOMER RETURN

1. Enter the Customer Returns form.
2. Specify the Customer No. The Customer Name, Date and Document number are filled in automatically.
3. In the General tab, indicate the Receiving Warehouse into which the customer goods are returned.
4. To link the return document to a sales order, service call or customer shipment, click the References tab and specify the document number in the relevant column.
5. If the current document is linked to a customer shipment and the shipped items are defined for pallet control, flag the Return to Pallet Column If you want the inventory to be pallet control, flag the Return to Pallet column if you want the inventory to be returned to the pallets from which they were originally shipped,
6. Enter the Returned Items sub-level form.
7. If the return is linked to another document, all of the items in the linked document are displayed. If the returned quantity is identical to that appearing in the Shipped Quantity column, flag the Approve column. The shipped quantity is then copied into the Quantity column. If not, record the returned quantity manually.
8. If the return is not linked to another document, it must be itemised manually. For each returned item, specify the Part Number and Quantity.
9. Return to the upper-level form and change the Status to the next one defined in the BPM workflow for customer returns.
10. To make revisions to the document after it is final, choose one of the following options:
    - Select Reopen Document from the list of Direct Activations. The program returns the document to the "Draft" status to the next one in the workflow.
    - Enter the Revisions of Final Return Doc. Form and make the necessary revisions. NOTE: You cannot update any columns that have been greyed out in this form.

RESULTS

- If the Document is linked to a sales order, the supply balance of each returned part is updated automatically in the order, according to the value if the SOpenOrder constant (defined in the Logistic Constants form).
- The inventory of each returned part in the receiving warehouse is increased according to the returned quantity.