



User Guide

Shipping User's Guide and Reports
V21.1.0200

Copyright © 2011 - 2021 by Electronics for Imaging, Inc. All Rights Reserved.

EFI PrintStream | V21.1.0200 *Shipping User's Guide and Reports*

This publication is protected by copyright, and all rights are reserved. No part of it may be reproduced or transmitted in any form or by any means for any purpose without express prior written consent from Electronics for Imaging, Inc. Information in this document is subject to change without notice and does not represent a commitment on the part of Electronics for Imaging, Inc.

Patents

This product may be covered by one or more of the following U.S. Patents: 4,716,978, 4,828,056, 4,917,488, 4,941,038, 5,109,241, 5,170,182, 5,212,546, 5,260,878, 5,276,490, 5,278,599, 5,335,040, 5,343,311, 5,398,107, 5,424,754, 5,442,429, 5,459,560, 5,467,446, 5,506,946, 5,517,334, 5,537,516, 5,543,940, 5,553,200, 5,563,689, 5,565,960, 5,583,623, 5,596,416, 5,615,314, 5,619,624, 5,625,712, 5,640,228, 5,666,436, 5,745,657, 5,760,913, 5,799,232, 5,818,645, 5,835,788, 5,859,711, 5,867,179, 5,940,186, 5,959,867, 5,970,174, 5,982,937, 5,995,724, 6,002,795, 6,025,922, 6,035,103, 6,041,200, 6,065,041, 6,112,665, 6,116,707, 6,122,407, 6,134,018, 6,141,120, 6,166,821, 6,173,286, 6,185,335, 6,201,614, 6,215,562, 6,219,155, 6,219,659, 6,222,641, 6,224,048, 6,225,974, 6,226,419, 6,238,105, 6,239,895, 6,256,108, 6,269,190, 6,271,937, 6,278,901, 6,279,009, 6,289,122, 6,292,270, 6,299,063, 6,310,697, 6,321,133, 6,327,047, 6,327,050, 6,327,052, 6,330,071, 6,330,363, 6,331,899, 6,340,975, 6,341,017, 6,341,018, 6,341,307, 6,347,256, 6,348,978, 6,356,359, 6,366,918, 6,369,895, 6,381,036, 6,400,443, 6,429,949, 6,449,393, 6,476,927, 6,490,696, 6,501,565, 6,519,053, 6,539,323, 6,543,871, 6,546,364, 6,549,294, 6,549,300, 6,550,991, 6,552,815, 6,559,958, 6,572,293, 6,590,676, 6,606,165, 6,633,396, 6,636,326, 6,643,317, 6,647,149, 6,657,741, 6,662,199, 6,678,068, 6,707,563, 6,741,262, 6,748,471, 6,753,845, 6,757,436, 6,757,440, 6,778,700, 6,781,596, 6,816,276, 6,825,943, 6,832,865, 6,836,342, RE33,973, RE36,947, D341,131, D406,117, D416,550, D417,864, D419,185, D426,206, D439,851, D444,793.

Trademarks

The APPS logo, AutoCal, Auto-Count, Balance, Best, the Best logo, BESTColor, BioVu, BioWare, ColorPASS, Colorproof, ColorWise, Command WorkStation, CopyNet, Cretachrom, Cretaprint, the Cretaprint logo, Cretaprinter, Cretaroller, DockNet, Digital StoreFront, DocBuilder, DocBuilder Pro, DocStream, DSFdesign Studio, Dynamic Wedge, EDOX, EFI, the EFI logo, Electronics For Imaging, Entrac, EPCount, EPPhoto, EPRegister, EPStatus, Estimate, ExpressPay, Fabrivu, Fast-4, Fiery, the Fiery logo, Fiery Driven, the Fiery Driven logo, Fiery JobFlow, Fiery JobMaster, Fiery Link, Fiery Prints, the Fiery Prints logo, Fiery Spark, FreeForm, Hagen, InkIntensity, Inkware, Jetrion, the Jetrion logo, LapNet, Logic, MiniNet, Monarch, MicroPress, OneFlow, Pace, PhotoXposure, PressVu, Printcafe, PrinterSite, PrintFlow, PrintMe, the PrintMe logo, PrintSmith, PrintSmith Site, Printstream, Print to Win, Prograph, PSI, PSI Flexo, Radius, Rastek, the Rastek logo, Remoteproof, RIPChips, RIP-While-Print, Screenproof, SendMe, Sincolor, Splash, Spot-On, TrackNet, UltraPress, UltraTex, UltraVu, UV Series 50, VisualCal, VUTEk, the VUTEk logo, and WebTools are trademarks of Electronics For Imaging, Inc. and/or its wholly owned subsidiaries in the U.S. and/or certain other countries.

All other terms and product names may be trademarks or registered trademarks of their respective owners and are hereby acknowledged.

Table of Contents

Introduction	4
Overview	4
Contact Information	4
Overview	5
Opening the Shipping Module	5
Shipping from Print and Mail Estimating	5
Shipping from Print Estimating.....	5
Job Shipments	6
Adding a Shipment on a Packing Slip	7
Printing Shipping Labels	10
Shipping Reports	12
Production Reports > Shipped and Mailed Pieces by Date	12
Production Shipping Reports > Shipping Report by Due Date	13
Production Shipping Reports > Bill of Lading.....	14
Production Shipping Reports > Final Shipped By Date	15
Production Shipping Reports > Shipments By Shipped Date Report	16
Production Shipping Reports > Shipping	17
Security Event to Prevent Deletion of Shipments Marked Final Shipped	17

Introduction

Overview

This document provides user instructions for the EFI PrintStream .Net Shipping Queue.

Contact Information

EFI Support


US Phone:	855.334.4457 (first select option 3, then press option 8, then press option 1)
US Fax:	415.233.4157
US E-mail:	printstream-support@efi.com

Regular Service Desk hours are 8:00 AM to 7:00 PM Central Time, Monday – Friday. Outside of these hours, you may leave a voice mail message and an on-call support representative will be paged. Response time is based on the severity of the issue.

Note For problems involving infrastructure (i.e., computers, networks, operating systems, backup software, printers, third-party software, etc.), contact the appropriate vendor. EFI cannot support these types of issues.

EFI Professional Services

US Phone:	651.365.5321
US Fax:	651.365.5334
E-Mail:	ProfessionalServicesOperations@efi.com



Overview

This document provides information on using the Shipping module or shipping through the Estimating modules.

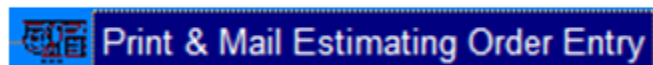
Opening the Shipping Module

Shipping from Print and Mail Estimating

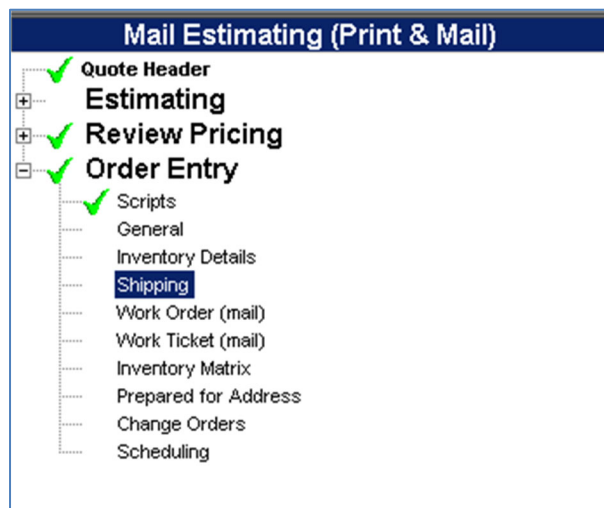
This section describes how to ship via the Mail Estimating or Print and Mail Estimating order entry systems.

To ship from the Print or Mail Estimating

1. Open Mail Estimating/Order Entry or Print and Mail Estimating/Order Entry.

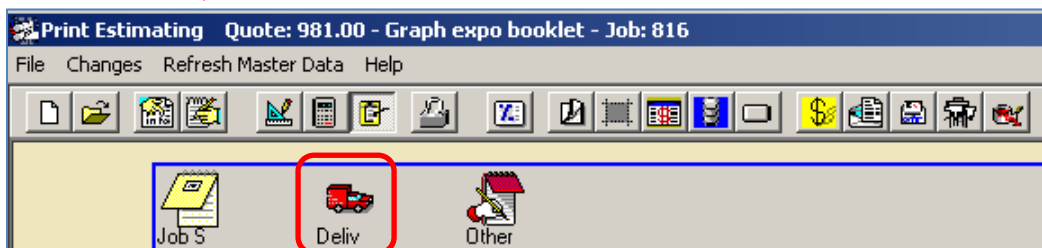


2. Open the job and expand **Order Entry** then select **Shipping** to open the Shipping module.



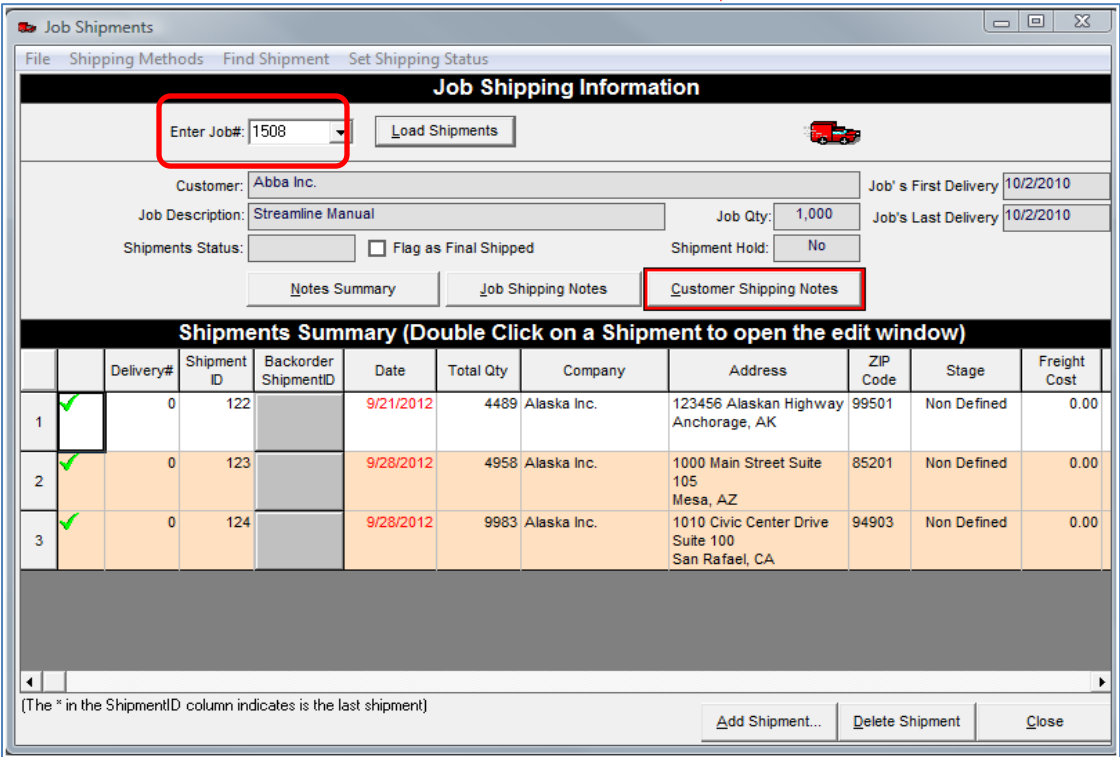
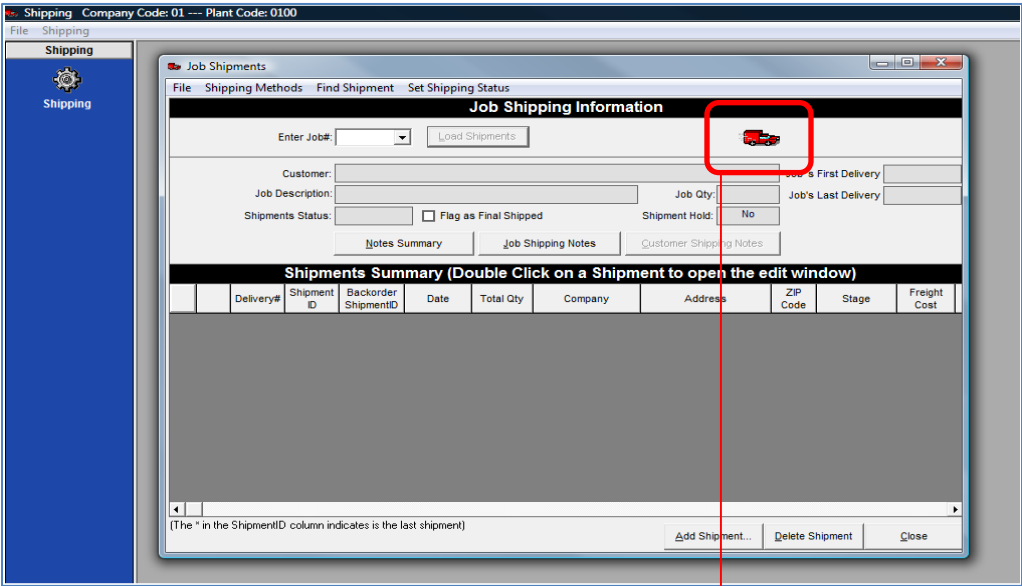
Shipping from Print Estimating

This section describes how to ship via the Print Estimating system. Open Print Estimating/Order Entry. Then open a job and click **Deliv** to open the Shipping module.



Job Shipments

To open, edit, or add shipments on a job, click on the shipping icon. This will open the Job Shipments screen. Type in the job number and press <Enter>.



Adding a Shipment on a Packing Slip

This section describes how to add or edit a shipment on a Packing Slip. The 'Shipping' module was designed for printers who ship their jobs immediately after completion and do not need to warehouse inventory. If you require warehouse transactions and need balances affected by the shipment use the 'Ship to Customer' module.

Note You can also view an online demo of this feature here:

<http://www.streamlinesolutions.com/psuser/Camtasia1/S013002XX/index.html>

To add/edit a Packing Slip Shipment

1. Select **Customer Shipping Notes** to view special shipping instructions. This option is set up in Master File > Customer. For example, always ship 2-Day Air unless otherwise specified.

The screenshot shows the 'Shipping' module window. The 'Job Shipping Information' section includes fields for 'Enter Job#', 'Customer', 'Job Description', 'Shipments Status', 'Job Qty', 'Job's First Delivery', 'Job's Last Delivery', and 'Shipment Hold'. The 'Customer Shipping Notes' tab is selected and highlighted with a red box. Below this is the 'Shipments Summary' table, which has columns for Delivery#, Shipment ID, Backorder ShipmentID, Date, Total Qty, Company, Address, ZIP Code, Stage, and Freight Cost. A red box also highlights the 'Customer Shipping Notes' button at the bottom of the summary section.

Delivery#	Shipment ID	Backorder ShipmentID	Date	Total Qty	Company	Address	ZIP Code	Stage	Freight Cost
0	122		9/21/2012	4489	Alaska Inc.	123456 Alaskan Highway Anchorage, AK	99501	Non Defined	0.00

2. Click **Add Shipment**.

The screenshot shows the 'Job Shipments' window. The 'Enter Job#' field is set to 450. The 'Customer' field is 'Boulder Outdoor Center' and the 'Job Description' is 'New Customers'. The 'Shipments Status' is 'No' and the 'Shipment Hold' is 'No'. The 'Customer Shipping Notes' tab is selected and highlighted with a red box. Below this is the 'Shipments Summary' table, which has columns for Qty, Date, Delivery#, Company, Address, ZIP Code, and Stage. A red box also highlights the 'Add Shipment...' button at the bottom of the window.

Qty	Date	Delivery#	Company	Address	ZIP Code	Stage
-----	------	-----------	---------	---------	----------	-------

3. In the Editing Shipment screen the customer's contact and address information is displayed. Edit it as needed.

Editing Shipment

Packing Slip#: Shipment ID: 77 Date: 11/23/2009 Time: 12:38:00 PM ☐ Ready To Ship ☐ Last Shipment

Cust. Acct#: NELS Customer: Nelsen, Esparza and Forney

Job#: 1222 Job Desc.: Adopt a Puppy Program

Contact: Pamela Truman Responsible: Acct#:

Phone: 402-555-1212 Email:

☒ Hold Contact when selecting a new address

Contact: Diego Esparza Ship Method:

Phone: 402-555-1212 Ship Type: Ship To

Company: Nelsen, Esparza and Forney Stage:

Address: 5331 W. Dodge Road Billing Type:

City: LINCOLN State: NE Cost Code:

County: LANCASTER Zip: 68524 Ship Cost:

Country: USA Tracking#:

Weight:

Packages:

No. of Skids:

Cust. PO:

Shipment Items									
	Description	Version	Bind Style	ISBN	Estimated Qty	Actual Qty	Back Order	Item Type	T
1	Adopt a Puppy Program				50000	50000			

(Double click on a shipment item# to edit the packages)

- **Select Address:** Click to choose any established address other than the default shipping address from Master File Customer.
- **Responsible:** Enter the person responsible for the shipment.
- **Email:** Enter the email address for the responsible person receiving notification of the shipment.
- **Ship Method (optional):** Choose the ship method from a list of previously defined methods of shipment. Prints on Packing Slip.
- **Ship Type:** Choose the type of shipment (ship to or pickup).
- **Stage:** Enter the current stage or status of this shipment such as first, second final shipment) from the user defined options.
- **Billing Type (optional):** Choose the billing type such as Third Party, Prepaid or Collect. Prints on Packing Slip.
- **Cost Code:** Choose from a list of defined cost codes using the dropdown menu.
- **Ship Cost:** Enter the cost of the shipment by clicking on the ellipsis button and entering the Shipping Instrument or activity code, the dollar amount of the freight or shipping charges and the date entered.
- **Tracking #:** Enter the tracking number (i.e. tracking number assigned for this shipment by the shipping company).
- **Acct#:** Enter the account number for billing or click on the ellipsis button to set up a third-party billing for this shipment.
- **Weight:** Enter the weight of the shipment.
- **No. of Skids:** Enter the number of skids.
- **Cust. PO:** Enter the customer's Purchase Order number if provided.

4. On the same screen complete the **Shipment Items** fields.
 - **ISBN:** A unique alpha/numeric code that prints on the packing slip.
 - **Estimated Quantity:** Enter the estimated quantity of the shipped item.
 - **Actual quantity:** Enter the actual quantity of the shipped item.
 - **Backorder:** This value is calculated by subtracting the Actual from the Estimated quantities. A Backorder will be created.
 - **Item Type:** Select an item type to prints on the packing slip. The item type is user defined and is set up using Report 711 in Master File Reports.
 - **Labels:** See the next section below for details.
5. (optional) Click **Add Ship Items** to insert an additional line under Shipment Items. You can also click **Delete Line Items** to remove items.
6. (optional) Click **Add Multiple Items** to add multiple components of the same job to this shipment.
7. (optional) You can mark this shipment as the **Last Shipment**. Click the **Internal Packing Slip Notes** and **Customer Packing Slip Notes** icons to add, edit or delete those. Click **Ready to Ship** if this shipment is ready to go but is not shipping when the shipment screen is completed.

Click **Save Shipment** if you are not ready to complete the transaction.

8. Click **Ship** and then select Yes (Final Shipment) or No (Partial Shipment).

Your Shipment has been created.

	Delivery#	Shipment ID	Date	Total Qty	Company	Address	ZIP Code	Stage	Freight Cost	Batch #
1	0	1	7/29/2008	0	Joe's Gym	Gym Street Charlotte, NC	28217	Non Defined	0.00	
2	1250	2	7/29/2008	0	Joe's Gym	Gym Street Charlotte, NC	28217	Advanced	0.00	

Printing Shipping Labels

This section describes how you would print shipping labels.

Note You can also view an online demo of this feature here:
<http://www.streamlinesolutions.com/psuser/Camtasia1/S013002XX/index.html>

To print shipping labels

1. From the Editing Shipment window click **Print** under the Shipment Items section.

Editing Shipment

Packing Slip#: [] Date: 1/18/2006 Time: 10:11:00 AM

Cust. Acct#: 9876543 Customer: Boulder Outdoor Center

Job#: 450 Job Desc.: New Customers

Contact: Kathy DiPaolo [] ☒ Hold Contact Responsible: []

Phone: [] Ship Method: Driver []

Company: Boulder Outdoor Center Tracking#: [] Acct#: []

Address: 4355 Trophy Drive Ship Cost: 0.00 Weight: 0

City: Boothwyn Ship Type: Ship To No. of Skids: 0

County: [] State: pa Zip: 19061 Edit Addresses Stage: Balance Customer PO: []

Billing Type: Third Party

	Description	ISBN	Estimated Quantity	Actual Quantity	Back Order	Item Type	Tax	Labels
1	New Customers		10000	5000	5000			Print

(Double click on a shipment item# to edit the packages)

Ship Cancel Shipment Add Shipment Save Delete Close

2. In the Print Labels window select the following:
 - **Labels Configuration:** Option to print a return and/or edit address, enter label notes, and add the country name in the ship to address.
 - **Label Formats:** Select the format type for the label.
 - **Preview Window:** Select to print preview on screen or to send the label to the printer.

Print Labels

Labels Configuration

☒ Return Address Edit Address

☐ Country Name in the Ship To Address

Country: USA

Label Notes: []

Output

☒ Preview Window ☐ Printer

Label Formats

☒ Mailing Label (Without pack details)

☐ Box Label (Without ship to address)

☐ Combo Label

☐ Print Quantity ☐ Print Carton No.

	Description to appear on label	Pack Qty.	Packages	Labels#
1	Insurance Guidelines Worldwide	67	67	67
2	Insurance Guidelines Worldwide	11	1	1

Select Printer... OK Cancel

Note To enter/edit packages double-click the line number next to the label Description. Enter per pack, # of packages, weight and click **Save**

3. In **Labels#** enter the number of labels you want to print per sheet and click **OK**.

Print Labels

Labels Configuration

☒ Return Address [Edit Address](#)

☐ Country Name in the Ship To Address

Country: USA

Label Notes:

	Description to appear on label	Pack Qty.	Packages	Labels#
1	Insurance Guidelines Worldwide	67	67	67
2	Insurance Guidelines Worldwide	11		1

Label Formats

☒ Mailing Label (Without pack details)

☐ Box Label (Without ship to address)

☐ Combo Label

☐ Print Quantity ☐ Print Carton No.

Output

☒ Preview Window ☐ Printer

[Select Printer...](#) **OK** [Cancel](#)

Note There is also an option to print a packing slip in the Edit Shipment window by selecting the Printer icon (upper right).

Shipping Reports

There are several shipping reports you can print.

Production Reports > Shipped and Mailed Pieces by Date

This report provides information that is available in the Mailed Pieces by Date Report but includes other fields and was originally created as a custom report for an EFI customer. All customers have access to this report but cannot edit the report. You must use a password to enter the report.

To print the *Shipped and Mailed Pieces by Date* report

1. When prompted enter the password is 'mail America'.
2. Select a **Data Range**.
3. Click **Preview** or **Print**.

Streamline Solutions

Shipped and Mailed Pieces by Date

Page 1 of 27

From Date: 9/4/2005

Printed: 9/4/2009

3:14:36PM

To Date: 9/4/2009

For: NORMA

Mailed Pieces

Customer	Job#	Description	Statement Destination	Pcs Shipped	Cost
<u>Mailed Date: 9/25/2006</u>					
Kelly Marketing	735	Data Mail 2	1310	130,000	28,250.00
Sub Total for 9/25/2006				130,000	28,250.00
<u>Mailed Date: 6/15/2007</u>					
Leah	1349	Copy of test postage	1430	1,000	141.00
Sub Total for 6/15/2007				1,000	141.00
<u>Mailed Date: 2/22/2008</u>					
Leah	1206	test	1326	9,999	2,180.00
Sub Total for 2/22/2008				9,999	2,180.00
<u>Mailed Date: 2/29/2008</u>					
Leah	1225	test 3600 R	1354	1,000	2,515.00

Production Shipping Reports > Shipping Report by Due Date

This report pulls all quantities flagged 'partial' or 'final' shipped using the 'Shipping' module (red truck icon).

The report allows queries, within a date range, of all shipments, shipments for one customer or shipments for one job. The report can be queried for on planned shipments, actual shipments and/or non-shipments.

To print the Shipping Report by Due Date report

1. Select the **Shipping Report** icon.

Production Reports for the Company: (01) Streamline Solutions - Plant Code: 0100 01 San Rafael

Reports

- Change Company/Plant
- Job Reports
- Shipping And Reports**
 - Shipping Report** (highlighted)
 - Bill of Lading
 - Final Shipped By Date
 - Shipments By Shipped Date
 - Shipping

Shipping Report

Report Type

- ☒ Shipments By Job Due Date
- ☐ Shipments By Shipped Date (Includes shipped shipments only)
- ☐ Shipments for Job#:

Customer Selection (* Leave blank to get all customers)

Group By

- ☒ CSR
- ☐ Salesrep

Name:

Job Due Date Range

Date From: 2/1/2013 Date To: 2/12/2013

Ship Type: Both

Options

- ☐ Shipped Jobs Only
- ☐ Non Shipped Jobs Only
- ☒ Both

Include

- ☒ Shipped Shipments
- ☐ Planned Shipments
- ☐ Cancelled Shipments
- ☒ Include Notes
 - ☒ Customer P. Slip Note
 - ☐ Internal P. Slip Note

Preview Print Close

2. In the Shipping Report window select a **Report Type**.
3. Select a **Customer #** or leave blank for ALL customers.
4. Select a **Job Due Date Range**.
5. Select **Sorting Options** and choose to include planned or canceled shipments.
6. Select **Preview** or **Print**.

Shipping Report By Due Date

Streamline Solutions

Selection Criteria:

Printed: 3/4/2009 3:17:09PM

From Date: 3/1/2008 To Date: 3/4/2008 For: NORMA

Ship Type: Pickup And Ship To

Job# Job Description Due Date Customer Job Qty Job Ship Notes Customer Ship Notes

<CSR NOT ASSIGNED>

1987 test 10/6/2008 Zip plus 4 customer 10,000

Packing Slip#	No.	Shipment ID	Ship To	Shipped Qty	Cost	Shipped Cost	Carrier	Billing Type	Weight	Status	Item Description	Item Type	Planned Qty	Quantity Packing Profile
296	1	296	Zip plus 4 customer 122 Main St Ste 100A POCATELLO, ID 83204	10,000	0.00	4,000	UPS 2nd Day Air	0.00	500	0		merchandise -	4,000	4,000
Totals														
1990	FF Monthly	12/20/2008	Harborside's do not touch	1										

Packing Slip#	No.	Shipment ID	Ship To	Shipped Qty	Cost	Shipped Cost	Carrier	Billing Type	Weight	Status	Item Description	Item Type	Planned Qty	Quantity Packing Profile
309	1	309	FF Monthly Harborside's do not touch 1 Main Street POCATELLO, ID 83204	1	0.00	0.00	1	0.00	500	0		merchandise -	1	1
301	2	301	Rob Alaska Inc. 100 West 22nd St Salem FRANKS Bldg, CA 94115-1224	50,000	0.00	50,000	UPS Ground	Collect	2,000	0		merchandise -	50,000	50,000
Pack Slip Note 1: Ship notes														
302	3	302	Rob Alaska Inc. 100 Main Street Suite 100 OAKLAND, CA 94612	100,000	0.00	100,000	UPS Ground	Collect	2,000	0		merchandise -	100,000	100,000
303	4	303	Rob	50,000	14.16	50,000	UPS Ground	Collect	2,000	0		merchandise -	50,000	50,000

Production Shipping Reports > Bill of Lading

This report collects one or more shipments, from one or more jobs, and prints a Bill of Lading. Shipments are listed by packing slip number, with the option to include a tracking number, number of skids and/or packages and weight. The report restricts the addition of a shipment to more than one Bill of Lading. There is a search tool for existing Bills of Lading, which searches by customer, date and job number.

To print the Bill of Lading report

1. Select the **Bill of Lading** icon.

2. Select the number of the **Bill of Lading** or search for one using Search button (binoculars.)
3. Choose to **Delete**, **New BOL**, or **Edit BOL**.
4. (Optional) Enter Special Instructions if needed.
5. Select **Preview** or **Print**.

		streamline solutions 100 Smith Ranch Road Suite 124 San Rafael, CA, 94903 T 415.462-7225 F 415.233-4157 www.printstream.com	<h2>Bill of Lading # 10</h2>																		
<hr/>																					
Deliver to: Leah VanWynsberghe Leah Hawaii WAKE ISLAND, HI 96898 T: Hawaii phone		Delivery Date 10/17/2008 <hr/> Billing Type <hr/> Carrier UPS 2nd Day Air																			
<table border="1"> <thead> <tr> <th>Packing Slip#</th> <th>Tracking#</th> <th>Skids</th> <th>Packages</th> <th>Weight</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>307</td> <td></td> <td>0</td> <td></td> <td>0.00</td> <td>test 18853 - merchandise</td> </tr> <tr> <td colspan="2">Totals</td> <td>0</td> <td>0</td> <td>0.00</td> <td></td> </tr> </tbody> </table>	Packing Slip#	Tracking#	Skids	Packages	Weight	Description	307		0		0.00	test 18853 - merchandise	Totals		0	0	0.00				
Packing Slip#	Tracking#	Skids	Packages	Weight	Description																
307		0		0.00	test 18853 - merchandise																
Totals		0	0	0.00																	

Production Shipping Reports > Final Shipped By Date

The Final Shipped by Date report is generated for all jobs marked Final Shipment between the selected date range.

Note A job is flagged Final Shipped in the Shipping module.

To print the Final Shipped By Date report

1. Select the **Final Shipped By Date** icon.

Production Reports for the Company : (01) Streamline Solutions - Plant Code: 0100 01 San

Reports

- Change Company/Plant
- Job Reports
- Shipping And Reports
- Shipping Report
- Bill of Lading
- Final Shipped By Date**

Final Shipped By Date Report

Description : Report will be generated for all the Final Shipments for the selected Date Range.

Shipped Date Selection

Date From : 8 / 4 / 2009 Date To : 9 / 4 / 2009

Preview Print Close

2. Select a date range for the report (**Date From** and a **Date To**.)
3. Select **Preview** or **Print**.

any : (01) Streamline Solutions - Plant Code: 0100 01 San Rafael - [Final Shipped By Date]									
1 of 1	96%	Total 8	100%	8 of 8					

Streamline Solutions

Final Shipped by Date Report

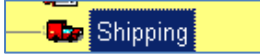
Printed : 9/4/2009 3:22:33PM

From Date : 8/4/2009 To Date : 9/4/2009

Shipped Date	Cust A/C#	Customer Name	Job#	Description	Pack Slip	Destination	Quoted Price \$
8/26/2009	001	Sunshine, LLC.	4022	Fall Advertiment	638	SALT LAKE CITY, 84123	178.00
8/28/2009	LEAH	Leah's Account	4032	Test Add Job Shipments option	648	DRAPER, 84020	3,847.16
8/28/2009	LEAH	Leah's Account	4032	Test Add Job Shipments option	649	TAYLOR, 48180	
8/28/2009	LEAH	Leah's Account	4032	Test Add Job Shipments option	650	.	
8/28/2009	LEAH	Leah's Account	4032	Test Add Job Shipments option	651	DRAPER, 84020	
9/2/2009	LEAH	Leah's Account	3182	Test some shipping	652	DRAPER, 84020	0.00
9/2/2009	0200	ABC Company	4037	XML Template Sample	653	SOUTH SALT LAKE, 84107	112,852.32
9/2/2009	0200	ABC Company	4037	XML Template Sample	654	SOUTH SALT LAKE, 84107	
116,877.48							

Production Shipping Reports > Shipments By Shipped Date Report

This report pulls all shipped quantities flagged 'partial' or 'final' shipped using the 'Shipping' module (red truck icon).



The report allows queries, within a date range, of all shipments, shipments for one customer or shipments for one job and can be filtered by carrier or CSR. You can choose to include or exclude item details and sample shipments. The report also displays packing slip number, responsible party, freight cost, weight and destination.

To print the Shipment By Shipped Date report

1. Select the **Shipment By Shipped Date** icon.

2. Select a date range for the report (**Date From** and a **Date To**.)
3. (optional) Choose to filter on a particular **Job#** or **Customer#**.
4. Select to include **Partially Shipped Only**, **Final Shipped Only**, or **Both**.
5. (optional) Choose to **Filter By Carrier** or **Filter By CSR**.
6. (optional) You can choose to **Include Items Details** or to **Exclude Sample Shipments**.
7. Select **Preview** or **Print**.

Without Item Details

Streamline Solutions

Shipments By Shipped Date Report

Printed: 9/4/2009 4:56:17PM

From Date: 8/1/2009 To Date: 9/4/2009

Pack Slip	Shipped Job#	Date	Responsible	Customer	Description	Skids	Freight Cost	Qty Shipped	Weight	Carrier	Destination	Notes
House Account												
638	4022	8/26/2009	RANDON	Sunshine, LLC.	Fall Advertisement	0	75.00	1,000	0.00		SALT LAKE CITY, UT 84123	
						0	75.00	1,000	0.00			

With Item Details

Streamline Solutions

Shipments By Shipped Date Report

Printed: 9/4/2009 4:55:40PM

From Date: 8/1/2009

To Date: 9/4/2009

Pack Slip	Shipped Job#	Date	Responsible	Customer	Description	Skids	Freight Cost	Qty Shipped	Weight	Carrier	Destination	Notes									
House Account																					
638	4022	8/26/2009	RANDON	Sunshine, LLC.	Fall Advertisement	0	75.00	1,000	0.00		SALT LAKE CITY, UT 84123										
					<table> <tr> <th>Description</th> <th>ItemType</th> <th>PlannedQty</th> <th>Quantity</th> </tr> <tr> <td>Fall Advertisement</td> <td></td> <td>1,000</td> <td>1,000</td> </tr> </table>	Description	ItemType	PlannedQty	Quantity	Fall Advertisement		1,000	1,000								
Description	ItemType	PlannedQty	Quantity																		
Fall Advertisement		1,000	1,000																		
						0	75.00	1,000	0.00												

Production Shipping Reports > Shipping

This icon provides the same shipping screen that is found in the 'Shipping' module (red truck icon) and in the Shipping tree branch in Print and Mail Estimating where job shipments may be entered.

Security Event to Prevent Deletion of Shipments Marked Final Shipped

There is a security event that can be set to prevent deleting shipments that have been shipped.

Security setting 'Delete Shipment' – set at No Read or Write

	Security Event	Program	Read	Write	Update	Delete	Author	Admin
526	Sales vs Customer Budget by	SalesSupport	✓	✓				
527	Save Permanent Print Template	Save Permanent Print T	✓	✓				
528	Sched PO Print	Scheduled Purchasing	✓	✓				
529	Sched PO Preview	Scheduled Purchasing	✓	✓				
530	Schd PO - Paper Rsv - Chang	Scheduled Purchasing	✓	✓				
531	Schd PO - Paper Rsv - Create	Scheduled Purchasing	✓	✓				
532	Scheduled Purchasing	Scheduled Purchasing	✓	✓				
533	SchedulerAdmin	Scheduler						
534	MRScheduler	Scheduler	✓	✓				
535	MRFinite	Scheduler	✓	✓				
536	DeleteShipment	Shipping						
537	TimeSheetOpenForAllEmplo	TimeSheet	✓	✓				

When you try to delete a shipment that has been marked as 'Final Shipped,' PrintStream will generate the following messages and will not allow the shipment to be deleted.

Job Shipments

File Shipping Methods Find Shipment Set Shipping Status

Job Shipping Information

Enter Job#: 7219 Load Shipments

Customer: Alaska Inc. Job's First Delivery: 3/1/2010

Job Description: TS Test Job Qty: 10,000 Job's Last Delivery: 3/1/2010

Shipments Status: FINAL ☒ Flag as Final Shipped Shipment Hold: No

Notes Summary Job Shipping Notes **Customer Shipping Notes**

Shipments Summary (Double Click on a Shipment to open the edit window)

	Delivery#	Shipment ID	Backorder ShipmentID	Date	Total Qty	Company	Address	ZIP Code	Stage	Freight Cost	Batch #
1	92	280		3/2/2010	10000	Alaska Inc.	123 West Main Suite 7 Provo, UT	84601		0.00	

PSJobShipments

Do you confirm to delete the shipment in the row 1 and all the associated items?

OK Cancel

PSJobShipments

You don't have permission to delete shipments.

OK

PSJobShipments

Could not delete the specified shipment.

OK