

How to Add a Ship Via Entity

1. On the user's menu panel, go to Common Info then click **Ship Via**
2. On Ship Via search screen, click **New** button
3. Enter details on **Create New Entity** screen then click **Find Duplicates**
4. On Duplicate Entities screen, click the **Add** toolbar button
5. The default entity types of Ship Via are Ship Via and Vendor. Enter the necessary details on the screen. Note that **Name**, **Contact Name**, **Location Name**, are required fields.

The screenshot shows the 'Ship Via - ShipVia A' form with the 'General' tab selected. The form contains various fields for entity information. The 'Name' field is filled with 'ShipVia A'. The 'Contact Name' is 'Ship Con', 'Suffix' is empty, and 'Email' is empty. The 'Class' is set to 'Ship Loc'. The 'Location Name' is 'Ship Loc', and the 'Printed Name' is 'ShipVia A'. The 'Search Address' is 'Enter address to search...', and the 'Address' is 'Fort Wayne Avenue'. The 'City' is 'Indianapolis', 'State' is 'IN', 'Zip/Postal' is empty, 'Country' is 'United States', 'Time Zone' is '(UTC-04:00) Eastern Daylight Time', and 'Language' is 'English'. The 'Document Delivery' is empty, 'External ERP ID' is empty, and 'Origination Date' is '10/15/2018'. The 'Line of Business' is empty. The 'Contact Information' section has a table with columns 'Type' and 'Details'. The 'Internal Notes' section is empty. The status bar at the bottom indicates '1 of 1' and 'Refresh'.

6. Click the **Ship Via** tab and enter the necessary details. Note that **Ship Via**, **Ship Service**, and **Freight Billed By** are required fields.

The screenshot shows the 'Ship Via - ShipVia A' form with the 'Ship Via' tab selected. The form contains fields for ship via details. The 'Ship Via' field is filled with 'ShipVia A'. The 'Ship Service' is 'DHL Express 1030'. The 'Federal ID' is 'FED01', 'Transporter License' is 'TL01', 'Motor Carried IFTA' is 'MCI', 'Transportation Mode' is 'Summary Information', 'Freight Billed By' is 'Others', and 'Company Owned Carrier' is checked. The status bar at the bottom indicates '1 of 1' and 'Refresh'.

7. Before saving the setup, all required fields should be filled in.

8. Click **Save** toolbar button. Vendor Entity will also be created

Ship Via - ShipVia A

New Save Search Delete Undo Additional Close

Entity Ship Via General Messages Activities Attachments Audit Log Entity Type

+ Insert X Remove Export View Filter (F3)

☐ Type

☐ Ship Via

☐ Vendor

☐

1. On the user's menu panel, go to Common Info then click **Ship Via**
2. On Ship Via search screen, click **New** button

Create New Entity

Add Find Duplicates Close

Details

This screen can be used to add a new Entity if no duplicate entity exists or it can be used to check for Duplicate Entities and merge them.

Name:

Contact:

Email:

Zip/Postal: ▼

Country: Philippines ▼

Phone:

Address:

? ? ? Ready

3. Enter details on **Name, Contact, Email, Phone, Address, Zip/Postal**



To go to Entity screen without checking for duplicates click Add button or Close button on Create New Entity screen

4. Click **Add** toolbar button

- The default entity types of Ship Via entity is Ship Via and Vendor. Enter the necessary details on the screen. Note that **Name**, **Contact Name**, **Location Name**, **Timezone**, **Terms** are required fields.

Entity - 158-Ent

New Save Search Refresh Undo Additional Close

Entity General Vendor Split Farm Ship Via Locations Contacts Comments (0) History Attachments (0) Messages Custom Audit Log (9)

Name: 158-Ent Phone: Entity No: 0001005142

Contact Name: 158-Ent Email: 158-Ent@irely.com Mobile:

Location Name: 158-Ent Location Origination Date: 5/26/2016

Address: 158-Ent address

Zip/Postal: 46772 City: MONROE

State/Province: IN Country: United States

Timezone: (UTC-11:00) Coordinated Universal Time-11

Document Delivery:

Print 1099: ☐ 1099 Name:

1099 Form:

1099 Type:

Federal Tax ID:

W9 Signed: ☐

Internal Notes:

Contact Information

+ Insert X Remove Types

☐ Type Details

Entity Type

+ Insert X Remove

☐ Entity Type

☒ Ship Via

☒ Vendor

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- Click the **Ship Via** tab and enter the necessary details. Note that **Ship Via** and **Ship Service** are required fields.

Entity - 158-Ent

New Save Search Refresh Undo Additional Close

Entity General Vendor Split Farm Ship Via Locations Contacts Comments (0) History Attachments (0) Messages Custom Audit Log (9)

Detail Tariff

Ship Via: 158-Ent

Ship Service: DHL Express 1030

Federal ID: 001

Transporter License: 001

Motor Carried IFTA: Test

Transportation Mode: Truck

Freight Billed By: Vendor

- Before saving the setup, all required fields should be filled in.
- Click **Save** toolbar button.

- On the user's menu panel, go to Common Info then click **Ship Via**
- On Ship Via search screen, click **New** button

Create New Entity

Add Find Duplicates Close

Details

This screen can be used to add a new Entity if no duplicate entity exists or it can be used to check for Duplicate Entities and merge them.

Name:

Contact:

Email:

Phone:

Address:

Zip/Postal:

Ready

- Enter details on **Name**, **Contact**, **Email**, **Phone**, **Address**, **Zip/Postal**



To go to Entity screen without checking for duplicates click Add button or Close button on Create New Entity screen

- Click **Add** toolbar button
- The default entity types of Ship Via entity is Ship Via and Vendor. Enter the necessary details on the screen. Note that **Name**, **Contact Name**, **Location Name**, **Timezone**, **Terms** are required fields.

Entity - 113-Ent

New Save Search Refresh Delete Undo Additional Close

Entity Vendor Split Farm Ship Via Locations Contacts Comments (0) History Attachments (0) Messages Custom Audit Log (0)

Name: 113-Ent Phone: 123-456 Entity No:

Contact Name: 113-Ent Email: 113-Ent@irely.com Mobile:

Location Name: 113-Ent Location Origination Date: 04/18/2016

Address: 113-Ent address

Zip/Postal: 46772 City: MONROE

State/Province: IN Country: United States

Timezone: (UTC-11:00) Coordinated Universal Time-11

Print 1099: ☐ 1099 Name:

1099 Form:

1099 Type:

Federal Tax ID:

W9 Signed:

Internal Notes:

Contact Information

+ Insert X Remove Types

☐ Type Details

Entity Type

+ Insert X Remove

☐ Entity Type

☐ Vendor

☒ Ship Via

User Portal

Portal Access: ☐ Portal Admin: User Role

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- Click the **Ship Via** tab and enter the necessary details. Note that **Ship Via** and **Ship Service** are required fields.

Entity - 113-Ent

New Save Search Refresh Delete Undo Additional Close

Entity Vendor Split Farm Ship Via Locations Contacts Comments (0) History Attachments (0) Messages Custom Audit Log (0)

Detail Tariff

Ship Via: 113-Ent Ship

Ship Service: DHL Express 1030

Federal ID: 0100

Transporter License: 1001

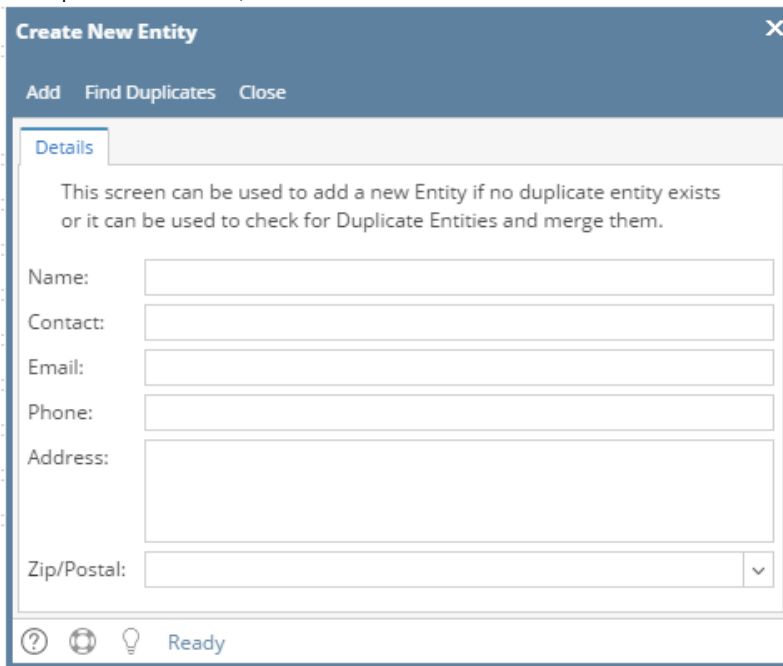
Motor Carried IFTA: Test

Transportation Mode: Truck

Freight Bill By: Vendor

- Before saving the setup, all required fields should be filled in.
- Click **Save** toolbar button.
- On the user's menu panel, go to Common Info then click **Ship Via**

2. On Ship Via search screen, click **New** button



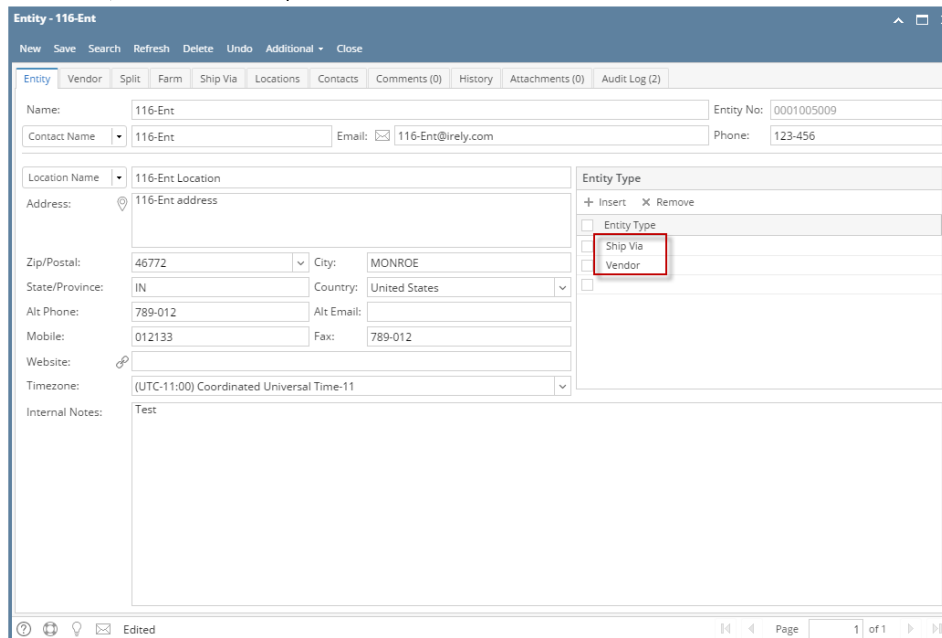
The 'Create New Entity' dialog box has a title bar with a close button (X). Below the title bar are three buttons: 'Add', 'Find Duplicates', and 'Close'. The 'Details' tab is selected, showing a text area with instructions: 'This screen can be used to add a new Entity if no duplicate entity exists or it can be used to check for Duplicate Entities and merge them.' Below this are input fields for 'Name:', 'Contact:', 'Email:', 'Phone:', 'Address:', and 'Zip/Postal:'. The 'Zip/Postal:' field has a dropdown arrow. At the bottom, there are icons for help, search, and a lightbulb, followed by the word 'Ready'.

3. Enter details on **Name, Contact, Email, Phone, Address, Zip/Postal**



To go to Entity screen without checking for duplicates click Add button or Close button on Create New Entity screen

4. Click **Add** toolbar button
5. The default entity types of Ship Via entity is Ship Via and Vendor. Enter the necessary details on the screen. Note that **Name, Contact Name, Location Name, and Terms** are required fields.



The 'Entity - 116-Ent' screen has a title bar with a maximize, close, and search icon. Below the title bar is a menu bar with 'New', 'Save', 'Search', 'Refresh', 'Delete', 'Undo', 'Additional', and 'Close'. The 'Entity' tab is selected, showing a list of tabs: 'Entity', 'Vendor', 'Split', 'Farm', 'Ship Via', 'Locations', 'Contacts', 'Comments (0)', 'History', 'Attachments (0)', and 'Audit Log (2)'. The 'Entity' tab is active, showing a form with fields for 'Name:', 'Contact Name', 'Email:', 'Phone:', 'Location Name', 'Address:', 'Zip/Postal:', 'City:', 'State/Province:', 'Country:', 'Alt Phone:', 'Alt Email:', 'Mobile:', 'Fax:', 'Website:', 'Timezone:', and 'Internal Notes:'. The 'Entity Type' section has a list of checkboxes for 'Ship Via' and 'Vendor', with 'Ship Via' selected. The 'Internal Notes' field contains the text 'Test'. At the bottom, there are icons for help, search, and a lightbulb, followed by the word 'Edited' and a page indicator 'Page 1 of 1'.

6. Click the **Ship Via** tab and enter the necessary details. Note that **Ship Via** and **Ship Service** are required fields.

The screenshot shows a software window titled "Entity - 116-Ent". At the top is a menu bar with options: New, Save, Search, Refresh, Delete, Undo, Additional, and Close. Below the menu bar is a tabbed interface with tabs for Entity, Vendor, Split, Farm, Ship Via (which is currently selected), Locations, Contacts, Comments (0), History, Attachments (0), and Audit Log (2). Under the "Ship Via" tab, there are two sub-tabs: "Detail" and "Tariff". The "Detail" sub-tab is active, displaying a form with the following fields: "Ship Via:" with a text input containing "116-Ent Ship"; "Ship Service:" with a dropdown menu showing "DHL Express 1030"; "Federal ID:" with a text input containing "001"; "Transporter License:" with a text input containing "Test"; "Motor Carried IFTA:" with a text input containing "Test"; "Transportation Mode:" with a dropdown menu showing "Barge"; and "Freight Billed By:" with a dropdown menu showing "Internal".

7. Before saving the setup, all required fields should be filled in.
8. Click **Save** toolbar button.