

How to Create Inventory Shipment - Direct type > Non-Lot Tracked item is selected

The following will guide you on how to create Inventory Shipment with Direct type. In this illustration also, non-lot tracked item is selected for item to be shipped.

1. There are 2 ways where you can create a new Inventory Shipment.
 - a. From Inventory module > click on **Inventory Shipment** menu. The **Inventory Shipment** search will be shown. Click **New**.

Inventory Shipment - IS-420

Buttons: New, Save, Search, Delete, Undo, Pick List, Print BOL, Invoice, Customer, Warehouse Instructions, Close

Tabs: Details, Charges, Trailer Inspection, Activities, Attachments, Unpost Preview, Post History, Audit Log

Order Type: Sales Contract, Source Type: Scale, Customer: Techntronix, Ship Date: 11/27/2018, Ref. Number: , Req. Arrival: , Frt. Terms: USD, Currency: USD, Shipment No: IS-420

Shipping Details: Shipping Company: , Delivery:

Ship From: 0001-Fort Wayne, 4242 Flagstaff Cove, Fort Wayne, IN, 46815 United States

Ship To: 6644 N. Western Ave., Chicago, IL, 60640 United States

Instructions: , Comments:

Items Table:

Order Number	Sequence	Source No.	Item No.	Description	Charges Link	Order UOM	Order Qty	Customer Storage	Load Contract	Load S
1281	1	1095	CORN	CORN	CL-1	Busheis	10,000			

If there are no existing records yet, upon clicking Inventory Shipment menu, it will open a new Inventory Shipment screen.

- b. From an existing Inventory Shipment transaction, click **New**.

Inventory Shipment

Buttons: Close, Open Selected, New, Export, Columns, View, Items, Categories, Commodities, Locations, Storage Units, Customer

246 records

Search: Shipment Number, Contains, Add Filter, Clear Filters

Shipment Number	Ship Date	Order Type	Source Type	Customer	Customer Name	Currency	Posted
IS-420	11/27/2018	Sales Contract	Scale	0001005095	Techntronix	USD	✓
IS-419	11/26/2018	Sales Contract	Scale	0001005095	Techntronix	USD	✓
IS-418	11/26/2018	Sales Contract	Scale	1005643	Jim Yolevich	USD	✓
IS-417	11/26/2018	Sales Contract	Scale	1005639	Derek Holden	USD	✓
IS-416	11/26/2018	Sales Contract	Scale	1005645	Derek-2	USD	✓
IS-415	11/26/2018	Sales Contract	Scale	1005639	Derek Holden	USD	✓
IS-414	11/26/2018	Sales Contract	Scale	1005645	Derek-2	USD	✓
IS-413	11/26/2018	Sales Contract	Scale	1005643	Jim Yolevich	USD	✓
IS-411	11/26/2018	Sales Contract	Scale	1005618	ABC	USD	✓
IS-410	11/26/2018	Sales Order	None	1005639	Derek Holden	USD	
IS-408	11/08/2018	Sales Contract	Scale	0001005095	Techntronix	USD	✓
IS-407	11/08/2018	Sales Contract	Scale	0001005095	Techntronix	USD	✓
IS-406	11/08/2018	Sales Contract	Scale	0001005095	Techntronix	USD	✓
IS-405	11/06/2018	Sales Contract	Scale	0001005095	Techntronix	USD	✓
IS-404	11/06/2018	Sales Order	None	0001005095	Techntronix	USD	✓

2. The **Inventory Shipment** search will be shown. Click **New**.

Inventory Shipment

Buttons: New, Save, Search, Delete, Undo, Pick List, Print BOL, Post, Customer, Warehouse Instructions, Close

Tabs: Details, Charges, Trailer Inspection, Activities, Attachments, Post Preview, Post History, Audit Log

Order Type: Sales Contract, Source Type: None, Customer: , Ship Date: 12/27/2018, Ref. Number: , Req. Arrival: , Frt. Terms: USD, Currency: USD, Shipment No: Created on Save

Shipping Details: Shipping Company: , Delivery:

Ship From: 0001-Fort Wayne, 4242 Flagstaff Cove, Fort Wayne, IN, 46815 United States

Ship To: , Instructions: , Comments:

Items Table:

Order Number	Sequence	Item No.	Description	Charges Link	Order UOM	Order Qty	Customer Storage	Load Contract	Load Shipped
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3. This will open a new Inventory Shipment screen.
4. In the **Details** tab,
 - a. Select Direct in the **Order Type** field.

The screenshot shows the 'Inventory Shipment - Details' tab. The 'Order Type' field is set to 'Direct'. The 'Source Type' is 'Customer'. The 'Ship Date' is '12/27/2018'. The 'Req. Arrival' is 'Deliver'. The 'Frts. Terms' is 'USD'. The 'Currency' is 'USD'. The 'Shipment No' is 'Created on Save'. The 'Shipping Details' section shows 'Ship From' as '0001-Fort Wayne, 4242 Flagstaff Cove, Fort Wayne, IN, 46815 United States' and 'Ship To' as 'Office, 4242 Flagstaff Cv, Fort Wayne, IN, 46815 United States'. The 'Items' section is empty.

- b. Select the customer for this Inventory Shipment in the **Customer** field.

The screenshot shows the 'Inventory Shipment - Details' tab. The 'Order Type' is 'Direct'. The 'Source Type' is 'Customer'. The 'Customer' field is set to 'ABC Trucking'. The 'Ship Date' is '12/27/2018'. The 'Req. Arrival' is 'Deliver'. The 'Frts. Terms' is 'USD'. The 'Currency' is 'USD'. The 'Shipment No' is 'Created on Save'. The 'Shipping Details' section shows 'Ship From' as '0001-Fort Wayne, 4242 Flagstaff Cove, Fort Wayne, IN, 46815 United States' and 'Ship To' as 'Office, 4242 Flagstaff Cv, Fort Wayne, IN, 46815 United States'. The 'Items' section is empty.

- c. Select Freight Terms in the **Freight Terms** field.

The screenshot shows the 'Inventory Shipment - Details' tab. The 'Order Type' is 'Direct'. The 'Source Type' is 'Customer'. The 'Customer' is 'ABC Trucking'. The 'Ship Date' is '12/27/2018'. The 'Req. Arrival' is 'Deliver'. The 'Frts. Terms' is 'Deliver'. The 'Currency' is 'USD'. The 'Shipment No' is 'Created on Save'. The 'Shipping Details' section shows 'Ship From' as '0001-Fort Wayne, 4242 Flagstaff Cove, Fort Wayne, IN, 46815 United States' and 'Ship To' as 'Office, 4242 Flagstaff Cv, Fort Wayne, IN, 46815 United States'. The 'Items' section is empty.

5. In the **Shipping Details** tab,
 - a. Select the Location from where item/s will be shipped from in the **Ship From** field.



If you would like to always use your user's Location when creating Inventory Shipment, then setup the Default Location from the Users screen.

System Manager > Users > select your user > in the Default Location field select your default location.

The screenshot shows the 'Entity - iRely Admin' window with the 'User' tab selected. The 'User Options' section on the left includes checkboxes for 'Allow User to only Post Transactions they created', 'Administrator User' (checked), 'Disable User', 'User cannot change password', and 'User must change password on next login'. The 'Settings' section on the right includes fields for 'JIRA Username', 'Dashboard Role' (set to 'Administrator'), 'Default Location' (set to '1000-Location A' and highlighted with a red box), and 'Default Role' (set to 'ADMIN'). The 'Approvals' section at the bottom has a 'Require Approval For' checkbox.

The screenshot shows the 'Inventory Shipment' form. The 'Shipping Details' tab is selected. The 'Ship From' field is set to '0001-Fort Wayne' and the 'Ship To' field is set to 'Office'. The 'Ship To' dropdown menu is open, showing the selected option 'Office' and its address: '4242 Flagstaff Cv, Fort Wayne, IN, 46815 United States'. The 'Items' table at the bottom is empty.

b. Select the Customer's location to where item/s will be delivered in the **Ship To** field.

The screenshot shows the 'Inventory Shipment' form with the 'Ship To' dropdown menu open. The 'Ship To' field is set to 'Office' and the dropdown menu is showing the selected option 'Office' and its address: '4242 Flagstaff Cv, Fort Wayne, IN, 46815 United States'. The 'Items' table at the bottom is empty.

6. Enter other relevant inventory shipment information. See [Inventory Shipment - Field Description](#).
7. In the grid area,

- a. Select a non-lot tracked item to be shipped in the **Item No** field. As item is selected, all other item information will automatically be filled in like default Sub Location, Storage Location, UOM, Unit Price and so on.

The screenshot shows the 'Inventory Shipment' form. The 'Order Type' is 'Direct', 'Source Type' is 'None', and 'Customer' is 'ABC Trucking'. The 'Ship Date' is '12/27/2018'. The 'Ship From' location is '0001-Fort Wayne' and the 'Ship To' location is 'Office'. The 'Items' table has one row with 'CORN' selected, showing a quantity of 0 Bushels and a price of 4.7 Bushels.

Item No.	Description	Quantity	Price	Price UOM	Gross/Net UOM
CORN	CORN	0 Bushels	4.7	Bushels	

- b. Enter the quantity of items to be shipped in the **Quantity** field. As you enter the quantity, **Line Total** field will automatically be updated.

The screenshot shows the 'Inventory Shipment' form with the quantity '10 Bushels' entered in the 'Quantity' field. The 'Line Total' field is updated to '47.00'.

Quantity	Price	Price UOM	Gross/Net UOM	Gross	Tare	Net	Line Total
10 Bushels	4.7	Bushels		0	0	0	47.00

- c. Enter other relevant item information. See [Inventory Shipment - Field Description](#).
8. Save the record and post it later or you may directly post this transaction.
- a. Save the record. You can click **Save** or use the shortcut key **Ctrl+S**. In case you miss to save it and you click the **Close** or the **x** button at the top right corner of the screen or use the shortcut key **Alt+X** or **Esc**, i21 will prompt you if you would like to save it before closing the screen.

The screenshot shows the 'Inventory Shipment' form with the record saved. The 'Quantity' field is '10 Bushels' and the 'Line Total' is '47.00'. The status bar at the bottom indicates 'Saved'.

Item No.	Description	Quantity	Price	Price UOM	Gross/Net UOM
CORN	CORN	10 Bushels	4.7	Bushels	

b. Post Inventory Shipment. See [How to Post Inventory Shipment](#).

Inventory Shipment - IS-421

New Save Search Delete Undo Print BOL Unpost Invoice Customer Warehouse Instructions Close

Details Charges Trailer Inspection Activities Attachments Unpost Preview Post History Audit Log

Order Type * Source Type Customer * Ship Date * Ref. Number Req. Arrival Frt. Terms * Currency * Shipment No

Direct None ABC Trucking 12/27/2018 Deliver USD IS-421

Shipping Details Shipping Company Delivery

Ship From * 0001-Fort Wayne
4242 Flagstaff Cove
Fort Wayne, IN, 46815 United States

Ship To * Office
4242 Flagstaff Cv
Fort Wayne, IN, 46815 United States

Instructions
Comments

Items Quality Export View Filter (F3)

Item No. *	Description	Charges Link	Customer Storage	Quantity	Price	Price UOM	Gross/Net UOM	Grade
<input type="checkbox"/> CORN	CORN			10 Bushels	4.7	Bushels		
<input type="checkbox"/>				0	0.0			

1 of 1 Refresh

Inventory Shipment -

New Save Search Delete Undo Print Print BOL Post Recap Customer Warehouse Instructions Close

Details Charges Comments (0) Attachments (0) Audit Log (0)

Order Type: Source Type: Ship Date: Reference Number: Requested Arrival: Customer: Customer Name: Freight Terms: Shipment No:

Direct None 03/14/2016 ABD Inc. ABD Inc. Deliver Created on Save

Shipping Details Shipping Company Delivery

Ship From: 1000-Location A Ship To: Loc01
c/o Luke Castellani
ABC St.

Instructions:
Comments:

Items Split Lots

+ Insert View Item Quality Remove Layout Filter Records (F3)

Item No.	Description	Ownership Type	Sub Location	Storage Location	Quantity	UOM	Weight UOM	Unit Price	Line Total	Grade
<input checked="" type="checkbox"/> item A	non-lot item	Own	Main	M-bin1	10	pound		10.00	100.00	
<input type="checkbox"/>					0			0.00	0.00	