

# How to Create Inventory Shipment - Direct Type > Lot Tracked-Manual item is selected

The following will guide you on how to create Inventory Shipment with Direct type. In this illustration also, lot tracked - manual 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: Pickup, 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: Work: 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

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	Amelia Patricia Colon	USD	✓

2. This will open a new Inventory Shipment screen.

**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: Techntronix, Ship Date: 12/27/2018, Ref. Number: , Req. Arrival: , Frt. Terms: 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. In the **Details** tab,  
a. Select Direct in the **Order Type** field.

The screenshot shows the 'Inventory Shipment - Details' window. The 'Order Type' dropdown is highlighted with a red box and set to 'Direct'. Other fields include 'Source Type' (None), 'Ship Date' (12/27/2018), 'Ref. Number', 'Req. Arrival', 'Frt. Terms' (Deliver), 'Currency' (USD), and 'Shipment No'. The 'Shipping Details' section shows 'Ship From' as 0001-Fort Wayne and 'Ship To' as Office. The 'Items' table at the bottom is empty.

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

The screenshot shows the 'Inventory Shipment - Details' window. The 'Customer' dropdown is highlighted with a red box and set to 'ABC Trucking'. Other fields are the same as in the previous screenshot. The 'Items' table at the bottom is empty.

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

The screenshot shows the 'Inventory Shipment - Details' window. The 'Frt. Terms' dropdown is highlighted with a red box and set to 'Deliver'. Other fields are the same as in the previous screenshots. The 'Items' table at the bottom is empty.

4. 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 Receipt, 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 fields for 'Maximum Number of Origin Screens Allowed' (set to 3) and several checkboxes: 'Allow User to only Post Transactions they created' (unchecked), 'Administrator User' (checked), 'Disable User' (unchecked), 'User cannot change password' (unchecked), and 'User must change password on next login' (unchecked). The 'Settings' section on the right includes '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 which is unchecked.

The screenshot shows the 'Inventory Shipment' screen. The 'Shipping Details' tab is active. The 'Ship From' dropdown is set to '0001-Fort Wayne' and the 'Ship To' dropdown is set to 'Office'. The 'Ship To' dropdown is highlighted with a red box. The 'Items' table at the bottom is empty, showing columns for Item No., Description, Quantity, Price, Price UOM, and Gross/Net UOM.

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

This screenshot is identical to the previous one, showing the 'Inventory Shipment' screen with the 'Ship To' dropdown highlighted by a red box.

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

- a. Select a lot tracked-manual 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' window. The 'Order Type' is 'Direct', 'Source Type' is 'None', and 'Ship Date' is '12/27/2019'. The 'Ship From' location is '0001-Fort Wayne' and the 'Ship To' location is 'Office'. The 'Items' table shows one item: 'CORN-B' with a quantity of 0 lb and a line total of 0.00. The 'Lot Tracking' table is empty.

Item No.	Description	Charges Link	Customer Storage	Quantity	Price	Price UOM	Line Total	Gross/Net UOM
CORN-B	Corn for Blending			0 lb	0	lb	0.00	

- 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' window with the quantity '100 lb' entered for item 'CORN-B'. The 'Line Total' has been updated to '1,000.00'.

Item No.	Description	Charges Link	Customer Storage	Quantity	Price	Price UOM	Line Total	Gross/Net UOM
CORN-B	Corn for Blending			100 lb	10	lb	1,000.00	

- c. Select UOM in the **Weight UOM** field.

The screenshot shows the 'Inventory Shipment' window with the UOM 'lb' selected for item 'CORN-B'. The 'Gross/Net UOM' field is highlighted.

Item No.	Description	Charges Link	Customer Storage	Quantity	Price	Price UOM	Line Total	Gross/Net UOM	Gross
CORN-B	Corn for Blending			100 lb	10	lb	1,000.00	lb	100 lb

- d. Enter other relevant item information. See [Inventory Shipment - Field Description](#).

7. At the bottom of the screen, the Lot Tracking grid will be shown. This grid is shown when item selected is lot tracked.

- a. Select a lot number where the item will be taken from in the **Lot Number** field.

The screenshot shows the 'Inventory Shipment' form. The 'Lot Tracking' section is expanded, showing a table with columns: Lot Number, Available Qty, Ship Qty, Gross, Tare, Net, Storage Unit, and Warehouse Code. The row for 'LOT-1' is highlighted, and the 'Lot Number' field is selected with a red box.

Lot Number	Available Qty	Ship Qty	Gross	Tare	Net	Storage Unit	Warehouse Code
LOT-1	1,000 lb	0 lb	0 lb	0 lb	0 lb	RM Storage	

- b. Quantity shown in the **Ship Qty** field is the same quantity entered from Item grid > Quantity field. Leave this as is if you are to take out that full quantity from this lot number, else enter a ship quantity.

The screenshot shows the 'Inventory Shipment' form. The 'Lot Tracking' section is expanded, showing a table with columns: Lot Number, Available Qty, Ship Qty, Gross, Tare, Net, Storage Unit, and Warehouse Code. The row for 'LOT-1' is highlighted, and the 'Ship Qty' field is selected with a red box, containing the value '100 lb'.

Lot Number	Available Qty	Ship Qty	Gross	Tare	Net	Storage Unit	Warehouse Code
LOT-1	1,000 lb	100 lb	100 lb	0 lb	100 lb	RM Storage	

- c. **Gross, Tare** and **Net** quantity are automatically be filled  
d. Enter other relevant lot 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 titled 'Inventory Shipment - 15-400'. The 'Lot Tracking' section is expanded, showing a table with columns: Lot Number, Available Qty, Ship Qty, Gross, Tare, Net, Storage Unit, and Warehouse Code. The row for 'LOT-1' is highlighted, and the 'Ship Qty' field is selected with a red box, containing the value '100 lb'. The 'Gross' field is also highlighted with a red box, containing the value '100 lb'.

Lot Number	Available Qty	Ship Qty	Gross	Tare	Net	Storage Unit	Warehouse Code
LOT-1	1,000 lb	100 lb	100 lb	0 lb	100 lb	RM Storage	

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

**Inventory Shipment - IS-399**

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

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

Order Type: Direct Source Type: None Customer: ABC Trucking Ship Date: 12/27/2018 Ref. Number: Req. Arrival: Frt. Terms: Deliver Currency: USD Shipment No: IS-399

Shipping Details Shipping Company Delivery

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

Ship To: ABC Trucking  
512 East Washington Avenue  
Madison, WI, 53703 United States

Instructions: Comments:

Items Quality Export View Filter (F3)

Description	Quantity	Price	Price UOM	Line Total	Gross/Net UOM	Gross
Corn for Blending	100 lb	10	lb	1,000.00	Bushels	1.785714 Bushels
	0	0				0

Lot Tracking Export View Filter (F3)

Lot Number	Ship Qty	Gross	Tare	Net	Storage Unit	Warehouse Cargo No.

0.45s Posted 1 of 2 Refresh

**Inventory Shipment - INVSH-26**

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

Details Charges Comments (0) Attachments (0) Audit Log (2)

Order Type: Direct Source Type: None Ship Date: 03/15/2016 Reference Number: Requested Arrival: Customer: ABD Inc. Customer Name: ABD Inc. Freight Terms: Deliver Shipment No: INVSH-26

Shipping Details Shipping Company Delivery

Ship From: 1000-Location A  
100 E Main St

Ship To: Loc01  
c/o Luke Castellan  
ABC St.

Instructions: Comments:

Items Split Lots

+ Pick Lots View Item Layout Filter Records (F3)

Sub Location	Storage Location	Quantity	UOM	Weight UOM	Unit Price	Line Total	Grade	Dock Door	Notes
Main	M-bin1	10	pound	pound	10.00	100.00			
		0			0.00	0.00			

Layout Filter Records (F3)

Lot Number	Ship Qty	Lot UOM	Lot Wgt UOM	Gross	Tare	Net	Storage Location	Warehouse Cargo No.
0315-001	10	pound	pound	10	0	10	M-bin1	
	0			0	0	0		

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