

How to Create Inventory Shipment - Direct Type > Lot Tracked-Serial Number item is selected

The following will guide you on how to create Inventory Shipment with Direct type. In this illustration also, lot tracked - serial number 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

| Order Number | Sequence | Source No. | Item No. | Description | Charges Link | Order UOM | Order Qty | Customer Storage | Load Contract | Load Shipped |
|--------------|----------|------------|----------|-------------|--------------|-----------|-----------|------------------|---------------|--------------|
| 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: 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, 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: Work, 6644 N. Western Ave., Chicago, IL, 60640 United States

Instructions, Comments

| Order Number | Sequence | Item No. | Description | Charges Link | Order UOM | Order Qty | Customer Storage | Load Contract | Load Shipped |
|--------------|----------|----------|-------------|--------------|-----------|-----------|------------------|---------------|--------------|
|--------------|----------|----------|-------------|--------------|-----------|-----------|------------------|---------------|--------------|

3. In the **Details** tab,
a. Select Direct in the **Order Type** field.

The screenshot shows the 'Inventory Shipment - Details' window. The 'Order Type' field is highlighted with a red box and contains the value 'Direct'. The 'Source Type' is 'None', 'Ship Date' is '12/27/2018', 'Ref. Number' is empty, 'Req. Arrival' is empty, 'Frt. Terms' is 'Deliver', 'Currency' is 'USD', and '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' 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' field is highlighted with a red box and contains the value 'ABC Trucking'. The 'Order Type' is 'Direct', 'Source Type' is 'None', 'Ship Date' is '12/27/2018', 'Ref. Number' is empty, 'Req. Arrival' is empty, 'Frt. Terms' is 'Deliver', 'Currency' is 'USD', and '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' table at the bottom is empty.

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

The screenshot shows the 'Inventory Shipment - Details' window. The 'Freight Terms' field is highlighted with a red box and contains the value 'Deliver'. The 'Order Type' is 'Direct', 'Source Type' is 'None', 'Ship Date' is '12/27/2018', 'Ref. Number' is empty, 'Req. Arrival' is empty, 'Currency' is 'USD', and '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' 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 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' (highlighted with a red box and set to '1000-Location A'), and 'Default Role' (set to 'ADMIN'). The 'Approvals' section at the bottom includes a 'Require Approval For' checkbox.

The screenshot shows the 'Inventory Shipment' window. The 'Shipping Details' section includes 'Ship From' (0001-Fort Wayne, 4242 Flagstaff Cove, Fort Wayne, IN, 46815 United States) and 'Ship To' (4242 Flagstaff Cv, Fort Wayne, IN, 46815 United States). The 'Items' table below is empty. The 'Ship To' field is highlighted with a red box.

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

The screenshot shows the 'Inventory Shipment' window. The 'Shipping Details' section includes 'Ship From' (0001-Fort Wayne, 4242 Flagstaff Cove, Fort Wayne, IN, 46815 United States) and 'Ship To' (ABC Trucking, 512 East Washington Avenue, Madison, WI, 53703 United States). The 'Items' table below is empty. The 'Ship To' field is highlighted with 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-serial number 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' is '0001-Fort Wayne' and the 'Ship To' is 'ABC Trucking'. The 'Items' table has one row: 'CORN-B Corn for Blending' with a quantity of '0 lb' and a price of '0.0'. The 'Lot Tracking' table is empty.

- 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. The 'Quantity' field for 'CORN-B Corn for Blending' is now '100 lb', and the 'Line Total' is '1,000.00'. The 'Lot Tracking' table is still empty.

- c. Select UOM in the **Gross/Net UOM** field.

The screenshot shows the 'Inventory Shipment' form. The 'Gross/Net UOM' field for 'CORN-B Corn for Blending' is now 'Bushels'. The 'Lot Tracking' table is now populated with one row: '0 0 Bushels'.

- 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.

Inventory Shipment - IS-399

Order Type: Direct, Source Type: Customer, Ship Date: 12/27/2018, Ref. Number: , Req. Arrival: , Frt. Terms: Deliver, Currency: USD, Shipment No: 15-399

Shipping Details: Shipping Company: ABC Trucking, Delivery: 512 East Washington Avenue, Madison, WI, 53703 United States

Items:

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

Lot Tracking:

| Lot Number | Available Qty | Ship Qty | Gross | Tare | Net | Storage Unit | Warehouse Car |
|------------|---------------|----------|-----------|-----------|-----------|--------------|---------------|
| L163270001 | 1,000 lb | 0 lb | 0 Bushels | 0 Bushels | 0 Bushels | 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.

Inventory Shipment - IS-399

Order Type: Direct, Source Type: Customer, Ship Date: 12/27/2018, Ref. Number: , Req. Arrival: , Frt. Terms: Deliver, Currency: USD, Shipment No: 15-399

Shipping Details: Shipping Company: ABC Trucking, Delivery: 512 East Washington Avenue, Madison, WI, 53703 United States

Items:

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

Lot Tracking:

| Lot Number | Available Qty | Ship Qty | Gross | Tare | Net | Storage Unit | Warehouse Car |
|------------|---------------|----------|------------------|-----------|------------------|--------------|---------------|
| L163270001 | 1,000 lb | 100 lb | 1,785714 Bushels | 0 Bushels | 1,785714 Bushels | 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.

Inventory Shipment - IS-399

Order Type: Direct, Source Type: Customer, Ship Date: 12/27/2018, Ref. Number: , Req. Arrival: , Frt. Terms: Deliver, Currency: USD, Shipment No: 15-399

Shipping Details: Shipping Company: ABC Trucking, Delivery: 512 East Washington Avenue, Madison, WI, 53703 United States

Items:

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

Lot Tracking:

| Lot Number | Available Qty | Ship Qty | Gross | Tare | Net | Storage Unit | Warehouse Car |
|------------|---------------|----------|------------------|-----------|------------------|--------------|---------------|
| L163270001 | 1,000 lb | 100 lb | 1,785714 Bushels | 0 Bushels | 1,785714 Bushels | RM Storage | |

Status: Saved

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 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 Pagstaff 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)

| Item No. | Description | Charges Link | Customer Storage | Quantity | Price | Price UOM | Line Total | Gross/Net UOM |
|--|-------------------|--------------|------------------|----------|-------|-----------|------------|---------------|
| <input checked="" type="checkbox"/> CORN-B | Corn for Blending | | | 100 lb | 10 | lb | 1,000.00 | Bushels |
| <input type="checkbox"/> | | | | 0 | 0 | | | |

Lot Tracking Export View Filter (F3)

| Lot Number | Ship Qty | Gross | Tare | Net | Storage Unit | Warehouse Cargo No. |
|-------------------------------------|----------|------------------|-----------|------------------|--------------|---------------------|
| <input type="checkbox"/> L163270001 | 100 lb | 1.785714 Bushels | 0 Bushels | 1.785714 Bushels | RM Storage | |
| <input type="checkbox"/> | 0 | 0 | 0 | 0 | | |

0.48s Posted 1 of 1 Refresh

Inventory Shipment - INVSHIP-27

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: INVSHIP-27

Shipping Details Shipping Company Delivery

Ship From: 1000-Location A
100 E Main St

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

Instructions: Comments:

Items Split Lots

+ Pick Lots View Item 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 C | lot tracked-serial number | Own | Main | M-bin1 | 10 | pound | pound | 10.00 | 100.00 | |
| <input type="checkbox"/> | | | | | 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. |
|--|----------|---------|-------------|-------|------|-----|------------------|---------------------|
| <input checked="" type="checkbox"/> LOT-10 | 10 | pound | pound | 10 | 0 | 10 | M-bin1 | |
| <input type="checkbox"/> | 0 | | | 0 | 0 | 0 | | |

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