

# Streamline Shipments with Acumatica for Distributors, Retailers, and Manufacturers

## NAVIGATE SHIPPING CHALLENGES AND ECONOMIC UNCERTAINTY WITH A MODERN ERP PLATFORM WITH CONNECTED CARRIER SYSTEMS

Shipping costs hit record highs during the global pandemic, fueled by eCommerce demand during stay-at-home orders and volatile fuel costs. As a result, inventory-centric businesses in distribution, retail, and manufacturing struggled to manage strained supply chains and unpredictable shipping schedules forcing companies to overstock inventory, resulting in high carrying costs and increased risk.

Today, companies struggle to manage shipping documents and label requirements mandated by government agencies and customers. Others pay exorbitant costs for parcel shipments, unaware of more affordable less-than-truckload (LTL) or full-truckload (FTL) options.

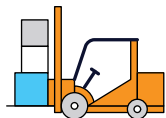
Thankfully, supply chains and shipping costs are forecast to return to more practical levels. However, business leaders still face shipping challenges—mainly when businesses rely on entry-level accounting or legacy ERP applications that do not connect order management and fulfillment processes with dedicated shipping software. In addition, manual data entry between disparate applications creates roadblocks for customer support and stifles the customer experience with outdated and inaccurate shipping information. Conversely, modern ERP applications like Acumatica connect seamlessly with transportation and shipping software suites like 3G for shipping insights and visibility.

This eBook provides an overview of connected shipping and ERP applications with considerations for specific industry segments, automation benefits, and tips for shipping integration configuration. Discover how to seamlessly calculate shipping rates from sales order entry with shipment preparation during order fulfillment. Learn how to process shipments effectively, manage shipping documents, analyze shipment data, and avoid common shipping mistakes. A feature checklist provides insights into ERP system functionality needed to streamline shipping activities.

## HOW TO STREAMLINE SHIPPING WITH MODERN CLOUD ERP SOFTWARE



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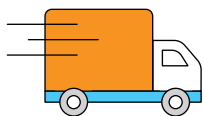
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“We personalize Acumatica to our needs almost daily; it’s the real hammer and anvil in our cubicles. We use the dashboard to show items like shipments per day, dollar value per day, and on the sales side, we have monthly sales totals, totals by salesperson, invoice amounts by order. For shippers—who’s doing the most volume there, and what are our top-selling items are. In addition, we’ve broken out our brand partners in Asia so we can see how brand partners perform against others.”

– CHRIS SAKAMOTO, CHIEF FINANCIAL OFFICER, BLUEFIN COLLECTIBLES

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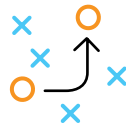


## Common Shipping Mistakes and How to Avoid Them

Shipping mistakes erode margins and cause late or incorrect shipments that push customers to competitors. Connecting ERP software with your shipping or carrier systems alleviates manual processes while eliminating documentation and labeling mistakes that impact shipment dates and costs. System integration and process automation verify the correct products were picked and packed for each shipment, improving customer retention, and boosting profits.

### POOR PLANNING

Incorrect demand forecasting or poor route planning impacts shipment planning and spend. Use forecasts to understand future shipping volume and to negotiate carrier contracts. Leverage planning algorithms to make efficient use of FTL and LTL capacity and measure results.



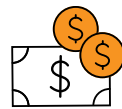
### LABELING ERRORS

Incorrect labels or label formats may be inadvertently affixed to the packaging, addresses may be wrong, the label may be difficult to read, or it may not survive the trip from your facility to the customer’s location. Error-proof labeling activities with address validation and label rules to prevent the wrong label from printing or being selected for shipments. Choose durable labels and use high-quality ink or toner for label printing.



### FAILURE TO RATE SHOP

Using a single carrier leaves your business at risk of overspending and falling victim to capacity shortages. Growing companies may find parcel shipments less efficient than LTL or FTL freight. Make sure to have a backup if your primary carrier encounters labor issues or other difficulties. Protect yourself and your customers with 3G’s extensive carrier network through Acumatica.



### MISSING OR INCORRECT DOCUMENTS

Documentation errors wreak havoc on shipping. Missing paperwork and information causes confusion, delays customer shipments, and incurs carrier penalties. Review documentation for accuracy and create processes to ensure that required documents are included. Use 3G’s Address Validation to verify deliverability.



### PICKING AND PACKAGING MISTAKES

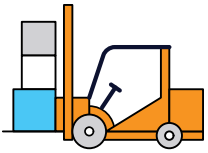
Mark warehouse locations and use bar coding to reduce picking errors. Include item photos on pick sheets or pick screens to aid warehouse workers and use validation to ensure that the correct products were picked and packed appropriately. Define which boxes to use for specific items and document procedures to avoid incorrect packaging.



### MANUAL PROCESSES

Disparate systems force users to enter data manually into multiple systems. Manual data entry is fraught with human error causing delays, costly returns, and unhappy customers. Automation with Acumatica and 3G can cut throughput times and human activity by as much as 50%.





# Industry Considerations

Inventory-centric distributors, retailers, and manufacturers have varied shipping processes and business requirements. For example, specific industry segments like food, beverage, and chemicals must manage lot recalls. At the same time, consumer goods distributors face ever-changing order and shipping policies for retailers like Amazon and Walmart. In addition, customer packaging, labeling, and documentation requirements vary by industry and segment. For these reasons, companies need adaptable shipping solutions with flexible configuration options.

“Before Acumatica, every single order we shipped . . . they would have to key into the carrier’s system, the address, and create a label for the parcel . . . With Acumatica, from day one, that order when dispatched in the warehouse during this pick, pack, and ship scan phase. They produced the carrier’s label, in this case, DPD. The DPD label printed out in the warehouse straightaway . . . and it was at least half a person’s job saved day one.”

– JO YOUNG, MANAGING DIRECTOR, ADDITIVE-X

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## WHOLESALE DISTRIBUTION

Distributors often source and ship products globally with challenging import and export processes and paperwork. Growth in eCommerce sales increases pressure on distributors to provide warehousing and drop-shipment services for customers who place orders but expect the distributor to provide order fulfillment on their behalf. Wholesalers often purchase in bulk with increased use of LTL and FTL shipping modes as opposed to smaller parcel shipments. Connections with business-to-business (B2B) and business-to-consumer (B2C) commerce storefronts and marketplaces are prevalent in the industry. Unique labeling requirements are common as well.



## MANUFACTURING

Many manufacturing components such as electronics, specialty food ingredients, rare metals, and other raw materials are sourced internationally, forcing companies to manage long lead times for products. Similarly, many manufactured goods are exported to international customers requiring similar shipping coordination. Heavy products like industrial equipment, machinery, automobiles, and liquid products require LTL or FTL shipping. Custom labeling and other requirements challenge manufacturers who need more shipping features than entry-level or legacy systems provide.



## RETAIL AND COMMERCE

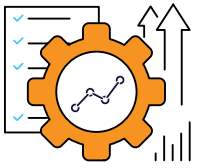
Retail and commerce businesses rely on accurate and timely shipping details. Customers expect shipping costs and delivery schedules when the order is placed with online order tracking for detailed shipping updates from carrier systems. Data must be easily connected between the ERP system and online storefronts, marketplaces, customer self-service portals, and third-party warehouse and logistics providers to minimize manual data entry for seamless communication with customers and fulfillment providers.



## OTHER INDUSTRIES

Other industries have shipping needs. For example, a construction firm may ship products from centralized warehouses to remote job sites, and agricultural businesses ship crops or animals to processing plants. Forestry and mining companies ship natural resources to manufacturers, while other businesses stock products sent to external locations for consumption or use in projects, jobs, or daily operations. Shipping needs vary widely among these industries, often requiring specialized shipping applications like 3G Pacejet.





# Shipping Automation Benefits

Companies using disparate shipping and ERP applications struggle to keep pace with shipping activities due to mundane data entry fraught with errors. Delayed information prevents stakeholders from accessing crucial details to update customers, carriers, and internal employees. Modern systems like Acumatica provide seamless shipping connectors to streamline order fulfillment. Automation improves the customer experience, providing executives with valuable insights to manage and improve business processes effectively.

“A lot of the frustrations were mis-shipping items. So that would create this whole domino effect of delaying shipments, and then having the customer reach back to us . . . So now we’re able to track down the open shipments, and . . . make sure it doesn’t get left behind.”

– MARIO MANHAREZ, FULFILLMENT OPERATIONS MANAGER  
JEFFREY STAR COSMETICS AND KILLER MERCH

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## IMPROVED PROFITS

Streamlined shipping processes minimize duplicate data entry allowing you to do more with less staff. Empower users and customers with transparent shipping costs. Improve profits by passing accurate shipping costs along to customers. Rate shop across carriers with visibility into LTL and FTL freight options helps companies manage shipping costs for large or bulky orders.



## CONNECTED SYSTEMS

Connecting shipping and ERP systems eliminates multiple steps. First, customer service has immediate access to shop and compare carrier rates and delivery schedules to provide customers with accurate shipping costs and dates. Second, businesses can leverage their ERP system for shipment preparation, picking, and packing or harness additional functionality in the shipping application at any stage in the process.



## STREAMLINED ORDER FULFILLMENT

Shipping automation improves order fulfillment, enabling businesses to choose which system they use for each process. Barcoding and mobile warehouse management (WMS) support paperless batch and wave picking. Choose manual packing or configure auto packing with the connected 3G PACEJET Shipping application. Acumatica’s holistic product suite provides everything businesses need to process shipments faster and more accurately to reduce staffing, recruitment, and training costs.



## ACCURATE FINANCIALS

Everything in Acumatica flows through to the robust accounting suite. Automate freight invoice bill payments with automated accounts payable powered by artificial intelligence with machine learning. Improve your cash position with native collections and automated dunning letters and streamline expense management and sales commission processing on a single platform.



## CUSTOMER SATISFACTION

Displaying shipping information to customers via automated emails or through self-service storefronts and portals provides customers with transparency and confidence in your shipping process, boosting sales for future orders while building customer loyalty.



## BUSINESS INSIGHTS

Monitor results with timely and complete information from your ERP and shipping systems within a single platform. Analyze shipping costs and carrier performance with Acumatica or 3G PACEJET Shipping with role-based dashboards, drilldowns to source transactions, configurable reports and inquiries, push notifications, and dimensional reports via Microsoft Power BI.





# System Configuration Options

Most systems will meet the majority of your business needs. However, evaluating if they provide flexibility to adapt as your business changes, customer demands increase, and technology evolves, is challenging. Acumatica delivers a future-proof cloud platform designed for scalability and extensibility with ample configuration options to tailor the solution to your unique needs. Tweak approval workflows, change sales order and shipping preferences, add carriers and shipping modes, and connect the system with scales and ancillary systems to build a cohesive platform for the future.

“We were able to put everything into the system, print out the barcodes and the shipping labels . . . Implementing Acumatica has been a huge game changer.”

– MELISSA PATTERSON, CONTROLLER, AFF|GROUP

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## SALES ORDER PREFERENCES

Many systems lack sales order and shipping preferences. Acumatica provides options to configure shipment numbers, freight allocation on partial shipments, and free shipping settings. Automatically place orders on hold during order entry and validate totals during order confirmation.

## ORDER TYPES

Modern systems like Acumatica provide flexibility to manage shipping defaults differently based on order types, such as blanket orders, credits and returns, mixed orders, sales orders, transfers, and other order types. Set up order types to ship items on each order, separate from items with other order types. Allow or prevent shipments in full if there is insufficient stock to fulfill the order and determine which order types should include freight. Other parameters provide control over freight accounting settings and how to copy notes from the order to the shipment.

## SHIP VIA CODES

Ship Via Codes offer robust features to manage packaging and freight rates for different carriers. Also, establish shipping calendars, charge for freight on returns, require additional packaging, generate return labels, define freight accounting and tax settings, and determine whether to validate packed quantities during shipment confirmation. Other Ship Via settings control shipments for commerce orders and local deliveries.

## SHIPPING TERMS AND FREIGHT CALCULATION

Calculating freight is challenging in most business applications. Acumatica’s freight calculations offer flexibility to manage diverse scenarios. Ship Via Codes determine which freight cost to include. The freight price can be calculated for each customer or with shipping terms on the sales order. Encourage larger sales by offering free shipping on large orders with tiered discounts based on totals. The freight price is calculated as a sum of the bill amount for the delivery, the freight price according to shipping terms, or the premium freight price. Premium freight rates may be used for upcharges on items that are fragile, bulky, or require special handling. Freight costs and customer freight prices may be manually entered during order entry. Further, shipping terms define additional handling fees and freight markup or discounts.

## CUSTOMER DETAILS

Control customer-specific shipping details, such as which party is responsible for freight based on free on board (FOB points like destination, shipping port, or other scenarios. Define customer carrier accounts where customers pay for shipping costs. Define customer ship-to and bill-to addresses with default ship-from warehouses. Allow partial orders or enforce ship-complete for customer orders. Define preferred carriers, shipping terms, required designations, and special residential or weekend delivery options per customer record.

## CARRIER CONNECTIONS

Shop for parcel or LTL shipping rates during order entry or shipment processing with connections to your carrier systems. Acumatica natively supports USPS (Stamps.com), UPS, and FedEx. Connected apps support additional parcel and freight carriers like Amazon, Canada Post, DHL, and LTL and FTL carriers like Estes, FedEx freight, YRC, and more. Further, some connected apps support third-party logistics providers (3PL) like CH Robinson, Evans, FreightQuote.com, GlobalTranz, and more. Additional shipping applications, including direct-store-delivery systems, are available on the extensive Acumatica Marketplace.

## COMMUNICATION OPTIONS

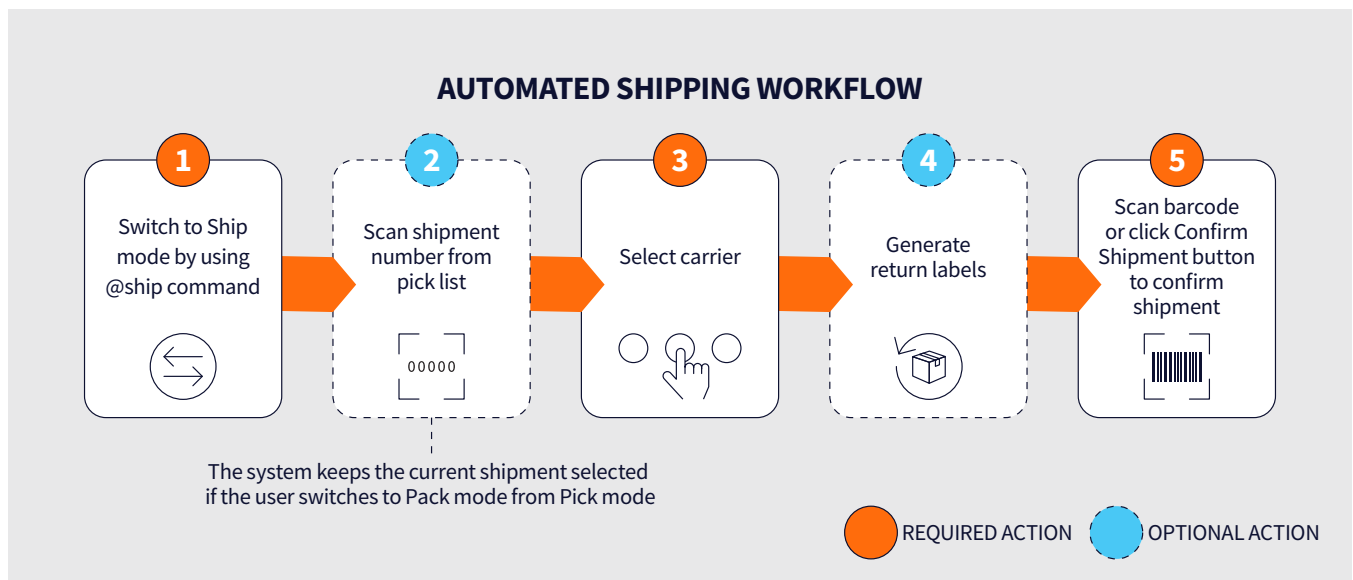
Automate communication by requiring customer confirmation, allowing customer receipts without signatures, or requiring adult signatures. Manage endorsement services such as address service and return service requests, forwarding, and new address notifications. Determine if shipment deliveries are permitted when customers are absent or non-responsive.

## ITEM AND WAREHOUSE DETAILS

Item settings impact shipping costs. Define units of measure for inventory items with unit of measure conversions. Define item weight and volume used for freight calculations. Establish auto-pack options by weight, quantity, or by weight and volume combination. Define items that must be packed separately and boxes used for shipping each item. Advanced ERP applications like Acumatica support international shipping commodity codes and shipping thresholds for over and under-shipments by a percentage. Control shipping locations and priorities by warehouse location with country of origin definitions.

## OTHER SETTING OPTIONS

Connected shipping applications support incoterms for customs to identify the party responsible for international taxes, freight, insurance, and duties. Manage currencies and exchange rates for shipping transactions. Access carrier labels or use connected apps like Asgard Labels to design custom 2D and 3D barcode labels to comply with customer and carrier requirements.



Modern ERP systems like Acumatica automate shipment processes with barcode scanning from pick lists, carrier system integration, and shipment label printing.

“Our salespeople work remotely, and because of Acumatica, they can dive straight into sales orders and shipments and have information at their fingertips . . . We were running blind before. Now, we can see volume, location, type of product, and managers can prepare and put new orders into the production schedule.”

– TIM PATTON, ICT DIRECTOR, SAM

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# Sales Order Processing

Order management is crucial for every business. Unfortunately, entry-level and legacy systems often create hurdles for customer service representatives with multiple order entry steps and limited features that require multi-step workarounds or costly customizations. Conversely, modern ERP applications like Acumatica are designed to support varied order entry scenarios with flexibility to expedite order entry and improved customer experience.

## SALES ORDER OVERVIEW

Sales order entry should be seamless and intuitive for customer service representatives. Users should have access to customer order history for repeat orders with item recommendations for substitute, up-sell, and cross-sell items to boost sales. Allocate inventory for orders to ensure availability during shipping. Systems should provide backorder management with flexible customer invoicing and payment options.

## SHIPMENTS AND OVERRIDES

ERP systems like Acumatica provide flexible shipping settings to streamline order entry. Customer service reps can shop carrier rates directly from the application with overrides by order for ship via, delivery confirmation, priority, FOB points, ship-from warehouse location, and other parameters. Shipment transactions, costs, and item details are just a mouse-click away with side panels and shipping details in the order entry total.

“We have partnered with PACEJET as our shipping provider, and they have been a wonderful group to work with. They have helped out tremendously on our parcel timing. When it comes to process of shipment has decreased drastically. Our LTL performance, helping with creating those shipments, and that has just been wonderful.”

– KIMBERLY MCELROY, DIRECTOR OF OPERATIONS, PORTACOOOL

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# Order Fulfillment with Embedded WMS

Companies must have the flexibility to tailor order fulfillment processes with automation to ensure pick accuracy and on-time shipments. Acumatica provides native warehouse management with barcode scanning on mobile devices for automated data capture for order fulfillment tasks. In addition, advanced WMS options are available from connected marketplace applications for more sophisticated operations.

## ORDER PICKING

Create prioritized picking queues and leverage paperless single order, batch, or wave picking to expedite shipments for customer orders, shipments to vendors for outsourced manufacturing operations, or warehouse transfers.

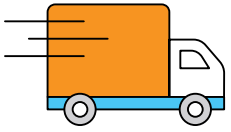
Improve picking accuracy and speed with hands-free warehouse automation using barcode labels for locations, totes, carts, and items. Manage perishable goods with connected quality management and first-expired-first-out (FEFO) picking with full lot and serial traceability.

## ORDER PACKING

Manually pack items for shipment or use native auto-pack features with barcodes to streamline the process. Print required labels, pack lists, and other documents during the packing process. Pack items inside Acumatica or leverage advanced auto pack capabilities with connected applications like 3G Pacejet Shipping.

## VENDOR FULFILLMENT

Leverage drop-shipments to link sales orders with purchase orders for orders fulfilled by suppliers.



# Shipment Processing

Shipment completion varies by industry, customer, carrier, and business. Flexibility is critical for streamlined processes and accurate shipments. The process begins by confirming shipments and processing transactions with carrier coordination. Leverage native features to automate customer notifications with shipping details and carrier tracking links.

“With Acumatica we are able to do so much more proactive support and outreach where with our prior systems, really, we were fixing things after they had become a problem . . . For example, with shipping volume, we could see potentially how many orders we had scheduled to ship, but we couldn’t see things like how many units were on those orders and were they potted plants or were they bag plants? Potted plants are more time-consuming to ship because you’ve got to package them in a very different way.”

– **TABAR GIFFORD, CUSTOMER EXPERIENCE CULTIVATOR**  
**AMERICAN MEADOWS**

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## SHIPMENT CREATION OPTIONS

Shipments for specific sales orders are created directly from Sales Order Entry or through the Shipments Entry form. Shipments for multiple sales orders are created through the Process Orders task. These processes provide options to create shipments, open closed orders, remove credit holds, prepare invoices, cancel orders, and authorize credit card payments.

## SHIPMENT CONFIRMATION

Confirm the shipment after the required items are picked and packed, updating available inventory quantities and changing the status of the associated sales order. Issue and define shipped inventory lot or serial numbers based on first-in-first-out (FIFO), last-in-first-out (LIFO), sequential, expiration date, or user-defined options. Shipment authorization may be required for some transactions. In these cases, a shipment confirmation document may be necessary for record-keeping. Invoices may be generated and released following shipment confirmation with automated inventory releases for accounting. Alternatively, companies may opt to update inventory before invoice generation.

## CARRIER COORDINATION

Shipping connectors transmit new and updated shipping information to carrier systems for scheduling and billing. Tracking numbers and related confirmations are retrieved and viewable within Acumatica. Additionally, Business Events can be used to send automated email notifications to customers with shipment details and tracking links. This information can be published to the customer portal and synchronized with some commerce storefront applications. Shipping connections support various small parcel, LTL, FTL, 3PL carriers, and transportation services.

## SHIPMENT EDITS

Open shipments may be adjusted in cases where customers modify dates or other shipment details have been changed since the order was entered.

## EDI TRANSACTIONS

Connected electronic data interchange (EDI) applications like SPS Commerce provide additional automation to transmit 856 Advanced Ship Notices and 810 Invoice documents to customers.



## QUALITY ASSURANCE

Acumatica’s connected Quality Management System (QMS) ensures product quality with tests for items with non-conformance and corrective actions. Quality testing may occur at any time and may be instituted as part of the shipment preparation, picking, or packing process.





# Labels, Documents, and Compliance

Companies using older systems or low-end accounting software struggle to manage paperwork, vendor and carrier bills, and labeling requirements effectively. Acumatica provides native barcode support with connected applications to manage labeling requirements. Further, accounts payable automation, native document management, and connections to carrier systems minimize paperwork with embedded digital document storage.

“We are using Pacejet to manage carrier connections with 3 tenants comprised of 5 warehouses—each with their own small package accounts. Each warehouse is also getting their respective LTL freight rates from a 3PL via the same Pacejet interface. The ability to consolidate and utilize a single portal for all tenants provides a major cost savings and simplifies maintenance . . . The help desk and implementation teams also helped to make our solution a quick success.”

– WAYNE WATER, PART OF SCOTT FETZER CONSUMER BRANDS

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## CARRIER LABELS

Automate printing of industry and customer-compliant labels for GS1-128, Amazon, and more. The connected shipping application provides a library of industry and regulatory labels. In addition, the optional label connector makes it easy to tailor labels with your company logo and address.

## PRODUCT AND LOCATION LABELS

Create barcode labels for items, locations totes, carts, and lot or serial numbers to streamline shipping processes. Use Asgard Labels to create custom barcoded labels with multiple data elements such as the inventory identification number, serial or lot number, expiration date, and more.

## AP VENDOR AND CARRIER FREIGHT BILLS

Electronic vendor and carrier freight bills can be added to the Acumatica recognition engine powered by artificial intelligence with machine learning. Paper bills can be scanned with optical character recognition (OCR) and added to the recognition engine for processing. Acumatica’s automated accounts payable process identifies the vendor, terms, currency, line items, amount, and other details on the bill. These elements are mapped automatically into accounts payable from the electronic or scanned document.

## DOCUMENT MANAGEMENT

Modern ERP systems like Acumatica provide embedded document storage. Share files via native document management with Adobe PDF markup capabilities and Microsoft Teams integration for collaboration. Documents are attached to records within Acumatica with universal search to find documents quickly.

## SHIPPING DOCUMENTS

Combining ERP software with shipping solutions like 3G Pacejet Shipping provides a platform to create and manage virtually all shipping paperwork digitally. Supported documents include bills of lading, packing slips, safety datasheets, hazardous materials documentation, and more. Manage international shipments easily for certificates of origin, tariff documents, commercial invoices, shipper’s letter of instruction, and other required paperwork. Automate document printing with shipments, use Business Events to send documents to carriers and customers electronically, and eliminate paper with connected electronic data interchange (EDI) for 856 Advanced Shipping Notice (ASN) documents.



# Shipping Analytics

Companies need the right tool to make sense of colossal amounts of shipping data. Executives need to know what is happening in real-time with detailed reports and key performance indicators to measure performance and how to improve business processes to reduce costs and grow profits. Acumatica offers a collection of reporting and analytic resources that go far beyond financial reporting, enabling you to see the health of your company at-a-glance and quickly spot trends.

## ROLE-BASED DASHBOARDS

Use role-based dashboards for shipping and receiving clerks and warehouse managers to visualize data from multiple sources. Dashboard content is dynamically generated for real-time results with drilldowns to view detailed transactions.

## BUSINESS INTELLIGENCE

Integrated business intelligence tools like Microsoft Power BI aggregate data from multiple sources, extract actionable information for strategic decision-making and present it visually to stakeholders.

## LOW-CODE AND NO-CODE REPORTS

Leverage essential reports that can be used out-of-the-box or easily modify reports and create new reports quickly with Acumatica's Report Designer.

## ROBUST GENERIC INQUIRIES

Use Generic Inquiries to access data contained in Acumatica and make it available for reports, dashboards, Excel files, or OData. Add a side panel to Generic Inquiries to show the details of specific records in an inquiry all on the same screen. Side panels can be resized, maximized, or minimized.

## BUSINESS EVENTS

Use business events to trigger email alerts, SMS text notifications, or tasks when database conditions require user intervention.

## ADVANCED SHIPPING INSIGHTS

The connected 3G Pacejet Shipping connector empowers users to uncover opportunities in shipment data to drive better business decisions when selecting a carrier, inform teams of issues, compare spending to budget, and gain valuable insights to negotiate carrier contracts.

**Shipping Clerk**

Warehouse:

SHIPMENTS FOR TODAY: 0 | LATE SHIPMENTS: 0 | SHIPPED TODAY: 1

PICK LISTS TO COMPLETE: 65 | URGENT PICK LISTS TO COMPLETE: 0

**ORDERS TO SHIP**

Order Type	Order No.	Description	Requested On	Shipped	Customer	Customer Name	Ordered Qty.	Order Total	Ship Via
SO	00008		10/29/2021	10/29/21	ABAXEY	Allen's Bakery	1.00	4.15	
SO	00008		10/29/2021	10/29/21	ABAXEY	Allen's Bakery	1.00	4.15	
SO	00008		9/1/2021	9/1/2021	COBESQUE	High Bakery & Sals	10.00	45.53	
SO	00009	Website order #10687	1/29/2021	1/29/2021	RETAIL	Individual Retail Cust.	20.00	95.45	
SO	00001	Site #12 Journals #1	1/29/2021	1/29/2021	GOODFOOD	GoodFood One Rest.	12.00	93.81	

**SHIPMENTS TO PICK AND PACK**

Shipment No.	Customer	Customer Name	Status	Shipment Date	Shipped Quantity	Package	Ship Via
00001	GOODFOOD	GoodFood One Restaurant	Open	9/7/2021	12.00		
00008	COFFEEHOUSE	FourStar Coffee & Sweets Shop	Open	1/30/2021	4.00		
00008	GOODFOOD	GoodFood One Restaurant	Open	1/30/2021	2.00		
00008	COFFEEHOUSE	FourStar Coffee & Sweets Shop	Open	1/30/2021	12.00		
00008	GOODFOOD	GoodFood One Restaurant	Open	1/30/2021	24.00		

**Shipment Details by Customer**

Company/Branch: PRODWHOLE | Start Date: 3/1/2022 | Date: 3/29/2023 12:00 AM  
 User: admin admin | End Date: 3/29/2023 | Page: 1 of 1

Customer ID	Customer Name
ABAKTEND	USA Hartending School

Type	Ref. Nbr.	Operation	Order Status	Date	Order Number	Inventory	Subitem	Warehouse	UOM	Order Qty.	Shipped Qty.
SO	004389	Issue	Completed	3/13/2022	SO006727	FOODCOLA12		WHOLESALE	EA	9,100.00	9,100.00
SO	004440	Issue	Completed	4/16/2022	SO008786	FOODCOLA12		WHOLESALE	EA	8,300.00	8,300.00
SO	004519	Issue	Completed	5/19/2022	SO006943	FOODCOLA12		WHOLESALE	EA	5,800.00	5,800.00
SO	004570	Issue	Completed	8/15/2022	SO006902	FOODCOLA12		WHOLESALE	EA	8,000.00	8,000.00
SO	004507	Issue	Completed	7/10/2022	SO006900	FOODCOLA12		WHOLESALE	EA	8,200.00	8,200.00
SO	004870	Issue	Completed	8/14/2022	SO007017	FOODCOLA12		WHOLESALE	EA	6,500.00	6,500.00
										<b>Total:</b>	<b>45,900.00</b>

Monitor shipments with Acumatica's role-based shipping dashboard with drilldowns to source transactions and updated shipment information.



# ERP Feature Checklist

Acumatica provides a [general ERP feature checklist](#) with standard accounting requirements. Similar checklists are available for [retail](#), [distribution](#), [construction](#), and [manufacturing](#). The checklist below provides a consolidated list of shipping features business leaders should expect to find in modern business platforms.

FEATURE	BENEFIT	PRIORITY	Acumatica		
<b>Ship Via Codes</b>	Manage packaging and freight rates for carriers with shipping calendars, freight accounting, tax settings, and more.		✓		
<b>Carrier Rate Shopping</b>	Compare freight rates during sales order entry for approved carriers.		✓		
<b>Freight Rate Breaks</b>	Set volume quantity breaks for customer freight discounts or free shipping.		✓		
<b>Small Parcel</b>	Connect to USPS (Stamps.com), UPS, and FedEx from order or shipment entry.		✓		
<b>LTL, FTL, and DSD</b>	Connect to common LTL and FTL carriers. Manage company-owned fleet shipments via connected direct-store-delivery apps.		✓		
<b>3PL Providers</b>	ERP integration with leading third-party logistics providers.		✓		
<b>International Shipping</b>	Prepare shipments and required documents for international shipping.		✓		
<b>Barcoding with WMS</b>	Barcode scanning via rugged mobile devices for pick, pack, and put-away with paperless picking, prioritized picking queues, and wave and batch picking.		✓		
<b>Auto Pack with Validation</b>	Auto pack with validation via barcode scanning during pick and pack operations.		✓		
<b>Vendor Drop-Ship</b>	Link purchase orders to a sales order for vendor drop-shipments to customers.		✓		
<b>Label Designer</b>	Create custom 2D and GS1-128 package, item, and location labels.		✓		
<b>Scale Interface</b>	Connect scales for package weights used in freight calculations.		✓		
<b>Retail and Commerce</b>	Sync in-store and online retail and commerce orders with the back office system for order fulfillment and shipping.		✓		
<b>Quality Assurance</b>	Conduct quality tests for items with non-conformance and corrective actions.		✓		
<b>EDI ASN</b>	Integrate shipping with EDI for 856 advanced ship notices (ASN).		✓		
<b>Shipping Insights</b>	Leverage secured, role-based dashboards, robust reporting, flexible Generic Inquiries, and business intelligence powered by Microsoft Power BI for analytics and reporting.		✓		
<b>AP Automation</b>	Automate vendor invoices and carrier freight bills with AP automation powered by artificial intelligence.		✓		
<b>Multi-Currency</b>	Manage shipping and freight in base currencies and customer currencies.		✓		
<b>Document Management</b>	Create and store documents inside the ERP system attached to records.		✓		
<b>Communication</b>	Automate customer communication for shipments with tracking links.		✓		
<b>Flexible Workflows</b>	Configure workflows for pick, pack, and ship or quick shipment processing without pick and pack operations.		✓		



**THE ANSWER COMPANY**

## About The Answer Company

For nearly 30 years, The Answer Company ERP consulting group has been transforming businesses with custom technology solutions. Our team of experts combine their deep industry knowledge with a wide range of cutting-edge tech solutions to drive tangible results. From designing and deploying robust ERP systems to optimizing work flows, automating manual processes and leveraging real-time data and insights, we give our clients the power to make informed decisions, enhance productivity and employee satisfaction, and achieve sustainable growth to drive profitability.

For more info, visit: [www.theanswerco.com](http://www.theanswerco.com)

To speak to one of our experts, contact:

✉ [sales@theanswerco.com](mailto:sales@theanswerco.com)

☎ 1-866-670-6686

Head Office:

502-233 Nelson's Crescent

New Westminster, BC V3L 0E4

Local staff in every major city across Canada

