

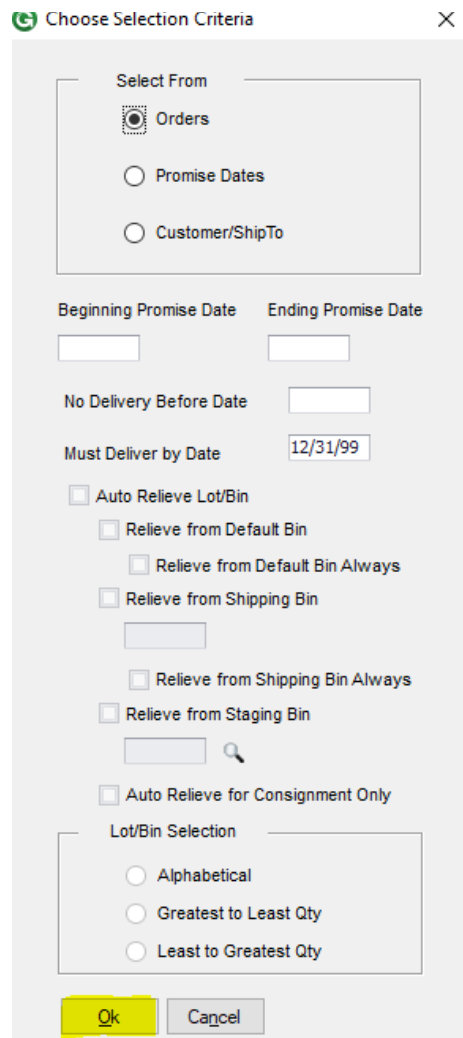
Instrument Tracker Project

Testing Instructions

Written By: Ashley Collins

Shipping & Receiving > Transactions > Shipments > New

1. The user will need to confirm they have the correct selection criteria baaed on the Shipping Process used within the company. Once this information is confirmed, the user will need to click 'Ok.'



The screenshot shows a dialog box titled "Choose Selection Criteria" with a close button (X) in the top right corner. The dialog contains the following elements:

- Select From:** A group box containing three radio buttons:
 - ☒ Orders
 - ☐ Promise Dates
 - ☐ Customer/ShipTo
- Beginning Promise Date:** An empty text input field.
- Ending Promise Date:** An empty text input field.
- No Delivery Before Date:** An empty text input field.
- Must Deliver by Date:** A text input field containing "12/31/99".
- Auto Relieve Lot/Bin:** A checkbox that is currently unchecked.
- Relieve from Default Bin:** A checkbox that is currently unchecked.
- Relieve from Default Bin Always:** A checkbox that is currently unchecked.
- Relieve from Shipping Bin:** A checkbox that is currently unchecked.
- Relieve from Shipping Bin Always:** A checkbox that is currently unchecked.
- Relieve from Staging Bin:** A checkbox that is currently unchecked.
- Auto Relieve for Consignment Only:** A checkbox that is currently unchecked.
- Lot/Bin Selection:** A group box containing three radio buttons:
 - ☐ Alphabetical
 - ☐ Greatest to Least Qty
 - ☐ Least to Greatest Qty
- Buttons:** At the bottom, there are two buttons: "Ok" (highlighted in yellow) and "Cancel".

- The user will need to enter a range of orders and click 'Ok' to load all the orders that are ready to be shipped.

Select For Shipping [X]

Enter The Range of Order Numbers for Selection

Beginning Order Ending Order Location ☐ All Locations

Select For Shipping [X]

Enter The Range of Order Numbers for Selection

Beginning Order Ending Order Location ☐ All Locations

- The grid below will open and allow the user to select the orders they want to ship. To open the shipment screen, the user will need to click the checkbox in the 'Select' column.

Select Orders for Shipping [Min] [Max] [X]

Select	Customer	Part Number	Part Description	Sales Order	SO Line	Promise Date	Order Qty	Available Qty	On Order	Quired Qu
<input type="checkbox"/>	GENERAL ELECTRIC	210900	IPX 8 ASSEMBLY	0000002	1	09/23/2009	35.0000	39.0000	0.0000	0.00
<input type="checkbox"/>	GENERAL ELECTRIC	210900	IPX 8 ASSEMBLY	0000002	2	01/28/2010	500.0000	39.0000	0.0000	0.00
<input type="checkbox"/>	GENERAL ELECTRIC	210900	IPX 8 ASSEMBLY	0000002	3	10/22/2009	100.0000	39.0000	0.0000	0.00
<input type="checkbox"/>	GENERAL ELECTRIC	210900	IPX 8 ASSEMBLY	0000002	4	09/24/2009	500.0000	39.0000	0.0000	0.00
<input type="checkbox"/>	GENERAL ELECTRIC	210900	IPX 8 ASSEMBLY	0000002	5	11/30/2009	250.0000	39.0000	0.0000	0.00
<input type="checkbox"/>	GENERAL ELECTRIC	210900	IPX 8 ASSEMBLY	0000002	6	11/12/2009	500.0000	39.0000	0.0000	0.00
<input type="checkbox"/>	GENERAL ELECTRIC	210900	IPX 8 ASSEMBLY	0000002	7	12/31/2009	500.0000	39.0000	0.0000	0.00
<input type="checkbox"/>	FREIGHTLINER TRUCKS	0025	CAT IDLER	0000201	1	02/02/2010	80.0000	81.0000	0.0000	-10.00
<input type="checkbox"/>	TEXAS CUSTOM	JST3000	BRACKET	0000202	1	01/02/2010	1.0000	0.0000	0.0000	0.00
<input type="checkbox"/>	ANDERSON WINDOWS	05-5259	POWER CART	0000203	1	10/15/2009	5.0000	0.0000	0.0000	0.00
<input type="checkbox"/>	ANDERSON WINDOWS	1321	ANSWERING MACH	0000203	2	10/15/2005	1.0000	97.0000	0.0000	0.00
<input type="checkbox"/>	ADVANCED MICRO DEVIC	1321	ANSWERING MACH	0000421	2	05/21/2020	44.0000	97.0000	0.0000	0.00
<input type="checkbox"/>	ADVANCED MICRO DEVIC	0025	CAT IDLER	0000422	1	08/03/2021	15.0000	81.0000	0.0000	-10.00
<input type="checkbox"/>	ADVANCED MICRO DEVIC	1321	ANSWERING MACH	0000422	2	08/03/2021	10.0000	97.0000	0.0000	0.00
<input type="checkbox"/>	ADVANCED MICRO DEVIC	0025	CAT IDLER	0000423	1	08/03/2021	1.0000	81.0000	0.0000	-10.00
<input type="checkbox"/>	ADVANCED MICRO DEVIC	0025	CAT IDLER	0000432	1	12/08/2021	1.0000	81.0000	0.0000	-10.00
<input type="checkbox"/>	ADVANCED MICRO DEVIC	0025	CAT IDLER	0000432	2	12/08/2021	1.0000	81.0000	0.0000	-10.00
<input type="checkbox"/>	ADVANCED MICRO DEVIC	TEST1	TEST1	0000433	2	12/10/2021	2.0000	0.0000	0.0000	0.00
<input type="checkbox"/>	ADVANCED MICRO DEVIC	0025	CAT IDLER	0000434	1	12/03/2021	2.0000	81.0000	0.0000	-10.00

☐ Show Components

- The user can ship all lines for the order by checking the 'Ship All Lines' checkbox.

Shipments - New [Min] [Max] [X]

☒ Ship All Lines

Customer Ship To ID Packing List No Cartons Gross Weight Ship Date Bill of Lading Number 3rd Party Freight

Carrier Service Type Carrier Account Transport Method Ship Via ETA Date Tracking Number

- If the user wants to process a partial shipment, they will need to enter the correct quantity in the 'Shipped Qty' column.

Shipments - New

Ship All Lines: Customer: Ship To ID: Cartons: Gross Weight: Ship Date: Bill of Lading Number: 3rd Party Freight:

Carrier: Service Type: Carrier Account: Transport Method: Ship Via: ETA Date: Tracking Number:

Bill To Address

Address 1:
 Address 2:
 Address 3:
 Address 4:
 Address 5:
 City/State/Zip:
 Country:
 Attention:
 Contact Name:
 Email:
 Customer PO: Facility Code: Residential: ☐

Ship To Address ☐ Non US

Name:
 Address 1:
 Address 2:
 Address 3:
 Address 4:
 Address 5:
 City/State/Zip:
 Country:
 Attention:
 Contact Phone: Ext:

☐ Print Packing List ☐ Auto Select for Invoicing
☐ Show Bill of Lading Screen ☐ Insurance
☐ Print Bill of Lading ☐ Cert Enclosed
☐ Print BOL Labels ☐ Use Bill To for 3rd Party Freight
☐ Print Shipping Labels ☒ Transfer Using From Bin
☐ Show Packing Screen ☐ Transfer Using Default Bin
☐ Show Tracking Information Screen
☐ Serialized Returnable Containers
☐ Print Commercial Invoice

Order	Item	Order Qty	Shipped Qty	Net Weight	Gross Weight	Cartons	Back Order Qty	Part Number	Description	Loc UM	Available Qty	Prom Date
201	001	80.0000	<input type="text" value=""/>	400.0000				0025	CAT IDLER	EA	81.0000	02/02/10

- If the part has a corresponding Serial record, the screen below will open and allow the user to select the Serial they want to ship the part from.
- Once the user has selected the correct Serial Number, the 'Process' number will need to be clicked to finish the selection.

Serial Number Selection Screen

Part:
 Location:
 Quantity:

Left click on a line to select/deselect the item.
 Right click on a line to select/deselect all following items.

Bar Code Select Single Serial #

Bar Code Select Range

From
 To

Serial Number	NCMR	User ID	Alloc
90405			
90410			

Selected:

C = Customer
 G = Consigned
 J = Project
 P = Purchase Order
 S = Sales Order
 U = User ID
 W = Work Order

- The user will need to confirm that the 'Shipped Qty' is correct, and then they can click 'Save' to process the shipment. Once the shipment is processed, the corresponding records will be added to the custom Instrument Serial table.

Shipments - New

☐ Ship All Lines ☐ FRT Ship To ID Packing List No 000064 Cartons Gross Weight 50.0000 Ship Date 01/19/22 Bill of Lading Number 000064 3rd Party Freight

Carrier Service Type Carrier Account Transport Method Ship Via BEST WAY ETA Date Tracking Number

Bill To Address

FREIGHTLINER TRUCKS
5500 NORTH LOOP WEST

MARION IN 60954
MR. RAY SEALS
Contact Name Contact Phone Ext Email
Customer PO YOUR REQUEST Facility Code ☐ Residential

ShipTo Address ☐ Non US

FREIGHTLINER TRUCKS
5500 NORTH LOOP WEST

MARION IN 60954
MR. RAY SEALS
Contact Name Contact Phone Ext Email

☐ Print Packing List ☐ Auto Select for Invoicing

☐ Show Bill of Lading Screen ☐ Insurance

☐ Print Bill of Lading ☐ Cert Enclosed

☐ Print BOL Labels ☐ Use Bill To for 3rd Party Freight

☐ Print Shipping Labels ☒ Transfer Using From Bin

☐ Show Packing Screen ☐ Transfer Using Default Bin

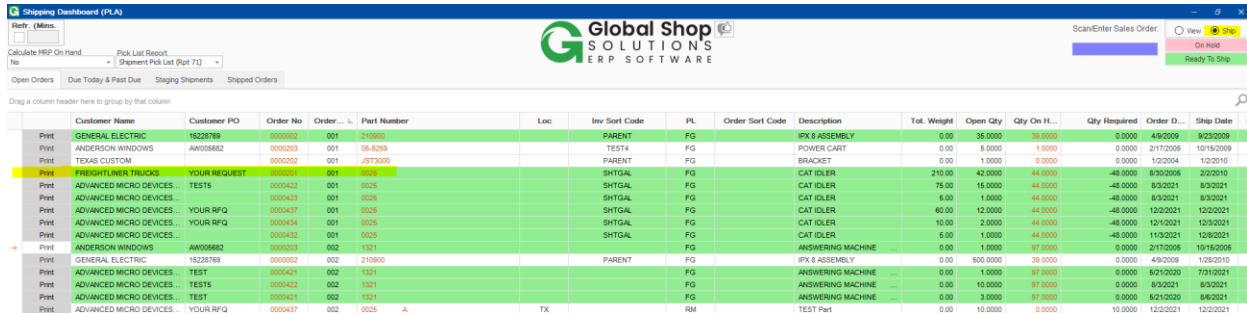
☐ Show Tracking Information Screen ☐ Serialized Returnable Containers Transfer to Bin

☐ Print Commercial Invoice

Order	Item	Order Qty	Shipped Qty	Net Weight	Gross Weight	Cartons	Back Order Qty	Part Number	Description	Loc	UM	Available Qty	Prom Date
201	001	80.0000	10.0000	50.0000	50.0000	70.0000	0025		CAT IDLER	EA		71.0000	02/02/10

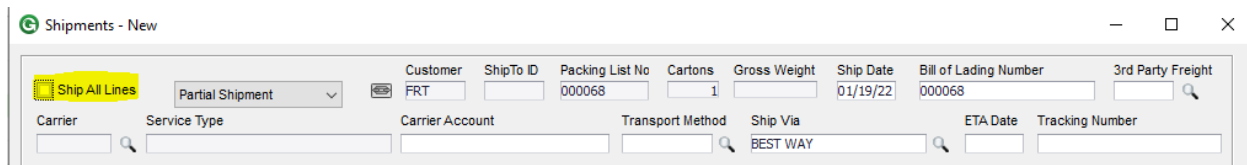
Shipping & Receiving > View > Shipping Dashboard

1. If the user has security, they can also ship from the Shipping Dashboard.
2. The user will need to make sure the 'Ship' radio button is selected before they can ship any orders.



Customer Name	Customer PO	Order No	Order No	Part Number	Loc	Inv Sort Code	PL	Order Sort Code	Description	Tot. Weight	Open Qty	Qty On H...	Qty Required	Order D...	Ship Date
GENERAL ELECTRIC	15228789	0000002	001	210900		PARENT	FG		IPX 8 ASSEMBLY	0.00	35.0000	39.0000	0.0000	4/9/2009	8/23/2009
ANDERSON WINDOWS	AW005682	0000203	001	95-4258		TEST4	FG		POWER CART	0.00	8.0000	1.0000	0.0000	2/17/2005	10/16/2009
TEXAS CUSTOM		0000202	001	JST3000		PARENT	FG		BRACKET	0.00	1.0000	0.0000	0.0000	1/2/2004	1/2/2010
Freightliner Trucks	YOUR REQUEST	0000437	001	8025		SHTGAL	FG		CAT IDLER	210.00	42.0000	44.0000	48.0000	8/30/2006	2/20/2010
ADVANCED MICRO DEVICES	TEST5	0000423	001	8025		SHTGAL	FG		CAT IDLER	75.00	15.0000	44.0000	48.0000	8/30/2021	8/30/2021
ADVANCED MICRO DEVICES	TEST6	0000423	001	8025		SHTGAL	FG		CAT IDLER	8.00	1.0000	44.0000	48.0000	8/30/2021	8/30/2021
ADVANCED MICRO DEVICES	YOUR RFQ	0000437	001	8025		SHTGAL	FG		CAT IDLER	80.00	12.0000	44.0000	48.0000	12/20/2021	12/20/2021
ADVANCED MICRO DEVICES	YOUR RFQ	0000434	001	8025		SHTGAL	FG		CAT IDLER	10.00	2.0000	44.0000	48.0000	12/10/2021	12/10/2021
ADVANCED MICRO DEVICES	TEST	0000421	002	1321		SHTGAL	FG		CAT IDLER	5.00	1.0000	44.0000	48.0000	11/30/2021	12/8/2021
ANDERSON WINDOWS	AW005682	0000003	002	1321		SHTGAL	FG		ANSWERING MACHINE	0.00	1.0000	97.0000	0.0000	2/17/2006	10/16/2006
GENERAL ELECTRIC	15228789	0000002	002	210900		PARENT	FG		IPX 8 ASSEMBLY	0.00	500.0000	39.0000	0.0000	4/9/2009	1/28/2010
ADVANCED MICRO DEVICES	TEST	0000421	002	1321		SHTGAL	FG		ANSWERING MACHINE	0.00	1.0000	97.0000	0.0000	5/21/2020	7/31/2021
ADVANCED MICRO DEVICES	TEST6	0000423	002	1321		SHTGAL	FG		ANSWERING MACHINE	0.00	10.0000	97.0000	0.0000	8/30/2021	8/30/2021
ADVANCED MICRO DEVICES	TEST	0000421	002	1321		SHTGAL	FG		ANSWERING MACHINE	0.00	3.0000	97.0000	0.0000	5/21/2020	8/6/2021
ADVANCED MICRO DEVICES	YOUR RFQ	0000437	002	8025	A	TX	RM		TEST Part	0.00	10.0000	0.0000	10.0000	12/20/2021	12/20/2021

3. When the user clicks the Order Number in the 'Order No' column, it will open the core shipping screen that was shown above.
4. The user can ship all lines for the order by checking the 'Ship All Lines' checkbox.



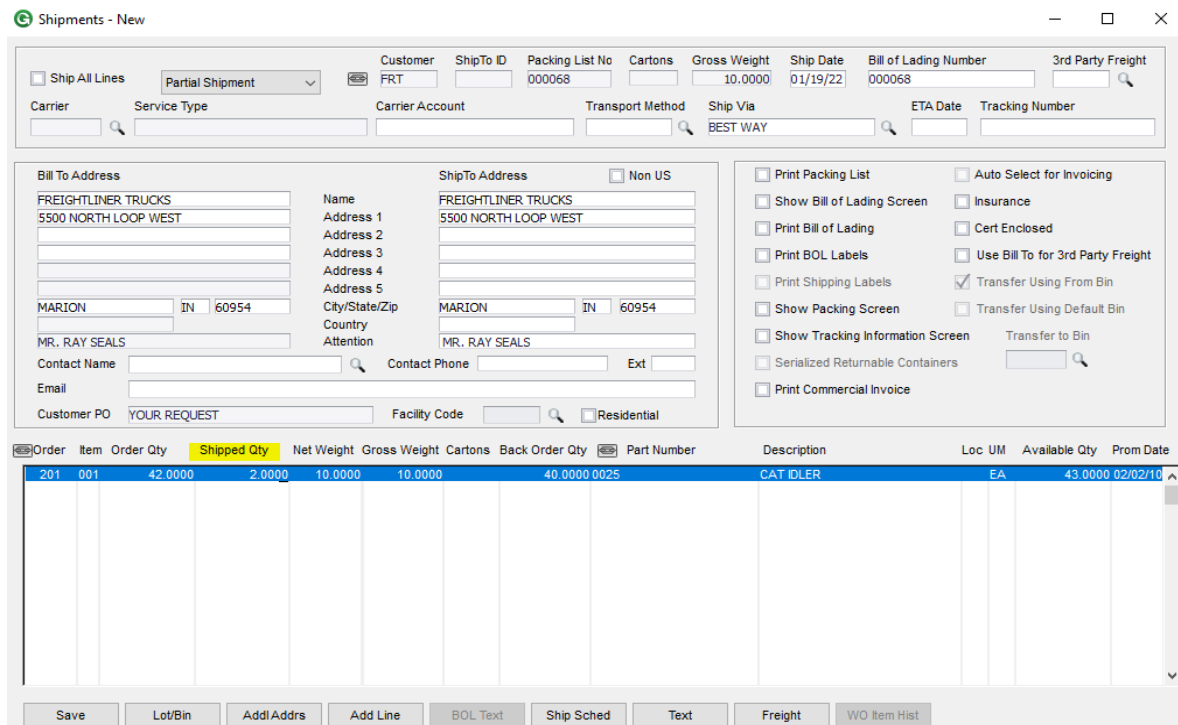
Shipments - New

☒ Ship All Lines ☐ Partial Shipment

Customer: FRT Ship To ID: Packing List No: 000068 Cartons: 1 Gross Weight: Ship Date: 01/19/22 Bill of Lading Number: 000068 3rd Party Freight:

Carrier: Service Type: Carrier Account: Transport Method: Ship Via: BEST WAY ETA Date: Tracking Number:

5. If the user wants to process a partial shipment, they will need to enter the correct quantity in the 'Shipped Qty' column.



Shipments - New

☐ Ship All Lines ☒ Partial Shipment

Customer: FRT Ship To ID: Packing List No: 000068 Cartons: Gross Weight: 10.0000 Ship Date: 01/19/22 Bill of Lading Number: 000068 3rd Party Freight:

Carrier: Service Type: Carrier Account: Transport Method: Ship Via: BEST WAY ETA Date: Tracking Number:

Bill To Address: FREIGHTLINER TRUCKS 5500 NORTH LOOP WEST MARION IN 60954 MR. RAY SEALS Contact Name: Contact Phone: Ext: Email: Customer PO: YOUR REQUEST Facility Code: Residential

Ship To Address: FREIGHTLINER TRUCKS 5500 NORTH LOOP WEST MARION IN 60954 MR. RAY SEALS Attention:

☐ Print Packing List ☐ Auto Select for Invoicing ☐ Show Bill of Lading Screen ☐ Insurance ☐ Print Bill of Lading ☐ Cert Enclosed ☐ Print BOL Labels ☐ Use Bill To for 3rd Party Freight ☐ Print Shipping Labels ☒ Transfer Using From Bin ☐ Show Packing Screen ☐ Transfer Using Default Bin ☐ Show Tracking Information Screen ☐ Transfer to Bin ☐ Serialized Returnable Containers ☐ Print Commercial Invoice

Order	Item	Order Qty	Shipped Qty	Net Weight	Gross Weight	Cartons	Back Order Qty	Part Number	Description	Loc UM	Available Qty	Prom Date
201	001	42.0000	2.0000	10.0000	10.0000	40.0000	0025		CAT IDLER	EA	43.0000	02/02/10

Save Lot/Bin Add Addr Add Line BOL Text Ship Sched Text Freight WO Item Hist

6. If the part has a corresponding Serial record, the screen below will open and allow the user to select the Serial they want to ship the part from.
7. Once the user has selected the correct Serial Number, the 'Process' number will need to be clicked to finish the selection.

Serial Number Selection Screen

Part: 9001_900_440
Location:
Quantity: 1

Bar Code Select Single Serial #
[Text Field]

Bar Code Select Range
From [Text Field]
To [Text Field]

Select All
Deselect All

Left click on a line to select/deselect the item.
Right click on a line to select/deselect all following items.

Serial Number	NCMR	User ID	Alloc
90405			
90410			

Selected: [Text Field]

Process Refresh

Legend:
C = Customer
G = Consigned
J = Project
P = Purchase Order
S = Sales Order
U = User ID
W = Work Order

8. The user will need to confirm that the 'Shipped Qty' is correct, and then they can click 'Save' to process the shipment. Once the shipment is processed, the corresponding records will be added to the custom Instrument Serial table.

Shipments - New

☐ Ship All Lines ☒ Partial Shipment

Customer: FRT Ship To ID: Packing List No: 000068 Cartons: Gross Weight: 10.0000 Ship Date: 01/19/22 Bill of Lading Number: 000068 3rd Party Freight: [Text Field]

Carrier: Service Type: Carrier Account: Transport Method: Ship Via: BEST WAY ETA Date: Tracking Number:

Bill To Address: FREIGHTLINER TRUCKS, 5500 NORTH LOOP WEST, MARION, IN 60954, MR. RAY SEALS, Contact Name: [Text Field], Contact Phone: [Text Field], Ext: [Text Field], Email: [Text Field], Customer PO: YOUR REQUEST, Facility Code: [Text Field], Residential: ☐

Ship To Address: [Non US] FREIGHTLINER TRUCKS, 5500 NORTH LOOP WEST, MARION, IN 60954, MR. RAY SEALS, Attention: [Text Field]

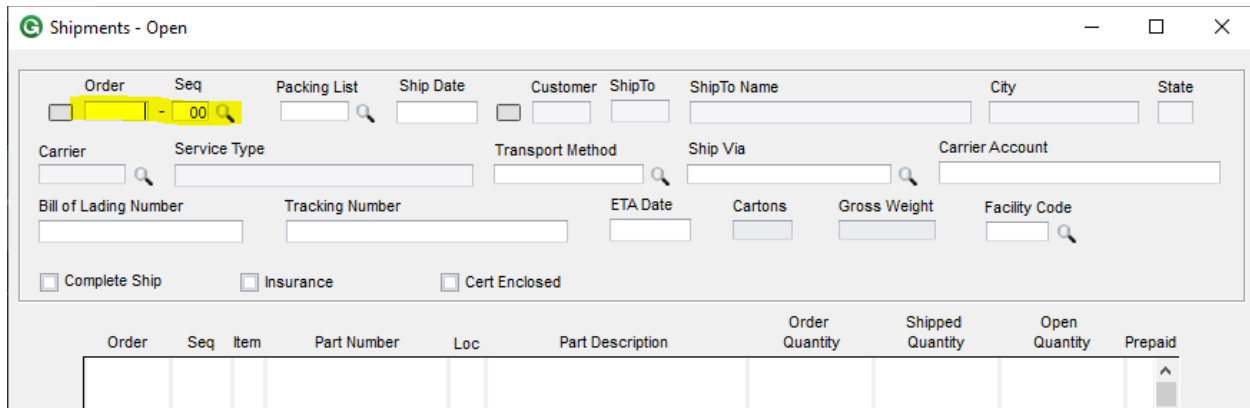
☐ Print Packing List ☐ Auto Select for Invoicing
☐ Show Bill of Lading Screen ☐ Insurance
☐ Print Bill of Lading ☐ Cert Enclosed
☐ Print BOL Labels ☐ Use Bill To for 3rd Party Freight
☐ Print Shipping Labels ☒ Transfer Using From Bin
☐ Show Packing Screen ☐ Transfer Using Default Bin
☐ Show Tracking Information Screen ☐ Transfer to Bin
☐ Serialized Returnable Containers ☐ [Text Field]
☐ Print Commercial Invoice

Order	Item	Order Qty	Shipped Qty	Net Weight	Gross Weight	Cartons	Back Order Qty	Part Number	Description	Loc	UM	Available Qty	Prom Date
201	001	42.0000	2.0000	10.0000	10.0000	40.0000	0025	0025	CAT IDLER	EA		41.0000	02/02/10

Save Lot/Bin Addl Addr Add Line BOL Text Ship Sched Text Freight WO Item Hist

Shipping & Receiving > Transactions > Shipments > Open

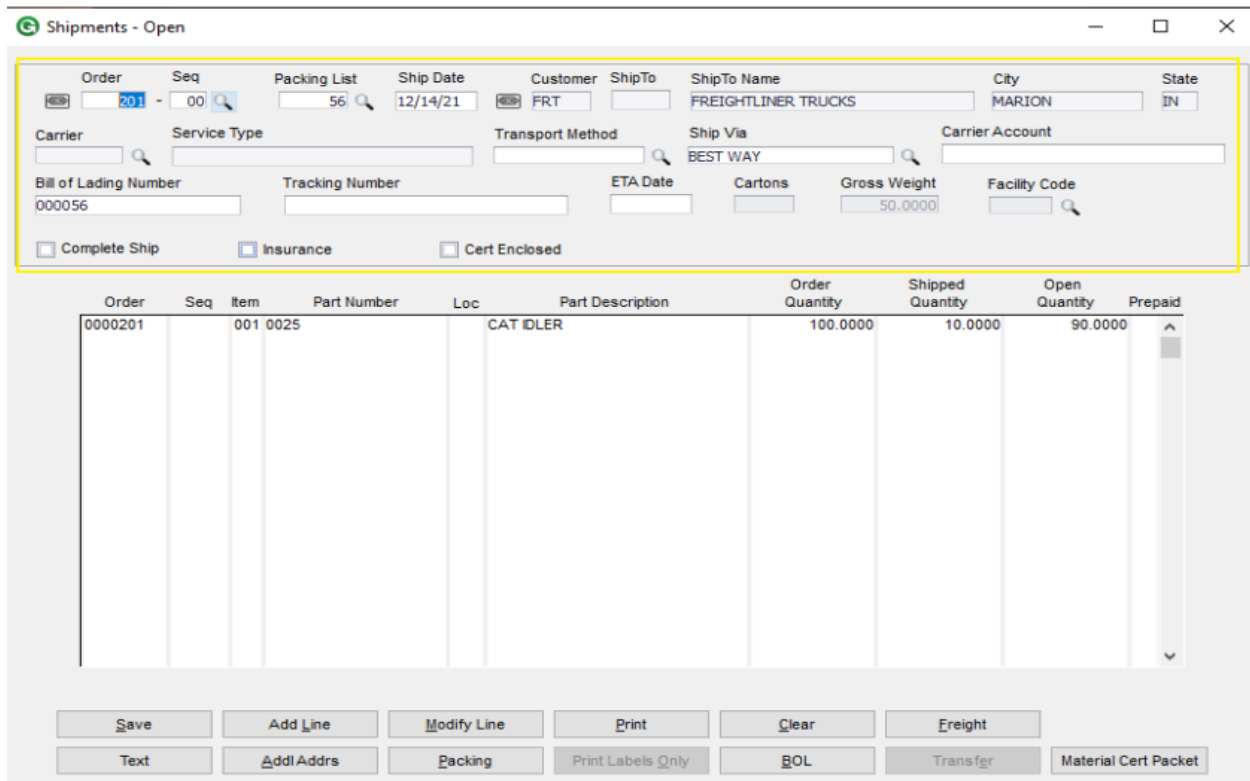
1. The user can use Shipping & Receiving > Transactions > Shipments > Open to modify existing shipments in Global Shop.
2. The user will need to select the Order/Suffix they want to modify. This can be done by entering the order manually or by selecting it with the browser.



The screenshot shows the 'Shipments - Open' window. The header information section is highlighted in yellow. It includes fields for Order, Seq, Packing List, Ship Date, Customer, ShipTo, ShipTo Name, City, State, Carrier, Service Type, Transport Method, Ship Via, Carrier Account, Bill of Lading Number, Tracking Number, ETA Date, Cartons, Gross Weight, and Facility Code. There are also checkboxes for Complete Ship, Insurance, and Cert Enclosed.

Order	Seq	Item	Part Number	Loc	Part Description	Order Quantity	Shipped Quantity	Open Quantity	Prepaid

3. The user can modify the Shipment Header information in the yellow box below, as well as, modify existing lines or add lines to the shipment.



The screenshot shows the 'Shipments - Open' window with the header information section highlighted in yellow. The line items table is also visible.

Order	Seq	Item	Part Number	Loc	Part Description	Order Quantity	Shipped Quantity	Open Quantity	Prepaid
0000201		001	0025		CAT IDLER	100.0000	10.0000	90.0000	

Buttons at the bottom: Save, Add Line, Modify Line, Print, Clear, Freight, Text, Addl Addr, Packing, Print Labels Only, BOL, Transfer, Material Cert Packet.

- To modify a line on the shipment, the user will need to select the line and click 'Modify Line'.

Shipments - Open

Order	Seq	Packing List	Ship Date	Customer	ShipTo	ShipTo Name	City	State
201	00	56	12/14/21	FRT		FREIGHTLINER TRUCKS	MARION	IN
Carrier	Service Type	Transport Method	Ship Via	Carrier Account				
			BEST WAY					
Bill of Lading Number	Tracking Number	ETA Date	Cartons	Gross Weight	Facility Code			
000056				50.0000				
<input type="checkbox"/> Complete Ship <input type="checkbox"/> Insurance <input type="checkbox"/> Cert Enclosed								

Order	Seq	Item	Part Number	Loc	Part Description	Order Quantity	Shipped Quantity	Open Quantity	Prepaid
0000201	001	0025			CAT IDLER	100.0000	10.0000	90.0000	

- The screen below will open and allow the user to select a sequence, modify the shipped quantity and allow the user to select a different Serial Number for the shipment.
- Once the user modifies the line, they will need to click 'Save' to process the changes to the line.

Modify Shipment Line

Current Order Information								
Seq	Line	Part Number	Rev	Loc	Description	Order Qty	Shipped Qty	BO Qty
	001	0025			CAT IDLER	100.0000	60.0000	40.0000

Order Qty	Shipped Qty	Net Weight	Gross Weight	Cartons	BO Qty
100.0000	10.0000	50.0000	50.0000		90.0000

Packing Seq	List	Order Qty	Shipped Qty	Weight	Pkgd Weight	Cartons	BO Qty	Ship Date	Status	Batch	Invoice	Deleted
06	000068	42.0000	2.0000	10.0000	10.0000		40.0000	01/19/22	Shipped			
05	000067	50.0000	8.0000	40.0000	40.0000		42.0000	01/19/22	Shipped			
04	000066	60.0000	10.0000	50.0000	50.0000		50.0000	01/19/22	Shipped			
03	000065	70.0000	10.0000	50.0000	50.0000		60.0000	01/19/22	Shipped			
02	000064	80.0000	10.0000	50.0000	50.0000		70.0000	01/19/22	Shipped			
01	000063	90.0000	10.0000	50.0000	50.0000		80.0000	01/19/22	Shipped			
	000056	100.0000	10.0000	50.0000	50.0000		90.0000	12/14/21	Shipped			

- The user can add a line to the shipment by clicking 'Add Line.'

Shipments - Open

Order	Seq	Packing List	Ship Date	Customer	ShipTo	ShipTo Name	City	State
201	00	56	12/14/21	FRT		FREIGHTLINER TRUCKS	MARION	IN
Carrier	Service Type	Transport Method	Ship Via	Carrier Account				
			BEST WAY					
Bill of Lading Number	Tracking Number	ETA Date	Cartons	Gross Weight	Facility Code			
000056				50.0000				
<input type="checkbox"/> Complete Ship <input type="checkbox"/> Insurance <input type="checkbox"/> Cert Enclosed								

Order	Seq	Item	Part Number	Loc	Part Description	Order Quantity	Shipped Quantity	Open Quantity	Prepaid
0000201		001	0025		CAT IDLER	100.0000	10.0000	90.0000	

- Once the user has finished modifying the shipment, they will need to click 'Save' to finish processing the shipment changes.

Order	Seq	Item	Part Number	Loc	Part Description	Order Quantity	Shipped Quantity	Open Quantity	Prepaid
0000201		001	0025		CAT IDLER	100.0000	10.0000	90.0000	

- After the shipment has finished updating, the custom Instrument tracker table will be updated to match the Serials that were changed in the shipment.

Shipping & Receiving > Transactions > Shipments > Delete

1. The Delete Shipment screen is the same as the Open Shipment screen, minus the fact that the user can either delete the entire shipment or delete lines from the shipment.
2. The user will need to either enter the order number and sequence manually, or they can browse for an order using the browser.

Shipments - Delete

Order	Seq	Packing List	Ship Date	Customer	ShipTo	ShipTo Name	City	State
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Carrier	Service Type	Transport Method	Ship Via	Carrier Account	ETA Date			
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			
Bill of Lading Number	Tracking Number	Cartons	Gross Weight	Reason for Deleting	Facility Code			
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			
<input type="checkbox"/> Complete Ship <input type="checkbox"/> Insurance <input type="checkbox"/> Cert Enclosed <input type="checkbox"/> Invoice Hold <input type="checkbox"/> Time and Material <input type="checkbox"/> Transfer Order								

Order	Seq	Item	Part Number	Loc	Part Description	Order Quantity	Shipped Quantity	Open Quantity	Prepaid

3. Once the user has selected the Order, they will have the option to either delete the entire order using the 'Delete' button, or they can select a line from the grid and use the 'Delete Line' button.

Shipments - Delete

Order	Seq	Packing List	Ship Date	Customer	ShipTo	ShipTo Name	City	State
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Carrier	Service Type	Transport Method	Ship Via	Carrier Account	ETA Date			
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			
Bill of Lading Number	Tracking Number	Cartons	Gross Weight	Reason for Deleting	Facility Code			
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			
<input type="checkbox"/> Complete Ship <input type="checkbox"/> Insurance <input type="checkbox"/> Cert Enclosed <input type="checkbox"/> Invoice Hold <input type="checkbox"/> Time and Material <input type="checkbox"/> Transfer Order								

Order	Seq	Item	Part Number	Loc	Part Description	Order Quantity	Shipped Quantity	Open Quantity	Prepaid
000201	006	001 0025			CAT IDLER	42.0000	2.0000	40.0000	

4. After the core process has finished deleting the line or deleting the entire shipment, the custom instrument table will be updated to reflect the changes.

1. To view the imported and shipped Instrument Serial data, the user will need to open the dashboard using the Sales Analysis > View > Instrument Tracker (6581) menu item. The screen below will open.

2. The user can load the data using a date range for the date shipped or the user can forgo the date range and load all the data up to today's date. If the user forgoes the date range, they will just click the 'Refresh' button to load the data.

3. If the user chooses to use the date range, they will need to check the 'Use Date Range' checkbox and select the Start Date and End Date. The user will then need to click the 'Refresh' button to load the Instrument Data with a Shipped Date that falls within the selected range.

[illegible]

4. The data will appear as shown below.

Instrument Tracker (IST)

Date Shipped

☒ Use Date Range

Start Dates: 1/1/2020

End Dates: 2/22/2022

Drag a column header here to group by that column

Serial Number

Date Shipped

Part

Loc

Description

Alt Desc 1

Order No

Order Suffix

Order Line

Original Customer

Original Customer Name

Original Owner City

Original Owner State

Original Owner Zip

Original Owner Country

Cs

30128

4/1/2021

0015118

023990

Jacob Pope

Fort Worth...

TX

76107

US

30955

1/13/2020

0014111

022641

Carlos Chaves

US

30999

3/5/2020

0014228

026503

Pablo Chou Int'l Company Ltd

Taichung C...

Taichung City 4...

427

TW

31000

2/28/2020

0014304

024543

Guitar Center

Thousand ...

CA

91359

US

02

31001

3/12/2020

0014380

023088

Percussion/Spirit Music Centre

Kowloon ...

HK

31002

5/13/2020

0014390

014913

Thomann GmbH

Burgebrac...

96138

DE

31003

5/13/2020

0014390

014913

Thomann GmbH

Burgebrac...

96138

DE

31004

4/24/2020

0014294

024216

Tyler Marvin

Addison ...

TX

75001

US

31005

5/1/2020

0014041

015030

Northshore Music

St. Louis ...

MO

63125

US

02

31006

7/16/2020

0014271

027156

Music And Marching Center

Oldenburg ...

26122

DE

31007

7/17/2020

0014502

011018

Northern Arizona University

Flagstaff ...

AZ

86004

US

31008

6/30/2020

0014615

019090

Steve Weiss Music

Willow Gro...

PA

19090

US

02

5. The user can change the current customer by selecting the magnifying glass next to the 'Current Customer' column.

Instrument Tracker (IST)

Date Shipped

☒ Use Date Range

Start Date: 1/1/2020End Date: 2/22/2022

↺↻

Drag a column header here to group by that column

Part	Loc	Description	Alt Desc 1	Order No	Order Suffix	Order Line	Original Customer	Original Customer Name	Original Owner City	Original Owner State	Original Owner Zip	Original Owner Country	Current Customer	Current Customer Name
				0015118		023990	Jacob Pope	Fort Worth...	TX	76107	US			
				0014111		022641	Carlos Chaves				US			
				0014228		026503	Pablo Chou Int'l Company Ltd	Taichung C...	Taichung City 4...	427	TW			
				0014304		024543	Guitar Center	Thousand ...	CA	91359	US	023966	Pflugerville ISD	
				0014380		023088	Percussion/Spirit Music Centre	Kowloon ...				HK		
				0014390		014913	Thomann GmbH	Burgebrac...				96138	DE	
				0014390		014913	Thomann GmbH	Burgebrac...				96138	DE	

6. The Customer Master browser will open and allow the user to select the new Current Customer.

Select Customer							
Drag a column header here to group by that column							
Customer	Name	City	St...	Zip	Country	Telephone	
023920	Sarek Gutierrez	San Antonio	TX	78256	US	8328583183	
023928	Giancarlo Levano				US		
023930	Cam Denby					1 4313741390	
023937	Adam Gotskind	Chicago	IL	60640	US		
023938	Nicholas Jung				US		
023939	Yi-Wen Lin					88 6922123300	
023950	Kevin Foley	Greenwood	IN	46143	US	3173717881	
023951	Eric Heukeshoven	Winona	MN	55987	US	5074505622	
023953	Monroe Community College	Monroe	MI	48161	US	7347355462	
023954	N-Tune Music & Sound -Alido	Odessa	TX	79762	US	8174419003	
023956	Larry Mcfall	Santa Cruz	CA	95062	US	8317065635	
023962	Fabian Löbhard						
023966	Pflugerville ISD	Pflugerville	TX	78660	US	9154744363	
023968	Matt Silverberg	St Paul	MN	55119	US	6462414152	
023972	Aaron Montreal	Port Washington	WI	53074	US	2622434223	
023976	Yen Co	Dallas	TX	75228	US	2143252415	
023984	PM Music Center	Aurora	IL	60504	US	6309789927	
023990	Jacob Pope	Fort Worth	TX	76107	US	6162601569	

- Once the user selects the Current Customer, the 'Current Customer' column will be updated to reflect the changes. The customer's name, city, state zip and country columns will also be populated with the selected customer's information.

Instrument Tracker (TSI)

Date Shipped
☒ Use Date Range
 Start Date: 1/1/2020 End Date: 2/22/2022

Drag a column header here to group by that column

Order No	Order Suffix	Order Line	Original Customer	Original Customer Name	Original Owner City	Original Owner State	Original Owner Zip	Original Owner Country	Current Customer	Current Customer Name	Current Owner City	Current Owner State	Current Owner Zip	Current Owner Country	Series
0015118			023990	Jacob Pope	Fort Worth...	TX	76107	US							3100_Wood Rail
0014111			022641	Carlos Chaves				US							3100_A-Rail
0014228			026503	Pablo Chou Int'l Company Ltd	Taichung C.	Taichung City 4...	427	TW							3100_A-Rail
0014304			024543	Guitar Center	Thousand...	CA	91359	US	023966	Pflugerville ISD	Pflugerville...	TX	78660	US	3100_A-Rail
0014380			023088	PercussionSpirit Music Centre	Kowloon			HK							3100_A-Rail
0014390			014913	Thomann GmbH	Burghard...		96138	DE							3100_A-Rail
0014390			014913	Thomann GmbH	Burghard...		96138	DE							3100_A-Rail
0014294			024216	Tyler Marvin	Addison	TX	75001	US							3100_A-Rail
0014241			015030	Notelmann Music	St. Louis	MO	63125	US	027279	Jefferson College	Hillsboro	MO	63050	US	3100_A-Rail
0014271			027156	Music And Marching Center	Oldenburg		26122	DE							3100_A-Rail
0014202			011018	Northern Arizona University	Flagstaff	AZ	86004	US							3100_Wood Rail
0014615			015090	Steve Weiss Music	Wilow Gro...	PA	19090	US	020708	Cedar Park High School	Cedar Park...	TX	78613	US	3100_A-Rail
0014144			015793	Jim Baber	LA CRESCEN...	CA	91214	US							Soloist
0014644			013220	Wheaton College	Wheaton	IL	60187	US							IZZY, A-Rail

- The user also can manually enter the current customer's number, name, city, state, zip, and country if the customer doesn't exist in the Customer Master. They can do this by typing in the yellow columns for the corresponding field and tabbing to the next column.

Instrument Tracker (TSI)

Date Shipped
☒ Use Date Range
 Start Date: 1/1/2020 End Date: 2/22/2022

Drag a column header here to group by that column

Order No	Order Suffix	Order Line	Original Customer	Original Customer Name	Original Owner City	Original Owner State	Original Owner Zip	Original Owner Country	Current Customer	Current Customer Name	Current Owner City	Current Owner State	Current Owner Zip	Current Owner Country	Series
0015118			023990	Jacob Pope	Fort Worth...	TX	76107	US							3100_Wood Rail
0014111			022641	Carlos Chaves				US							3100_A-Rail
0014228			026503	Pablo Chou Int'l Company Ltd	Taichung C.	Taichung City 4...	427	TW							3100_A-Rail
0014304			024543	Guitar Center	Thousand...	CA	91359	US	023966	Pflugerville ISD	Pflugerville...	TX	78660	US	3100_A-Rail
0014380			023088	PercussionSpirit Music Centre	Kowloon			HK							3100_A-Rail
0014390			014913	Thomann GmbH	Burghard...		96138	DE							3100_A-Rail
0014390			014913	Thomann GmbH	Burghard...		96138	DE							3100_A-Rail
0014294			024216	Tyler Marvin	Addison	TX	75001	US							3100_A-Rail
0014241			015030	Notelmann Music	St. Louis	MO	63125	US	027279	Jefferson College	Hillsboro	MO	63050	US	3100_A-Rail
0014271			027156	Music And Marching Center	Oldenburg		26122	DE							3100_A-Rail

- The user also can add Notes to a serial number by typing in the 'Notes' column and tabbing. The Notes will be stored in the custom Instrument Serial table and will appear each time the data is loaded.

Instrument Tracker (TSI)

Date Shipped
☒ Use Date Range
 Start Date: 1/1/2020 End Date: 2/22/2022

Drag a column header here to group by that column

me	Current Owner City	Current Owner State	Current Owner Zip	Current Owner Country	Series	Size	Wood Type	Resonator Type	Resonator Color	Keyboard	Frequency	Height	Vibe Cord	Vibe Motor Voltage	Notes
					3100_Wood Rail	5.0 Octave	Mahogany	Basso Bravo	Black	Enhanced	A442				custom engraving
					3100_A-Rail	5.0 Octave	Mahogany	Basso Bravo	Black	Enhanced	A442				
	Pflugerville, TX		78660	US	3100_A-Rail	5.0 Octave	Mahogany	Basso Bravo	Black	Enhanced	A442				
					3100_A-Rail	5.0 Octave	Mahogany	Basso Bravo	Black	Premium	A442				
					3100_A-Rail	5.0 Octave	Mahogany	Basso Bravo	Black	Premium	A443				
					3100_A-Rail	5.0 Octave	Mahogany	Basso Bravo	Black	Premium	A443				
					3100_A-Rail	5.0 Octave	Mahogany	Basso Bravo	Black	Premium	A443				
	Hillsboro, MO		63050	US	3100_A-Rail	5.0 Octave	Mahogany	Basso Bravo	Black	Enhanced	A442				
					3100_A-Rail	5.0 Octave	Cherry	Basso Bravo	Black	Premium	A442				

Inventory > Administration > Instrument Historical Upload (6581)

1. To Upload the existing Instrument Serial Numbers, you will need to create either a CSV or XLSX following the attached templates. The template also indicates the data type for each column, the number of allotted characters and an example of what the data should look like
2. The columns should be in the following order:
 - a. Serial Number
 - b. Order Number
 - c. Order Line
 - d. Original Customer
 - e. Original Customer Name
 - f. Original Customer City
 - g. Original Customer State
 - h. Original Customer Zip
 - i. Original Customer Country
 - j. Current Customer
 - k. Current Customer Name
 - l. Current Customer City
 - m. Current Customer State
 - n. Current Customer Zip
 - o. Current Customer Country
 - p. Date Shipped
 - q. Series
 - r. Size
 - s. Wood Type
 - t. Resonator Type
 - u. Resonator Color
 - v. Keyboard
 - w. Frequency
 - x. Height
 - y. Vibe Cord
 - z. Vibe Motor Voltage
 - aa. Notes

****Note:** if you have any questions about the template, please don't hesitate to ask

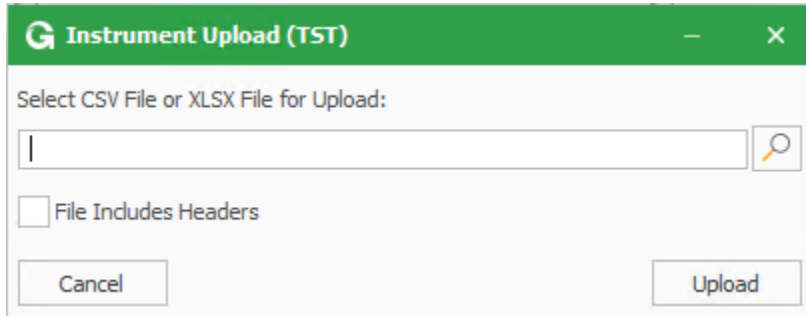


6581_Upload_Template.xlsx



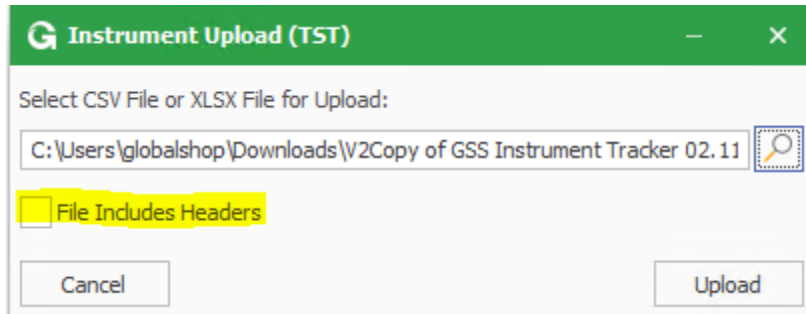
6581_Upload_Template.csv

3. Once you have sent over the CSV or XLSX of all Instruments that need to be uploaded, I will review the data to make sure everything is in the correct format. Once I have confirmed the information is correct, I will run the Instrument Upload from Inventory > Administration > Instrument Historical Upload (6581).



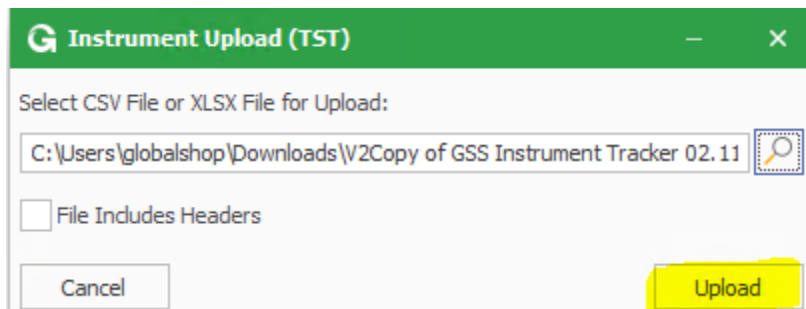
The dialog box titled "Instrument Upload (TST)" has a green header bar with a logo and window controls. Below the header, it says "Select CSV File or XLSX File for Upload:". There is a text input field with a magnifying glass icon to its right. Below the input field is a checkbox labeled "File Includes Headers". At the bottom are two buttons: "Cancel" and "Upload".

4. If you know the file includes headers, you will need to check the 'File Includes Headers' checkbox so the process doesn't try to insert the header record into the custom table.



The dialog box is the same as the previous one, but the text input field now contains the file path "C:\Users\globalshop\Downloads\V2Copy of GSS Instrument Tracker 02.11". The "File Includes Headers" checkbox is now checked and highlighted with a yellow background.

5. I will move the CSV to a location on the server, browse for the file using the Windows browser, and click 'Upload' to add the information to the custom Instrument Serial table.



The dialog box is the same as the previous one, but the "Upload" button is now highlighted with a yellow background.