Shipping and Receiving

The Shipping and Receiving functionality allows organizations to generate shipments of assets and stock items within their organization, receive items on shipments, and manage shipping exceptions. Shipments consist of one or multiple containers, each of which may contain identified assets or stock items. Sunflower provides users with the ability to generate shipping manifests as well as summary shipment reports. Additionally, organizational and personal parameter options are available to minimize data entry of common field values. Currently the Shipping and Receiving functionality is available for Inventory assets exclusively.

Key Concepts

This chapter will include the following discussion points and concepts:

- About Shipping and Receiving
- Creating Shipments and Containers
- Receiving Shipments and Containers
- Managing Shipping Exceptions
- Viewing Shipment Summary
- Managing Shipment and Container Interface Records
- Application and Personal Parameter Options
- Shipping Reports
ABOUT SHIPPING AND RECEIVING

Organizations may use the shipping and receiving functionality to document the transfer of items from one organization to another.

Sunflower’s Shipping and Receiving process is as follows:

Shipping Organization:

Step 1. Pack items into Containers
Step 2. Create Shipments and Add Containers

Receiving Organization:

Step 3. Receive Containers
Step 4. Reconcile and Unpack Assets

Given that shipments don’t always proceed as intended, Sunflower provides users with the ability to manage shipments returned to the shipper and individual asset exceptions within the containers. Receivers can indicate if items have not be found during unpacking. Shippers can then review the shipment exceptions and mark the not found items as removed from the container.
ABOUT SHIPPING AND RECEIVING

TRANSFER TYPES

Sunflower supports two types of shipping transfers:

- **Internal Transfers**: Shipments between steward organizations. The ship from and ship to organizations must be stewards within Sunflower. When the Ship To Organization receives the items, the steward is updated automatically through the receipt and unpacking process.

- **External Transfers**: Shipments to an internal or external organization. External transfers are not meant to have a corresponding receipt transaction. Additionally, organizations may supply a final event on external transfers that will automatically retire all the items in the shipment.

ROLES

Users with the Administrator, Inventory Manager, Inventory Clerk, and Asset Center Representative roles will have access to the Shipping and Receiving functionality. Standard security related to steward contacts is enforced within the Shipping and Receiving forms. For example, if an Inventory Clerk is a steward contact of Asset Center 01, the clerk will be able to create shipments and containers for assets with a steward of Asset Center 01. Additionally, Clerks will only be able to receive shipments and containers that have a Ship To Organization of Asset Center 01.

NOTE: Users with only the asset center representative role will be unable to ship external transfers with final events as ACRs do not have sufficient rights to retire assets in Sunflower. A user with a higher role must mark those shipments as Shipped.
CREATING SHIPMENTS AND CONTAINERS

Users that are shipping items to internal or external organizations are responsible for:

- Packing items into containers
- Creating shipments with destination details
- Marking the shipment as shipped with appropriate tracking information
- Printing the Shipment Manifest

Sunflower’s Shipping and Receiving functionality allows users to create either the shipment or the container first, depending upon the organization’s business process. However, before a shipment is marked as shipped, at least one container must be included and the container must have at least one asset or stock item.

This section will describe how to complete the steps of the shipping organization.
Packing Items Into a Container

Scenario: The following graphic illustrates how to create a new container and add assets and stock items to the container.

**NAVIGATION**
- Click Shipments
- Click Maintain Shipments and Containers

**Step 1.** Navigate to the **Maintain Shipments and Containers** screen.

**Step 2.** Click the **Containers** Tab.

**Step 3.** Enter a unique **Container Number**. To auto-generate a container number, enter the metacharacter and press the tab button.

**NOTE:** The auto-generated container identifier is based upon Personal or Application level parameters. See section on Parameters in this chapter for more information.

**Step 4.** Select the **Steward** Organization of container.

**NOTE:** The Steward organization of the container must be the same as the Steward organization of the assets added to the container.

**Step 5.** Enter **Location** of container.

**NOTE:** If assets are added to the container, the assets’ locations are changed to the container’s location.
Step 6. Optionally enter **External Tracking #**. This is generally done upon shipment unless already known upon packing. External Tracking numbers are used for shipments through third party shippers.

Step 7. Double click in the **User Fields** and enter any additional container level details as needed.

Step 8. Enter assets at the bottom of the screen.

Step 9. Use the **Assets** tab to pack barcoded assets into the container. Enter barcode Identifiers, or optionally click on **Asset Search** to search off a particular set of parameters. If using the search method, select assets as needed to **Add to Container**.

**NOTE:** Assets can only be located in one container. If an asset is already located in a container that has not been received or removed, an error will display that indicates the container in which it is currently located.

Step 10. Use the **Stock Items** tab to include stock items in the container.
NOTE: The stock items in containers are not associated with individual commodity or non-serialized material assets. Rather users enter a stock number based upon the catalog, Shipped quantity and UOM.
Step 11. Press the **Save** button to save the container.

NOTE: An Ongoing Event of PACK ASSET will be recorded against all assets placed in the container. The Location will also be updated on the asset record, as appropriate.
CREATING SHIPMENTS AND CONTAINERS

CREATE A NEW SHIPMENT AND CONTAINERS

Required to create the shipment:

- Shipment Number
- Transfer Type
- From Information: organization and Address
- To Information: Organization and Address

Upon shipment, the Shipper Type, Tracking #s, From and To Contact information is also required. Note that Personal and Application level parameters can be used to default the From Information block.

Scenario: The following graphic illustrates how to create a new shipment

NAVIGATION
- Click Shipments
- Click Maintain Shipments and Containers

Step 1. Navigate to the Maintain Shipments and Containers screen Shipment Tab.

Step 2. Enter a unique Shipment Number. To auto-generate a value, enter the meta-character and press the tab button.

NOTE: The auto-generated container identifier is based upon Personal or Application level parameters. See section on Parameters in this chapter for more information.
CREATING SHIPMENTS AND CONTAINERS

Step 3. Select the appropriate Transfer Type from the list of values.

NOTE: Internal transfers are between steward organizations and require receipt. External transfers do not require receipt, may specify any organization as the destination organization, and may record a final event upon shipment.

Step 4. Optionally double click in the User Fields to enter additional shipment information.

Step 5. Optionally select the Shipper Type.

NOTE: Shipper type indicates which carrier is responsible for the shipment. Internal shippers designate a tracking number at the shipment level. Third party shipment types require the entry of a Courier organization at the shipment level and an external tracking number for each container in the shipment.

Step 6. If using an Internal Shipper Type, enter Internal Tracking #.

Step 7. If using a Third Party Shipper Type, optionally enter the Courier organization.

Step 8. Select the appropriate Ship From Organization steward from the List of Values.

NOTE: The container steward organizations must be within and below the Ship From Steward Organization on the shipment.

Step 9. Double-click in the Ship From Location to enter the ship from location information in the Address field. Enter an internal or external location and press the Save button to return to the shipment form.

NOTE: If the Organization record of the Ship From Organization contains a value in the Location field, it will default in the Ship From Location automatically.

Step 10. Use the list of values to select the Ship From Contact Name.

Step 11. Enter the recipient information in To Information.

Step 12. Select the appropriate Ship To Organization from the List of Values.

NOTE: For Internal Transfers, this LOV will display Steward Organizations only. For External Transfers, the LOV will display all organizations.

Step 13. Double-click in the Ship To Location to enter the ship from location information in the Address field. Enter an internal or external location and press the Save button to return to the shipment form.

NOTE: If the Organization record of the Ship From Organization contains a value in the Location field, it will default in the Ship From Location automatically.
Step 14. Use the list of values to select the Ship To Contact Name. If your application parameters allow, users may enter new contacts or search for contacts by pressing the Edit button in this field to create or search for person records.

Step 15. Place your cursor in the Containers block. Note that the Location and Steward default from the Ship From Information block.

Step 16. Enter a unique Container Number. To auto-generate a container number, enter the meta-character and press the tab button.

NOTE: The auto-generated container identifier is based upon Personal or Application level parameters. See section on Parameters in this chapter for more information.

Step 17. Update the Location field as necessary.

Step 18. Optionally enter External Tracking #. This is generally done upon shipment unless already known upon packing. External Tracking number are used for shipments through third party shippers.

Step 19. Double click in the User Fields and enter any additional container level details as needed.

Step 20. Press the Save button to save the shipment and new container when shipment record is complete.
CREATING SHIPMENTS AND CONTAINERS

Step 21. To add items to the container, press the Edit button next to the container. You will navigate to the Container tab of the specific container that was created in the Shipment Tab.

Step 22. Enter assets at the bottom of the screen.

Step 23. Use the Assets tab to pack barcoded assets into the container. Enter barcode Identifiers, or optionally click on Asset Search to search off a particular set of parameters. If using the search method, select assets as needed to Add to Container.
Step 24. Use the **Stock Items** tab to include stock items in the container. Note that the stock items in containers are not associated with individual commodity or non-serialized material assets. Rather users enter a stock number based upon the catalog, Shipped quantity and UOM.

![Image of the interface showing Stock Items tab]

Step 25. Press the **Save** button to save the container.

**NOTE:** An Ongoing Event of PACK ASSET will be recorded against all assets placed in the container. The Location will also be updated on the asset record, as appropriate.
ADD CONTAINERS TO AN EXISTING SHIPMENT

Scenario: The following graphic illustrates how to add a new container to an existing shipment through the Container Tab.

NAVIGATION
- Click Shipments
- Click Maintain Shipments and Containers

Step 1. Navigate to the Maintain Shipments and Containers screen.

Step 2. Click the Containers Tab.

Step 3. Create or query the Container to be shipped.

Step 4. To query, click the Find button and enter the container Identifier. Click Find again to execute the query.

Step 5. Click the Add to Shipment button to select the shipment the container will be shipped in.
NOTE: The list of values for the Shipments will be limited to the “From” organization of the container. If the shipment needed does not appear, then the Steward organizations on the Shipment and Container tabs differ.

Step 6. Save to add the container to the shipment.
REMOVE CONTAINERS FROM A SHIPMENT

Scenario: The following graphic illustrates how to remove a container to an existing shipment through the Containers Tab.

**NAVIGATION**
- Click Shipments
- Click Maintain Shipments and Containers

**Step 1.** Navigate to the **Maintain Shipments and Containers** screen.

**Step 2.** Click the **Containers** Tab.

**Step 3.** Create or query the Container to be shipped.

**Step 4.** To query, click the **Find** button and enter the container **Identifier**. Click **Find** again to execute the query.
Step 5. Click the **Remove From Shipment** button to select the shipment the container will be shipped in.

Step 6. Press **Save** to save your changes.
**REMOVE ASSETS FROM A CONTAINER**

Scenario: The following graphic illustrates how to remove assets and stock items from a container.

**NAVIGATION**

- Click Shipments
- Click Maintain Shipments and Containers

Step 1. Navigate to the **Maintain Shipments and Containers** screen.

Step 2. Click the **Containers** Tab.

Step 3. Create or query the Container to be shipped.

Step 4. To query, click the **Find** button and enter the container **Identifier**. Click **Find** again to execute the query.

Step 5. Search for the assets that you want to remove from the container.

Step 6. Enable the checkbox in front of the asset(s) that you want to remove.

Step 7. Click the **Remove Record** button remove the items from the container.

Step 8. Press **Save** to save your changes.

**NOTE:** An ongoing event of REMOVED FROM CONTAINER will display on the asset’s timeline. Note that the asset location will remain the container location. If the location of the item requires update, navigate to the Maintain Inventory Assets or Change Inventory Asset Information screens to update.
**MARK A SHIPMENT AS SHIPPED**

Required to mark a shipment as Shipped:

- Shipper Type
- Internal Tracking #
- Courier and Internal Tracking #
- From and To Contact Name
- Final Event Type and Final Event UDFs

Scenario: The following graphic illustrates how to mark a shipment as shipped.

**NAVIGATION**

- Click Shipments
- Click Maintain Shipments and Containers

![Maintain Shipments and Containers Screen](image)

**Step 1.** Navigate to the Maintain Shipments and Containers screen Shipment Tab.

**Step 2.** Query for the Shipment Number.

**Step 3.** Verify the Shipper Type.

**NOTE:** Shipper type indicates which carrier is responsible for the shipment. Internal shippers designate a tracking number at the shipment level. Third party shipment types require the entry of a Courier organization at the shipment level and an external tracking number for each container in the shipment.
Step 4. For Internal Shipper Types, verify the **Internal Tracking #**.

Step 5. For Third Party Shipper Types, verify the Courier and External Tracking # for all containers in the shipment.

Step 6. Click the **Shipped** button.

Step 7. Enter the **Ship Date**.

Step 8. If an External Shipment and Final Events are applicable, enter a **Final Event Type** from the LOV. Double-click in the **User Fields** and enter any additional final event information.

Step 9. Press **OK** to save.

**NOTE:** Once you press OK, the record is saved.
### Creating Shipments and Containers

#### Shipment Details
- **Shipment Number:** XXXXXXXX
- **Shipment Status:** SHIPPED
- **Transfer Type:** EXTERNAL
- **Shopper Type:** INTERNAL
- **User Fields:**
- **From Information:**
  - Organization: SUNFLOWER SYSTEMS
  - Address: LIVERMORE_BUILDING_G
  - Contact Name: DOE JOHN 00305
- **To Information:**
  - Organization: EXCESS CENTER
  - Address: ARLINGTON
  - Contact Name: DOE JANE 00309
- **Containers:**
  - **Container Number:** 000000021
  - **Location:** LIVERMORE_BUILDING_G
  - **Steward:** Sunflower System
  - **External Tracking #:**
  - **User Fields:**
- **Ship Date:** 03/02/2014
**Mark a Shipment As Returned**

When a shipment is returned to the sender, the shipping organization may use Sunflower to mark the shipment as returned. The status of the shipment will be updated to Returned and can no longer be received by the destination organization. Containers that are associated to the shipment will be removed from the shipment and can be assigned to new shipments as required. Assets will remain within the containers that were on returned shipments. Refer to the Removing assets from containers steps if the items are returned to the general stock and no longer grouped for shipment. Note that external shipments cannot be marked as returned.

Scenario: The following graphic illustrates how to mark a shipment as returned.

**Navigation**
- Click Shipments
- Click Maintain Shipments and Containers

![Maintain Shipments and Containers Screen](image)

**Step 1.** Navigate to the **Maintain Shipments and Containers** screen **Shipment** Tab.

**Step 2.** Query for the **Shipment Number**.

**Step 3.** Verify the shipment is the one that should be returned.

**Step 4.** Click the **Return** button.

**NOTE:** You will receive a prompt to confirm that you want to return the shipment. Once you click Yes to the message, the transaction will be saved and cannot be reversed.
Step 5. Click Yes button.

NOTE: The containers will be detached from the shipment automatically and the shipment status will be Returned. Note that the assets located in the containers returned will receive a ‘Shipment Returned’ event on the timeline.
UPDATING A SHIPMENT

Certain fields can be updated on a shipment depending upon the status of the shipment. Most changes can be made while the shipment is still not shipped. Once the shipment has been marked as shipped, certain fields cannot be updated. Once at least one container on a shipment has been received by the Ship To organization, no changes can be made in the Maintain Shipments and Containers form. Any shipping exceptions must be processed through the Verify Shipping Exception form.

The table below describes the fields that can be updated based upon the shipment status:

<table>
<thead>
<tr>
<th>FIELD NAME</th>
<th>Can Update in Not Shipped Status</th>
<th>Can Update in Shipped Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shipment Number</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Transfer Type</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Shipper Type</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Internal Tracking Number</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Courier</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Shipment User Fields</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>From Information Organization</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Address</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Contact Name</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>To Information Organization</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Address</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Contact Name</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Container</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Container Number</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Steward</td>
<td>Yes, but must be within steward hierarchy of Ship From Organization.</td>
<td>No</td>
</tr>
<tr>
<td>Location</td>
<td>Yes. Note location of all assets in container will be updated as well.</td>
<td>No</td>
</tr>
<tr>
<td>User Defined Field</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>External Tracking Number</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
CREATING SHIPMENTS AND CONTAINERS

Scenario: The following graphic illustrates how to update a shipment

NAVIGATION

• Click Shipments
• Click Maintain Shipments and Containers

Step 1. Navigate to the Maintain Shipments and Containers screen Shipment Tab.

Step 2. Query for the Shipment Number.

Step 3. Update the required information.

Step 4. Press the Save button.
The receiving process within Sunflower’s Shipping and Receiving functionality is a two step process. The first step is to receive the containers that are included in the shipment. At that time, the receipt date is indicated as well as the new location of the container. Once the container has been received, the contents of the container can be unpacked. At this point, for each asset unpacked, the steward organization responsible for the items is updated to the recipient organization and information on the item location, status, user and custodian can also be updated. In the event that items are indicated as being shipped but not found in the container during unpacking, the receiving organization can mark the item as not found and the shipping organization must reconcile these exceptions. Stock items are also unpacked and the received quantity is indicated upon unpacking.

The following processes will be covered in this section

• Receiving Containers on Shipments
• Unpacking Containers

This section will describe how to complete the steps of the receiving organization.
RECEIVING CONTAINERS ON A SHIPMENT

The first step is to indicate that the container has been received by the Ship To organization. At that point, the date of receipt is recorded as well as the new location of the container. Given that the individual items within the container have not been verified or unpacked, no changes to the asset records are processed at the time that the container is received.

Scenario: The following graphic illustrates how to mark a containers on a shipment as received.

**NAVIGATION**
- Click Shipments
- Click Receive Shipments and Containers

**Step 1.** Navigate to the **Receive Shipments and Containers** screen **Shipment Tab**.

**Step 2.** Query for the **Shipment Number**.

**NOTE:** The containers that require receiving are displayed in the Not Received tab. Any containers that have already been received on the shipment will be displayed on the Received tab.

**Step 3.** Select the **Received** checkbox in front of each Container Number that is being received.

**Step 4.** Double click in the Location field to enter the receiving location of the container.

**Step 5.** Update the Received Date, and User Fields of the individual containers as necessary.

**NOTE:** By default, the **Received Date** will default to the current date.
Step 6. Press the **Save** button.
UNPACKING CONTAINERS

Once a container has been received, the Ship To Organization must unpack it to complete the transfer between organizations. When unpacking barcoded assets, the steward organization will be updated to the Ship To organization on the shipment. In addition, the location of assets will be updated to the container location by default. Additionally, the receiving clerk may update the following fields upon unpacking:

- Activity Status
- Condition
- User
- Custodian

The receiving clerk can choose to update the above fields for all assets that are unpacked from the container or specific values for each item being unpacked.

When unpacking stock items, clerks must indicate the quantity received. No updates are made to existing material or stock in Sunflower upon unpacking. A separate receipt transaction must be completed to increase the individual stock levels of a warehouse.

If the container record contains items that were not found at the receiving location, the receiving clerk should mark those items as being ‘Not Found’. This indication will alert the shipping organization to the item level exception. The not found items remain in the shipping organizations steward organization and are not transferred to the destination steward. If items were received by clerks that were not included in the container record, an off line process must be followed to request transfer of the record in a separate shipment.
Scenario: The following graphic illustrates how to unpack containers:

Step 1. Navigate to the Receive Shipments and Containers screen Containers Tab.

Step 2. Click the Find button to search for the container to be unpacked.

Step 3. Enter the search criteria such as Container Number and click Find again.

Step 4. Optionally, update the following fields to be applied to all assets that are being unpacked:

<table>
<thead>
<tr>
<th>FIELD NAME</th>
<th>Description/Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Steward</td>
<td>The Steward organization receiving the items. Defaults to the ship to organization and cannot be updated.</td>
</tr>
<tr>
<td>Location</td>
<td>The location of the unpacked assets. Defaults to the Container location but can be updated.</td>
</tr>
<tr>
<td>Activity Status</td>
<td>Optional: Activity status of the items being unpacked.</td>
</tr>
<tr>
<td>Custodian</td>
<td>Optional: The custodian of the assets being unpacked. Note to set the custodian field to a blank value, enable the checkbox in front of Custodian and leave the value blank.</td>
</tr>
<tr>
<td>User</td>
<td>Optional: The user of the assets being unpacked. Note to set the User field to a blank value, enable the checkbox in front of User and leave the value blank.</td>
</tr>
<tr>
<td>Asset Condition</td>
<td>Optional: The condition of the assets being unpacked. Note to set the condition field to a blank value, enable the checkbox in front of Condition and leave the value blank.</td>
</tr>
</tbody>
</table>
RECEIVING SHIPMENTS AND CONTAINERS

Step 5. Click the **Unpack** box next to each asset in the container that will be unpacked – or click the button just under the word **Unpack** to unpack all assets in that container.

Step 6. To update the asset record values for an individual asset, click the **Identifier** and update the various fields to the right of each asset.

**NOTE:** To search for a specific asset in the list, users may use the **Find** button while the cursor is in the asset block. Enter your asset identifier and press the **Find** button to execute the query.

Step 7. For those assets that are not found in the container, click the **Not Found** checkbox to the right of the item.

**Example:** Below is a sample unpacked container.

![Sample Unpacked Container](image)

Step 8. Click the **Stock Items** tab to view stock items shipped in the container.
Step 9. For each stock line, enter the quantity received. If the item was not received, enter 0.

Step 10. Select the unpack checkbox.

Step 11. Save to unpack the assets.
NOTE: An Ongoing Event of UNPACK ASSET will be recorded on the Timeline of all assets in the container(s) that were unpacked. In addition, the Timeline will record updates to the Steward, Custodian, User and Location.
NOTE: An Ongoing Event of ASSET NOT RECEIVED will be recorded on the Timeline of all assets in the container(s) that were marked as ‘Not Found’. In addition, the asset will still indicate that it remains in the container until such time that it is unpacked or removed by the shipper.
MANAGING SHIPMENT EXCEPTIONS

After the container is unpacked by the destination location, the shipment and container should be reviewed to ensure that all items and quantities in the original shipment document matches the actual items received. If the recipient organization indicates while unpacking that an asset was not found or the quantity of stock assets was different than the amount shipped, the shipping organization should research the discrepancies and take necessary actions. If it is found that the items were not actually in the shipment, the Ship From organization can remove them from the container. It is important to complete this step as an asset can only be in a single container. If the item is not removed, it will not be able to be place in another container.

This section will describe how to update containers due to shipment exceptions.
**Verifying and Removing Shipping Exceptions**

Scenario: The following graphic illustrates how to create a new container and add assets and stock items to the container.

**Navigation**
- Click Shipments
- Click Verify Shipment Exceptions

![Image of the Verify Shipment Exceptions screen]

**Step 1.** Navigate to the **Verify Shipment Exceptions** screen.

**Step 2.** Click the **Find** button to enter your search criteria, such as **Container Number**.

**Step 3.** Click the **Find** button again to execute your search.

**NOTE:** The information for shipment, container details and assets will populate.

**Step 4.** Review the **Container Details** section. Note that if multiple containers were associated with the shipment, use the scroll bar to identify the container with the exceptions.

**Step 5.** On the **Assets** tab, review the status of the items in the container.

<table>
<thead>
<tr>
<th>FIELD NAME</th>
<th>Description/Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>RM</td>
<td>Enable this checkbox to remove the item from the container.</td>
</tr>
<tr>
<td>NF</td>
<td>Display only indicator. Item was marked as not found by the receiving organization.</td>
</tr>
<tr>
<td>UP</td>
<td>Display only indicator. Item was unpacked by receiving organization.</td>
</tr>
</tbody>
</table>
MANAGING SHIPMENT EXCEPTIONS

Step 6. Enable the RM checkbox on the line of any Identifier that should be removed from the container.

NOTE: Contacts of the Ship From Organization may remove items that are in a Not Found or Not Received status. If an item was unpacked from a container, the item may not be removed.

Step 7. Press the Save button to save the changes to the container.

Step 8. Review the Message for each item removed. Note that the asset will remain in the location of the container when originally shipped. Any additional updates should be made through the Maintain Inventory Asset form.

Step 9. Click the Stock Items tab to review the status of the stock items in the shipment.

<table>
<thead>
<tr>
<th>FIELD NAME</th>
<th>Description/Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identifier</td>
<td>Asset identifier of the item in the container.</td>
</tr>
<tr>
<td>Descriptives</td>
<td>Descriptive information on the item, such as the Manufacturer, Model Number, and Official Name.</td>
</tr>
<tr>
<td>Unpack/Not Found Date</td>
<td>Display only. The date that the receiver unpacked the item or marked it as Not Found.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FIELD NAME</th>
<th>Description/Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>RM</td>
<td>Enable this checkbox to make the shipped quantity equal to the received quantity of the stock item.</td>
</tr>
<tr>
<td>NF</td>
<td>Display only indicator. Item was marked as not found by the receiving organization.</td>
</tr>
<tr>
<td>UP</td>
<td>Display only indicator. Item was unpacked by receiving organization.</td>
</tr>
<tr>
<td>Stock Number</td>
<td>The stock number of the item.</td>
</tr>
<tr>
<td>Descriptive</td>
<td>The description of the stock item.</td>
</tr>
<tr>
<td>Unpack/Not Found Date</td>
<td>Display only, the date that item was unpacked or quantity received was indicated.</td>
</tr>
<tr>
<td>Quantity Shipped</td>
<td>The original shipment quantity.</td>
</tr>
<tr>
<td>Quantity Received</td>
<td>Display only. The quantity received by the Ship To organization.</td>
</tr>
<tr>
<td>UOM</td>
<td>Display only. The unit of measure of the stock item.</td>
</tr>
</tbody>
</table>

Step 10. Enable the RM checkbox in front of the items that you want the Quantity Shipped to be Updated to the Quantity Received.

Step 11. Press the Save button to save the updates to the Stock Items.

Step 12. Review the Message field for each line item to validate that the updates were saved successfully.
VIEWING SHIPMENT SUMMARIES

The Shipment Summary screen provides a concise description of each shipment, including the shipment status, the containers included in the shipment, and the assets included in the containers. For each shipment, container, and item, the shipment summary provides a status as well as the user name and date that key transactions were performed. For example, for assets in a container, the Shipment Summary indicates who packed it into the container on what date as well as who unpacked it and when the unpacking was completed. The Shipment Summary screen can be accessed from the main menu as well as through the lookup button on the asset timeline for any shipping events.

Reviewing Shipment Summary Information.

Scenario: The following graphic illustrates how to access and view the shipment details through the Shipment Summary screen.

Step 1. Navigate to the Shipment Summary screen.
Step 2. Click the Find button.
Step 3. Enter your search criteria and press Find.
Step 4. Review the Shipment Summary Information as described in the table below:

### FIELD NAME
<table>
<thead>
<tr>
<th>Description/Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Shipment Number</strong></td>
</tr>
<tr>
<td><strong>Shipment Status</strong></td>
</tr>
<tr>
<td><strong>Transfer Type</strong></td>
</tr>
<tr>
<td><strong>From Organization</strong></td>
</tr>
<tr>
<td><strong>From Address</strong></td>
</tr>
<tr>
<td><strong>From Contact Name</strong></td>
</tr>
<tr>
<td><strong>To Organization</strong></td>
</tr>
<tr>
<td><strong>To Address</strong></td>
</tr>
<tr>
<td><strong>To Contact Name</strong></td>
</tr>
<tr>
<td><strong>Created By</strong></td>
</tr>
<tr>
<td><strong>Shipped By</strong></td>
</tr>
<tr>
<td><strong>Closed By</strong></td>
</tr>
<tr>
<td><strong>Returned By</strong></td>
</tr>
<tr>
<td><strong>Container Number</strong></td>
</tr>
</tbody>
</table>

**NOTE:** To search for a specific asset in the container, place the cursor in the **Identifier** field, press the **Find** button, enter your barcode, and press the **Find** button to execute the search.
### VIEWING SHIPMENT SUMMARIES

<table>
<thead>
<tr>
<th>FIELD NAME</th>
<th>Description/Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Container Status</td>
<td>The current status of the container. Options are: Packed, Shipped, Received, Partially Unpacked, Fully Unpacked, Returned.</td>
</tr>
<tr>
<td>Created By/On</td>
<td>The user and date the container was created.</td>
</tr>
<tr>
<td>Received By/On</td>
<td>The user and date the container was received.</td>
</tr>
<tr>
<td>Container Items</td>
<td></td>
</tr>
<tr>
<td>Assets Tab</td>
<td></td>
</tr>
<tr>
<td>Identifier</td>
<td>The asset identifier of the item in the container.</td>
</tr>
<tr>
<td>Descriptives</td>
<td>The description of the item in the container.</td>
</tr>
<tr>
<td>Status</td>
<td>The current status of the item in the container. Options are: Packed, Shipped, Unpacked, Not Found, Removed.</td>
</tr>
<tr>
<td>Packed By/On</td>
<td>The user and date that the item was packed in the container.</td>
</tr>
<tr>
<td>Unpacked By/On</td>
<td>The user and date that the item was unpacked from the container.</td>
</tr>
<tr>
<td>Removed By/On</td>
<td>The user and date that the item was removed from the container.</td>
</tr>
<tr>
<td>Stock Items Tab</td>
<td></td>
</tr>
<tr>
<td>Stock Number</td>
<td>The stock number of the item.</td>
</tr>
<tr>
<td>Descriptive</td>
<td>The description of the stock item.</td>
</tr>
<tr>
<td>Received</td>
<td>The quantity of the stock item received.</td>
</tr>
<tr>
<td>Quantity</td>
<td>The quantity of the stock item shipped.</td>
</tr>
<tr>
<td>UOM</td>
<td>The unit of measure of the stock item.</td>
</tr>
<tr>
<td>Packed By/On</td>
<td>The user and date the item was packed in the container.</td>
</tr>
<tr>
<td>Unpacked By/On</td>
<td>The user and date that the item was unpacked from the container.</td>
</tr>
<tr>
<td>Removed By/On</td>
<td>The user and date that the item was removed from the container.</td>
</tr>
</tbody>
</table>
Use the Shipments module’s Edit Container and Shipments Interface Records screen to review errors in data transferred into Sunflower from other systems or from Sunflower PackTrak. If an error is encountered in the load process, users may navigate to this form, review and update the records, and process the data again.

This screen contains three main tabs:

- Shipments
- Containers
- Container Assets

Certain transactions may contain information in all three tabs, while other transactions may only have data in one or two. The transaction code on each tab will indicate what type of transaction is being migrated.
EDIT AND PROCESS SHIPMENT AND CONTAINER INTERFACE RECORDS

Scenario: The following graphic illustrates how to search, update, and process Shipment and Container transactions through the Edit Container and Shipment Interface Records form.

NAVIGATION
- Click Shipments
- Click Edit Container and Shipment Interface Records

Step 1. Navigate to the Edit Container and Shipment Interface Records screen.
Step 2. Click the Find button.
Step 3. Enter your search criteria such as Load Group or Record Group and press Find.
Step 4. Navigate to the tab that you want to update. Review the tabs and their contents below:

<table>
<thead>
<tr>
<th>TAB</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shipment &gt; Shipment Details</td>
<td>Displays shipment header information such as identifier, transfer type, shipment type, transaction code, Ship From and Ship To organization and contact information.</td>
</tr>
<tr>
<td>Shipment &gt; Shipped From Location</td>
<td>Displays the ship from location information.</td>
</tr>
<tr>
<td>Shipment &gt; Destination Location</td>
<td>Displays the ship to location information.</td>
</tr>
<tr>
<td>Shipment &gt; Final Event</td>
<td>Displays final event and final event user defined fields for external shipments.</td>
</tr>
<tr>
<td>Shipment &gt; User Fields</td>
<td>Displays shipment user fields.</td>
</tr>
</tbody>
</table>
### Step 5. Update the fields as required.

### Step 6. Click the **Save** button to save the field level changes.

### Step 7. Click the **Process** button to process the changes. This action will then apply those changes to the asset records.

### Step 8. Review the **Result** field on each tab to view status of the record after process.

<table>
<thead>
<tr>
<th>TAB</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Container &gt; Container/Asset Details</td>
<td>Displays container identifier, steward organization, associated shipment identifier and transaction code.</td>
</tr>
<tr>
<td>Container &gt; Location</td>
<td>Displays the container location.</td>
</tr>
<tr>
<td>Container &gt; User Fields</td>
<td>Displays the container user fields.</td>
</tr>
<tr>
<td>Container Assets &gt; Asset</td>
<td>Displays the container asset, stock item information, and transaction code.</td>
</tr>
<tr>
<td>Container Assets &gt; Change To Information</td>
<td>Displays the information that should be updated on the asset record when unpacking an item.</td>
</tr>
<tr>
<td>Container Assets &gt; Location</td>
<td>Displays the location information that should be updated on the asset record when unpacking the item.</td>
</tr>
</tbody>
</table>
APPLICATION AND PERSONAL PARAMETER OPTIONS

Sunflower provides a set of personal and application level parameters to control the functionality of the Shipping and Receiving function as well as provide users with time saving default values. This section will review the various parameter options available. Application level parameters must be set by Administrators. Personal parameters must be set by each individual user.

All parameters related to the Shipping and Receiving are in the category ‘HVS’ or High Volume Shipping. The table below provides the parameter code, description, and indicator if the parameter is available at the personal level.

<table>
<thead>
<tr>
<th>PARAMETER CODE</th>
<th>Description</th>
<th>Personal Parameter Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>AUTORETIRE</td>
<td>Automatically retire assets that are in external shipments. When set to Yes, the final event and final event UDF fields will be available when shipping external transfers.</td>
<td>No</td>
</tr>
<tr>
<td>DCNLENGTH</td>
<td>Default length for a generated container identifier.</td>
<td>Yes</td>
</tr>
<tr>
<td>DCNPREFIX</td>
<td>Default prefix for generating container identifiers.</td>
<td>Yes</td>
</tr>
<tr>
<td>DSHFRCNTC</td>
<td>* Default Shipped from Contact Name.</td>
<td>Yes</td>
</tr>
<tr>
<td>DSHFRLOC</td>
<td>* Default Shipped from location.</td>
<td>Yes</td>
</tr>
<tr>
<td>DSHFRORG</td>
<td>Default Shipped from Organization.</td>
<td>Yes</td>
</tr>
<tr>
<td>DSHLENGTH</td>
<td>Default length for a generated shipment identifier.</td>
<td>Yes</td>
</tr>
<tr>
<td>DSHPREFIX</td>
<td>Default prefix for generating shipment identifiers.</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Sunflower provides a flexible web-based reporting system. The Sunflower database is queried when a report is created and executed. Reports display real-time information. Therefore, an afternoon report may differ from a morning report by reflecting any changes made throughout the day.

There are several output options available for reports.

- PDF (Adobe Acrobat)
- HTML
- Text

Outputs depend upon the report selected. Acrobat and HTML are standard options provided for most reports. Text file export is available for selected reports.

Sunflower provides the following reports with the Shipment module:

**Shipment and Container Global Information Report**

The **Shipment and Container Global Information** report shows detail and summary information of shipments, containers, and container assets. Use this report to display shipment and container details by status, by organization, for a specific date range.

**Shipment Manifest Report**

The **Shipment Manifest** report provides users with a packing list to include in shipment. The shipment manifest report provides details of the shipment, including from and to information, container details, and asset and stock item information located in the shipped containers.

**Shipment and Container Interface Processing Report**

The **Shipment and Container Interface Processing Report** displays the results of information migrated into Sunflower through the interface tables and any errors encountered by source load group.