DDMSPLUS®: Setting Up & Using Delivery Manifests

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About Delivery Manifests

The Delivery Manifest application is designed to help you streamline the delivery manifest. In line with our other EBS products, such Price Plans and Price Modeling, Delivery Manifest replaces a text-based screen with a graphical interface that has added functionality. Delivery Manifest replaces the text-based (TS) Shipping Manifest screen and the (L8) Manifest & Route Parameters screen.

Using the Delivery Manifest application, you can scan tickets, add tickets based on limit criteria, or use manual entry. You can create a new manifest or append to an existing manifest. You can also use the Update Counts feature to update delivery manifest counts and quickly print delivery documents including invoices, packing slips, and shipping labels. You can even export manifests to a third party.

Before You Begin

Before you begin creating Delivery Manifests, you must complete the following steps:

1. Set up your routes and add tickets in Order Entry. For more information, see your online help.

2. Import sales journals and customers.

3. Set general and route parameters.

4. (Optional) Set up customers. You can assign customer routes, sort order, and freight. You can also set up the Fr box for customer freight for third party carriers such as ShipStation. For more information, see your online help.

5. If you plan to export to JumpTrack, you need to set up a URL in the DDMSPLUS® Administration.

Importing Sales Orders and Customers

Both sales orders and customers should be imported periodically throughout the day. For example, you might set up a schedule to update every 15 minutes.

Note: Sales journals and customers should be imported each time a change is made to either of these databases. Not importing a customer causes any orders associated with the customer to not show on manifests.

You must also import sales journals to SQL so that you can access past sales. You do this using the EBS SQL Import Panel. You can use the Import Sales Journal function to import data from sales journal files to the SalesOrderJournal SQL Table and the SalesOrderArchive SQL Table. The SalesOrderJournal contains your most recent sales. You must specify the number of months to store in this table. All sales that are older than the specified number of months can be imported to the SalesOrderArchive during the same procedure. After the initial import, the system automatically adds new completed sales to the SalesOrderJournal file. It also moves past sales that are no longer within the specified number of months to the SalesOrderArchive table. Before using any EBS program for the first time, you must import your existing data to the new SQL database.

For details on importing data on the DDMSPLUS system, see Using the EBS SQL Import Panel.

Setting Delivery Manifest Parameters

Before using the Delivery Manifest application, you need to set parameters. There are two sets of parameters conveniently located within the application itself: General Parameters and Route Parameters.

Note: Shipping manifest parameters previously set in the (L8) and (L8)[R] are automatically imported into Delivery Manifest. Changes made in Delivery Manifest also update the text-based (L8) and (L8)[R] parameters.

Setting General Parameters

1. From the Main Menu, double-click Warehouse.

2. From the Warehouse Menu, double-click Delivery Manifest.

3. From the Delivery Manifests menu, click General Parameters. The General Parameters window opens. In this window, you can view or modify general parameters. General parameters apply to all routes. Route parameters override the settings in general parameters.

4. Enter passwords for the delete and release features in the Delete and Release boxes. Users must enter these passwords before deleting or releasing a manifest.

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5. Use the boxes in the window to add additional parameters:

   5.1 In the Next Manifest # box, specify a beginning manifest number for shipping manifests. This gives you the option of letting the system assign manifest numbers that begin with this number. If you leave this box blank, you must manually assign manifest numbers.

   5.2 In the Maximum Stops # box, enter the maximum number of stops allowed for each manifest.

   5.3 The Third Party Carrier Volume box works with the third party carrier manifest feature. In this box, specify a volume serial where to store the P-SHIPI and P-SHIPO files.

   5.4 Click the Set Carton from Third Party Carrier box to automatically update the carton amount. If you are using ShipStation®, select this box.

   5.5 Click the Do Returning Release box to specify whether to execute a returning release. Leave the box blank to not allow a returning release on the manifest.

   5.6 Click the Batch Add Bill Complete Orders box to add bill-complete orders to the shipping manifest when they are complete. Leave the box blank to not add bill-complete orders to the delivery manifest.

   5.7 Click the Allow Sales Order Display box to view sales orders for delivery manifests in the Delivery Manifest List window. (You can view sales orders by clicking Display Sales Order(s) in the Current Options menu.)

   5.8 Use the Carton and Envelope buttons to select which package type to use for the default quantity.

   5.9 Use the JumpTrack™ User Name and Password boxes to enter your JumpTrack login information.

   5.10 Use the DQ Technology User Name and Password boxes to enter your DQ login information.

   Note: This feature is not included in all software packages and may require authorization. For more information, contact ECI sales.

   5.11 If you are using ShipStation, you must enter the API information that you received from ShipStation in the API Key and API Secret boxes.

   Note: This feature is not included in all software packages and may require authorization. For more information, contact ECI sales.

6. The Batch Add Limits boxes allow you to add limits. For example, you can use the Route box and corresponding To box to limit the delivery manifest according to a particular route code or a range of route codes. These limits are the default limits when building a delivery manifest. However, you can change these limits any time you are building a delivery manifest. If you are using the Route/To boxes to limit according to route, you can use the R/M box when you run the delivery manifest to assign the route to the ticket.

   6.1 Set limits by Location, Route, Order Code, Status, SIC, Sort or Long P/O# by adding the beginning of the range in the first box and the ending range in the To box.

   6.2 Use the National Drop Ship box to specify whether to include national drop ship orders on delivery manifests. You can specify to include national drop ship orders on manifests by typing I, exclude by typing E, or enter O to only include national drop ship orders.

6.3 The Default Order Date to Yesterday box lets you specify whether the delivery manifest defaults the order to yesterday's date. Click the box to default delivery manifests to orders with yesterday's date. Leave the box blank to default delivery manifests to orders with the current system date.

7. The SQL Reporting Formats boxes allow you to select what to print on the label, packing slip, loading report, and delivery report. Use the drop down arrow in each box to make your selection.

8. In the ShipStation boxes, enter the information from your ShipStation account API Settings. You must enter the information in these boxes before you can use ShipStation.

9. Click .

Setting Route Parameters

In the Route Parameters window, you can add and delete routes as well as setting parameters by route. To add a route, click Add Route then complete the boxes for the route. To delete a route, select the route to delete then click Delete Route.

1. From the Delivery Manifests menu, click Route Parameters. The Route Parameters window opens. In this box you can override the settings in the General Parameters dialog box and create route specific parameters.

2. In the lower half of the window under the Routes heading, click the route for which to change parameters.

3. The Route box displays the code for the selected route. You can change the driver, route description, delivery days, maximum number of stops, and the substitute list ID. For more information on the corresponding boxes, see your online help.

Note: If you are using ShipStation, you must enter a route description in the Description box.

4. Click the Build Third Party Source Table When Releasing box to use the route with a third party carrier service such as ShipStation. You must check this box if you are using a proof of delivery system such as ShipStation.

Leave this box blank to not use this route with a third party carrier service.

5. Click the Inactive Route box to mark a route as inactive.

6. In the How to Default the Label Copies Field, select from one of the following options:

Cartons + Envelopes: This option prints the number of labels for cartons and envelopes.

Cartons + Whl Cartons: This option prints the number of labels both for your carton count and the wholesaler carton count.

**Whl Cartons:** Use this option to print only the labels for the wholesaler cartons.

7. In the SQL Reporting Formats boxes, select the layout of the Label, Packing Slip, Loading Report, and Delivery Report using the drop down arrow in each box.

8. Click .

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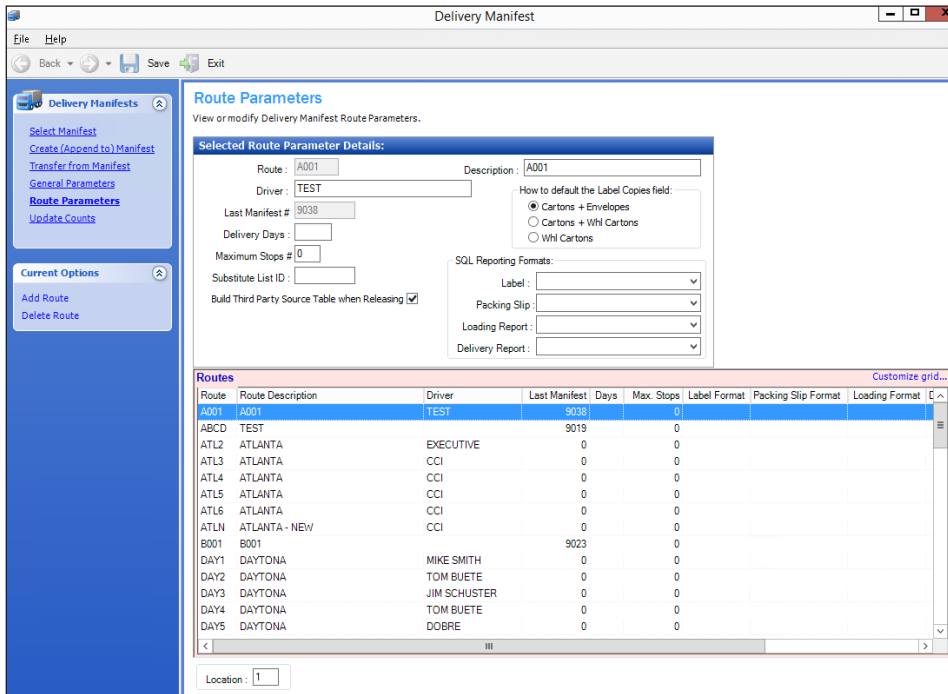
Setting the URL for Your E-commerce Site

If you plan to export to JumpTrack, you need to set up a URL in the DDMSPLUS Administration.

1. Log in to DDMSPLUS Administration.

2. Click Configuration.

3. Click Application Settings. The Application Settings page opens.

4. Click Edit next to the JumpTrack ECinteractive Address box.

5. Click the JumpTrack Ecinteractive Address box and enter your URL.


6. Click Save.

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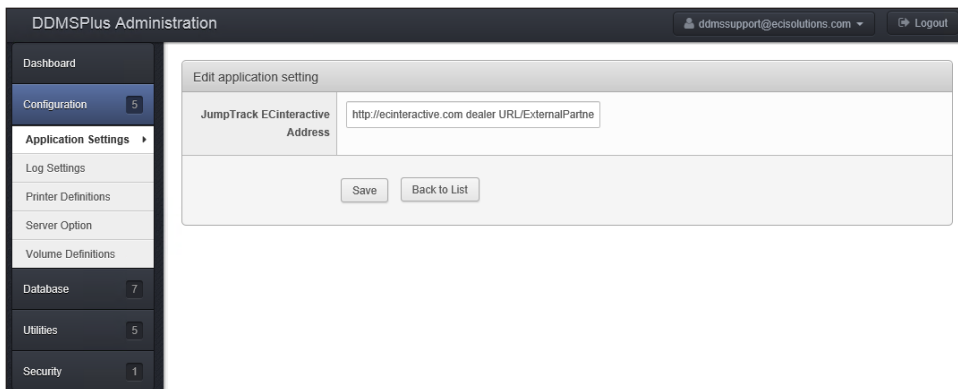
Using Delivery Manifests

Using Delivery Manifests involves creating and editing manifests and transferring tickets.

Creating and Appending to Manifests

Use the Create Delivery Manifest window to add or append to existing manifests. Adding new manifests creates a new manifest for each route. Appending to existing manifests adds tickets with the same route to an existing manifest. You may select to both create and append. Selecting both options adds tickets to manifests with a matching route and creates a new manifest for each ticket that has a route not currently on a manifest.

1. From the Main Menu, double-click **Warehouse** then double-click **Delivery Manifest**.

2. Click Create (Append To) Manifest in the Delivery Manifest menu. The Create Delivery Manifest window opens.
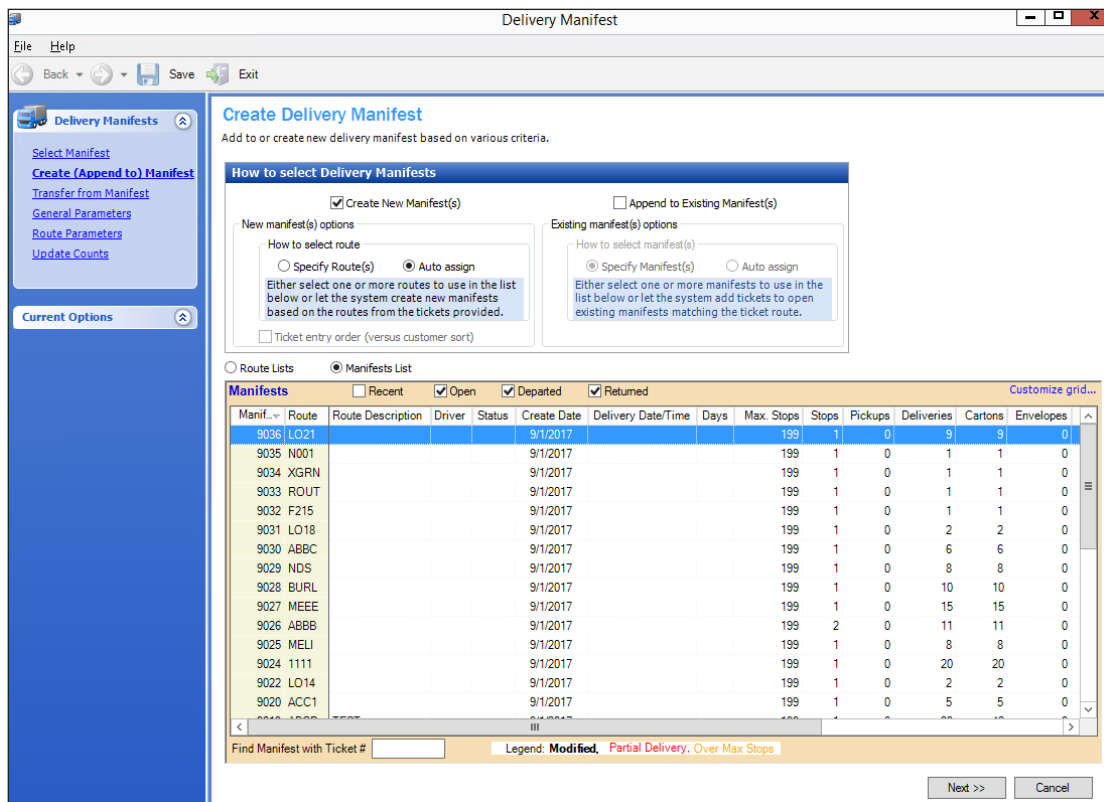
3. Click Create New Manifest(s) to create a new manifest or Append to Existing Manifest(s) to add the tickets to an existing manifest. Click both check boxes to create a new manifest if an existing manifest with the same route is not available.

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4. In the New Manifest(s) Options and Existing Manifest(s) Options, set options according to what you selected above. If you selected both to create and append to an existing manifest, you need to set options in both the New and Existing Manifest(s) Options.

    4.1   Choose how to select routes. You can select Specify Route(s) or Auto Assign.

- If you select Specify Route(s), the routes display in the Routes box below. In addition, the Ticket Entry Order option becomes available if creating a new manifest.

- Select Ticket Entry Order to sort by ticket order instead of customer order.

- In the Route box, select the routes for which to create a manifest. To select several different lines, press the Ctrl key and click individual lines. You can also select several lines in a row by clicking the first line, holding the Shift key and clicking the last line.

- If you select Auto Assign, each route is automatically placed on its own manifest.

    4.2   In the Existing Manifest Options, choose how to select the manifest. You can select Specify Manifest(s) or Auto Assign.

- If you select Specify Manifests, the Manifests List displays below. Use the Recent, Open, Departed, and Returned boxes to determine which manifests display. You can also find a manifest by ticket number using the Find Manifest with Ticket # box.

Note: To switch between the Route List and Manifests List, use the buttons above the Lists grid.

- Use the Manifest List to select the manifests to which to append. To select several different lines, press the Ctrl key and click individual lines. You can also select several lines in a row by clicking the first line, holding the Shift key and clicking the last line.

- If you select Auto Assign, each ticket is automatically placed on a manifest matching the ticket route.

5. Click Next. The Creating Manifest Tickets and Printing window opens.
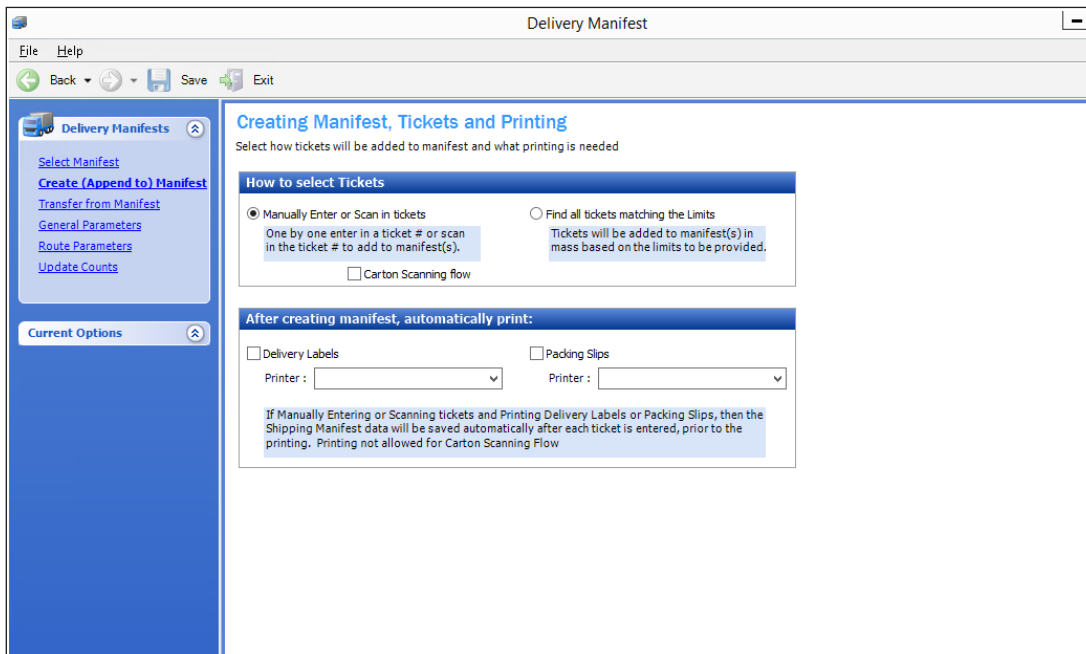
6. In the How to Select Tickets box, select whether to manually enter tickets or find tickets matching a set of limits. If you select Manually Enter or Scan in Tickets, you can choose to use the Carton Scanning Flow.

    The regular flow when manually entering tickets means that tickets are assigned to a manifest as soon as they are entered. If a manifest exists with the route of the ticket, the ticket is placed on that route. If a manifest does not exist, a new manifest is automatically created. The manifest is printed after each entry.

    Selecting Carton Scanning Flow allows you to enter all the tickets before assigning any to a manifest. Once you click save, the tickets are placed on manifests matching the ticket route. New manifests are created if there is no manifest matching the route. The manifest is not printed after each entry.

    If you select Find All Tickets Matching the Limits, go to **Step 8**.

7. In the After Creating Manifests Automatically Print boxes, select whether to print delivery labels or packing slips automatically.

**Note:** This option is not available for the carton scanning flow.

To print delivery labels, click the Delivery Labels box and use the drop down arrow in the Printer box to select the printer.

To print packing slips, click the Packing Slips box and use the drop down arrow in the Printer box to select the printer.

Note: Once you select a printer, that printer becomes the default until changed.

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8. Click Next and go to **Step 11**.

9. If you select Find Tickets Matching the Limits, the Ticket Limits window opens.

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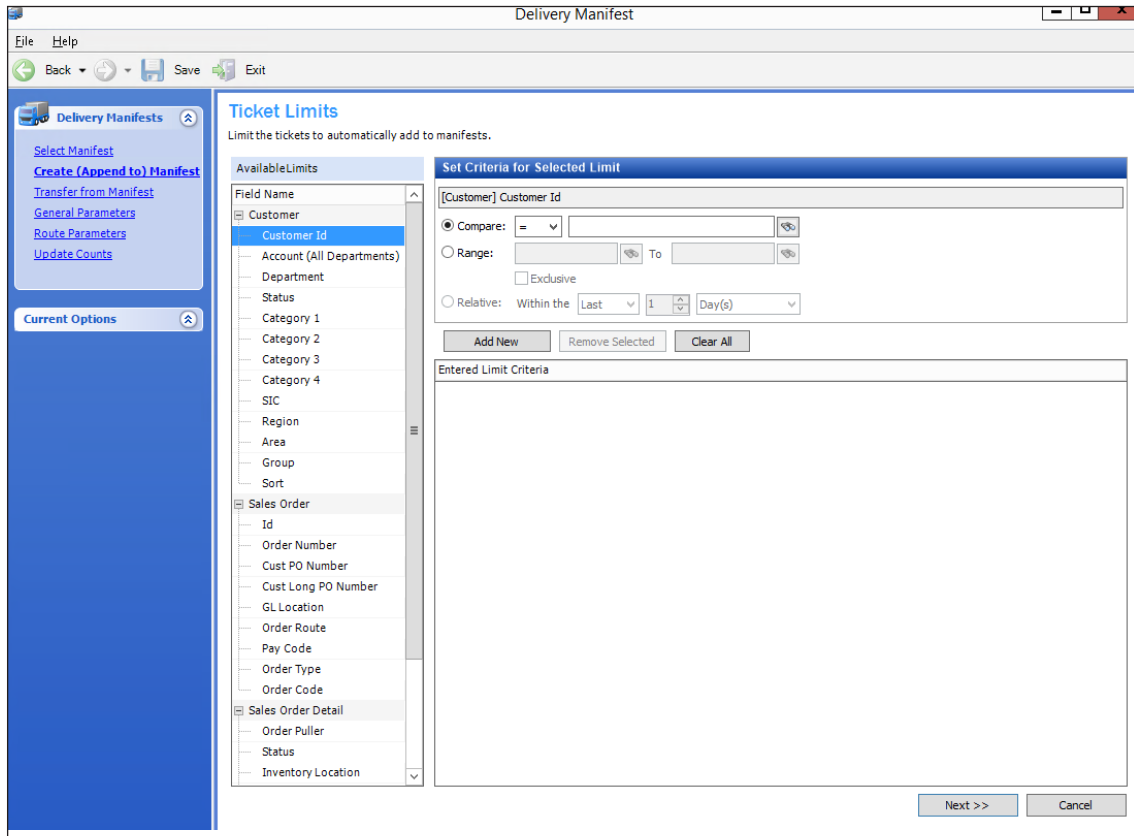
Use this window to set up limits. To see all the limits, click + (plus sign) in front of the field name.

Click the field name, then set the criteria for that filter. For example, to limit by customer ID, click the Customer ID option under Customer.

In the Set Criteria for Selected Limit box, select Compare or Range.

Use the Compare boxes to specify whether to limit by numbers that are greater than, less than, or equal to the numbers entered in these boxes.

For example, if you limit by customer ID, you would click Compare, then specify whether to limit by customer IDs greater than, less than, or equal to using the drop down arrow. Then, enter the number in the last box. Use the following table to determine which symbol to use:

>	Greater Than
<	Less Than
=	Equal To
>=	Greater Than or Equal To
<=	Less Than or Equal To
<>	Not Equal

Use the Range boxes to enter a range of numbers, such as item numbers or customer IDs. Click or the drop down arrow to query and set up the range.

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The Exclusive check box works with the Range boxes. After entering a range, you can click Exclusive to limit by numbers outside of the range you set.

The Relative boxes work with the date limits. For example, to limit by Entry Date, click Relative. Then, use the boxes to set a range within the last number of days, weeks, months, or years.

10. As you select the criteria to use, click Add New to apply it. To remove a filter, highlight it and click Remove Selected.

    To remove all limits, click Clear All.

    To exit the Limit Screen window and cancel the current limit set, click Cancel.

    To save click [icon].

11. When finished setting up limits, click Next.

Note: If you don't set limits, a Warning message may appear. To set limits, click OK. To continue, click Cancel. However, if you don't set limits, the search may time out before finishing.

12. The Delivery Manifest List window opens. If you used limits to enter the manifests, this shows the final manifest list. If you are manually entering tickets, you must manually enter your tickets.

    In the Ticket box in the Manifest Tickets grid, enter a ticket to add to a manifest.

13. In the Cartons and Envelopes boxes, enter the number of cartons or envelopes for the ticket. You can enter up to four characters in these boxes.

14. Press Enter. The ticket is assigned to a manifest according to the selected flow.

Note: The regular flow when manually entering tickets means that tickets are assigned to a manifest as soon as they are entered. If a manifest exists with the route of the ticket, the ticket is placed on that route. If a manifest does not exist, a new manifest is automatically created. The manifest is printed after each entry.

The carton scanning flow allows you to enter all the tickets before assigning any to a manifest. Once you click Save, the tickets are placed on manifests matching the ticket route. New manifests are created if there is no manifest matching the route. The manifest is not printed after each entry.

15. Continue entering tickets, pressing Enter after each ticket to move to the next line.

16. When finished entering tickets, click [icon].

Note: Added tickets display in bold until they are saved.

Selecting and Editing Manifests

Once you create manifests, they are available in the Delivery Manifest List.

1. Click Select Manifest in the Delivery Manifests menu. The Delivery Manifest List opens.

2. Click a manifest to select it from the list.

3. Depending on the status of the manifest and the parameters set in the General and Route Parameters windows, you can limit the manifest; print labels, packing slips, loading report, or delivery report for the manifest; run a departing or returning release; delete the entire manifest or remove selected tickets; and export to or import from a third party. These options display in the Current Options menu. Options that are not available are grayed out.
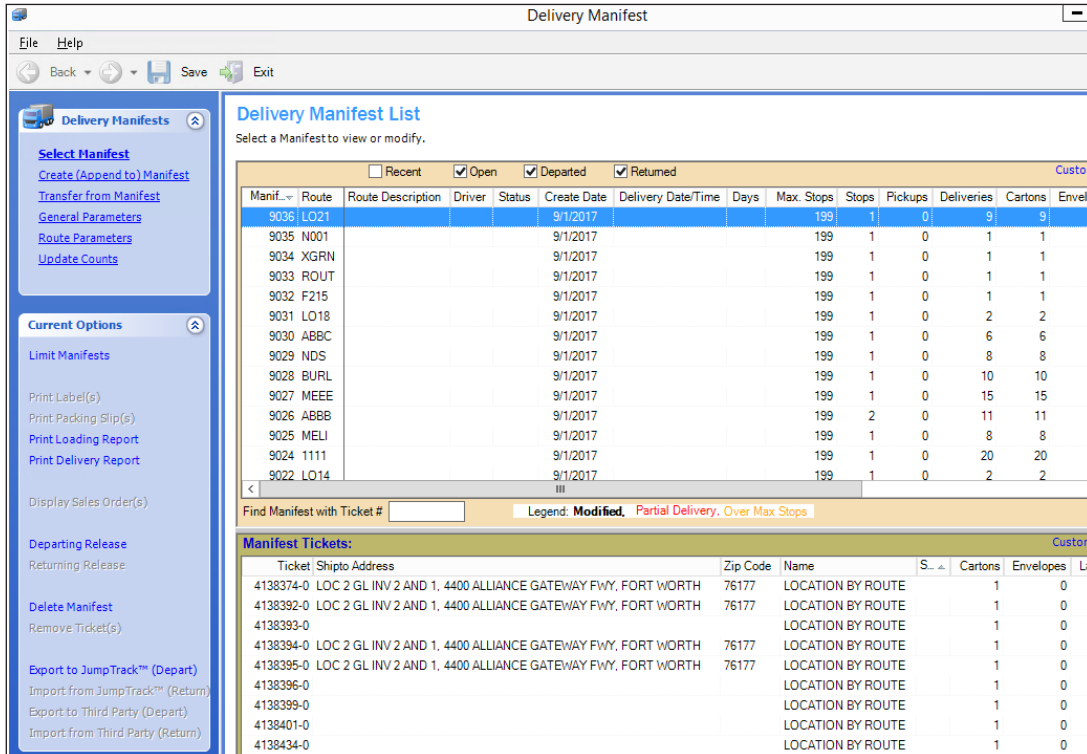
Limiting Manifests

1. Select a manifest in the Delivery Manifest List.

2. Click Limit Manifests in the Current Options menu. The Delivery Manifest Limit window displays. This Limits window works just like the Ticket Limits window, except you are limiting manifests instead of tickets. For more information, refer back to **Steps 8-11** under the heading **Creating and Appending to Manifests**.

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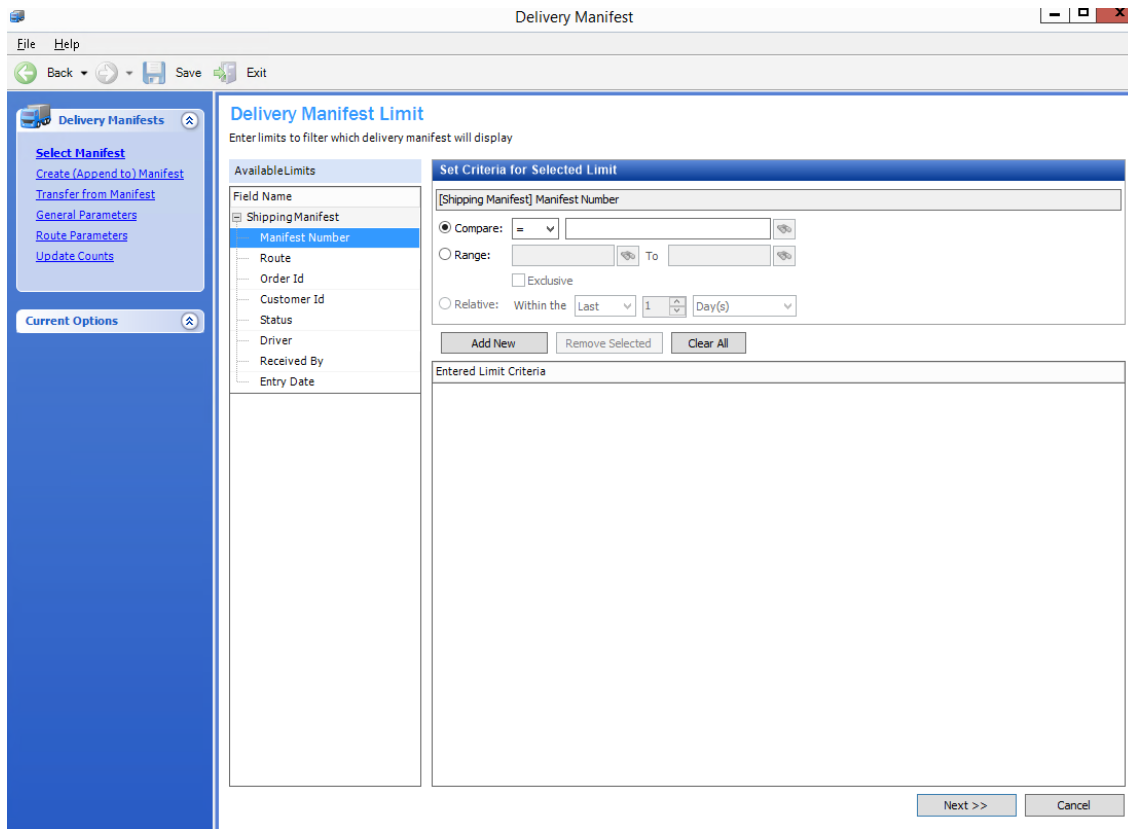
Printing Manifests

Printing manifests is quick and easy. Simply select a manifest in the Delivery Manifest List and select the printing option in the Current Options menu.

You can print labels, packing slips, a loading report, or a delivery report for each manifest. The availability of these printing options depends on the status of the manifest and the parameters set in the Route and General Parameters windows.

Releasing Manifests

When you are ready to load and deliver the orders, you should release the manifest. Releasing a manifest attaches delivery information to the order. This delivery information, which is stored in the file P-SPECIAL, includes the manifest number, the delivery time, the name of the driver making the delivery, and the number of cartons and envelopes.
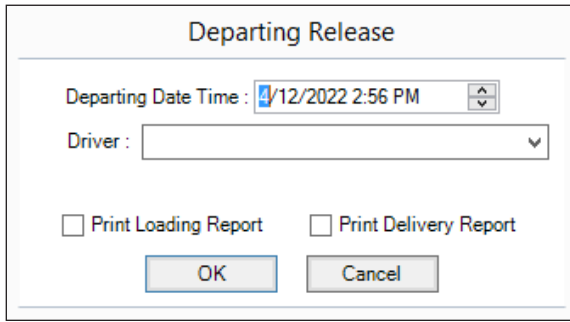
After releasing a manifest, you can view the delivery information in Order History. Viewing these orders lets you quickly determine the date and time of the delivery, the number of cartons and envelopes, and so on. You can also view information in Order Analysis including tracking numbers.

There are two types of releases: a departing release and a returning release. A departing release lets you enter delivery information before it is actually delivered, while the returning release lets you add or change information on the delivery manifest once the driver returns.

You can execute both departing and returning releases.

To execute a departing release on a manifest:

1. In the Current Options menu, click Departing Release.

2. The Departing Release Password dialog box opens. Enter the password.

3. The Departing Release dialog box opens. In the Departing Date Time box, enter the date and time to release the manifest. This time should be the time when the driver leaves.

4. In the Driver box, confirm that the correct driver is listed. If it is not, enter the driver name or use the drop down arrow to select one.

5. At this point, you have the option to print the loading report or the delivery report. Click the check box(es) corresponding to the report(s) to print.

6. Click OK. Any reports you selected print and the manifest is released.

7. Click .

To execute a returning release on a manifest:

1. In the Current Options menu, click Returning Release.

2. The Returning Release Password dialog box opens. Enter the password.

3. The Returning Release dialog box opens. Enter the date and time that the driver returned.

4. Click OK. The manifest is released.

5. Click .

Deleting Manifests

1. In the Delivery Manifest List, select the manifest to delete.

2. Click Delete Manifest in the Current Options menu.

3. A dialog box opens prompting you to enter a password. Enter the password to delete manifests.

4. At the Manifest Delete confirmation box, click OK. The selected manifest is deleted.

5. Click .

Deleting Tickets From a Manifest

1. In the Delivery Manifest List, select the manifest for which to delete tickets.

2. The tickets display in the Manifest Tickets grid. Click the ticket(s) to delete. To select several different lines, press Ctrl and click individual lines. You can also select several lines in a row by clicking the first line, holding Shift and selecting the last line.

3. Click Remove Ticket(s) in the Current Options menu.

4. When prompted, enter your password to delete tickets.

5. Click OK. The tickets are deleted.

6. Click .

Exporting Manifests

DDMSPLUS users can export to JumpTrack or export to ShipStation. See the headings **Exporting to JumpTrack** and **Exporting to ShipStation**.

Exporting to JumpTrack

1. Select the manifest to export from the list.

2. Under the Current Options menu, click Export to JumpTrack™ (Depart).

3. Enter the departing release password.

4. The Departing Release dialog box opens and displays the departing driver and time. At this point, you can print reports, if needed.

5. Click OK.

Exporting to ShipStation

Before you can export to a third party, make sure the Build Third Party Source Table When Releasing box in the Route Parameters window is checked. Checking this box ensures that the PSHIPO file is created. After you've built the PSHIPO file, you're ready to export the information to ShipStation.

1. Click Select Manifest and select the manifest to export from the list.

2. Under the Current Options menu, click Export to ShipStation (Depart).

3. Enter the departing release password.

4. The Departing Release dialog box opens. You can set the date and time in the Departing Date Time box. You can type the information in the box or use the arrows to make adjustments.

5. In the Driver box, use the down arrow to select the driver.

6. You can select to print a loading report and/or delivery report by checking these boxes.

7. Click OK. Departed displays next to the manifest in the Delivery Manifest List.

8. Click Save. A dialog box opens confirming how many tickets were exported to ShipStation.

9. Click .

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Importing Manifests

DDMSPLUS users can import from JumpTrack or import from ShipStation.

Importing From JumpTrack

1. Select the departed manifest from the list.

2. Under the Current Options menu, click Import From JumpTrack™ (Return). The Returning Release dialog box opens.

3. Adjust the date as needed.

4. Click OK. The information is imported from JumpTrack.

Importing From ShipStation

Once the shipping labels are printed, you can import the third-party carrier information back to your system. You can view this information in Order Entry and Order Analysis.

1. Select the departed manifest from the list.

2. Under the Current Options menu, click Import From ShipStation (Return). If there are no exceptions, go to **Step 3**.

    If there were exceptions, the Third Party Import Exceptions dialog box opens. You can change the info as needed. You can print exceptions by clicking Print Exceptions. The Continue with Release of Manifest prompt is at the bottom, click OK to continue or click Cancel.

3. The Returning Release dialog box opens. Use the Returning Date Time box to adjust the date and time, if needed.

4. Click OK. If you fixed exceptions in the Third Party Import Exceptions dialog box, the information updates on the manifest.

5. Click .

    The shipment information is updated and available for viewing in O/E History and Order Analysis. In Order Analysis, you can click the Tracking #'s link to view the tracking information.

Transferring Tickets

1. In the Delivery Manifests menu, click Transfer from Manifest. The Transfer Tickets window opens. You can transfer tickets before the routes depart or when the routes return, for example if some items on a ticket were not delivered.
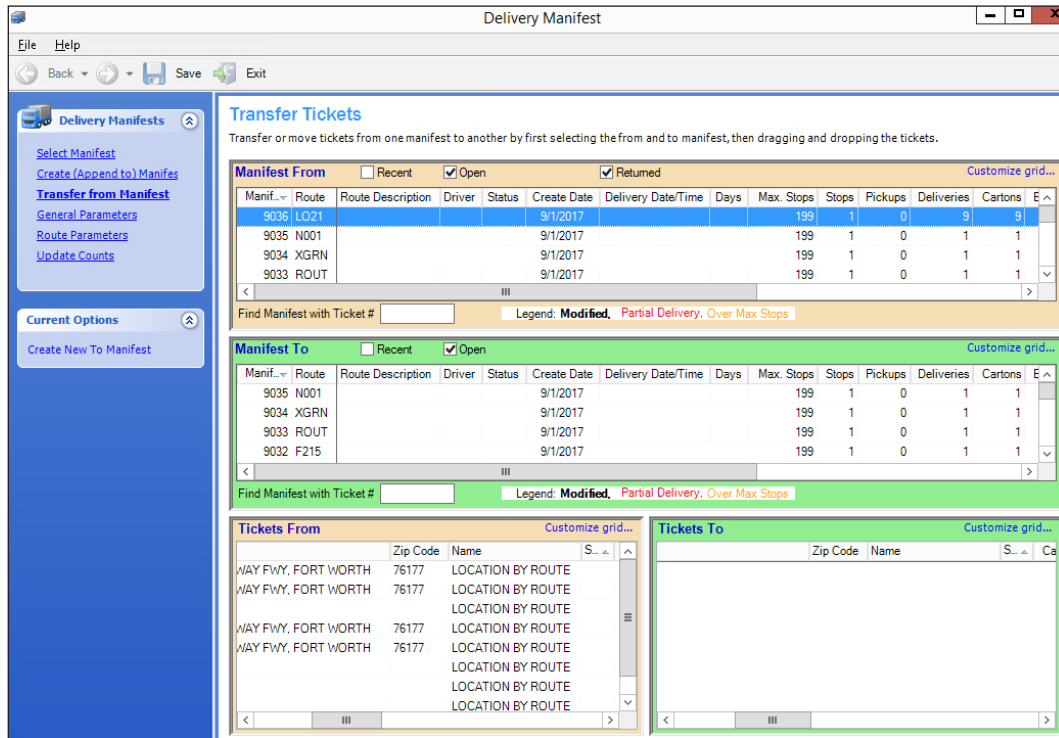
2. In the Manifest From box, use the scroll bar to locate the manifest from which to transfer tickets and highlight it to select. You can also use the Recent, Open, and Returned check boxes to limit the manifests that display. To find a manifest with a particular ticket, enter the number for the ticket in the Find Manifest with Ticket # box.

3. In the Manifest To box, use the scroll bar to locate the manifest to which to transfer tickets and highlight it to select. You can also use the Recent and Open check boxes to limit the manifests that display. To find a manifest with a particular ticket, enter the number for the ticket in the Find Manifest with Ticket # box.

4. Once you have selected both the manifest to transfer from and the manifest to transfer to, use the Tickets From and Tickets To to transfer the tickets. Double-click and drag the ticket from the Tickets From to the Tickets To box.

    You can also transfer the tickets to a new manifest. Click Create New To Manifest. The Tickets To box is blank, allowing you to create a new manifest. Drag the tickets to the Tickets To box.

5. Click [icon].

Update Counts

From the Delivery Manifests menu, click Update Counts. The Delivery Manifest Update Counts window opens. Use this window to update delivery manifest counts and quickly print delivery documents including invoices, packing slips, and shipping labels. This feature also populates the number of bulk labels printed, eliminating the need to populate that quantity at the time of packing. For more information, see your online help.

Note: This feature requires authorization. For more information, contact ECI Sales.