

**PURPOSE:**

Ship-To companies can be assigned Bill-To companies and designate where a Sales Order will be shipped.

**PROCESS STEPS:****Create Ship-To Company**

1. Navigate to Sales > Bill-To / Ship-To Management.
2. Change Report Type to "Ship-To Company".
3. Search Bill-To Company, double-click on Company Name in "Select a Bill-To Company" screen
4. Click the **Add Ship-To button**.
5. On the General tab of the "Edit Ship-To Company" form.
  - a. The company's name in the Ship-To Company field.
  - b. Company's shipping contact in the Contact field
  - c. Enter the Phone number and Extension field for this contact if known
  - d. Enter in the COMPLETE Ship-To Company Address, Country (2 digit), Country Code(search).
  - e. Click Validate Address
  - f. Enter Email address; change Print Document Group to "Email" if applicable.
  - g. Add Ship-To Notes, Order Pop-up Notes, and Ship Pop-up Notes if certain notes are required for entering or shipping an order.
    - i. Ship-To Notes: Only on the Ship Bill-to Company form. Enter any general notes about the Ship-To. (ex. Hours of receiving)
    - ii. Order Pop-up Notes: Enter pop-up notes for order entry. When the selected bill-to/ship-to customers are added on an order, these notes will pop-up for display. Order pop up notes also display on the DSD mobile application but are not available in the WMS application. (ex. Customer specific instructions per order)
    - iii. Ship Pop-up Notes: Enter pop-up notes for when shipping. When orders containing the selected bill-to/ship-to customers are shipped, these notes will pop-up for display. Ship pop up notes also display on the DSD mobile application but are not available in the WMS application. (ex. DSD for drivers)
  - h. Verify the Active Box is checked.
6. Navigate to the Order Defaults tab
  - a. Broker (choose one)
  - b. Facility (choose one) **Note:** ALL National Ship-To's require "Tulsa"
  - c. IC-Disc (choose one)
  - d. Division (choose one) **Note:** ALL National Ship-To's require "Tulsa" Facility (see Step b above)
  - e. Territory (choose one)
  - f. Customer Type (choose one)
  - g. Industry Type (choose one)
  - h. Select the default Freight Type if known, if not leave Prepaid and Add **Note:** ALL Customer Ship-To's with the Tulco Office address for "Customer Pickup"...need Freight Type="Customer Pick Up"
  - i. Select the default Ship Via if known, if not leave TBD **Note:** ALL Customer Ship-To's with the Tulco Office address for "Customer Pickup"...need Ship Via="Customer Arranged Truck"
  - j. Select the Document Group for this Customer
  - k. Select Print Substitutions for applicable customer (choose one) **Note:** see International Division for which one

- I. Check box for Tax Exempt if applicable
7. Navigate to the User Fields tab
  - a. Enter current date in Ship-To Created Date.[Required]
  - b. Enter the Document Type.[Required]
  - c. Enter the Ship-To Lead Time – this is the average number of days it takes for product to be delivered to this customer.
  - d. Enter the Truck Day – This is the day of the week Tulco would deliver to this customer.
8. Navigate to the Sales Reps tab
  - a. Click plus sign [+]
  - b. Search for Sales Rep, by clicking on the magnifying glass and double-clicking the selection
  - c. Check box for Primary
  - d. Click Save and exit the 'Edit Sales Rep' window
9. Navigate to the GL Overrides for National & International ONLY
  - a. **ALL National Bill-To's require GL Overrides: Position "3", Override "800"**
  - b. **ALL International Bill-To's require GL Overrides: Position "3", Override "900"**
10. Select Save

*\*Note: If this is a ship to for an Inter-company transfer, the Facility is the facility the items are shipping from while the Transfer Facility is the facility it is shipping to.\**

## Modify Ship-To Company

If modifying an existing Ship-To, follow the steps below:

1. Navigate to Sales > Bill-To / Ship-To Management
2. Change Report Type to "Ship-To Company".
3. Search Bill-To Company, double-click on Company Name in "Select a Bill-To Company" screen
4. Click Modify Ship-To button
5. Repeat Steps 5-9 in Create Ship-To Company above.

## REVISIONS

Rev	Date	Change
I/R	11/17/17	New
A	3/29/18	Added Notes description
B	3/30/18	Add Required – User Fields/Ship to Created Date, removed Sales Rep section
C	7/25/18	Add steps for required fields: Division & Sales Rep
D	10/3/18	Add GL Override note
E	10/4/18	Remove GL Override note
F	10/8/18	Add User Field – Document Type[Required]
G	12/7/18	Add Order Defaults list of items to change/verify
H	1/15/19	Add National/International requirements
I	1/24/19	Add Ship-To for Customer Pick Up/Customer Arranged Truck defaults