PURPOSE:

Ship-to companies can be assigned Bill-to companies and designate where a Sales Order will be shipped. If the Default ship to company flag on the Ship-to companies tab of a Bill-to is checked, it will automatically be selected when its Bill-to is used for a Sales Order.

PROCESS STEPS:

1. Navigate to Sales > Bill-to / Ship-to Management.
2. Verify the Report type is set to Ship-to Company. The Bill-to company field can be filled in to assign a company to the Ship-to, but does not have to be. Click the 'Add Ship To.'
3. On the Edit Ship-to Company form, note that some of the information in various tabs may be populated from a selected Bill-to. This information can be overwritten if needed. If a field is not populated, the 'Copy Bill-to' button at the bottom of the Edit Ship-to Company form can be used to automatically fill in fields from the selected Bill-to.
4. On the Edit Ship-to Company form header enter:
   a. The company's name in the Ship-to company field
   b. Confirm the required information has defaulted correctly. If not correct, change as desired.
5. On the General Tab:
   a. Enter address information
   b. Enter fax and email information
   c. Add Ship-To Notes, Order Pop-Up Notes, and Ship Pop-up Notes if certain notes are required for entering or shipping an order.
   d. Confirm the Active Box is checked.
6. Navigate to the Order Defaults Tab
   a. Select the Broker
   b. Select the Facility – This is the facility where inventory will be transferred from.
   c. Select User1 – User5 fields.
   d. Select Ship Via, Freight Type, and Currency.
   e. Transfer Facility- This is the facility where inventory will be transferred to.
7. Navigate to the Credit Tab- select appropriate terms.
8. Navigate to the User Fields tab
   a. Enter the Ship-To Lead Time – this is the average number of days it takes for product to be delivered to this customer.
   b. Enter the truck day – This is the day of the week Tulco would deliver to this customer.
9. Navigate to the Sales Reps Tab
   a. Add a sales rep by clicking on add button.
   b. Assign a percentage for commission purposes.
   c. Check "Primary" box to identify the primary sales rep for this bill-to company.
10. Navigate to the Bill- To Companies tab
    a. Confirm the correct Bill- to is attached to this Ship To
    b. If the Bill to is not linked, select the plus sign
    c. Enter in the Bill-To Company this Ship-to Is linked to, if the Bill- to company does not exist refer to the *Creating a Bill- to* SOP
    d. Leave Default Bill-to Company unchecked
    e. Select Save
11. Select save

REVISIONS

Rev	Date	Change
I/R	01/08/18	New