



BellHawk Shipping Dock Option User Manual

Introduction

The Shipping Dock option works in conjunction with the Sales Order and Picking modules to add the following capabilities to BellHawk:

1. Preventing loading customer orders on the wrong truck/trailer.
2. Planning of shipments that can consist of multiple ship orders for different customers.
3. Tracking of materials as they are loaded onto a truck at a shipping dock.
4. Generation of pre-load report for shipper to monitor loading status.
5. Generation of post-loading report to compare what should have been loaded with what was actually loaded.
6. Generation of Bills of Lading for each Ship-To address in a shipment.



The Shipping Dock option works in conjunction with the BellHawk Sales Order and Pick options. The Sales Order option allows you to set up Ship Orders for customers and to create Picking Orders to fulfill those Ship Orders. Picking scan actions are available for operators to record the material as it is being picked. Please refer to the separate user's manual for the Sales Order and Picking options for details.

The Shipping Dock option provides a Dock Shipments screen on which you can plan and monitor shipments from the loading dock. It adds two scan actions to the system for use in loading materials.

1. Load Picked – allows you to load all previously picked material to a staging area by scanning the pick order number and the shipping dock barcode. This action is preferred when you are picking and staging material ahead of time to the loading dock area. Then when the truck actually arrives, this scan action is used to quickly load all the staged material to the truck.
2. Load Material – allows you to pick and load a single container at a time to the truck after it has arrived. This scan action is preferred for “live loading”. Here the material handler scans the tracking barcode on the pallet or other container as it is picked and then a dock door barcode as it is loaded on the trailer. When the dock door barcode is scanned, the material handler is warned if the picked container does not match the one of the orders that are supposed to be loaded onto the trailer at the dock door.

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Shipping Dock Locations

In order to use the Shipping Dock option, you must set up staging areas (1) to which you will pick your orders and loading/shipping docks (2) where trailers will be loaded. This is done using the Excel import capability of BellHawk as shown below:

| | A | B | C | D | E | F | G | H | I | J |
|----|----------|--------------|----------------------|----------------|--------------|---------|-----------|-------------|----------------|--------------|
| 1 | LOCATION | LocationCode | LocationDescription | WorkCenterCode | FacilityCode | ERPCode | IsGeneric | IsReceiving | IsShippingDock | IsQCLocation |
| 2 | | #01504 | Warehouse #01504 | | | | N | N | N | N |
| 3 | | #01506 | Warehouse #01506 | | | | N | N | N | N |
| 4 | | #01513 | Warehouse #01513 | | | | N | N | N | N |
| 5 | | #01516 | Warehouse #01516 | | | | N | N | N | N |
| 6 | | MRB | Material Review Area | | | | Y | Y | N | N |
| 7 | | Production | Production | | | | Y | N | N | N |
| 8 | | QC | QC Dept | | | | Y | Y | N | Y |
| 9 | 1 | Receiving | Receiving Dock | | | | Y | Y | N | Y |
| 10 | | Shipping | Shipping Dock Area | | | | Y | N | N | N |
| 11 | 2 | DockA | Dock A | | | 3 | Y | N | Y | N |
| 12 | | DockB | Dock B | | | | Y | N | Y | N |
| 13 | | | | | | | | | | |

At least for testing and training, Shipping Docks are marked as Generic locations (3), as are staging areas, so they appear in a drop down list of locations. Only shipping dock locations are marked as such (4), however, as they have special properties.

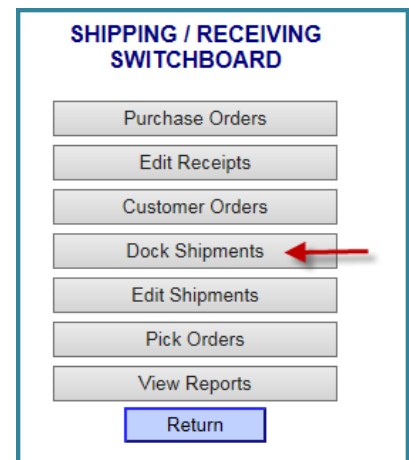
Loading/Shipping Docks are special in the system in that you can not use “Move” scan actions to move material there, you must use the “Load” scan actions to do so. Loading/Shipping Docks must be “opened” in order to load material there and when the Dock is “closed” all the material at the dock is removed from inventory and recorded as shipped to the customer.

Generally, in operation, it is a good idea not to mark the Shipping Docks Generic (3). Instead Location Barcodes should be hung by the Dock Doors to identify which dock is being used to load a pallet, so as to check that the pallet is being loaded onto the correct trailer.

Planning Shipments

Go to the Shipping/Receiving Switchboard from the Main Switchboard and select the Dock Shipments button, as shown here. This will bring up the Dock Shipments screen shown below:

Clicking on the Dock Shipments button brings up the View All Dock Shipments screen which shows all pending, active and recently completed shipments.



This screen has the usual sortable column headings and filter controls (1) as well as a date filter to narrow down the shipments shown to only those occurring within a particular date range.

It also has buttons to:

- Open a dock when a truck arrives at the shipping dock (3)
- Close the dock when the truck is finished loading (4)
- Print a Load Report showing what needs to be loaded (5)
- Print a Bill of Lading when loading is complete (6)
- Assign Ship Orders to a dock shipment (7)

To set up a new planned shipment, click the Add New button to bring up the Dock Shipment screen:

On this screen:

1. Each dock shipment needs a unique identifying Shipment Number (1). The system will automatically generate a shipment number but the user may enter a number if your company has an existing shipment numbering scheme.
2. Notice the Dock field is not editable (2). A Shipping Dock location is assigned by clicking the “Open Dock” button when the truck actually arrives and you are ready to start loading. This button becomes selectable after you have saved the shipment.
3. The Status field (2) is also not editable – all new shipments are assigned a status of “Planned”. The status will automatically change to “Loading” when the dock is opened for loading and will change to “Shipped” when the dock is closed and the truck leaves.
4. The optional Description field (3) allows the user to enter whatever description is meaningful, such as the Customer(s) for whom the shipment is intended.
5. The optional Ship Date & Time (4) refers to the planned time for this shipment. The date can be entered by using the Calendar button to bring up a selectable calendar. The time can be entered in HH:MM format, either as a 24 Hour format or in a 12 hour format with AM and PM appended after the time.
6. The optional Shipper (5) is selected from the drop down list. This list is limited to the top 20 shippers in the setup list. If there are more, or if the shipper needs to be added dynamically, then the ellipses are used.
7. The Truck Number and Driver (6) are optional and may be filled in later when the truck actually arrives at the loading dock.
8. The Sales Orders to be included in this shipment (7)
9. Comments (8) are also all optional and may be filled in later when the truck actually arrives at the loading dock.
10. Save (9) button that will save the Dock Shipment.

Once the shipment has been saved, then the Sales Orders to be included in the shipment can be selected by clicking the [+] button (1) on the Dock Shipments screen.

Sales orders can also be removed from the planned shipment by selecting the Sales Order and then selecting the [--] button (2). Please note that any changes adding or removing sales orders are not changed until the Save button (3) is selected.

When the [+] button is selected this will open a list of available Sales Orders from which to select, as shown below:

The screenshot shows the 'DOCK SHIPMENT' form with the following fields and controls:

- Shipment Number:** SH0001376
- Dock:** (empty)
- Status:** Planned
- Description:** Smithfield Printing Order
- Planned Ship Date:** 3/23/2017 (with a calendar icon)
- Planned Ship Time:** 12:30
- Shipper:** Armada (dropdown menu)
- Truck Number:** (empty)
- Driver Name:** (empty)
- Planned Ship Order(s):** SO6461 (with a list box containing 'Test Run')
 - Annotation 1: A red circle with the number '1' points to the '+' button next to the list box.
 - Annotation 2: A red circle with the number '2' points to the '--' button next to the list box.
- Comments:** (empty)

At the bottom of the form, there are six buttons:

- Save:** A green button with a red circle and the number '3' next to it.
- Open Dock:** A grey button.
- Close Dock:** A grey button.
- Load Report:** A grey button.
- Bill of Lading:** A grey button.
- Return:** A blue button.

| Select Available Ship Order | | | | | | | | | |
|-----------------------------|--|-------------|--------------|--------------|--------------|---------------|--------------|------------------------|------------------------|
| Order Number | Customer Name | Order Notes | Date Placed | Date Wanted | Importance | Status | Last Action | | |
| SO6428 1 | CONCORD- MCLANE FOODSERVICE INC | Taco Bell | 03/01/2017 | 03/03/2017 | Standard | Ready To Pick | 03/01/2017 | 2 View Order | 3 Pick Order |
| --Show All-- | | | --Show All-- | --Show All-- | --Show All-- | --Show All-- | --Show All-- | | |

Filter Return

The user can select the Ship Order (1). They can also View (2) an order before selecting it and also generate a Pick Order (3) for the order. Please note that this list does not include Ship Orders already assigned to this or other ship orders.

Picking for the Shipment

Once the shipment has been setup, we can generate a Pick Order for each sales order to be loaded onto the trailer (as described in the Sales Order User's Manual).



PICKING SHEET

Pick Order # P000389

Ship Order # SO6428

Customer Name

Customer Order #

From Facility

To Facility

To Location

Issued By:

Shipping Instructions: USE JOB #172



Date Wanted 03/03/2017

Description

| Item Number / Description | Quantity Ordered | Quantity Shipped | Quantity Picked | Quantity To Be Picked |
|---|------------------|------------------|-----------------|------------------------|
|  56043 Taco Bell Straws <i>Configuration</i> | 400 CA | 0 CA | 0 CA | 400 CA |
| <i>Suggested Location:</i> Staging Area A08 | | | | |
| | | | | <i>Initials:</i> _____ |

Opening the Dock

Once the Dock Shipment has been setup, the Dock can be Opened for shipping by selecting Open Dock on the Dock Shipment detail screen or by selecting (checking) the dock on the list of Dock Shipments screen and then selecting the Open Dock button, which brings up the following screen:

OPEN SHIPPING DOCK

Dock Location
Dock A

Location must have been set up as Shipping Location and can not already be associated with another shipment.

Open Return

Here the shipping supervisor can select the Dock (1) from a drop-down list and then Open it (2).

Once the dock door is open then the status changes to Loading (1) and the truck number and driver can be entered.

DOCK SHIPMENT

Shipment Number: SH0001377

Dock:

Status: Loading

Description: Smithfield Printing Order

Planned Ship Date: 3/23/2017

Planned Ship Time: 12:30

Shipper: Armada

Truck Number:

Driver Name:

Planned Ship Order(s): S06458

Comments: Test Run

Save Open Dock Close Dock

Load Report Bill of Lading Return

The changes should be saved (3) and then a Load Report can be produced (3).

| Load Report | | | | |
|---|--|---------------|------------------|-------------------|
| <i>Shipment Number:</i> SH0000001 | | | | |
| <i>Ship Order #</i> S1234 | | | | |
| <i>Customer Name:</i> Smithfield Printing | | | | |
| <i>Part Number</i> | <i>Part Description</i> | <i>Line #</i> | <i>Order Qty</i> | <i>Qty Loaded</i> |
| SGR6 | 6 inch wide Green Coated Roll 100 feet | 1 | 4 ea | 0 |

In the above report, we have not yet loaded any material so it is only showing the quantities required by the Ship Orders. As materials are loaded on the trailer, this shows the order quantity and the part loaded.

This can be printed out and used by the driver to check that all the materials that will be on the Bill-of-Lading have been loaded.

Load Container Transaction

In this mode, containers are picked and loaded directly onto the trailer. This is like a Pick transaction except that the destination has to be an open dock door.

The user scans or selects the pick order (1) and the pick order line (2). They then scan the barcode on the container to be picked. This is then checked against the item in the pick order line and is also checked for having passed inspection and is not passed its expiration date.

The dock door is selected (4) and then the Pick is submitted (5).

When Picking is completed, a packing list for the order can be printed using the Packing List Button from the Shipping Transaction Switchboard.

LOAD CONTAINER

Employee Badge
E301

Pick Order Number
P000003 1 ...

Pick Order Line
PP000003>1 2 ...

6 inch wide Green Coated Roll 100 feet

Item Number: SGR6

Quantity Left To Pick: 1

Units: each

Container Barcode
3

Dock Location
Dock B 4

5 Pick Clear Return

Here the user scans or selects the Pick order (1) and then Views (2) the Packing list, which looks as below:

PRINT PACKING LIST

Pick Order Barcode

P000002 1 ...

2 View Clear Return



Packing List
Order Number: S1234
Customer Name: Smithfield Printing

SHIP FROM: Smith Industries SHIP TO: Smithfield Printing
 25 Frost St
 Western, MA 01876
 USA

| Container Tag | Line # | Item Number | Item Description | Lot # | Serial # | Quantity | Units |
|---------------|--------|-------------|---|-------|----------|----------|-------|
| #02446 | 1 | SGR6 | 6 inch wide Green Coated Roll 100 feet | J786 | | 1 | ea |
| #02448 | 1 | SGR6 | 6 inch wide Green Coated Roll 100 feet | J786 | | 1 | ea |

CONTAINER COUNT: 2

Load Picked Transaction

In this mode, we pick the materials the materials (as described in the Pick User’s Manual) to a Staging area (typically located in the shipping area). This associates the selected materials, which are typically barcoded pallets, with the corresponding ship order.

When picking is complete on a pick order, a packing slip can be printed for the items picked using the Packing Slip button on the Shipping Transactions switchboard.

The Load Picked transaction is used to load picked materials from a staging area onto the truck. It avoids the need to scan each pallet or other container as it is loaded onto the truck but does not check that the correct materials were loaded onto the truck. It works best when the relationship between each dock door and the corresponding staging areas can be clearly delineated.

The Load Picked transaction has a close relationship to the Ship Picked transaction:

In this transaction, the user scans or selects the Pick Order number (1) from the pick sheet used to move the order to the staging area. The user then scans or selects the Dock location and selects Load.

Everything picked on that pick order will then be recorded as having been loaded on the trailer at the specified Dock Location.

As the materials are loaded, the shipping supervisor can monitor what has been loaded on a given trailer, through the load report:

| Load Report | | | | |
|---|--|---------------|------------------|-------------------|
| <i>Shipment Number:</i> SH0000001 | | | | |
| <i>Ship Order #</i> S1234 | | | | |
| <i>Customer Name:</i> Smithfield Printing | | | | |
| <i>Part Number</i> | <i>Part Description</i> | <i>Line #</i> | <i>Order Qty</i> | <i>Qty Loaded</i> |
| SGR6 | 6 inch wide Green Coated Roll 100 feet | 1 | 4 ea | 2 ea |

Closing the Dock Door

Once the shipment is complete, the Close Dock button on the Dock Shipment screen can be selected to “close” the dock door. Thereafter no more loading can take place at that dock door until it is opened for a different shipment.

Bill-of-Lading

Once the Dock is closed then a Bell-of-Lading can be printed using the [Bill of Lading] button on the Dock Shipment screen, as shown below:

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Straight Bill of Lading

| | |
|---|--|
| <p>Ship From: Smith Industries 134 Main Street Grafton, MA 01524 USA</p> | <p>Date Loaded: 12/07/14 4:00 PM Carrier: C&A Trucking Truck #:</p> |
| <p>Ship To: Smithfield Printing 25 Frost St Western, MA 01876 USA</p> | <p>Bill To: Smithfield Printing 25 Frost St Western, MA 01876 USA</p> |

Comments: Test Run

Order # S1234

| Item Number | Description | Quantity | Units |
|-------------|--|----------|-------|
| SGR6 | 6 inch wide Green Coated Roll 100 feet | 2 | ea |

Reviewing Shipments

The Shipping Supervisor can use the Edit Shipments button on the Shipping/Receiving Switchboard to review the shipments between specified dates (1) inclusive:

Shipped Orders

Shipped between: 1 and:

| Date Shipped | Customer Name | SO Number | Dock Shipment | Status | Date Changed | |
|--------------|--------------------------------|-----------|---------------|--|--------------------|---|
| 03/01/2017 | MANASSAS-MARTIN-BROWER LLC | SO6452 | SH0001375 | Approved | Mar 1 2017 1:29PM | View |
| 03/01/2017 | ORLANDO MCLANE FOODSERVICE INC | SO6432 | SH0001373 | Shipped 2 | Mar 1 2017 11:51AM | View |
| 02/28/2017 | LEXINGTON-GOLDEN-STATE-FOODS | SO6436 | SH0001372 | Approved | Feb 28 2017 4:20PM | View |
| 02/28/2017 | HARRIMAN-MARTIN-BROWER LLC | SO6440 | SH0001370 | Approved | Feb 28 2017 4:07PM | View 3 |
| 02/28/2017 | ENFIELD-MARTIN-BROWER LLC | SO6450 | SH0001371 | Approved | Feb 28 2017 2:23PM | View |
| | | | | --Show All-- | | |

Please note that these Shipments are listed by Sales Order number (2) and that a single shipment through a shipping dock may have multiple entries, one for each sales order.

The shipping supervisor can then View a specific shipment for a selected sales order (3), to get a list of the containers shipped:

Shipped Containers for Ship Order SO6432 on 03/01/2017

Customer Name: ORLANDO MCLANE FOODSERVICE INC
 SO Number: SO6432
 Date Shipped: 03/01/2017

| <input type="checkbox"/> | Container | Parent Container | Item Number | Item Description | Quantity | Status | Date Changed | <input type="button" value="Edit"/> |
|--------------------------|----------------------|------------------|-------------|------------------|----------|---------|--------------------|-------------------------------------|
| <input type="checkbox"/> | 00086995300010140554 | | 56043 | Taco Bell Straws | 20 CA | Shipped | Mar 1 2017 11:51AM | <input type="button" value="Edit"/> |
| <input type="checkbox"/> | 00086995300010144484 | | 56043 | Taco Bell Straws | 20 CA | Shipped | Mar 1 2017 11:51AM | <input type="button" value="Edit"/> |
| <input type="checkbox"/> | 00086995300010146273 | | 56043 | Taco Bell Straws | 20 CA | Shipped | Mar 1 2017 11:51AM | <input type="button" value="Edit"/> |
| <input type="checkbox"/> | 00086995300010151789 | | 56043 | Taco Bell Straws | 20 CA | Shipped | Mar 1 2017 11:51AM | <input type="button" value="Edit"/> |
| <input type="checkbox"/> | 00086995300010151857 | | 56043 | Taco Bell Straws | 20 CA | Shipped | Mar 1 2017 11:51AM | <input type="button" value="Edit"/> |
| <input type="checkbox"/> | 00086995300010152038 | | 56043 | Taco Bell Straws | 20 CA | Shipped | Mar 1 2017 11:51AM | <input type="button" value="Edit"/> |
| <input type="checkbox"/> | 00086995300010152847 | | 56043 | Taco Bell Straws | 20 CA | Shipped | Mar 1 2017 11:51AM | <input type="button" value="Edit"/> |
| | | | | | | | --Show All-- | |

Filter

This will list the containers, with their contents and the status of each container. For single use Type 1 containers and individually barcoded items, the Container barcode (1) will be the barcode on the outside of that container. If loose (non-barcoded) materials or non-inventoried items (such as shipping charges) are included in the shipment then there will be no entry in column (1).

If there are multiple loose materials within a Type 2 multi-use container then each will have an entry with the same barcode that is on their type 2 container.

More details can be accessed about each entry through its Edit button (2). This brings up a screen, such as that shown at right.

Here the shipping supervisor can change the quantity shipped (1), except for individually barcoded items (as shown here) which always have a unit quantity, and then select Update (2) to update the record of containers shipped.

The shipping supervisor can also remove the selected container (3) from the list of shipped containers.

Shipped Material Detail

Shipped Date: 3/1/2017 11:51:49 AM
 Customer: ORLANDO MCLANE FOODSERVICE INC
 Ship Order #: SO6432
 Item Number: 56043
 Item Description: Taco Bell Straws
 Quantity:
 Unit of measure: CA
 Container Tag: 00086995300010140554
 Lot Number: 112250

Please note that these changes only change the record of what was shipped and do not make a corresponding change in the inventory being tracked in BellHawk. As a result, the Materials Manager may have to make a corresponding adjustment to the container inventory in BellHawk.

Shipments are also included in the Shipping Supervisor’s reports as shown below:

| <i>Order Number</i> | <i>Customer #</i> | <i>Customer Name</i> | <i>Date Shipped</i> | <i>Item Number</i> | <i>Item Description</i> | <i>Quantity</i> |
|---------------------|-------------------|----------------------|----------------------|--------------------|-------------------------|-----------------|
| SO6436 | Lexington | LEXINGTON | 2/28/2017 4:20:04 PM | 00269005 | | 810 |
| SO6436 | Lexington | LEXINGTON | 2/28/2017 4:20:04 PM | 03168048 | | 1,785 |
| SO6440 | Harriman | HARRIMAN | 2/28/2017 4:07:15 PM | 00223058 | | 456 |
| SO6440 | Harriman | HARRIMAN | 2/28/2017 4:07:15 PM | 00269005 | | 324 |
| SO6440 | Harriman | HARRIMAN | 2/28/2017 4:07:15 PM | 03168048 | | 735 |
| SO6450 | Enfield | ENFIELD | 2/28/2017 2:23:43 PM | 00223058 | | 552 |
| SO6450 | Enfield | ENFIELD | 2/28/2017 2:23:43 PM | 00269005 | | 162 |
| SO6450 | Enfield | ENFIELD | 2/28/2017 2:23:43 PM | 03168048 | | 420 |

This report can be selected from the Reports button on the Shipping/Receiving Supervisor’s Switchboard, which brings up the following report selector:

VIEW REPORTS MENU

Shipping

Item Number All Items

From: 02/28/2017

To: 02/28/2017

View Report

Return

This enables the generation of this report for specific items or all items between two inclusive dates, which are selectable by the Calendar control.