PSU

PACKING SLIP UPDATER

Packing Slip Updater is a shipping application, designed to be a final step in the QC process. It has an integrated web browser and makes use of internet technologies, including HTML form elements and highly scalable jQuery for math and printing functions. A shipping user can now create, edit and email slips, updating key personnel within one interface. This means a slip can have changes saved, for completion later. A completed slip will be "closed out", an email will be sent to CSRs (and others as needed) that the job is ready for shipment.

UI – Simple is Powerful

PSU has a menu set very similar to popular office software. Cut/Copy/Paste functionality allows for quick editing of different packing slip fields.

To begin, a user can type or scan a job name into the textbox and the file list will auto-select the appropriate packing slip.* Another option is to simply scroll through the list of files and pick a slip to work on. The main viewing window will then display the selected slip. Most fields in a slip are editable by direct typing or selecting allowed options from a dropdown list.
*If the slip doesn't exist, it will be created on the fly!

**Save Slip** – This button saves the changes made to the slip.

Reset Slip – This button reverts all edits made to the currently loaded slip, since the last save, losing the changes. Because of the severity of losing multiple edits, a user is prompted to confirm before continuing.
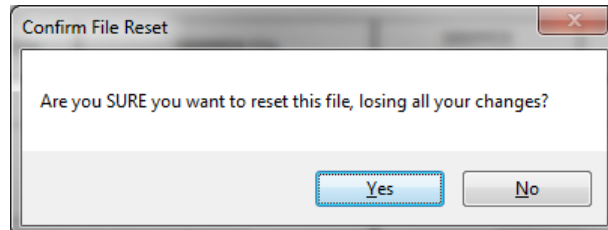
NOTE: A user could simply click a different slip from the file list and load a different slip, but this will ALSO prompt the user before switching to a different slip.

Commonly Used Addresses – This dropdown allows the selection of a saved address, which will auto populate address card information to the address lines of the packing slip. A user can also create a new address card which adds it to the selection list.


Address Cards - Editing and adding address cards are functionality also found in the Edit menu bar item. The New Address Card form requires a name, at the least, to create a new record.
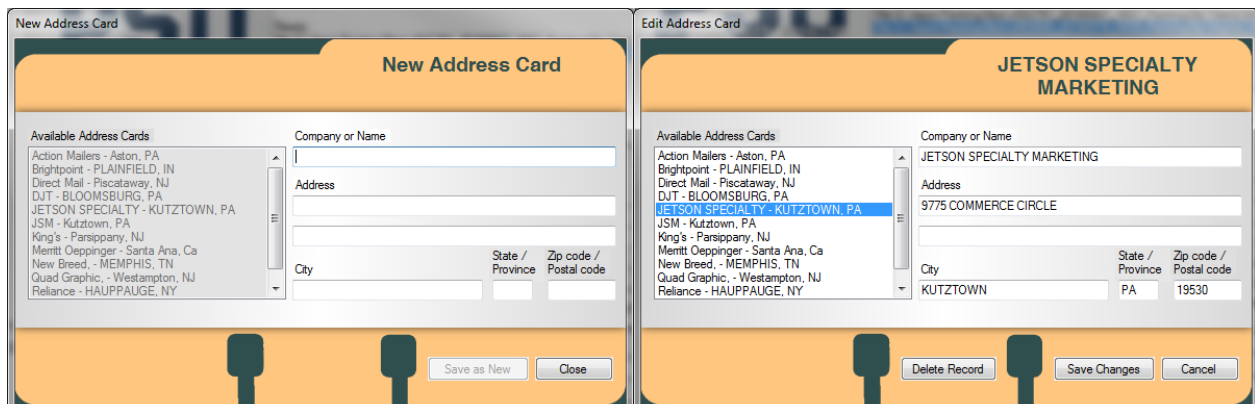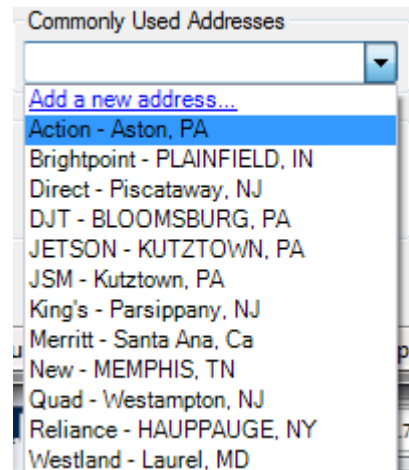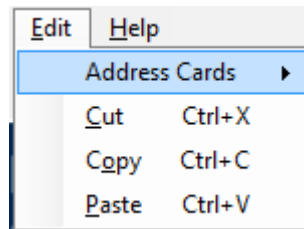
Print – This button can perform up to three main functions in one. Depending on the Print Options radio button chosen, the print button can:

1. Print & Save - save changes and print
2. Email & Save – save changes and send a job complete email
3. Print, Save & Email – the other two choices combined

Because of the power involved in this step, a user is prompted to verify the print options before continuing.
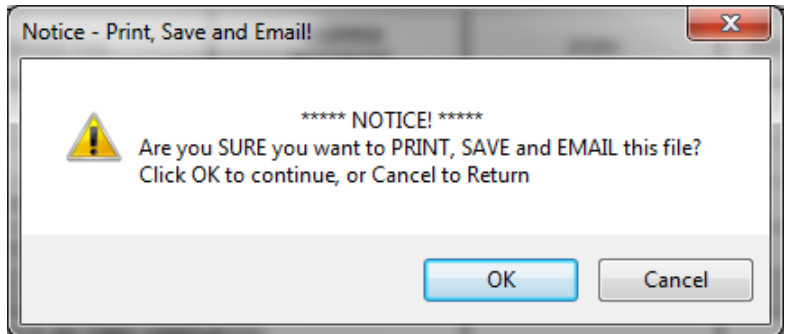

Making Edits

The entire process of making edits is similar to how Excel can make edits in a spreadsheet. Click into any "cell" in the table layout and make changes by typing or pasting from an external source. All field names shown below in **red** will be auto-populated, with the possible exception of the PO field (see below). In the case of a blind shipment, and the client is receiving a copy of the packing slip, a user can make the image invisible. Simply click the logo to either hide or show it as needed.

CUSTOMER P.O. – This field will be auto-populated if a PO number was provided before data processing. The PO information can be manually added / edited as necessary.

DATE SHIPPED – This field will be auto-populated when the sheet is created. If a sheet is only saved until later, this field will need to be updated when the shipment is emailed as completed.

SHIPPED VIA – This drop-down list contains selectable options that include all major variations of carrier and shipping type.

SHIPPED ACCOUNT – This drop-down list contains the types of shipping accounts available.
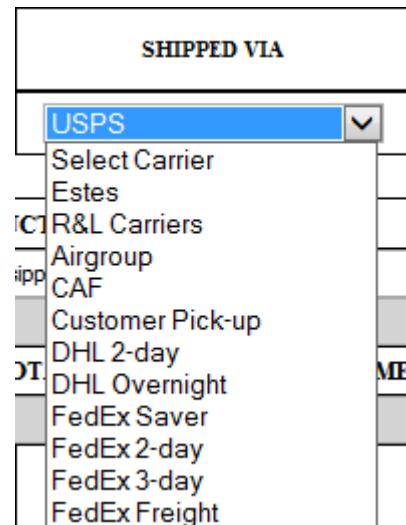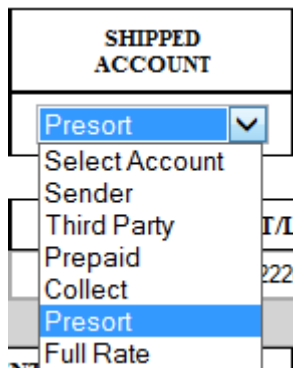
JOB# - This field contains the CPS job number. This field IS NOT EDITABLE.

SHIPMENT NUMBER – This field contains a preformatted number and time stamp combination, used for internal tracking and billing. This field IS NOT EDITABLE.

CHECKED BY – This drop-down list contains the usual users that produce packing slips. If a user's name is not in the list, there is an "Other:" option which allows a user to insert their name in the MISCELLANEOUS NOTES field.

QUANTITY - Quantity subtotals will be totaled by clicking into any of the loaded sheet's quantity cells and tabbing to another cell. This simple step auto-refreshes the totals by prompting the built-in math calculations. Every cell in the quantity column can be edited as necessary.

PRODUCT DESCRIPTION – This field contains information from the QC system. The description can be edited as necessary.

KIT/LOT# - This field contains predetermined information, based solely on the data's filename. The kit can be edited as necessary.

CARTON #S - This field is meant to be used for containing the carton count for each row.

WEIGHT – This field contains an estimate of the entire shipment's weight based on total card count and a predetermined amount for a pallet. The weight column (containing the numeric value) can have its visibility toggled, by clicking the "Total Weight" text.

The weight field can be edited as necessary.

NOTE: The weight field will not be visible if the SHIP TO: information (at the top of the slip) contains mail house information (i.e. – Pitney Bowes, Mailroom etc.) instead of a common carrier.

TOTAL CARTONS – This field will use built-in calculations to total the carton counts from all of the CARTON #S cells.

Add Item Row – This button adds a row for manually entering custom item info. Tabbing out of, or clicking into an existing row's quantity, or carton fields will update those totals.

Delete Row – This button removes the row that contains the button. Quantity and carton totals will be updated automatically.

ORDER COMPLETE & PENDING BALANCE – These drop-down lists contain only two options, Yes or No.

ORDER COMPLETE	BALANCE PENDING
Yes ▼	Yes ▼
Select Status	Select Status
Yes	Yes
No	No

CSR – This drop-down list contains the names of all available CSR/CAMs.

CSR
Lisa ▼
Select CSR
Denise
Lisa
Trish
Leigh