How to Manage Packing Lists

by OSOE Project

When you validate a Sale Order, as seen in the previous tutorial "How to create Sale Orders", ERP5 creates automatically the related **“Sale Packing List”** . Thanks to it, you will be able to track the shipment of the goods related to the order.

The goal of this tutorial is to explain how to manage Sale Packing Lists, in order to have the goods shipped and delivered.

This is a two steps procedure: first, the order needs to be shipped and, when it reached the client warehouse, the status must be turned into **“Delivered”** .

init

openAndWait	${base_url}/Zuite_createFunctionalTestUser
verifyTextPresent	Done.

 Wait for activiti

openAndWait	${base_url}/Zuite_setUpSaleOrderTest
verifyTextPresent	Init Ok

 Wait for activiti

openAndWait	${base_url}/Zuite_setUpSalePackingListTest
verifyTextPresent	Init Ok

 Wait for activiti

Login
Functional Test User

Agenda

- How to reach a Packing List
- How to define Packing Lists
- How to declare a shipment
- How to generate invoices from packing lists

 Invoke
simulation alarms

<span metal:use-macro="container/Zuite_viewTestMacroLibrary/macros/wait_for_activiti

Managing a Packing List

As you can see on the drawing, the different steps of managing a Packing List can be linked with real people in the company.

The principle of workflow based application makes sense in this case. Indeed, once the Sale Order has been registered and confirmed by the sales manager, the employee from the warehouse will prepare the automatically generated Sale Packing List related to the order. Thanks to the workflow, the sales manager will be aware that the order is ready to be sent and will give the order to “Ship” the goods. Once the client receives the goods, checks them and gives feedback, the sales manager will then change the status to “Delivered”.

In this way, it is possible to track the whole shipment process, thanks to ERP5.

Sale Packing List

From the previous tutorial "How to create Sale Orders", you have learned to generate the related Sale Packing List automatically by confirming the Sale Order, and reach the Sale Packing List by using the "Jump ..." menu.

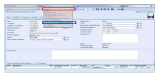
Now that you are on the initial view form of the Packing List related to your Sale Order, you can start **filling out the the missing information** where it is not filled automatically.

Note: **Most data in the View tab and the other tabs (Details, Payment, Profile) should have been updated automatically from the Sale Order** , so you will not have much to do now. If some fields have not been updated, it means that those fields have not been filled out correctly in the related Sale Order. This is why we recommend to fill out properly the Sale Orders before generating Packing Lists.

type	//textarea[@name="field_my_comment"]	Delivery by the test.
clickAndWait	//button[@name="Base_edit:method"]	
verifyValue	//input[@name="field_my_title"]	ZUITE-TEST-SALEORDER-PRODUCT-001
verifyValue	//input[@name="field_my_source_section_titl e"]	ZUITE-TEST-SALEORDER-ORGANISATI 001
verifyValue	//input[@name="field_my_source_title"]	ZUITE-TEST-SALEORDER-ORGANISATI 001
verifyValue	//input[@name="field_my_source_administrati	ZUITE-TEST-SALEORDER-ORGANISATI

	on_title"]	001
verifyValue	//input[@name="field_my_destination_section_title"]	ZUITE-TEST-SALEORDER-ORGANISATI 002
verifyValue	//input[@name="field_my_destination_section_title"]	ZUITE-TEST-SALEORDER-ORGANISATI 002
verifyValue	//input[@name="field_my_destination_administration_title"]	ZUITE-TEST-SALEORDER USER-001
verifyValue	//input[@name="field_my_specialise_title"]	General Sale Trade Condition
verifyTextPresent	1 records	
verifyValue	//tr[@class='listbox-data-line-0 DataA']/td[6]/input	100 000.0

Ship



After the sales manager confirms the Sale Order, the employees in warehouse will prepare the shipment and ship it. If the shipment corresponds with the information in the Sale Packing List, you have to tell ERP5 that your order has been shipped.

To do so, browse the “Action” menu on top of the screen, and click on **“Ship Packing List”** .

This will change the status of the Sale Packing List from "Confirmed" to **"Shipped"** , as you can see on the next page's screenshot.

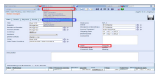
The next step will be to set the order as delivered after the clients acknowledges the shipment.

selectAndWait	//select[@name="select_action"]	Ship Packing List
clickAndWait	//button[@id="dialog_submit_button"]	
verifyText	//label[normalize-space(text())='State']/../div	Shipped
storeAttribute	//div[@id="breadcrumb"]/a[3]@href	wait

<span metal:use-macro="container/Zuite_viewTestMacroLibrary/macros/wait_for_activiti

open	${wait}

Deliver



When the shipment has been received by the customer, if the goods have been checked and are in good condition, you would like to set the order as delivered.

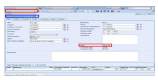
To do so, please browse the “Action” menu and click on the line **“Deliver Packing List”** .

This will change the status of the Sale Packing List from **"Shipped" to “Delivered”** , and this also will **generate the related invoice** , as you can see on the following two pages.

selectAndWait	//select[@name="select_action"]	Deliver Packing List
clickAndWait	//button[@id="dialog_submit_button"]	
verifyText	//label[normalize-space(text())='State']/../div	Delivered
storeAttribute	//div[@id="breadcrumb"]/a[3]@href	spl

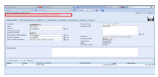
 Wait for activiti

Jump to "Related Sale Transaction Invoice"



After the Packing List is in "Delivered" state, you can access to related invoice by **clicking the "Related Sale Transaction Invoice" in the "Jump..." menu** .

Generated Sale Transaction Invoice



Now you can have a look at the Sale Transaction Invoice generated from the Sale Packing List. If you need to go back to the initial Sale Order or Sale Packing List, you can either use the "Jump..." list again, or by browsing the Sale Orders or Sale Packing Lists in the "Modules" list.

In next tutorial, you will learn how to manage invoices.

Diverged Packing List

Sale Packing Lists can **generate an invoice** for the related transaction by a simply action: **Ship Packing List** , if the number of items shipped (in the Sale Packing List) matches the number of items ordered (in the Sale Order). This means that you do not have to bother clicking on anything, the invoice will be automatically generated after you ship the Packing List.
The same as the "Related Sale Packing List", you can **reach the "Related Sale Invoice Transaction" from the "Jump ..." menu** .

However, ERP5 also allows you to manage the difference that can exist between what has been ordered and what has been exactly shipped.

For example, your client ordered 1000 products from you, but after the sales manager registered the Sale Order and confirmed it, the warehouse agent discovers that there is only 900 products left, due to a strike that obstructed your shipment to be delivered on time.

The warehouse agent, who is in charge of preparing the shipment, verifying the Sale Packing List on ERP5 and shipping the goods, decides to pack the 900 products available, and changed the quantity in the Sale Packing List. Technically speaking, this means that the order and the shipment are not convergent, because 1000 products have been ordered and only 900 have been shipped. For this reason, the invoice generation will be up to the sales manager. If he/she approves the shipment, he/she can **first "Split and Defer" the initial Sale Packing List** , which will create another Sale Packing List for this order with the quantity left to be shipped later. The warehouse can **then "Ship" and finally "Deliver" the first Packing List** . After the second part of the products are prepared, the warehouse can **"Ship" and "Deliver" the second Packing List** . In this way, the diverged Packing List can be solved.

Note that **once you Ship Packing List, the action generates invoice for the related Packing List automatically, with the updated quantity shipped** . So finally, you will have two sale invoices, corresponding to each diverged Sale Packing List.

 Invoke simulation alarms

 Wait for activiti

open	${spl}	
selectAndWait	//select[@name="select_jump"]	Related Sale Invoice Transaction
verifyText	//div[@id="breadcrumb"]/a[1]	ERP5
verifyText	//div[@id="breadcrumb"]/a[2]	Accounting

 Wait for activiti

Login As Manager

open	${base_url}/Zuite_tearDownSaleOrderTest	
verifyTextPresent	Clean Ok	

 Wait for activiti