

Shipping with JOBZ! - Part 1, The Sales Rep

JOBZ! makes it easy for a sales rep to produce delivery instructions. Simply select a company name and then a person name from the pop-up list, which displays contacts in your address database. The contact's delivery address and phone, plus any standard delivery notes, pop into the delivery instructions screen.

JOBZ! tracks the quantity specified for each destination, and compares it with the quantity ordered. Each destination can be set automatically with the job's ship and due dates. Add a further note if you like. Carrier type can be specified.

The instructions can be printed as part of the Sales Order to Production, by themselves as a standalone document, or as part of the JOBZ! Ticket. They can also be exported as an Excel spreadsheet.

Shown below is the input screen for a delivery destination, stored along with a sales rep's prospects and accounts. There is one place in JOBZ! for all the people in your work life. The Category for this contact is Delivery, so it won't appear in the various sales and marketing contact reports.

Go To		= 1 / 3 =		<< < > >>		Organ										
Name	Central Receiving															
Title																
Company	11 by Seventeen															
Co. Type	Advertising Agencies															
 Address	1536 Valley Parkway															
Address Line 2							Country: ▼									
City, State, Zip	Stockton		CA	97524												
 Email																
Office	408-666-7356		205	Cell												
Fax	408-395-0813															
			Cust. # 36846													
Category	Delivery		Vertical													
<table border="1"> <tr> <td>JOBS</td> <td>/ date</td> <td>PO</td> <td>MEMOS</td> <td>- from</td> <td>Notes</td> <td>Delivery</td> <td>Budget</td> <td>Alt.</td> </tr> </table>								JOBS	/ date	PO	MEMOS	- from	Notes	Delivery	Budget	Alt.
JOBS	/ date	PO	MEMOS	- from	Notes	Delivery	Budget	Alt.								
Delivery Note <i>Flows into job delivery instructions</i> Delivery notes specific to a contact can be stored in the contact's ADDRESS record, and will be pulled into a job's Delivery Instructions when you select them as a destination. These notes relate to deliveries to Central Receiving.																

Go To	= 1 / 1 =	<< < > >>	Organize	Actions	Output	Find...
SPEX	QUOTE	ORDER	SCHEDULE	AC'S	INVOICE	ADMIN
Carton Labels		1	2	3	4	+ Mail
		Production		Press	Delivery	

In Estimating

11 by Seventeen - Demo Job - 8 pages + cover

Job# 10140-13	Customer PO # 98797	Part#
Samples: Sales 10 for Sales Rep	Samples: Customer 50	Qty. Allow. 5%
Rev. 		
FOB Point FOB Origin	Freight Charges Freight Prepaid & Additional	
General Delivery Notes These notes apply to the entire job. Destinations each have their own notes.	Single Shipment	

Files Due	Tue 5/28/13	6
Proofs	Fri 5/31/13	3
On-press	Mon 6/3/13	0
Mail		
June Ship	Thu 6/6/13	3
1st Deliv		
1st Deliv Qty		
Bal Deliv	Mon 6/10/13	7
Time		
June Invoice	Thu 6/13/13	

60,000 Order
60,050 Destined 4 Destinations
-50 Difference

SAMPLES & DELIVERY DESTINATIONS


[Drop Ship Matrix](#)
[Excel Export](#)

QTY / NOTE	(COMPANY)	(ATTN)	COMPANY-ATTN-PHONE-ADDRESS	<u>SHIP</u>	<u>DUE</u>	VIA	
50	11 by Seventeen	Paige Turner	11 by Seventeen Paige Turner 408-395-8183 2538 22nd Street Suite 54 Opa City WI 54956 USA	Jun 6	Jun 6	Sales Rep	X
Samples							
#	11 by Seventeen	Delivery Notes	Delivery notes specific to a contact can be stored in the contact's ADDRESS record, and will be pulled into a job's Delivery Instructions when you select them as a destination. These notes relate to deliveries to Paige Turner.				
20,000	11 by Seventeen	Antioch Store #40	11 by Seventeen Antioch Store #40 408-666-7356 19000 Old Vineyard Road Antioch KY 12456	Jun 6	Jun 10	Ground	X
Qty.							
#	11 by Seventeen	Delivery Notes	Delivery notes specific to a contact can be stored in the contact's ADDRESS record, and will be pulled into a job's Delivery Instructions when you select them as a destination. These notes relate to deliveries to Antioch Store #40.				
20,000	11 by Seventeen	San Francisco Store #1	11 by Seventeen San Francisco Store #1 408-666-7356 1275 Fairfax Avenue San Francisco CA 94124	Jun 6	Jun 10	Ground	X
Qty.							
#	11 by Seventeen	Delivery Notes	Delivery notes specific to a contact can be stored in the contact's ADDRESS record, and will be pulled into a job's Delivery Instructions when you select them as a destination. These notes relate to deliveries to San Francisco Store #1.				
20,000	11 by Seventeen	Central Receiving	11 by Seventeen Central Receiving 408-666-7356 1536 Valley Parkway Stockton CA 97524	Jun 6	Jun 10	Ground	X
Balance + Overs							
#	11 by Seventeen	Delivery Notes	Delivery notes specific to a contact can be stored in the contact's ADDRESS record, and will be pulled into a job's Delivery Instructions when you select them as a destination. These notes relate to deliveries to Central Receiving.				

Customer: 11 by Seventeen
Job Title: Demo Job Part# 12345-A; Fall

Est #: 01-21350
Job #: 10140-13
Proj #: 01-21350
PO #: 98797

Rep: Jim Taylor
Date: May 23, 2013

Sales Samples: 10 for Sales Rep **Customer Samples:** 50

General Delivery Notes: These notes apply to the entire job. Destinations each have their own notes.

Order Qty: 60,000 (+/- 5%)
Destined: 60,050
Difference: -50

Samples & Delivery Destinations

50 Samples Ship: 6/6/2013 Due: 6/6/2013 Via: Sales Rep

11 by Seventeen
Paige Turner 408-395-8183
2538 22nd Street Suite 54
Opa City WI 54956 USA

Delivery notes specific to a contact can be stored in the contact's ADDRESS record, and will be pulled into a job's Delivery Instructions when you select them as a destination. These notes relate to deliveries to Paige Turner.

20000 Qty. Ship: 6/6/2013 Due: 6/10/2013 Via: Ground

11 by Seventeen
Antioch Store #40 408-666-7356
19000 Old Vineyard Road
Antioch KY 12456

Delivery notes specific to a contact can be stored in the contact's ADDRESS record, and will be pulled into a job's Delivery Instructions when you select them as a destination. These notes relate to deliveries to Antioch Store #40.

20000 Qty. Ship: 6/6/2013 Due: 6/10/2013 Via: Ground

11 by Seventeen
San Francisco Store #1 408-666-7356
1275 Fairfax Avenue
San Francisco CA 94124

Delivery notes specific to a contact can be stored in the contact's ADDRESS record, and will be pulled into a job's Delivery Instructions when you select them as a destination. These notes relate to deliveries to San Francisco Store #1.

20000 Balance + Overs Ship: 6/6/2013 Due: 6/10/2013 Via: Ground

11 by Seventeen
Central Receiving 408-666-7356
1536 Valley Parkway
Stockton CA 97524

Delivery notes specific to a contact can be stored in the contact's ADDRESS record, and will be pulled into a job's Delivery Instructions when you select them as a destination. These notes relate to deliveries to Central Receiving

Shipping with JOBZ! - Part 2, The Shipping Department

Now that sales has communicated the instructions, the Shipping Department can use JOBZ! to produce carton labels, packing lists and shipping summaries.

(By the way, in this example we are only specifying four destinations. As more are required, they flow to subsequent pages as needed.)

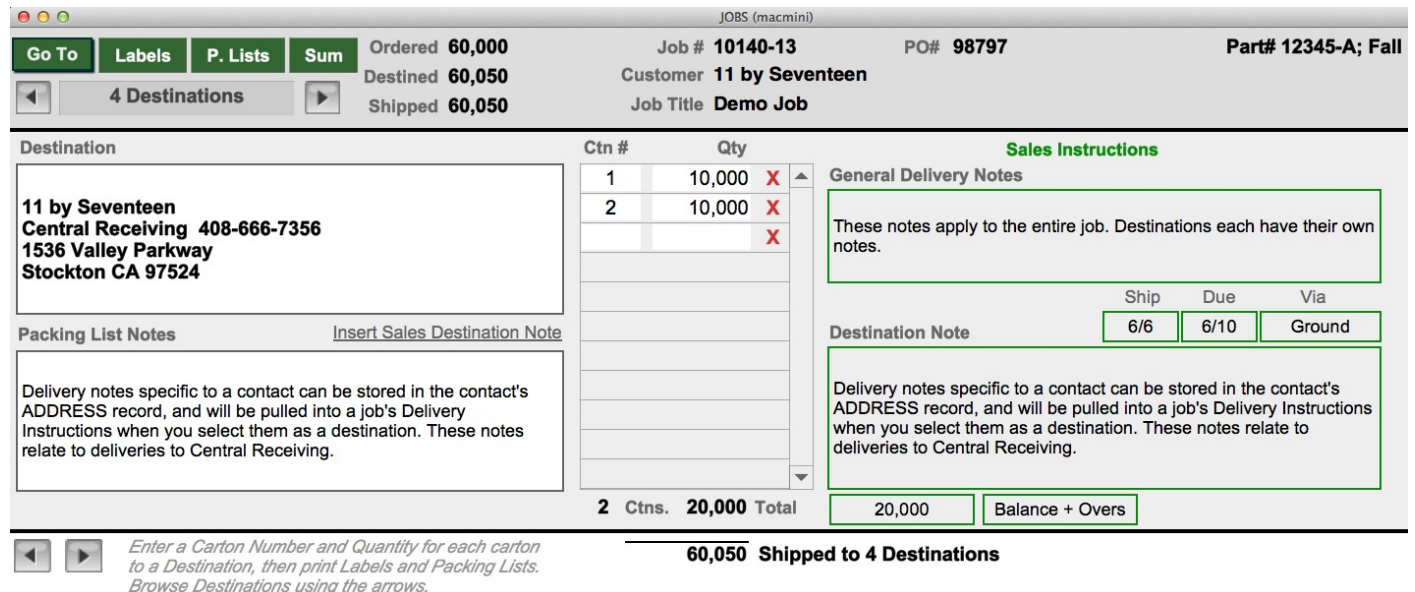
Click the Shipping button, and a screen appears that scrolls through each destination that the sales rep has specified. Simply enter the carton number and quantity in the carton, for as many cartons as it takes to make a complete shipment. A running total is kept for the destination and a grand total for all the destinations. Optionally enter notes that will appear on the packing list. Then click the Labels button.

Using standard un-printed, office store 6-up shipping labels, as many labels will print as you have specified. Each label displays the carton number, carton count and quantity in the carton, as well as the sales-entered address, job title, job number, PO number, and your plant's return address and company logo.

Click the Packing List button and produce a document for each destination that summarizes the shipment, and provides a delivery receipt. Then click the Summary button and produce a report that documents all of the shipments.

The interface is simple and intuitive, the sales-entered information is leveraged, clerical errors are eliminated, and the shipping department saves a lot of time. **"Everything in writing, without the paperwork."**

Examples of the 6-up labels, packing lists and shipping summary follow. Here is the carton label input screen:



The screenshot shows the JOBZ! (macmini) interface. At the top, there are tabs for 'Go To', 'Labels', 'P. Lists', and 'Sum'. Below these are status indicators: 'Ordered 60,000', 'Destined 60,050', and 'Shipped 60,050'. The 'Labels' tab is active, showing '4 Destinations'. The top right displays 'Job # 10140-13', 'PO# 98797', and 'Part# 12345-A; Fall'. Below this, 'Customer 11 by Seventeen' and 'Job Title Demo Job' are shown.

The main area is divided into several sections:

- Destination:** A text box containing '11 by Seventeen', 'Central Receiving 408-666-7356', '1536 Valley Parkway', and 'Stockton CA 97524'.
- Packing List Notes:** A text box with instructions: 'Delivery notes specific to a contact can be stored in the contact's ADDRESS record, and will be pulled into a job's Delivery Instructions when you select them as a destination. These notes relate to deliveries to Central Receiving.'
- Insert Sales Destination Note:** A link to insert a note.
- Ctn # Qty:** A table with two rows:

Ctn #	Qty
1	10,000
2	10,000
- Sales Instructions:** A section with 'General Delivery Notes' (a text box with instructions) and 'Destination Note' (a text box with instructions). Below these are fields for 'Ship', 'Due', and 'Via' with values '6/6', '6/10', and 'Ground' respectively.
- Summary:** At the bottom, it shows '2 Ctns. 20,000 Total' and '60,050 Shipped to 4 Destinations'.

At the bottom left, there are navigation arrows and a note: 'Enter a Carton Number and Quantity for each carton to a Destination, then print Labels and Packing Lists. Browse Destinations using the arrows.'



Carpe Data
5563 Calle Ocho
Carpinteria CA 93013
408-666-7356

Description Job # 10140-13 6/6/13

Demo Job

PO# 98797 Part# 12345-A; Fall

11 by Seventeen
Paige Turner 408-395-8183
2538 22nd Street Suite 54
Opa City WI 54956 USA

Qty. 50 Carton 1 of 1



Carpe Data
5563 Calle Ocho
Carpinteria CA 93013
408-666-7356

Description Job # 10140-13 6/6/13

Demo Job

PO# 98797 Part# 12345-A; Fall

11 by Seventeen
Antioch Store #40 408-666-7356
19000 Old Vineyard Road
Antioch KY 12456

Qty. 5,000 Carton 1 of 4



Carpe Data
5563 Calle Ocho
Carpinteria CA 93013
408-666-7356

Description Job # 10140-13 6/6/13

Demo Job

PO# 98797 Part# 12345-A; Fall

11 by Seventeen
Antioch Store #40 408-666-7356
19000 Old Vineyard Road
Antioch KY 12456

Qty. 5,000 Carton 2 of 4



Carpe Data
5563 Calle Ocho
Carpinteria CA 93013
408-666-7356

Description Job # 10140-13 6/6/13

Demo Job

PO# 98797 Part# 12345-A; Fall

11 by Seventeen
Antioch Store #40 408-666-7356
19000 Old Vineyard Road
Antioch KY 12456

Qty. 5,000 Carton 3 of 4



Carpe Data
5563 Calle Ocho
Carpinteria CA 93013
408-666-7356

Description Job # 10140-13 6/6/13

Demo Job

PO# 98797 Part# 12345-A; Fall

11 by Seventeen
Antioch Store #40 408-666-7356
19000 Old Vineyard Road
Antioch KY 12456

Qty. 5,000 Carton 4 of 4



Carpe Data
5563 Calle Ocho
Carpinteria CA 93013
408-666-7356

Description Job # 10140-13 6/6/13

Demo Job

PO# 98797 Part# 12345-A; Fall

11 by Seventeen
San Francisco Store #1 408-666-7356
1275 Fairfax Avenue
San Francisco CA 94124

Qty. 5,000 Carton 1 of 4



Carpe Data
5563 Calle Ocho
Carpinteria CA 93013
408-666-7356

Description Job # 10140-13 6/6/13

Demo Job

PO# 98797 Part# 12345-A; Fall

11 by Seventeen
San Francisco Store #1 408-666-7356
1275 Fairfax Avenue
San Francisco CA 94124

Qty. 5,000 Carton 2 of 4



Carpe Data
5563 Calle Ocho
Carpinteria CA 93013
408-666-7356

Description Job # 10140-13 6/6/13

Demo Job

PO# 98797 Part# 12345-A; Fall

11 by Seventeen
San Francisco Store #1 408-666-7356
1275 Fairfax Avenue
San Francisco CA 94124

Qty. 5,000 Carton 3 of 4



Carpe Data
5563 Calle Ocho
Carpinteria CA 93013
408-666-7356

Description Job # 10140-13 6/6/13

Demo Job

PO# 98797 Part# 12345-A; Fall

11 by Seventeen
San Francisco Store #1 408-666-7356
1275 Fairfax Avenue
San Francisco CA 94124

Qty. 5,000 Carton 4 of 4



Carpe Data
5563 Calle Ocho
Carpinteria CA 93013
408-666-7356

Description Job # 10140-13 6/6/13

Demo Job

PO# 98797 Part# 12345-A; Fall

11 by Seventeen
Central Receiving 408-666-7356
1536 Valley Parkway
Stockton CA 97524

Qty. 10,000 Carton 1 of 2



Carpe Data
5563 Calle Ocho
Carpinteria CA 93013
408-666-7356

Description Job # 10140-13 6/6/13

Demo Job

PO# 98797 Part# 12345-A; Fall

11 by Seventeen
Central Receiving 408-666-7356
1536 Valley Parkway
Stockton CA 97524

Qty. 10,000 Carton 2 of 2



Carpe Data
5563 Calle Ocho
Carpinteria CA 93013
408-666-7356

Packing List

6/6/13

Job 10140-13

Demo Job

PO# 98797

Part# 12345-A; Fall

Notes

11 by Seventeen
Antioch Store #40 408-666-7356
19000 Old Vineyard Road
Antioch KY 12456

Delivery notes specific to a contact can be stored in the contact's ADDRESS record, and will be pulled into a job's Delivery Instructions when you select them as a destination. These notes relate to deliveries to Antioch Store #40.

Number of Cartons	Total Qty
4	20,000

Receipt

Carpe Data
5563 Calle Ocho
Carpinteria CA 93013
408-666-7356

Job 10140-13

Demo Job

PO# 98797

Part# 12345-A; Fall

11 by Seventeen
Antioch Store #40 408-666-7356
19000 Old Vineyard Road
Antioch KY 12456

Number of Cartons	Total Qty
4	20,000

X

Received By

Date & Time



Carpe Data
5563 Calle Ocho
Carpinteria CA 93013
408-666-7356

May 24, 2013

Shipping Summary

Job 10140-13

Demo Job

PO# 98797 Part# 12345-A; Fall

Ordered	60,000
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Destined	60,050
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Total Shipped to 4 Destinations	60,050
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Shipped To	Number of Cartons	Qty
11 by Seventeen Opa City WI	1	50
11 by Seventeen Antioch KY	4	20,000
11 by Seventeen San Francisco CA	4	20,000
11 by Seventeen Stockton CA	2	20,000
Total Shipped to 4 Destinations		60,050