Orchid
Training Guide:

Freight SmartLink

Work Smarter with Orchid

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Freight SmartLink Overview

Freight SmartLink streamlines Sage 300 integration with freight management systems.

Refer to the Orchid website for details.

Installing Freight SmartLink

INSTALLATION STEPS

Freight SmartLink is installed by executing the EXE program downloaded for installation. InstallShield will execute and guide you through the installation steps, including whether to install documentation.

Before you Start

- Download the program installer for the version of Sage 300 you are running (only available in the Partner area of the Orchid website).
- Before installing Freight SmartLink, ensure that all users have logged out of Sage 300.

Installing the files

- Log on to the server where Sage 300 is installed as a user with full administrator rights.
- Run the previously downloaded InstallShield for the module.
- If prompted to re-boot, then do so.

> **Tip:**
>
> Programs are installed in the Sage 300 program folder, in the FFXXA subfolder, where FF is the 2-letter code for the Orchid module and XX depends on the Sage 300 version you are running:
>
> Example: FF68A for Freight SmartLink version 2021, FF69A for Version 2022, FF71A for Version 2024.

> **Note:** REGACC is run automatically as part of the installation process. If some files are locked during the installation, the re-boot is required to unlock all files and complete the installation.

> **Important!** If you install Sage 300 on each workstation, as well as the server, then you must do the same with Freight SmartLink. In this case, repeat the above steps for each workstation.

ACTIVATE FREIGHT SMARTLINK

Activate Freight SmartLink in Sage 300 Administrative Services > Data Activation.

For information on activating modules, refer to the Sage 300 System Manager online Help (choose the Help menu on the Sage 300 desktop) or review the chapter, Setting Up Security, in the *System Manager Administrator Guide*

LICENSE DETAILS

To start using Freight SmartLink, you need a valid serial number and license file.

If you don't have a valid license for Freight SmartLink, you only see the License screen.

Refer to Freight SmartLink License Screen on the facing page for details on entering Activation Code.

Enter License Details

The installation doesn't require a serial number anymore. You enter the serial number and activation code in the License screen.

> **Note:** This applies to Sage 300 versions 2019 and above. You need a serial number to install an older version.

After you install the software, you need to activate Freight SmartLink in one company using Sage 300 Administrative Services > Data Activation.

There are two options to enter the license details:

USE A 30 DAY TRIAL LICENSE FILE

To generate a 30-day trial license file, enter the serial number provided for your module and Save the details.

AFTER PURCHASING A SUBSCRIPTION OR A PERPETUAL LICENSE

If you have purchased the module, enter the serial number and activation code provided by your Sage 300 business partner.

> **Note:** The license applies to all the Sage 300 databases for the same installation. You only need to enter the license details in one company.

UPGRADING FROM A PRIOR VERSION.

1. Download the new version install program from the Orchid website (Business Partner access only)
2. Obtain the serial number and activation code for the new version
3. Backup your existing database and programs as per Sage Upgrade guidelines
4. Execute the EXE program downloaded (as above for a new install).

5. In Sage 300 / Administrative Services / Data Activation, Activate Freight SmartLink
6. Enter serial number and activation code in the Freight SmartLink License screen. (as above)

MINIMUM REQUIREMENTS

You need to use the same version for the core Sage 300 modules and Freight SmartLink. For example, Freight SmartLink version 2024 requires Sage 300 System Manager version 2024.

Additional specific Sage 300 modules may be required to enable all functionality. Refer to Orchid Systems's website for details (https://www.orchid.systems).

Freight SmartLink License Screen

To start using Freight SmartLink, you need a valid serial number and license file.

If you don't have a valid license for Freight SmartLink, you only see the License screen.

LICENSE SCREEN

You use the Freight SmartLink license screen to enter serial number and activation code.

When to use:

- After a new installation or an upgrade to a newer version of Sage 300.
- After a subscription renewal, enter the activation code with the new expiry date.
- View the components of the Orchid module you are licensed for.

How to use:

- Enter the license details, click the **Add** button to create the license file.
- Restart the Sage desktop to enable the new license.

30-day Trial Licence

If you don't have an activation code for Freight SmartLink, you can create a 30-day trial license.

In the License screen, enter a serial number for the module, Sage 300 version and edition you are running.

Click the Add button. This create a 30-day trial license.

> **Tip:** If you install a 30-day trial, enter a valid activation code before the trial expiry date to continue using the application.

Subscription Licenses Expiry Date

You can check the subscription expiry date and enter a new activation code after a subscription renewal is processed.

Subscription licenses have an expiry date. To continue using Orchid Module, you will need to renew the subscription and enter a new Activation code in the module License screen before the expiry date.

Contact your Sage 300 Business Partner for details.

> **Note:** In the four weeks before the expiry date, users receive a warning message when logging into Sage 300 (weekly for the first three weeks and daily in the last week). If you don't renew before the expiry date, the software will become read-only.

TROUBLESHOOTING ACTIVATION CODE

When saving the license information, the following problems may be encountered:

Activation code Invalid – verify the registered company name (displayed during installation) and serial number entered match the details supplied to Orchid Systems when an activation code was requested.

Invalid serial number – the entered serial number is not valid for this product, Sage 300 version and edition.

> **Important!** If the Sage 300 Version or Edition change, a new Serial Number and activation code must be requested from Orchid Systems.
>
> If the company name registered with Sage changes, a new Activation Code must be requested from Orchid Systems.

Refer to detailed troubleshooting tips in Troubleshooting Activation Code,

ACTIVATION CODE AND AVAILABLE FUNCTIONALITY

Depending on the components you are licensed to use, some features described here may not be available for you to use. Some functionality of Freight SmartLink is only active if you have purchased the required module component.

The license screen displays what components of the Freight SmartLink module are included in the activation code.

Freight SmartLink Setup

F/S SETUP>F/S OPTIONS

General Tab

On the General tab, fill in the configuration options for the Freight SmartLink.

FIELDS AND CONTROLS

EXPORT FORMAT: IFS/SUPPLYMASTER :

Select SmartFreight for SmartFreight integration / XML Files, SupplyMaster for SupplyMaster (CSV) integration.

DEFAULT SENDER ACCOUNT:

Select the Default Sender Account to be included in the shipment review integration file. This account may be overwritten on a shipment review by shipment review basis.

DEFAULT CHARGE TO: SENDER/RECEIVER.

Select Sender if (by default) the Sender Account number is to be used on the shipment review documents.

Select Receiver if the Receiver's Account number is to be used on the shipment Review documents. If Receiver is selected, then the following optional fields need to be set up on the customer and/or customer ship-to and on the O/E Transactions:

- Have an optional field call IFSLINK on either the customer or customer ship-to location. The first character should be 'R' for receiver, or 'S' for sender.
- If it is 'R' then there are 3 other optional fields you can (but don't have to) use. They can be set on the customer or customer ship-to location. They are:

- IFSACCNO - used as the sender account number on the shipment review
- IFSCARRIER - used as the default carrier on the shipment review
- IFSSERVICE - used as the default service on the shipment review (only if IFSCARRIER is specified)

- Set each IFSACCNO up in the F/S Setup>"Sender Accounts" screen
- Select the option "Receiver" in F/S Setup\Options\"Default Charge To"

> **Important!**
>
> The rules for the exporting of the "account id" in the XML file for Freight SmartLink is based on the following :
>
> - If the "Default Charge To" on F/S options is Sender then we use location/carrier account number (FFLOCCAR.ACCOUNT) if it exists, otherwise we use the carrier account number (FFCARH.ACCOUNT).
>
> - If the "Default Charge To" on F/S Options is Receiver then we use the Sender Account field from the header of the shipment review. This can default from the customer/customer ship-to if the optional fields (IFSLINK, IFSACCNO) have been set up for the customer/customer ship-to. If no optional fields are set on the customer, then the Sender Account will default to the Sender Account set up on the F/S Options.

UPDATE ON MANIFEST:

Select this option if you want to import the consignment note numbers and associated freight costs generated by the Freight Carrier when you run the Periodic Processing > Import Manifest function.

Deselect this option if the consignment note number is to be read back from the Freight Carrier when the Freight Carrier shipment review file is created and exported.

PATHS

Export Path: Specify the network folder where the Freight Carrier files are to be created

Import Path:Specify the network folder where the Consignment details are to be read from

Archive Path: Specify the network folder where the consignment details are to be archived once read

> **Note:** if using Freight SmartLink in multiple locations, the Path details can be
>
> defined per I/C Location in F/S Locations.

AUTO-NUMBER

Auto number Shipment Review: Select to Auto number Shipment Review documents

Shipment Review Prefix: If auto numbering, define the Shipment Review prefix

Shipment Preview Length: If auto numbering, define the maximum length for the shipment review number. This length is inclusive of the shipment review prefix

DEFAULT DOCUMENT TYPE:

Order/Shipment/Invoice. Select the default document type from which the shipment reviews are to be created

DEFAULT SEND EMAIL:

Yes/No Select "Yes" to send the customer (email address on the OE Order) an email notification when the consignment note number generated by the freight carrier has been imported back onto the shipment review and the consignment has been dispatched.

Default Email Template: If emails are automatically sent to customers when updating the consignment note number for the shipment review, select the Email Template to be used.

IF THE SENDER ACCOUNT DOES NOT EXIST THEN:

Display an error/Display a warning/Do Nothing validation done when the Shipment Review integration file is created.

SHOW FS SHIPPED DOCUMENTS IN FINDER:

When the option is selected, the finders on the Shipment Review screen include all Orders/Shipments/Invoices.

When the option is NOT selected, the finders only show Orders/Shipments/Invoices where the "Tracking Number" is blank.

UPDATE OE TRACKING NUMBER:

Don't update/With Shipment Review Number/With Consignment note number. When the consignment note number and freight costs are imported back onto the Shipment Review, you can optionally configure Freight SmartLink to update the associated OE Tracking number

with the Shipment Review Number or the Consignment Note Number.

DEFAULT APPLY MARKUP:

Select this option if you want to use the Freight SmartLink feature of basing the freight cost to the carriers cost plus a mark up.

REQUIRE PO NUMBER ON O/E ORDERS:

Select this option if you want to validate the P/O Number field is mandatory in O/E Orders.

ALLOW SHIP ALL IN ORDER ENTRY:

Select this option if you want to allow shipments to be created from the O/E Order entry screen,

if you want to ensure Shipments are only created using the O/E Shipment Screen, do not select the option.

Freight charges tab

Use this Tab to configure whether to Add freight automatically, validate that Freight is added, Create shipment and Export to the Freight Carrier automatically when invoicing OE Orders and OE Shipments

> **Important!**
>
> To add freight or to create Shipment Reviews automatically, you need to use the F/S Order Entry or F/S Shipment Entry screen to create the invoice.

FIELDS AND CONTROLS

O/E Order Entry Settings

When no freight on order: Do Nothing/Warn/Error/Add Freight

Default Freight Charge: Define the Default Freight charge when auto-adding Freight

Default Freight Charge Code: select the default Non-Stock item code to be used for auto-added freight charges to the OE Order

Always add freight to shipment: Yes/No. When creating shipments from the OE Order Entry Screen, you can define an automatic Freight Charge to be added

Freight Charge : Define the Default Freight charge when auto-adding Freight to a shipment created from the OE Order Entry Screen

Freight Code: select the default Non-Stock item code to be used for auto-added freight charges to the OE Shipment

Create shipment Review when invoicing: No/Create/Create and Export. If you are creating the OE Invoice from the OE Order Screen, you can select to automatically create the Shipment Review and/or Create the Shipment Review and export for the Freight Carrier.

> **Important!** If this option is selected, you need to use the F/S Order Entry screen to
>
> generate an invoice.

O/E Shipment Entry Settings

When no freight on shipment: Do Nothing/Warn/Error/Add Freight

Freight Charge: Define the Freight Charge to be added when auto-adding Freight to a shipment

Freight Code: select the default Non-Stock item code to be used for freight when auto-adding Freight to a shipment created from the OE Shipment Entry screen

Create shipment Review when invoicing: No/Create/Create and Export. . If you are creating the OE Invoice from the OE Shipment Screen, you can select to automatically create the Shipment Review and/or Create the Shipment Review and export for the Freight Carrier

> **Important!** If this option is selected, you need to use the F/S Shipment Entry screen
>
> to generate an invoice.

Add Freight Cost to Order/Shipment during Import Manifest: Yes/No. If selected then when the consignment note number and freight cost is imported onto the Shipment Review, the cost of the Non-Stock item for Freight on the associated OE Order or OE Shipment will be updated.

> **Note:** If you create the shipment review automatically when invoicing, the Cost associated with the freight line will not be updated on the invoiced line.

Use: Ship-via/Zone Table or Post Code/Zone Table. When adding freight automatically to OE Orders or OE Shipments, select if the Ship-Via code or Post Code is to be the link to the Zone.

> **Tip:**
> If Ship-via is selected, use the Ship-via/Zone to link Ship via codes to Zones.
>
> If Post code is selected, Use the Post Code/Zone Tab to link the post codes to Zones.

Freight Tab

Post Code / Zone tab

Use this tab to configure the post codes and zones used to calculate freight.

Note: You need to create the Zone codes in the F/S Options >Zone Tab on page 18 first.

FIELDS AND CONTROLS

Post Code: Enter the appropriate Post Code

Zone Code: select or enter the Zone Code this Post Code belongs to

Zone Code description is displayed

Ship-Via / Zone Tab

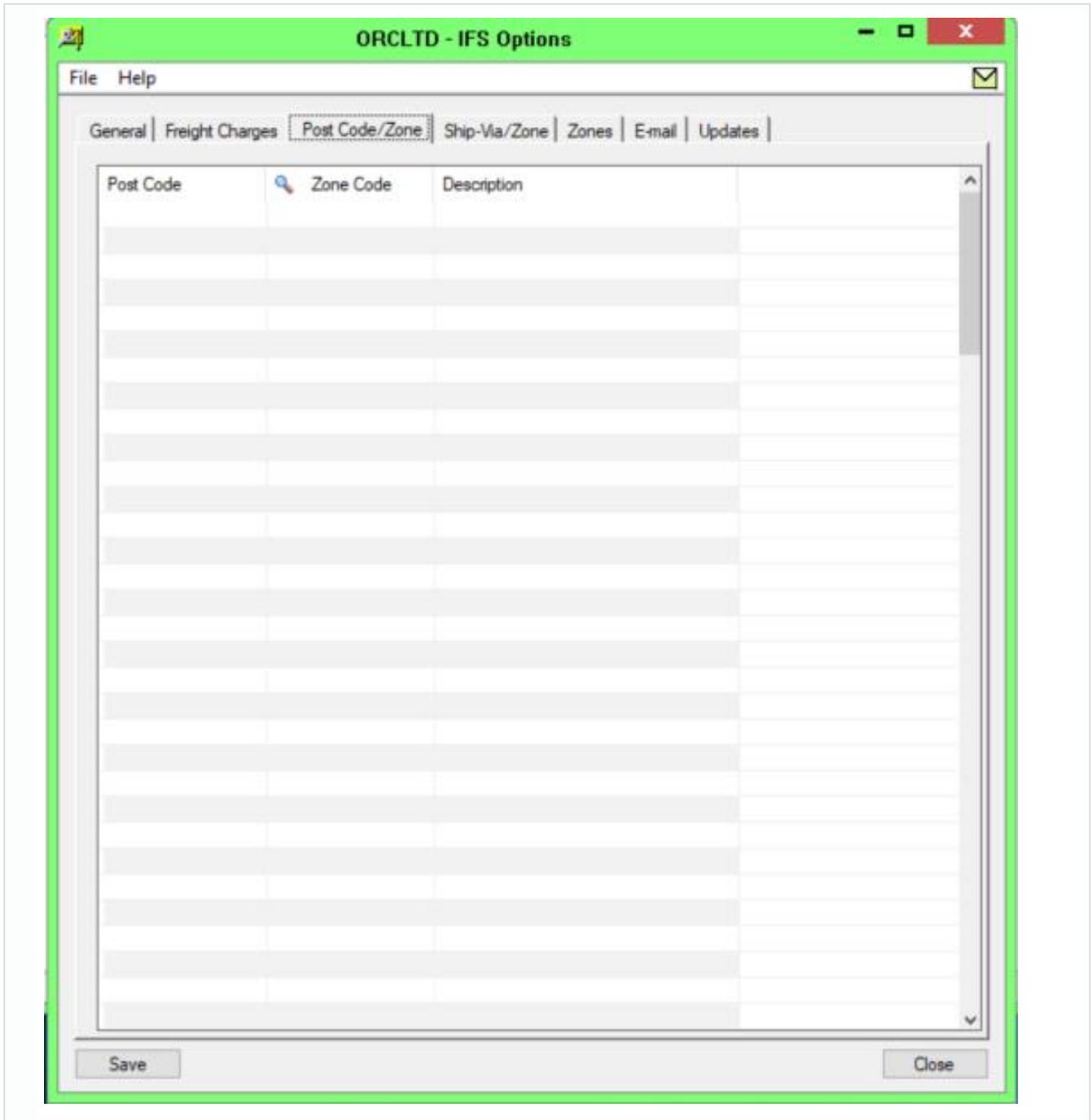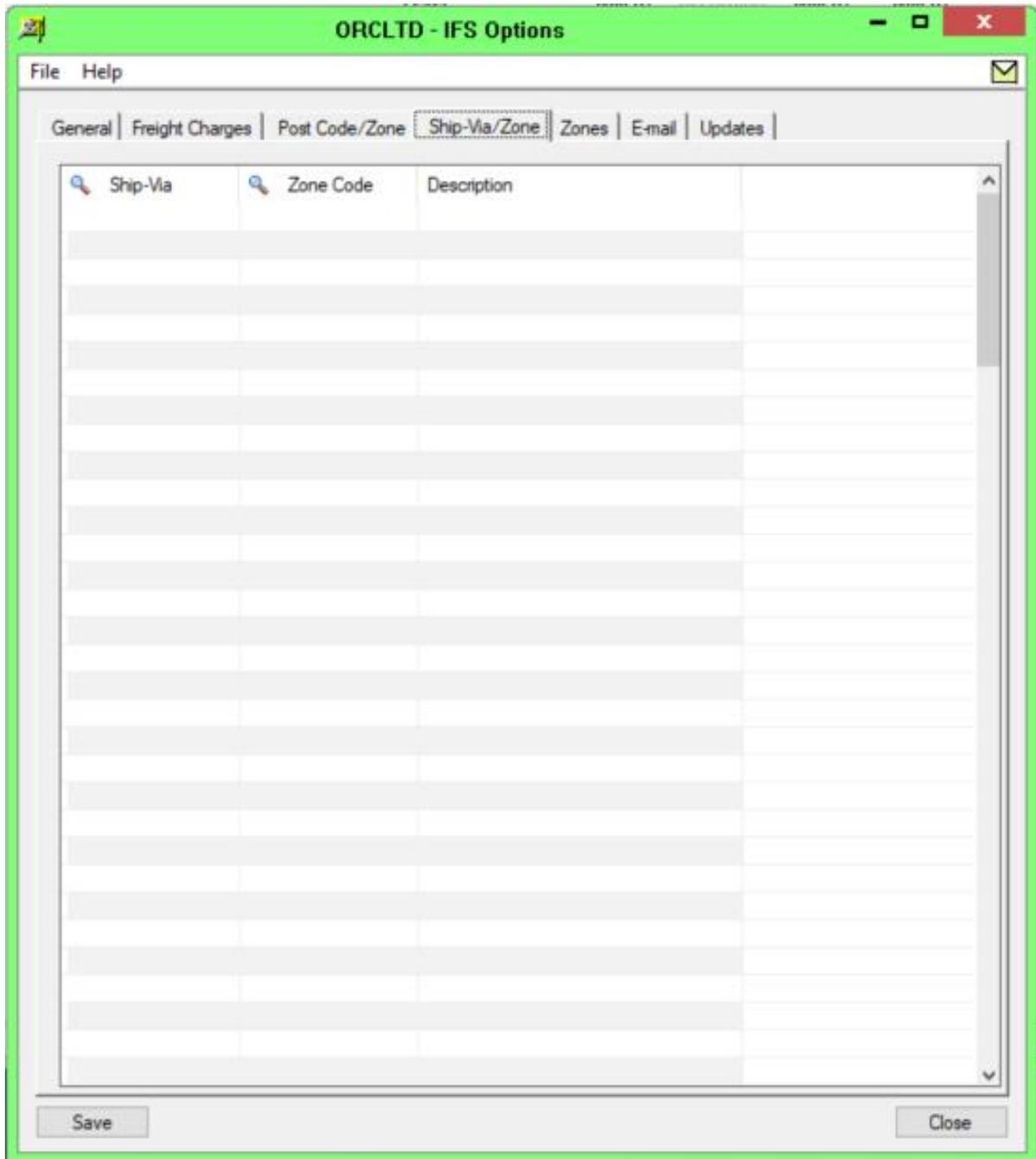Use this Tab to link Ship Via and Zone codes - used in freight calculations.

Note: You need to create the Zone codes in the F/S Options >Zone Tab on page 18 first.

FIELDS AND CONTROLS

Ship-Via: Enter the appropriate Ship-Via

Zone Code: select or enter the Zone Code this Ship-Via belongs to

Zone Code description is displayed

Zone Tab

Use this tab to define the rules for calculating freight for each zone.

FIELDS AND CONTROLS

Zone Code: Enter a code

Description: Enter the Zone description.

Max Order Value: Enter the maximum order value if required. If the order exceeds this value, freight will not be added.

Handling Charge: Enter the Handling Charge to be added to the calculated freight charge

Charge Type: Flat/Weight Select Flat for a flat charge Select Weight if the freight charge is to be calculated based on the weight of the order.

Flat Charge: If freight is calculated on a flat charge type, enter the flat charge

Charge/Kilo: If freight is calculated based on the order weight, enter the rate per kilo

Max Charge/Kilo: if there is a maximum freight charge when calculating freight based on the order weight, enter the maximum freight charge. If the order weight exceeds this value, freight will NOT be added.

Minimum Weight: if there is a minimum weight for orders to be used as the basis of calculating freight, then enter the minimum weight. If the order weight is less than the minimum weight, freight will be calculated on the minimum weight.

Item Number : Select or enter the non-stock item number to be used for this zone's freight charge.

Round to nearest: if calculating freight based on the order weight, you can define rounding rules. 0.01 will round to the nearest cent. 0.10 will round to the nearest 10 cents. 1.00 will round to the nearest dollar.

Zone Tab

Updates Tab

NOTIFY ME WHEN THERE ARE NEW UPDATES IN FREIGHT SMARTLINK

Users can now "subscribe" to notifications of updates.

By Default, this option is not selected for end-user serial numbers

The check is stored in the registry and it applies to this Windows user on this computer.

If selected, when starting Sage it will check if there are product updates available for Freight SmartLink

If there is a new update, and the user hasn't previously been notified of it, then the Options screen will open automatically on the Updates tab and display details of the new updates.

> **Tip:** The "administrator" or "super user" or "owner" of Sage 300 should have this option
>
> turned on. All other users should have it turned off.

CHECK FOR UPDATES AND SUPPORT REQUESTS

You can use "`Check for Updates`" button to view the list of new features and fixes.

To facilitate support, please include the Version and Product Updates you are running when reporting any issues.

Updates are available to be downloaded from the partner area of the Orchid website Product downloads.

Email Tab

The Email tab lets you define your email server. When you fill in the email option on the Orchid Module Options, it will email directly to your email server using the selected service. Since October 2022, in the latest product updates for Sage 300 versions 2020 and above, you can email documents using 2 methods, SMTP or Microsoft Graph.

Email Service

`SMTP (Simple Mail Transfer Protocol).` You can use your own SMTP server, or an SMTP service.

> **Example:** SMTP Email Examples

`Microsoft Graph`. This service sends email via Microsoft Office 365. It is generally used when SMTP Basic authentication is not enabled in Office 365.

Refer to Office 365 and Microsoft Graph

If you don't fill in the SMTP Details, Orchid Module cannot send emails.

Email Field details

Select the Service you want to use to email:

`Basic Authentication SMTP:`

Email Server : `smtp.domain.com:587` Enter the details of the SMTP Server you want to email from. The default port is generally port 587 with TLS.

> **Tip:** You can specify a port number after filling in the email server details. After the email server name, enter "`:xx`" i.e. colon xx where `xx` is the port number required. Example: `smtp.domain.com:587`

Email User and **Email Password**: Enter a correct combination of `Email user and pass-word`

> **Note:** If using multi-factor authentication and App password, enter the App password you create in he Email Password field. Refer to Using Orchid Modules with Office365 and Multi-Factor Authentication

Email Comes From: Enter the email address to be used when sending email.

> **Note:** Depending on the SMTP server you use, this address may need to match the one you enter in the Username field, or may not work unless you set up an email alias. Consult your SMTP server documentation for details about sending email.

`Microsoft Graph:`

This service sends email via Microsoft Office 365 where basic authentication is not enabled to use SMTP.

Refer to Office 365 and Microsoft Graph

Tenant ID. Enter the tenant ID (alternatively called the directory ID) from your Microsoft 365 account.

Client ID. Enter the client ID (alternatively called the application ID) from your Microsoft 365 account.

Client Secret. Enter the client secret from your Microsoft 365 account.

> **Tip:** This is actually the secret **value**, not the one called Secret ID. It is the one that you only see once when you first create the client secret.

From Email Address. Enter the email address to be used when sending email.

Examples

Refer to the examples below for detailed settings with commonly used mail providers, such as Office 365 and Gmail.

> **Example:** SMTP Email: Examples

Options Applicable to EFT Processing only

Send Email copy

Using Sage Company Profile details

If you leave the SMTP details blank in EFT Processing> Options Tab, the Sage 300 default way of sending emails will be used. However, the program cannot verify that the email has been sent and cannot report the number of emails sent.

- It will use SMTP or Microsoft Graph depending on the option selected on the Company Profile,
- If the details are not filled in, it will use Microsoft Outlook if installed on the client machine.

For more details, refer to Emailing from Sage 300 in Sage 300 documentation.

Test Email Configuration

You can use the "Send Test Email..." to check your email settings. You will be prompted to enter an email address to send the test email to.

> **Tip:** Test sending to an email address in the same domain as your SMTP Server and one outside of your domain.

> **Tip:** CC doesn't work when testing. Even if you configure a CC address in the
>
> Email Tab,, the test email is only sent to the email address you enter when testing.

Troubleshooting Sending emails

Email Troubleshooting

Updates Tab

Use the Options > Updates Tab to see details about product updates available. Also includes a list of new features and fixes since the initial release.

NOTIFY ME WHEN THERE ARE NEW UPDATES IN ORCHID MODULE

Users can now "subscribe" to notifications of updates.

By Default, this option is not selected for end-user serial numbers

The check is stored in the registry and it applies to this Windows user on this computer.

If selected, when starting Sage it will check if there are product updates available for Orchid Module

If there is a new update, and the user hasn't previously been notified of it, then the Options screen will open automatically on the Updates tab and display details of the new updates.

> **Tip:** The "administrator" or "super user" or "owner" of Sage 300 should have this option
>
> turned on. All other users should have it turned off.

CHECK FOR UPDATES AND SUPPORT REQUESTS

You can use "`Check for Updates`" button to view the list of new features and fixes.

To facilitate support, please include the Version and Product Updates you are running when reporting any issues.

Updates are available to be downloaded from the partner area of the [Orchid website Product downloads](#).

F/S SETUP> F/S CARRIERS

Use this screen to define which carriers are active, what services the carriers offer and what package descriptions and dimension the carriers allow.

General tab

Carrier: Enter the carrier code. Note : this code must be the same as the carrier code used in Freight SmartLink for this Carrier.

> **Tip:** These codes can be imported – Details in F/S Import Carriers on page 41

FIELDS AND CONTROLS

Active: Deselect if this carrier is no longer active.

Name: Fill in the Carrier's name

Web Site: Complete the carriers website

Account Number: If this carrier is to be charged to a separate Carrier Account number, complete the Sender Account Number here. If left blank, the Default Sender Account (or Receiver Account) configured in F/S Options will be used.
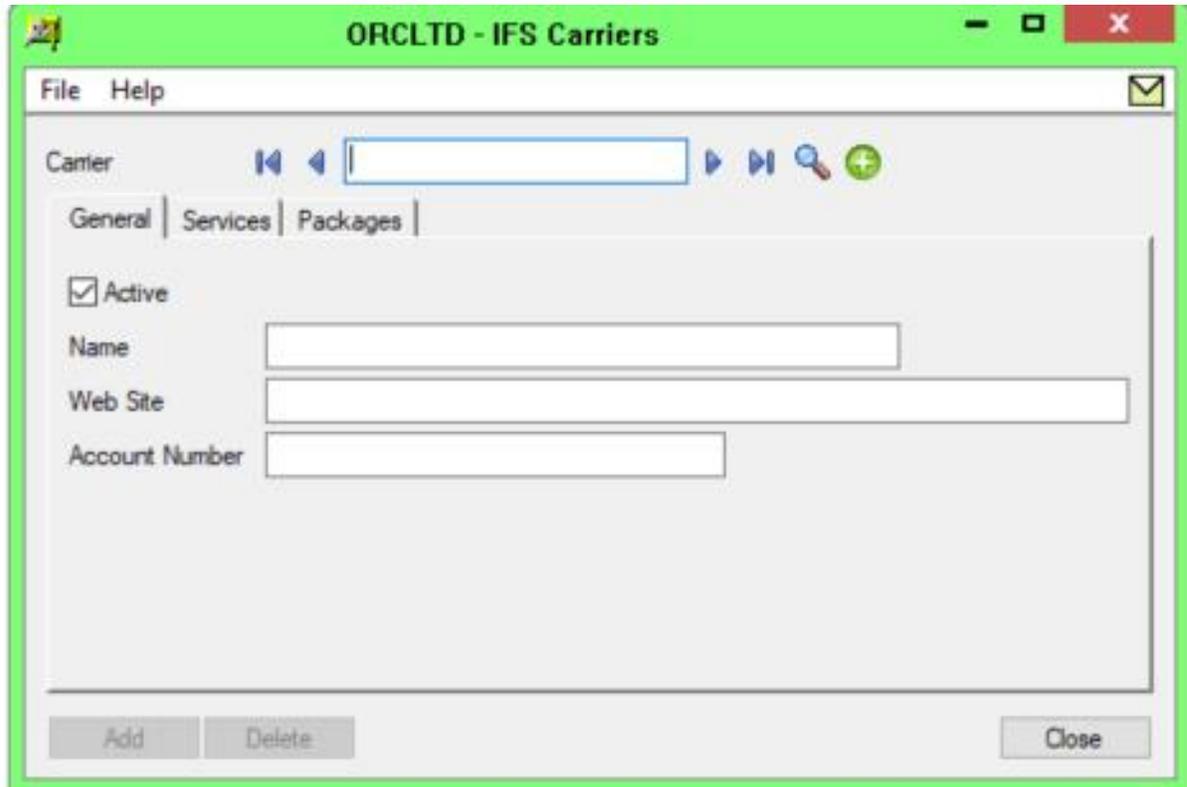
Services Tab

Use this tab to define the valid services for this carrier.   For example : Same day service, Next day service etc.

FIELDS AND CONTROLS

Service : Enter the Service Code. Note : this code must match the service codes in Freight SmartLink for this carrier.

Description: Enter the service description

Active : Select or Deselect based on the service being active for this carrier

Packages Tab

Use this tab to define the valid packages for this carrier.   For example: Parcel, Carton etc.

FIELDS AND CONTROLS

Freight Package: Enter the Freight Package Code. Note: this code must match the freight package codes in Freight SmartLink for this carrier.

Description: Enter the freight package description

Quantity: Enter the default quantity for this freight package

Weight: Enter the default weight for this freight package

Cubic (m): Enter the cubic meterage for this freight package

Length (cm): Enter the length in centimetres for this freight package

Width (cm): Enter the width in centimetres for this freight package

Height (cm): Enter the Height in centimetres for this freight package

Active: Select or Deselect based on the service being active for this carrier

F/S SETUP>SENDER ACCOUNTS

Use this screen to create the different Sender Accounts to be used in Freight SmartLink.

General Tab

FIELDS AND CONTROLS

Account: Enter the Sender Account Number. Must match the Account Number in the Freight Carrier

Name: Enter the Sender Account's name

Contact: Enter the Sender Account's contact name

Address: Enter up to 4 lines for the Sender Account's Address

City: Enter the Sender Account's City

State/Province: Enter the Sender Account's State or Province

Zip/PostCode: Enter the Sender Account's Zip or Post Code

Country: Enter the Sender Account's Country

Phone: Enter the Sender Account's Phone Number

Email: Enter the Sender Account's email address

Apply Least Cost: Select if you want Freight SmartLink to apply the least cost carrier to shipment reviews sent using this account number

Send E-Mail to Client: Select if you want the customer to be sent an email when the consignment note number is imported from the freight carrier to Freight SmartLink.

Default E-Mail Template: Specify the default e-mail template if sending customers e-mail notifications

F/S SETUP>E-MAIL TEMPLATES

Use this screen to define default e-mail templates for sending customers emails

FIELDS AND CONTROLS

Template: Enter the Email Template code

Description: Enter the Email Template description

Last Maintained: the date this email template was last maintained will be displayed

Active: Select if this email template is active

Subject: Fill in the required Email Subject

E-mail Body: Fill in the required Email Body

Field names can be used in the email body and subject, and will be replaced at with the value from the current shipment review when the email is sent.

VARIABLES TO INCLUDE IN EMAILS

FIELDS FROM OTHER TABLES

$PACKAGES – a list showing Freight Package Code, Description, Quantity and Total Weight for the Shipment Review

$OEORDERNUMBER – associated OE Order Number (when DOCNUMBER is the shipment or invoice number)

$OEORDERPONUMBER – PO Number on the associated OE Order

FIELDS FROM THE SHIPMENT REVIEW HEADER (FFSHIPH).

Use the field prefixed by a dollar sign ($)

$DOCSEQ Document Sequence

$SRNUMBER Shipment Review Number

$SRDATE   Date

$SRTIME   Time

$STATUS   Status

$MULTIDOC   From Multiple Documents

$DOCTYPE   Document Type

$DOCNUMBER   Document Number

$LEASTCOST   Apply Least Cost

$CARRIER   Carrier

$CARNAME   Carrier Name

$CARSERV   Carrier Service

$SERVDESC   Service Description

$IDCUST   Customer

$CUSTNAME   Customer Name

$SHTO   Ship-To Location

$SHNAME   Ship-To Name

$SHCONTACT   Contact

$SHADDR1   Address

$SHADDR2   Address

$SHADDR3   Address

$SHADDR4   Address

$SHCITY   City

$SHSTATE   State/Province

$SHZIP   Zip/Postal Code

$SHCOUNTRY   Country

$SHPHONE   Phone

$SHEMAIL   E-mail

$FOOD   Foodstuffs

$SENDEMAIL   Send E-mail

$ETEMPLATE   E-mail Template

$EMAILSENT   E-mail Sent

$WEIGHT   Theoretical Weight

$TOTWEIGHT   Total Weight

$SENDACCT   Sender Account

$SENDNAME   Sender Name

$SENDCONT   Contact

$SENDADDR1   Address

$SENDADDR2   Address

$SENDADDR3   Address

$SENDADDR4   Address

$SENDCITY   City

$SENDSTATE   State/Province

$SENDZIP   Zip/Postal Code

$SENDCTRY   Country

$SENDPHONE   Phone

$CONNOTE   Connote Number

$FRTCOST   Freight Cost

$WEBSITE   Web Site

$CHARGETO   Charge To

$COMMENT1   Comment 1

$COMMENT2   Comment 2

$COMMENT3   Comment 3

$COMMENT4   Comment 4

$INSTRUCT1   Instructions 1

$INSTRUCT2   Instructions 2

$INSTRUCT3   Instructions 3

$NDETAILS   Number of Details

$APPLYMARK   Apply Markup

$HASDANGER   Contains Dangerous Goods

$LOCATION   Location

F/S SETUP>LOCATION SETTINGS

Use this screen to define Freight SmartLink configuration settings per I/C Location. This is only required if you despatch goods from multiple addresses. In such cases, you need to setup multiple I/C Locations to despatch goods from and link them to each Freight SmartLink setup.

> **Note:** if you do not have a separate Freight Carrier system per I/C Location, the settings in F/S Options>General tab are used. You do not need to configure multiple Freight Carrier / I/C Location configurations.

General Tab

FIELDS AND CONTROLS

Export Path: Specify the network folder where the Freight SmartLink files are to be created for this Location

Import Path: Specify the network folder where the Consignment details are to be read from for this Location

Archive Path: Specify the network folder where the consignment details are to be archived for this location

Carrier Tab

For each of the I/C Locations, you can define a list of valid carriers and, you can define a Sender Account per carrier. If no Carrier/Account details are configured for a location, the Sender Account configuration set up in F/S Options>General tab will used.

FIELDS AND CONTROLS

Carrier: Enter the Carrier Number to be used from this location

Name: the carrier name will be displayed

Account Number: Enter the Sender Account Number to be used for this I/C Location/Carrier combination

F/S Transactions>Shipment Review

Use this screen to create the Shipment Review for every Order/Shipment/Invoice consignment that you want to send via Freight SmartLink. A shipment review can be based on one or more

- OE Order(s),
- OE Shipment(s) or
- OE Invoice(s)

TO CREATE A NEW SHIPMENT REVIEW,

Open the Shipment Review screen and click on the New button (or Insert) to insert a record. The record will be numbered according to the prefix and Document length set up in F/S Setup> F/S Options>General tab. If "auto numbering" was not selected, then enter a Shipment Review Number.

STATUS:

The initial status of a shipment review is "Active". Once exported to the Freight Carrier, the status becomes "Sent to the carrier". Once the Consignment Note details have been imported, the status becomes "Complete". This field cannot be amended on the screen.

EXPORT/IMPORT

Once the shipment review is complete and is ready to be sent to Freight SmartLink, then click the Export button. An XML file will be created for this shipment review and saved in the Export path set up in F/S Setup.

If the system has been set up to Update on Manifest in F/S Setup, then the status will become "Sent to the Carrier", and the send date and send time will be updated to the current time.

If the system has not been set up to Update on Manifest in F/S Setup, then the program will pause for 10 seconds and attempt to read the resulting consignment file from Freight SmartLink.

If read successfully, the status will become "Complete", the send date and send time will be updated to the current time, and the relevant Consignment details will be updated on the Connote tab.

> **Tip:** If a file is not found from Freight SmartLink a message will be given and the status will remain at "Sent to the freight carrier". The consignment file can later be imported using F/S Import Manifest on page 42 once the problem in Freight SmartLink has been resolved and the labels produced by Freight SmartLink.

Depending on your configuration options for updating the associated OE Order or OE Shipment, the OE Tracking number and freight cost can be updated based on the information being imported from Freight SmartLink.

SHIP-TO TAB

FIELDS AND CONTROLS

From Multiple Documents: If this shipment review is being based on a single document, do not tick this box. If selected, you can select the required documents on the Documents tab.

Date: Will default to the current session date, and will be updated when the Consignment Note details are imported from Freight SmartLink.

Time : will default to the current time and will be updated when the Consignment Note details are imported from Freight SmartLink.

Document Type: If this shipment review is being based on a single document, select if the document is an order, shipment or invoice. This will default to the "Default Document Type" selected on F/S Options>General Tab.

Document No: If this shipment review is being based on a single document, select if the appropriate document.

Carrier: Select a valid, active carrier

Carrier Service: Select a valid, active service from the carrier selected. Once the carrier has been entered, the details of the packages can be entered on the details tab.

Carrier Account No.: The appropriate carrier Account Number will be displayed.

Once a document has been selected, the following information is defaulted. Some fields can be amended from the default.

DETAILS

Customer No.: display only

Ship-to Location: may be amended

Ship-to Name: may be amended

Contact: may be amended

Ship-to Address: may be amended for this shipment review.

City: may be amended for this shipment review.

State/Province: may be amended for this shipment review.

Zip/Postal Code: may be amended for this shipment review.

> **Tip:** The combination of Post Code, City and State must be valid otherwise the freight carrier system will reject the file and the address will need to be manually manipulated using the Freight Carrier software.

Country: may be amended for this shipment review.

Phone: may be amended for this shipment review.

Email: may be amended for this shipment review.

Foodstuffs: Select this option if Foodstuffs are included in the consignment

Send Email: will be defaulted from F/S Options>General tab, but may be amended

Email Template: will be defaulted from F/S Options>General tab, but may be amended. Select this option if you require an email to be sent to the customer when the consignment note is issued and imported back to the Shipment Review.

Theoretical Weight: will default from the sum of the associated document's weight

Total Weight: will default to the theoretical weight but may be amended. This is the weight that will be exported for Freight SmartLink.

Charge To: Sender/Receiver will default from F/S Options>General tab but may be amended for this shipment review.

Apply Markup: will default from F/S Options>General tab but may be amended for this shipment review.

DANGEROUS GOODS EXPORT

Contains Dangerous Goods: select this option if the consignment contains dangerous goods, and requires special labels.

To include details about the Dangerous Goods classification, you can use Optional fields. For details, see configure Dangerous Goods: using Item Optional Fields

DOCUMENTS TAB

IF "FROM MULTIPLE DOCUMENTS" IS SELECTED, THIS TAB WILL BECOME VISIBLE.

Select the required document type(s) and document number(s). The theoretical weight for each document will be displayed.
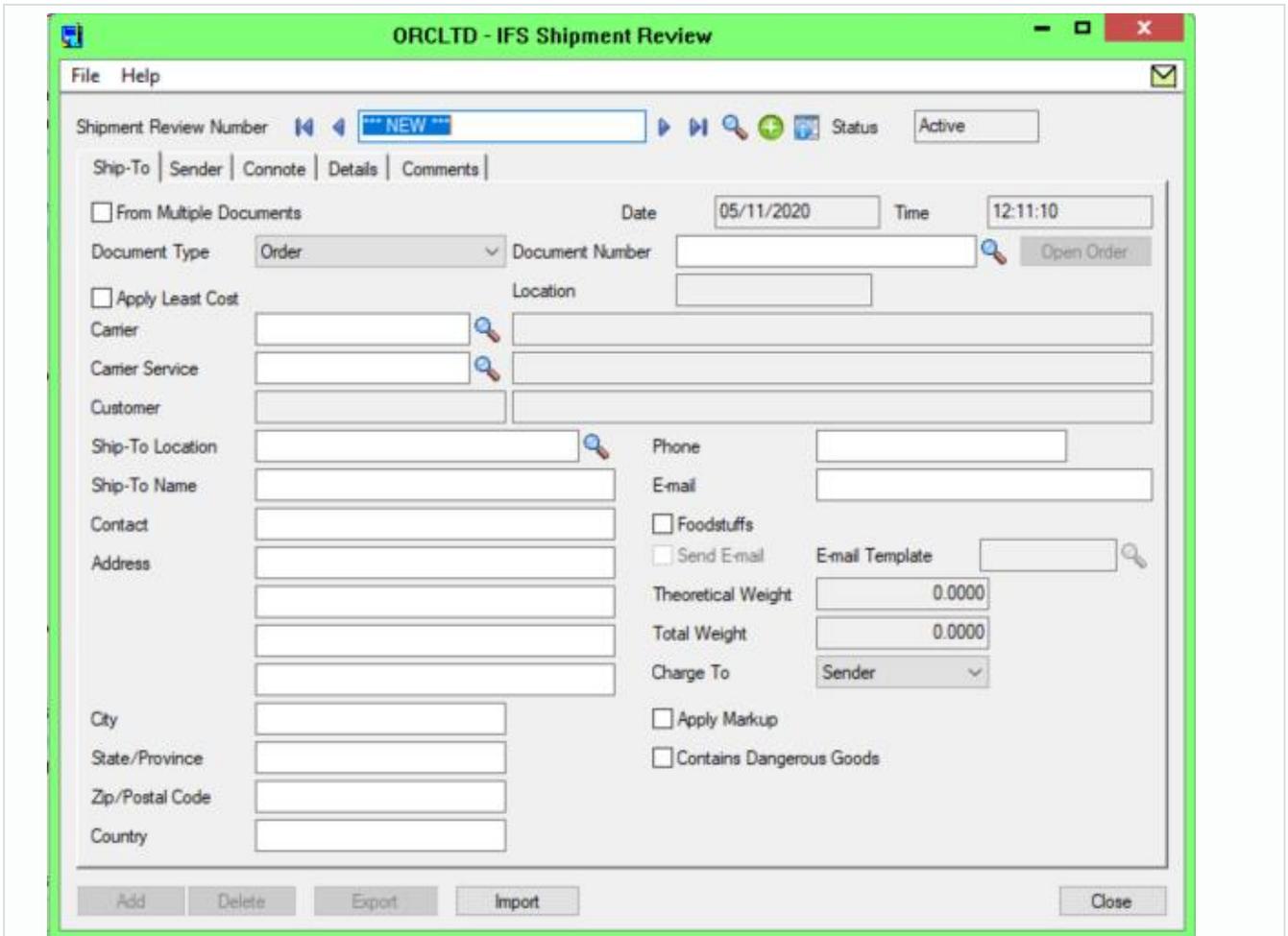
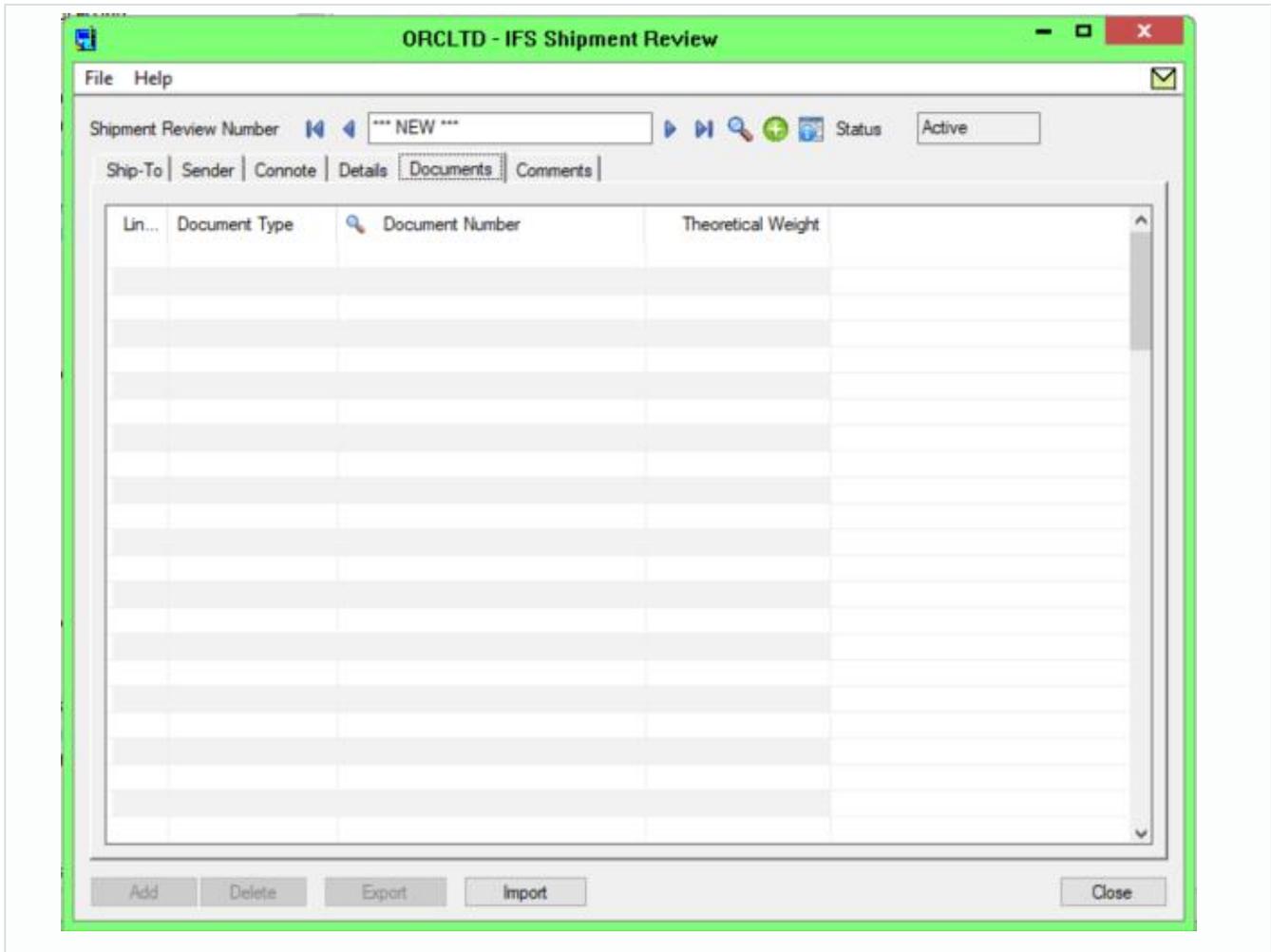The sum of the selected documents theoretical weights will be defaulted to the "theoretical Weight" on the Ship-to tab.

SENDER TAB

The Sender Account will default from the F/S Options>General Tab if "Charge To" is "Sender".

> **Note:** The Sender Account will default from the I/C location settings for the selected carriers if using multiple despatch locations.

If the "Charge To" is set to "Receiver", the Sender Account will default to the value entered in the "SenderAccount" Optional Field on the OE Document. This value defaults to the value in the "SenderAccount" Optional field on the A/R Customer Master file.

FIELDS AND CONTROLS

The Sender Account may be amended for this Shipment Review.

CONNOTE TAB

The consignment note number and freight cost allocated by Freight SmartLink can be imported back onto the shipment review. Depending on the F/S Options>General > Import on Manifest configuration, this happens when the shipment review is exported to the freight carrier or when using the Import Manifest option, .

CONFIGURATION OPTIONS:

- If the configuration option "Import on Manifest" is not selected on F/S Options>General tab, then when the Shipment Review is exported to the freight carrier, the Shipment Review will pause for 10 seconds or so, and attempt to read back the allocated consignment note number and allocated freight costs. If the file is not sent back to Freight SmartLink timeously, then you can click the Import button.

- If the configuration option "Import on Manifest" is selected on F/S Options>General Tab, then when the F/S Periodic Processing>Import Manifest is run, the allocated consignment note number and allocated freight costs will be imported to the relevant shipment review documents.

DETAILS TAB

Use this tab to select the appropriate Freight Packages to be included in this consignment together with the quantity per Freight Package.

DETAILS

The default weight, cubic (m), length (cm), width (cm) and height (cm) will be displayed but may be amended for this shipment review. The Total Weight will be calculated and displayed.

COMMENTS TAB

ADDING COMMENTS

The comments (1..4) for the Freight Carrier can be manually added.

The instructions (1..3) for the Freight Carrier can be manually added.

F/S Order Entry

Important! If Freight SmartLink is activated in a company and you have set the "Create Shipment Review when invoicing" to "Create" or "Create and export" in F/S Options > Freight Charges, the OE Transactions > F/S Order Entry and F/S Shipment Entry must be used instead of OE Order entry and OE Shipment Entry when invoicing OE Sales Orders and OE Shipments.

The underlying OE screen functionality is the same as the standard Sage 300 Order Entry functionality. The custom Freight SmartLink Screens include additional functionality, depending on the options configured in F/S Setup > Options to automatically create and export the associated Shipment Review and calculate and validate freight calculations before invoicing OE Orders and Shipments.

For details, refer to F/S Setup>F/S Options on page 9

When you use the OE Transactions > F/S Order Entry custom screen, you can:

1. Manually click the "Calc Freight" button to add the Freight Detail line to the OE Sales Orders based on your configured Zones in F/S Setup > Options \ Zones Tab.
2. If validation is configured in F/S Setup > Options \ Freight Charges Tab \ OE Order Section, validation messages are displayed if Freight has not been added to the OE Sales Order before invoicing
3. Auto create the Shipment Review document when invoicing the sales order- if "Create Shipment Review when invoicing" is set to "Create" in F/S Setup > Options \ Freight Charges Tab \ O/E Order Entry.
4. Auto create the Shipment Review document and Export for Freight Carrier when voicing the Sales order- if "Create Shipment Review when invoicing" is set to "Create and Export" in in F/S Setup > Options \ Freight Charges Tab \ O/E Order Entry.
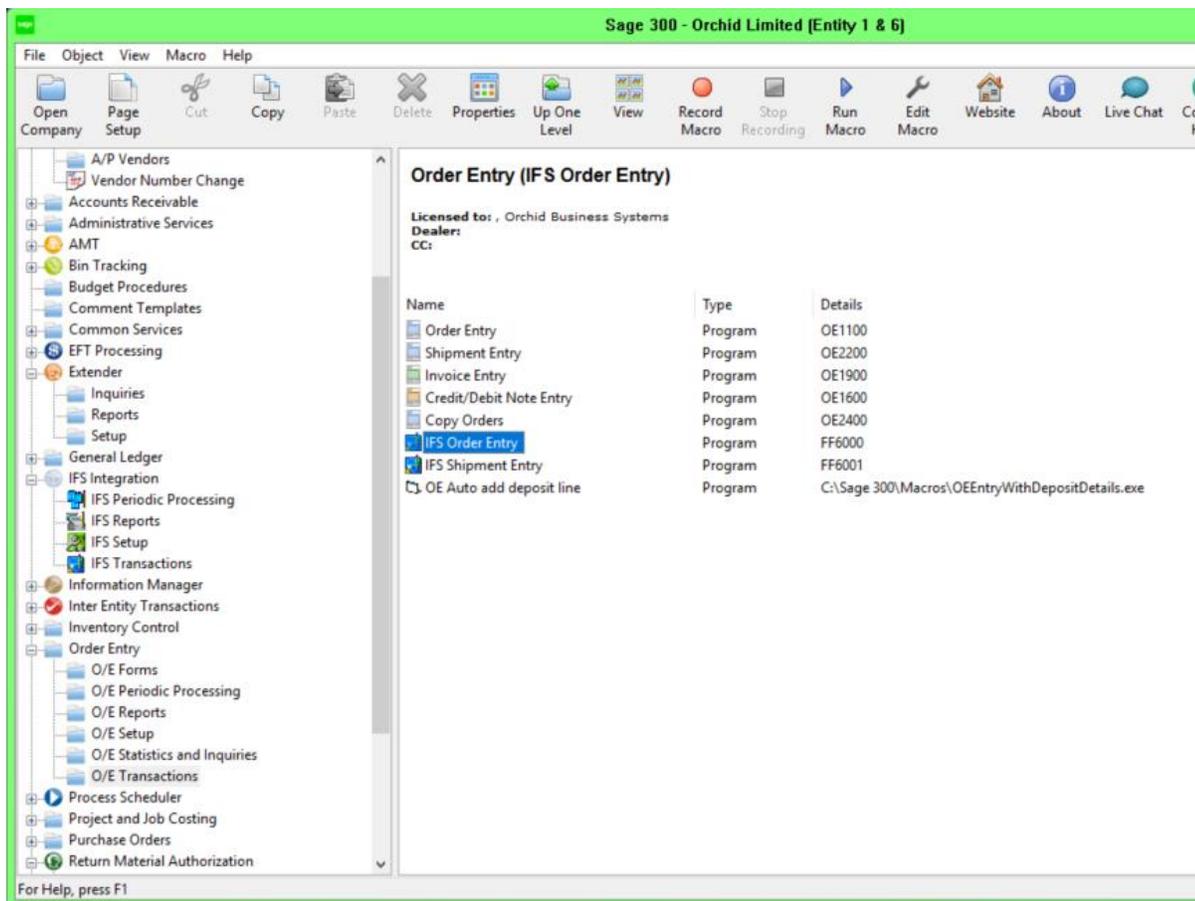
F/S Periodic Processing

F/S IMPORT CARRIERS

Use F/S Periodic Processing > Import Carriers screen to import the configured Carriers/Services/Packages from the Freight Carrier which will be provided in a ".sfb" file.

When you click "Import" the ".sfb" file in the Setup Options\General tab "Import" path will be imported.
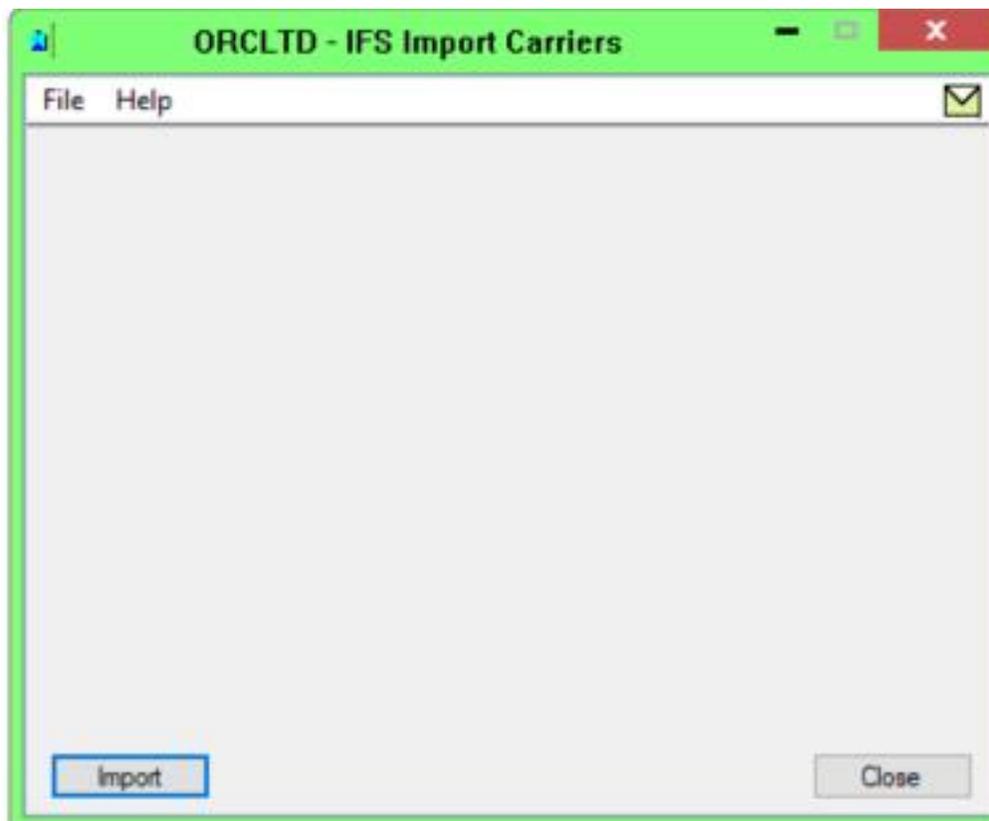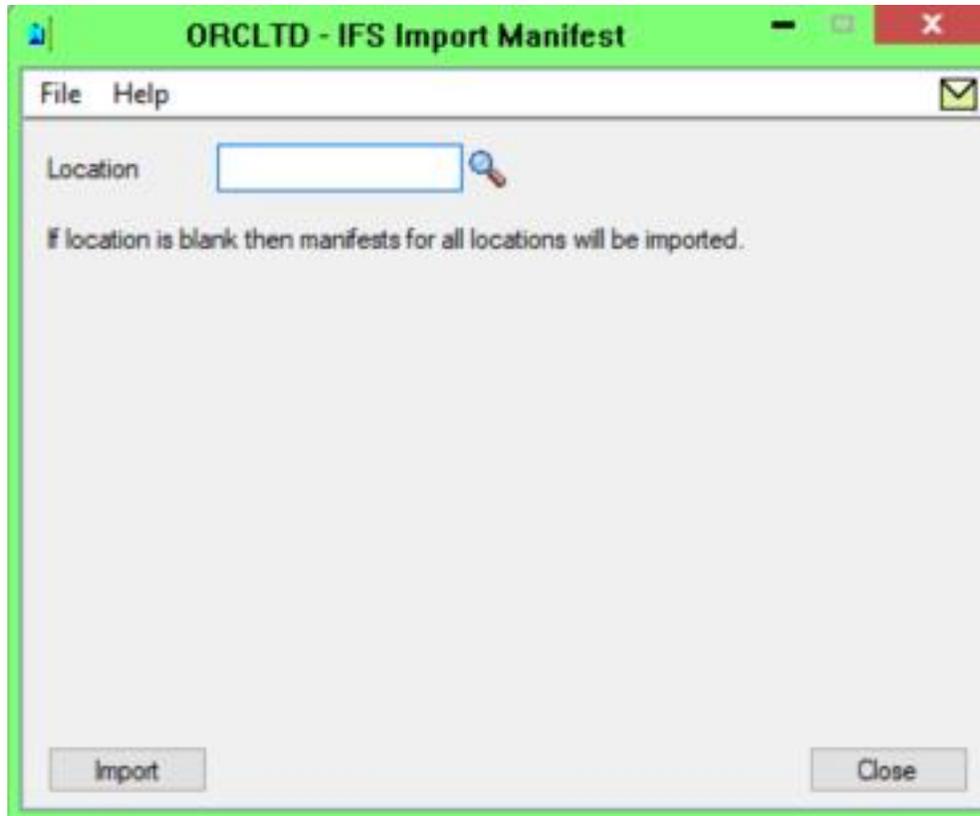
F/S IMPORT MANIFEST

Use the F/S Periodic Processing > Import Manifest screen to import consignment note numbers & the associated freight costs from the Freight Carrier to the associated Freight SmartLink Shipment Review.

> **Tip:**
>
> You can use Process Scheduler Level 3 to schedule the Import of the Manifest files.

> Location: If you want to import consignment note numbers and associated freight costs from the Freight Carrier for one location only, then enter or select the required location code. Alternatively if left blank, then all Location paths including the F/S Options\General tab path will be checked for new files to be imported.
>
> The associated consignment note number and freight costs will be imported onto the associated Shipment Review. Depending on the configuration in F/S option>Freight tab, the associated costs might be updated back to the OE Order or OE Shipment Freight Cost.

F/S Reports

Freight SmartLink includes processing and setup reports.

MANIFEST DETAILS

This report shows the details of the packages and freight costs for all Shipment Reviews in the selection criteria provided.

Includes Shipment Review Number, Dates, status, Customer, Carrier and Service as well as a list of packages, quantity, unit weight, volume and sizes.

AVAILABLE FILTERS

MANIFEST SUMMARY

This report shows the summary of the freight costs for all Shipment Reviews in the selection criteria provided.

Includes Shipment Review Number, Dates, status, Customer, Carrier and Service as well as Weight, Connote number and Freight cost.

AVAILABLE FILTERS

CARRIERS

Includes a list of Carriers with the Services and Packages details.

AVAILABLE FILTERS

SENDER ACCOUNTS

Includes contact details for Sender Accounts

AVAILABLE FILTERS

SETUP OPTIONS

Use this report to print the Freight SmartLink Setup Options.

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