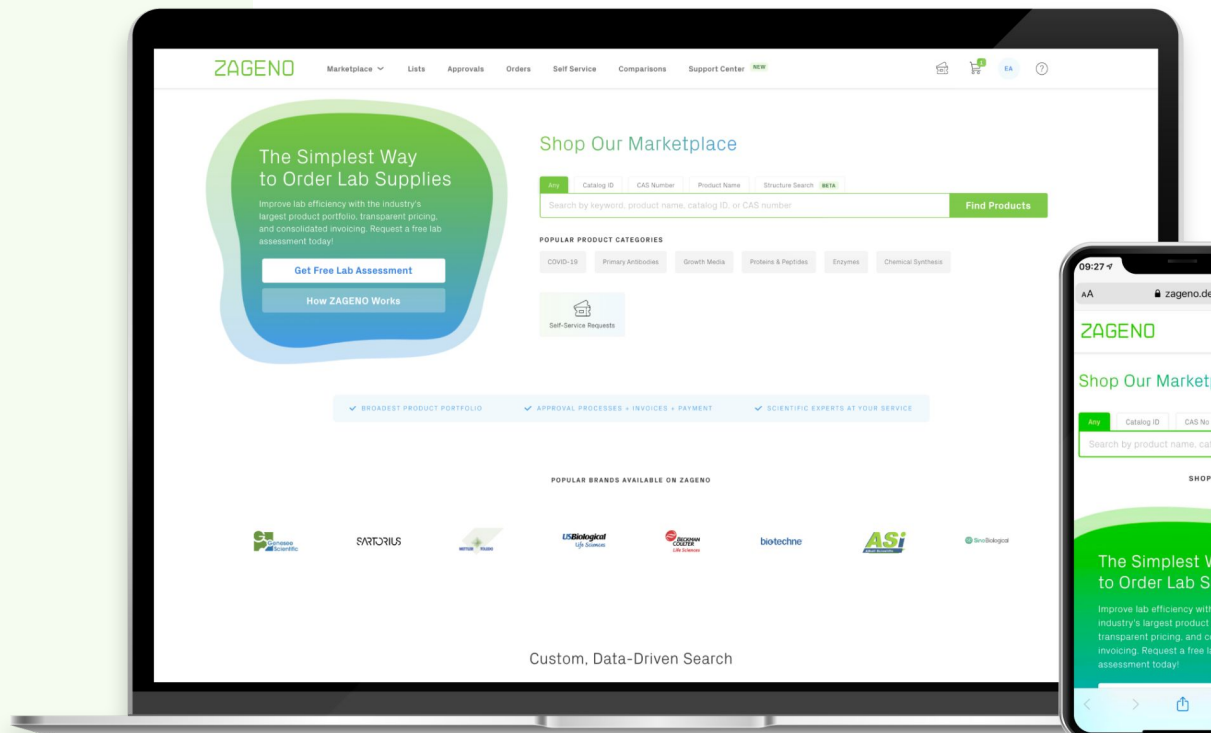


# ZAGENO

Saving Time for Science

## Creating Ship Docs via CSVs



# Section 1: Setting up a PO export

# Setting up a PO export

A PO export will make it really easy to:

- Pull only the POs that need to be shipped
- Export the key elements of each PO that need to be included with shipment document
- Avoid manual rekeying and data entry errors

This is a one time only exercise that you just need to do the first time!



Next you'll land in the main export setup screen, click save as and give your export a name

**Profile**

Select profile...

**Output Format**

CSV  XLSX  XML  JSON  External XML

**Document Filter**

Field	Operator	Value
Document Type	is	Order <input type="button" value="v"/>

Once your export is saved, you'll want to hit share so your colleagues can use it. Then you'll want to start adding document filters

### Profile

Rick Test



SAVE

SAVE AS

SHARE

1

DELETE

SAVE TO FILE

LOAD FROM FILE

This profile is only visible to you.

### Output Format

CSV  XLSX  XML  JSON  External XML

DOWNLOAD

### Document Filter

Field

Operator

Value

Document Type

is

Order



ADD

2

Now you'll setup the filters - noted below - that will pull only POs that need to be shipped and therefore need tracking numbers.

The screenshot displays a software interface with a dark sidebar on the left and a main content area on the right. The sidebar contains navigation items: Dashboard, Orders, Products, Reports, Message Center, Files, Advanced Export, Advanced Import, Attachments, Retailers, Testing, Knowledge Base, Settings, and Sign Out. A yellow arrow points to the 'Settings' item. The main content area is divided into three sections: 'Profile', 'Output Format', and 'Document Filter'. The 'Profile' section shows a dropdown menu set to 'Shipping Export' and buttons for 'SAVE', 'SAVE AS', 'SHARE', 'DELETE', 'SAVE TO FILE', and 'LOAD FROM FILE'. Below this is the text 'This profile is visible to all users for this company.' The 'Output Format' section has radio buttons for 'CSV', 'XLSX', 'XML', 'JSON', and 'External XML', with a red 'DOWNLOAD' button. The 'Document Filter' section is highlighted with a blue dashed border and contains a table with filter rules. The table has columns for 'Field', 'Operator', and 'Value'. The rules are: 'Document Type' is 'Order'; 'Status' is not 'Complete'; 'Status' is not 'Ready to Invoice'; 'Status' is not 'Cancelled'; and 'Status' is not 'Ignored'. Each rule has a 'REMOVE' button. An 'ADD' button is at the bottom of the filter section.

**Profile**

Shipping Export | SAVE | SAVE AS | SHARE | DELETE | SAVE TO FILE | LOAD FROM FILE

This profile is visible to all users for this company.

**Output Format**

CSV  XLSX  XML  JSON  External XML | DOWNLOAD

**Document Filter**

Field	Operator	Value	
Document Type	is	Order	
Status	is not	Complete	REMOVE
Status	is not	Ready to Invoice	REMOVE
Status	is not	Cancelled	REMOVE
Status	is not	Ignored	REMOVE

ADD

Next scroll down and add the fields that need to be selected from the PO (left column) and exported into a CSV (right column)

### Fields to Export

PO fields		CSV column names	
Order	Input Field/Expression	Output Column	
1	ReceiverCompanyId	ReceiverCompanyId	REMOVE
2	VendorNumber		REMOVE
3	PartnerPO		REMOVE
4	OrderNumber		REMOVE
5	OrderLine.LineNumber	ShipmentLine.LineNumber	REMOVE
6	OrderLine.ItemIdentifier.SupplierSKU	ShipmentLine.ItemIdentifier.SupplierSKU	REMOVE
7	OrderLine.Description	ShipmentLine.Description	REMOVE

ADD

**Note:** You'll want to give these columns different names so you don't have to manually change them in the CSV when its exported

### Output Format

CSV  XLSX  XML  JSON  External XML

**DOWNLOAD**

Once you're done, hit download

# Your output will look something like this

A	B	C	D	E	F	G
ReceiverCompanyId	VendorNumber	PartnerPO	OrderNumber	ShipmentLine.LineNumber	ShipmentLine.ItemIdentifier.SupplierSKU	ShipmentLine.Description
130904	3189	US-PRAH8A	US-PRAH8A-RV2Z08	220983	3-353072-CS	Falcon 96 Well Flat Bottomed With Lid Tissue Culture Plate ind. wrapped SKU: 353072
130904	3189	US-K3NJNT	US-K3NJNT-2JSOZ0	220944	45-GBL631031-20EA-EA	Coverwell Imaging Chambers. 20 Mm D. SKU: GBL631031-20EA
130904	3189	US-K3NJNT	US-K3NJNT-2JSOZ0	220945	45-24728-EA	0.75MI Clear 8 X 35Mm Vials Plugs Pk/10.75MI Clear 8 X 35Mm Vials Plugs Pk/1000 SKU: 24728
130904	3189	US-T4TL1P	US-T4TL1P-49PYME	220941	45-G9005-1KG	D-Gluconic acid sodium salt
130904	3189	US-T4TL1P	US-T4TL1P-49PYME	220942	45-358R-17-EA	MUM1 (EP190) 1ML PREDILUTE SKU: 358R-17

## **Section 2: Create + import a shipment CSV**

# Once you've exported the POs needing to be shipped, you'll need to add on the required shipping inputs + static fields to the CSV

- From PO export
  - Req'd shipping inputs
  - Static fields, same each time

ReceiverCompanyId	PartnerPO	OrderNumber	VendorNumber	ShipmentLine.LineNumber	ShipmentLine.Description
130259	US-IJ35SI	US-IJ35SI	130904	76404	Falcon 96 Well Flat Bottomed With Lid Tissue Culture Plate ind.
130259	US-IJ35SI	US-IJ35SI	130904	76404	D-Gluconic acid sodium salt

ExpectedDeliveryDate	ShipmentLine.ShipmentInfo.Qty	ShipmentLine.ShipmentInfo.TrackingNumber	ShipmentLine.ShipmentInfo.CarrierCode
9/21/22	2	123456	FDE
9/21/22	5	5566889	FDE

ShipFromAddress.Address1	ShipFromAddress.City	ShipFromAddress.State	ShipFromAddress.Zip	ShipFromAddress.Country
1 Main Street	Albany	NY	10001	USA
1 Main Street	Albany	NY	10001	USA

Once you've prepared the CSV, with the additional columns, go to advanced import

The screenshot shows a dashboard interface. On the left is a dark navigation menu with the following items: Dashboard, Orders, Products, Reports, Message Center, Files, Advanced Export, Advanced Import (highlighted with a yellow arrow), and Attachments. The main content area features two light green summary cards: 'Orders Waiting To Ship' with a count of 5, and 'Orders Shipping Today' with a count of 2. Below these cards is a table with a vertical axis on the left ranging from 1.0 to 2.0 and a header 'Orde' on the right.

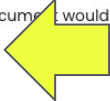
	Orde
2.0	
1.8	
1.6	
1.4	
1.2	
1.0	

Once you're in advanced import, select shipments and then click the middle of the page to upload your CSV file

**Advanced Import**

1 Configure import settings — 2 Select file to upload — 3 Map columns — 4 Validate — 5 Complete import

What kind of document would you like to import?

Shipments 

Invoices

Acknowledgements

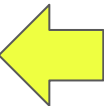
Returns

Predefined format  
Use this setting if you are importing a file with custom column names that Logicbroker has mapped for you. This type of file is usually uploaded through VFTP.

**CONTINUE**

**Advanced Import**

Configure import settings —  2 Select file to upload — 3 Map columns — 4 Validate — 5 Complete import

Drop a CSV/XLSX file here or click to choose a file. 

**BACK** **CONTINUE**

# On the next screen, just hit continue at the bottom

## Advanced Import

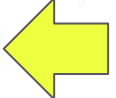
- 1 Configure import settings
- 2 Select file to upload
- 3 Map columns
- 4 Validate

Select profile... ▾

Column From File	Logicbroker Field	Sample Content
ReceiverCompanyId	ReceiverCompanyId	130259
PartnerPO	PartnerPO	US-IJ35SI
OrderNumber	OrderNumber	US-IJ35SI
VendorNumber	VendorNumber	130904
ExpectedDeliveryDate	ExpectedDeliveryDate	9/21/22
ShipmentLine.LineNumber	ShipmentLine.LineNumber	76404
ShipmentLine.ShipmentInfo.Qty	ShipmentLine.ShipmentInfo.Qty	2
ShipmentLine.ShipmentInfo.TrackingNumber	ShipmentLine.ShipmentInfo.TrackingNumber	123456
ShipmentLine.ShipmentInfo.CarrierCode	ShipmentLine.ShipmentInfo.CarrierCode	FDE
ShipFromAddress.Address1	ShipFromAddress.Address1	1 Main Street
ShipFromAddress.City	ShipFromAddress.City	Albany
ShipFromAddress.State	ShipFromAddress.State	NY
ShipFromAddress.Zip	ShipFromAddress.Zip	10001
ShipFromAddress.Country	ShipFromAddress.Country	USA

BACK

CONTINUE



# On the next screen, just hit continue at the bottom

## Advanced Import

- ✓ Configure import settings ———— ✓ Select file to upload ———— ✓ Map columns ———— 4 Validate ———— 5 Complete import

There are some common fields missing from this file. You can still continue if you have uploaded files in this format before or you know these fields are not required.

One shipment is missing item identification.

```
[
  {
    "ShipFromAddress": {
      "Address1": "1 Main Street",
      "City": "Albany",
      "State": "NY",
      "Country": "USA",
      "Zip": "10001",
      "ContactType": 0
    },
    "ExpectedDeliveryDate": "2022-09-21T00:00:00",
    "ShipmentLines": [
      {
        "Price": 0,
        "RetailPrice": 0,
        "Cost": 0,
        "MSRP": 0,
        "ShipmentInfos": [
          {
            "CarrierCode": "FDE",
            "TrackingNumber": "123456",
            "Qty": 2
          },
          {
            "CarrierCode": "FDE",
            "TrackingNumber": "5566889",
            "Qty": 5
          }
        ],
        "Quantity": 0,
        "LineNumber": "76404",
        "Weight": 0
      }
    ],
    "OrderNumber": "US-IJ35SI",
  }
]
```



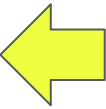
Upon successful upload, you'll see a list of one or more hyperlinks to each ship doc that was successfully created

### Advanced Import

- ✓ Configure import settings
- ✓ Select file to upload
- ✓ Map columns
- ✓ Validate
- 5 Complete import

Imported 1 records.

Created shipment [#1823014](#)



Shipment TEST0004 (ID# 1807643) (Zageno) MORE ACTIONS ▾ VIEW PACKING SLIP NEW INVOICE

**Shipment Status: Complete** Received: 09/16/2022 2:06 PM

**Test case:** [Test Case 1: Single Line PO](#)

Ship From Address	Ship To Address	General Information
Krackeler Scientific Inc 57 Broadway Albany, NY 12202 USA	BioTech Test Customer Mary Smith 1 Enterprise Drive Suite 302 Shelton, CT 06484 US T: 5555555 E: test@logicbroker.com	Order ID TEST0004 Reference Number TEST0004 Shipment Number TEST0004 Estimated Delivery Date 09/17/2022 Bill of Lading PRO Number Seal Number Trailer Number

If you were uploading multiple ship notices for multiple POs, you can check their status by following these steps

The screenshot shows the 'Order Management' dashboard. On the left is a navigation menu with 'Dashboard', 'Orders', 'Products', 'Reports', 'Message Center', and 'Files'. The main area has a header 'Order Management' and four buttons: 'REFRESH', 'ALL DOCUMENTS', 'TRACKING', and 'HIDE SALES ORDERS'. A yellow arrow with the number '1' points to the 'ALL DOCUMENTS' button. Below the buttons is a table with columns for 'ID', 'Reference Number', and 'Date'. One row is visible with ID '149787140', Reference Number 'US-DCAMKL', and Date '09/30/2022 11:41 AM'.

<input type="checkbox"/>	ID	Reference Number	Date ↓
<input type="checkbox"/>	149787140	US-DCAMKL	09/30/2022 11:41 AM

POs that were fully shipped will fall into a ready to invoice state

<input type="checkbox"/>	ID	Reference Number	Date ↓	Sender	Receiver	Status
<input type="checkbox"/>	149713553	US-NVPJND	09/29/2022 06:20 PM	Zageno	New England Biolabs, Inc.	Ready to Invoice
<input type="checkbox"/>	149431267	US-9AHNGL	09/27/2022 04:16 PM	Zageno	PerkinElmer	Ready to Invoice
<input type="checkbox"/>	149227346	US-6VGM6T	09/26/2022 09:55 AM	Zageno	PerkinElmer	Ready to Invoice
<input type="checkbox"/>	148681201	US-6M7TP9	09/20/2022 06:15 PM	Zageno	PerkinElmer	Ready to Invoice

