

# Handheld

## How to Ship Tags - Handheld

### Prerequisites

- Handheld module: Shipping purchased and installed
- At least one user license must be purchased and active
- At least one mobile device available
- An open load must be created on an ENVIO workstation

### Why & When Ship Tags is Used

The Ship Tag function is used to assign product pallet tags to Sales Orders via the Load Number. It calls up a load list which is comprised of open status sales order product information. Handheld capabilities can increase efficiencies and may reduce error because pallets can be marked as shipped when scanned using automatic matching allowing for near real-time data collection.

### How to Ship a Tag using a Handheld

1. Turn on the handheld device
2. Touch the Envio icon to start the application.
3. A screen with blue boxes will appear. Two tabs will also show: Tags and Bins. Touch the Tags Tab
4. Touch the Ship Tag button
5. A Load List grid of available loads receipts will show.
6. To view a load from the Load Detail screen:
  - Scan a load number barcode OR
  - Manually enter a Load Number in the Select Load text box OR
  - Highlight a load from the list. with a finger or stylus. Once line is highlighted blue, press the **Select Load** button.
    - If the load exists but has no assigned Sales Order an error "Load has no Sales Orders" will appear.
7. Touch the dropdown on either **Order** or **Ship To** to view or select an item not currently displayed. The order will display below corresponding to the Order selected.
8. When the Order and Ship To are correct, touch Scan Tags
  - If you receive an error message, the Order is not Open, Loading or Shipped. Log on to an Envio Workstation to adjust the sales order.
9. Scan the pallet tags of the sales order item to marked each pallet as shipped.
  - Scan a pallet tag OR manually enter a tag number in the Tag field
10. Each tag will match to the product line it was shipped against
  - If the tag matches more than one line see: Shipping a Tag - Product Matches More than One Line on a Sales Order
11. A warning may appear if you enter over the amount available.
  - Process Policies dictate warnings. Log in as Admin to modify.
12. To unship a tag. Enter a quantity of "0" and in the tag's Shpd field.

### Troubleshooting & Tips:

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- To review tags with inventory: Go to **Production > Inventory Items**
- Sales Order Shipment policies are located: **Company > Process Policies Tab > Sales Order Shipments > Handheld**. An unchecked policy in this area ignores that element when automatically matching product.

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