Consignment Report

How to use the Consignment Report and set up consignment report notification emails.

To access the report go to Search for Anything! and type in *Consignment Report*, this will take you to the page to adjust and run the report.

Report Overview

The Consignment Report is used to generate custom reports on consignment activity, predominantly on recently delivered consignments. The report is viewable either in the web browser by just clicking the *"Show Report"* button or by exporting the report into an CSV file by using the *"Export Excel"* button. It can also be sent as part of a daily consignment report notification.

The report is customisable and can be save as a "Report Template" for later use. See the Report Template Setup below.

Report Filters

Customer

1 | All ▾

Order By

3 | Consignment Reference ▾

Date Filter

2 | Date Added ▾

Delivery Status

4 | All ▾

From

5 | 2019-06-27

To

6 | 2019-06-27

1. **Customer (Admin Only)**: Run report over all customers or for a specific customer.

2. **Order By**: The order in which the report is sorted.

3. **Date Filter**: In combination with **4. From** and **5. To** this is used to filter the report to a specific date range (e.g. all consignments delivered today).

6. **Delivery Status**: Current status of consignment (e.g. Awaiting Pickup, In Transit (Pickup Warehouse), Delivered).

Report Template

See Creating Report Templates for more information on how to create and use Report Templates!

For this report the Report Template will also capture the Delivery Status and the Date Filter. When you switch between Report Templates these will update automatically. These are useful to set up as they greatly effect what the report displays.

(Admin Only) One further field that is captured by the Report Template is the *Run Email Notification Over*. This is used in the Consignment Notification (see below):

| | 2019-07-31 |

× Consignment Custom Fields   × Consignment Date Added

...cted Template   Delete Selected Template   **Run Email Notification Over:**   Last Day ▼

Consignment Notification

To access Consignment Notifications go to Contacts Customers:

Click on the Customer you wish to set up notifications for:

Click *Edit*:

Total Products:	1
Total Purchase Orders:	1
Total Sale Orders:	0
Total Users:	0
Stock Reports	**Stock Report (detailed)**
	Stock Report (Custom)
	Problem stock report
	Warning stock report
	Product Conversions
	Product Expiry / Warning Thresholds

✎ Edit   ⧉ Duplicate   ⚙ Merge Customer   ✖ Deactivate   ⬇ Export All Products

Pallet Locations (last 8 weeks)

Under the Email Notifications tab, confirm that *"Send Daily Consignment Report Email"* is ticked:

Basics   Transport Management   Warehouse Management   Invoice   **Email**   FTP   Parser   Warehouse   Barcode   Template   👤 ⏱ History

Addresses   **Notifications**

For examples of each notification type, see our **Knowledge Base**

Sale Order Notification Configuration:

When to send a Sale Order Import Notification
[Send Reply Always ▾]

☑ Send Email when Sale Order is Packed
☑ Send Reminder Email to Customer at 4:30pm if Sale Order is waiting for Customer Invoice
☑ Send Email when Sale Order is marked urgent by Administrator

Consignment Notification Configuration:

☑ Send Daily Consignment Report Email (at 10:00pm AEST Mon-Fri)

Under the Email Addresses tab either edit an existing notification or add a new email:

Customers >> Customer A >> Edit

Basics   Transport Management   Warehouse Management   Invoice   **Email**   FTP   Parser   Warehouse   Barcode   Template   👤 ⏱ History

Addresses   Notifications

Name	Email	Notifications	Parsers	Actions
Customer A				**Edit** / Delete

New email

[test@cartoncloud.com.au]

Add new email

Tick the *Consignment Notification* box and add the desired templates. These templates will be part of the Consignment Notification emails which are sent out daily.

☐	Purchase Order Successfully Imported (via Parser)	N/A	To ▾
☐	Shipment notification	N/A	To ▾
☐	Shipment Successfully Imported (via Parser)	N/A	To ▾
☑	Consignment notification	✖ Default	To ▾
		Create Report Templates	
☐	Stock Update Notification	N/A	To ▾

The Report Templates will be sent as an attachment with the name of the attachment used as the Report Template name (so name them wisely!) The attachments are sent as CSV files and contain exactly the same format/columns/data as can be extracted by exporting the report through the web app. One crucial difference is that it does not use both filters, rather it uses whichever filter you selected in the Run Email Notification Over. The options are:

1. **Last Day**: This uses the Report Template's saved *Date Filter and Delivery Status* and runs the report over the last day. For example, if date filter was set to date delivered and the delivery status was all and the date was the 18th then the email sent would contain an attachment with all consignments delivered on the 18th.
2. **Last 3 Months**: This uses the Report Template's saved *Delivery Status* and behaves exactly the same as the first option except it runs the report over the past three months.

N.B. Report Templates will not be sent if no consignments match the criteria defined in the template. This is to prevent users from being spammed daily with empty reports. If multiple attachments are supposed to be part of the email and only one has any consignments, just one attachment will be sent.

Report Columns

Below is a list and description of all columns that can be used in this report. For any that are custom fields (*".. Custom Fields"*) these will show all available custom fields in the report. Each custom field will have a separate header and appear in the order they were set up.

Transport Columns

Column Name	Description
Customer ID	The id of the customer
Customer Name	The name of the customer
Consignment Reference	The reference of the consignment
Date Delivered	The date the consignment was delivered
Consignment Date Modified	The date the consignment was last modified.
Consignment ID	The id of the consignment
Consignment Income	The income of the consignment
Consignment Expense	The expense of the consignment
Consignment Date Added	The date the consignment was added
Consignment Invoice ID	The id of the consignment invoice
Group Consignment ID	The id of the consignment's group.
Group Consignment	Yes if the consignment is part of a group, else No.
Cash On Delivery	How much cash on delivery for the consignment.
Consignment Value	The value of the consignment
Consignment Delivery Status	The current delivery status of the consignment e.g. Awaiting Pickup
Consignment Custom Fields	All enabled consignment custom fields.
Consignment Data Custom Fields	All enabled consignment data custom fields.
Delivery Run Date	The delivery date of the delivery run.
Delivery Run	The name of the delivery run.
Pickup Company Name	The company name of the consignment's pickup address.
Pickup Street Address	The street address of the consignment's pickup address.
Pickup Suburb	The suburb of the consignment's pickup address.
Pickup City	The city of the consignment's pickup address.
Pickup Postcode	The postcode of the consignment's pickup address.
Pickup State	The state of the consignment's pickup address.
Delivery Address ID	The id of the consignment's delivery address.
Delivery Address	The full address of the consignment's delivery address.
Delivery Company Name	The company name of the consignment's delivery address.
Delivery Street Address	The street address of the consignment's delivery address.
Delivery Suburb	The suburb of the consignment's delivery address.
Delivery City	The city of the consignment's delivery address.
Delivery Postcode	The postcode of the consignment's delivery address.

Delivery State	The state of the consignment's delivery address.
Delivery ID	The delivery id of the consignment
Manifest ID	The manifest id of the consignment
Driver Name	The name of the driver for the consignment
Vehicle Name	The name of the vehicle for the consignment
Mobile App Custom Fields	The Mobile App Custom Fields. See: Custom Fields within the App

Warehouse Columns

Column Name	Description
Sale Order Reference	The reference on the sale order
Sale Order Date added	The date the sale order was added
Sale Order ID	The id of the sale order
Sale Order Delivery Status	The current delivery status of the sale order e.g. Awaiting Pick and Pack
Order Qty	The original number of units of a product requested for this sale order
Ship Qty	The number of units of a product that were dispatched with this consignment
Product Code	The code of the product
Product Name	The name of the product
Product Type	The type of product
Unit of Measure	The unit of measure used by the product
Expiry date	The expiry date of the product
Pop Custom Fields	The purchase order product custom fields (e.g. Batch Number)