DISPATCH / ADMINISTRATOR / EDITOR

Prepare and export a shipping list

Select shippable assemblies and loose items, save a load, then export the saved quantities.

1 Open the project's Shipping list

Choose the project and phase, then Shipping list. Enter the load name or reference and, where needed, date, destination, customer reference, default lot, finish and loading notes.

2 Select marks and load quantities

Filter Assemblies, Loose items / parts, search or Selected. Tick rows or Select visible. Enter whole load quantities within the current project quantity. Selections can remain when filters change.

3 Review shipping details and drawings

Expand a selected line for load-specific description, lot, finish, length or area. Check linked drawings, known weight and missing measurements. A model can help identify the item, but linked assembly components must not be added again as loose shipping items.

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Continue the workflow, then check the saved result.

4 Save and reopen the load

Choose Save shipping selection and wait for the saved-state confirmation. Reopen from Saved lists. If source quantities change, Refresh items, review the selections and save again. Resolve missing items and stale versions explicitly.

5 Export the saved PDF or Excel

Use Shipping documents → PDF or Excel. Both use the saved selection and list version, not unsaved changes. Shipping lists do not reserve stock, deduct inventory, record dispatch, complete production or approve QA release. Review other loads for overlapping quantities.

CHECK BEFORE YOU CONTINUE

Compare the exported mark, load quantity, unit weight and total weight with the saved load. Check missing weights and prevent double-counting assembly components.

IF SOMETHING DOES NOT MATCH

If export asks for a save, save the reviewed list first. After a concurrent edit, reload the newest saved version. Old lists without an export snapshot need review and a fresh save.