

How to Set Shipment Instructions with Workflow?

This guide explains how to use the "Set Shipment Instructions" workflow option to automatically assign carrier related instructions to your orders based on rules you create.

What is this feature for?

The Set Shipment Instructions action is a powerful tool within Logiwa's workflow engine that automates how shipping details are applied to orders. By creating a rule with specific conditions, you can automatically assign a carrier, shipment service, package type, and other shipping-related information to an order without manual intervention. This helps ensure accuracy, maintain consistency across your fulfillment operations, and significantly speed up the order processing-to-shipping pipeline.

What you need to get started

Before you configure this action, ensure the following are set up in your Logiwa WMS:

- **Client Setup:** Orders are processed on behalf of a specific client, so your clients must be created in the system first.
- **Completed Carrier Setup:** The shipping carriers (e.g., UPS, FedEx) and your specific account information must be fully configured so the workflow can assign them to orders.
- **Warehouse:** A warehouse must be set up

Configuration

You can find the general steps to create a new workflow rule in our guide: [Create a Shipment Order Workflow](#).

After you create a rule and define its conditions, you will add the **Set Shipment Instructions** action. Below is an explanation of each option you can configure within this action.

- **Client *:** Select the client that this rule will apply to.
- **Warehouse *:** Select the warehouse where this rule will be active.
- **Carrier *:** Choose the shipping carrier (e.g., UPS, FedEx) that will be assigned to the order.

- **Carrier Setup ***: Select the specific account for the chosen carrier.
- **Shipment Method**: Assigns the specific shipping service level (e.g., Ground, Priority Mail, Next Day Air).
- **Carrier Package Type**: Predefines the packaging to be used, assigning the selected carrier package type to the shipment order (e.g., Customer Packaging, Small Box, Padded Pak).
- **Carrier Insurance Type**: Defines which carrier insurance type and value will be applied to the shipment order.
- **Insurance Value(%)**: Enter a percentage of the order's value to be insured. For example, enter 100 to insure the full value.
- **Carrier Confirmation Type**: Select a delivery confirmation service if needed, such as adult signature or direct signature.
- **Carrier Billing Type**: Define the responsible party for shipping charges (e.g., Sender/Prepaid, Receiver/Collect, or Third Party).
- **Carrier Int Billing Type**: Define the responsible party for duties and taxes on an international shipment (e.g., Sender/Prepaid, Receiver/Collect, or Third Party).
- **Charged Account Number**: Select the payor's account number for shipping charges. If the billing type is 'Third Party', you can select a predefined account number from the carrier setup.
- **Int'l Charged Account Number**: Select the payor's account number for duties and taxes on an international shipment. If the billing type is 'Third Party', you can select a predefined account number from the carrier setup.

After configuring these options, click **Set Action** and then **Save** the rule. It will automatically apply to all related orders that meet your conditions.

Add Action ✕

Then

Set Shipment Instructions

▼

Client *

TEST CLIENT

▼

Warehouse *

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▼

Carrier *

UPS

▼

Carrier Setup *

CANCEL THIS

▼

Shipment method

Ground

▼

Tracking Numbers

Tracking Numbers

Carrier package type

BPM Flat

▼

Carrier Insurance Type

UPS

▼

Insurance Value(%)

30.00

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▼

Carrier Confirmation Type

Adult Signature

▼

Carrier Billing Type

Recipient

▼

Carrier Int Billing Type

Sender

▼

Charged Account Number

4256789

▼

Int'l Charged Account Number

Link Article: <https://intercom.help/mylogiwa/en/articles/4619727-workflow-actions>