Email Packing Slips

Email Packing Slips lets you send packing slips to customers when orders are shipped.

You can email packing slips for a range of shipments, or you can email packing slips when you post shipments in Extended Order Entry and Extended Shipment Entry.

The Email Packing Slips program lets you:

- Select the Crystal Report to use for packing slips.
- Sort items on packing slips by picking sequence, item number, or shipment line number.
- Select shipments using a range of shipment numbers.
- Select the email message text used for sending packing slips.
- Include a link on the email to track the shipment on the shipper's website.
- Include the following information on packing slips:
 - Serial/Lot Numbers
 - Kit Components
 - Bills of Material Component Items
- Specify an email recipient or use the customer or ship-to email addresses for sending packing slips.

For details on setting up customers, packing slips, and selecting packing slip options, see <u>Setting Up Order Entry to Print Packing Slips</u>, in this guide.

Note: Email Packing Slips requires Sage 300 version 2018 or later to run properly.

Using the Email Packing Slips Program

The Email Packing Slips icon appears under **TaiRox Productivity Tools > Order Entry Tools** on the Sage 300 desktop and can be copied to other menu locations.

Sage 300 - Sample Company I	Limi	ted							Administrator	- 0	×
Home											
 TaiRox CRM and Collections TaiRox Productivity Tools 	^	Order Ent	ry Tools								
Accounts Payable Tools Accounts Receivable Tools Administrative Services Tools		Licensed to: Dealer: CC:	Don Thomson, TAIROX TAIROX SOFTWARE INC TAIROX SOFTWARE INC	SOFTWARE INC							
General Ledger Tools Inventory Control Tools Multi-Company Tools Order Entry Tools		Extended Order Entr	y Extended Shipment Entry	Extended O/E Invoice Entry	Extended CR/DR Note Entry	Ship Orders	Invoice Shipments	Update Orders	Update Shipments	Delete Ord	ers
Payroll Tools Purchase Order Tools > US Payroll > Visual Process Flows	<	Delete Quotes	Complete Orders	Create O/E Credit Notes	Extended Ship-Via Codes	Sales History Inquiry	Shipment Picking Slips	Email Packing Slips	Customer Backorders		
Sage For Help, press F1									Session Dat	e: 2023-09-07	1

You can also open the Email Packing Slips program from the O/E Forms button on the Extended Order Entry screen and Extended Shipment Entry screen.

tem/Tgx Components	Item Finder Ship	Shipment Margin	Shipment Subtotal	1,809.68	USD
Pogt History Prepayment				O/E Forms	Qose

The Email Packing Slips screen appears as follows:

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Use Slip	OEPACKSLIP.RPT Browse		
Sort By	Line Number 🗸		
From Shipment Number	SH000000000000000077		
To Shipment Number	SH000000000000000077		
Message ID	PACKING		
Print Serial/Lot Numbers			
Print Kit Component Items			
Print Bills Of Material Compon	ent Items		
Email To	Email Address Entered V		
Email	carl.jenner@jenner009.com		
Progress			
			_
Send		<u>C</u> lo	se

To Email Packing Slips to customers and customer contacts

See <u>Setting Up Order Entry to Email Packing Slips</u> for details on setting up customers, reports, and email messages for emailing packing slips.

Productivity Tools lets you email packing slips to customers for each shipment. Open the Email Packing Slips program, and fill in the fields as follows:

- Use Slip: This is the Crystal Report form that you are using to create a PDF packing slip.
- **Sort By:** The report lets you list items on the packing slip by picking sequence, item number, or line number.
- From / To Shipment Number: Choose a range of shipments for emailing packing slips.
- **Message ID:** Select the message for the packing slip. You can edit messages using the O/E Email Messages program, or click the Zoom button beside the Message ID field to load the form.
- **Print Serial/Lot Numbers:** The report lets you include serial numbers and lot numbers on the packing slip if you use Serialized Inventory and Lot Tracking.
- **Print Kit Component Items:** Select this option if you want the packing slips to list all components in kits.
- Print Bills of Material Component Items: Select this option to list the components of items built from bills of material.
- Email To: Specify an email recipient or select the customer or ship-to email addresses for sending packing slips.
- Email: If you choose "Email Address Entered", enter the recipient's email address.

If you choose Customer Email Address, the email addresses come from the A/R customer account record. You must also choose an email destination as the Delivery Method on the Processing tab for the A/R customer account.

Setting Up Order Entry to Email Packing Slips

Setting up Order Entry to email packing slips involves the following steps:

• Set up your email sever settings on the Email tab in the Sage 300 Company Profile in Common Services.

SAMLTD - Com	pany Profile – 🗆 🗙
Address Options	nal
Settings	
Server Name	smtp.gmail.com
Server Port	587 🔽 Use SSL
User Name	shipping@tairox.com
Password	
From Email Address	shipping@tairox.com
Send Copies To	shipping@tairox.com
Use SMTP Send Test Email To	Send <u>T</u> est Email
Save	Qlose

• Choose "Email" as a Delivery Method for each of the customers to which you want to email packing slips.

SAMLTD - A/R Customers		×
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Customer Number · I 4 4 1200 > > I Q + Q	* Required	
Customer Name Mr. Ronald Black		
Address Contact Processing Invoicing Optional Fields Statistics Activity Comments		
Account Type Balance Forward V Print Statements		
Account Set USA Q Accounts Receivable, Other		
Terms Code DUETBL Q Due by Invoice Date		
Billing Cycle BILLWK Q Weekly Billing Cycle		
Interest Profile INTRTL Q Interest Profile - Retail		
Payment Code CHECK Q Check		
Delivery Method Email (customer) Check Language ENG V		
Credit Bureau Inform		
Number Email (contact) Email (nutice) contacts		
Issue Credit Warning When		
Total Outstanding Balance Exceeds the Credit Limit of 20,000.00		
A/R Transactions Overdue by Days or More Exceed the Overdue Limit of 0.00		
Currency USD U.S. Dollars		ī.
Rate Type SP Q Daily spot rate		Ī
Save	<u>C</u> lose	

• You can choose the customer email address, the contact address, or multiple contacts.

If you choose multiple contacts, you must add each contact to the A/R Customers Contacts tab, then select O/E Order Confirmations for each recipient.

SAMLTD - A/R Cus File Settings Help	tomers					- 0	×
Customer Number *	I ∢ ∢ 1200		🕨 २ + 🖸			* Required	
Customer Name	Mr. Ronald Black						
Address Contact Proce	ssing Invoicing Optional F	ields Statistics	Activit <u>v</u> Co <u>m</u> ments				
Contact	Mr. Black						
Telephone	() -						
Fax	() -						
E-mail	ronaldblack99@hotmail.com						
Multiple Contacts	L						
Show Documents For	All	~					
Q Contact Code	Email	A/R Invoices	A/R Receipts	A/R Statements	0/E Order Confirmatio	ons 🔨	
ANDREWKURTH	akurth@telus.com				Х		
CARLLEMUIR000	carll@telus.net				Х		

• Set up a Crystal Report for packing slips.

Email Packing Slips uses the picking slip printing mechanism to create packing slips from shipments.

Follow these steps to customize your packing slips:

- Copy an existing picking slip Crystal Report and save it under a new name (like "PackingSlip.RPT).
- o Edit the copied Crystal Report form to suit your needs. For example:
 - Change the name at the top of the form to "Packing Slip."
 - Remove the Picking Sequence column.
- Add a new email message for packing slips.

You must also use the O/E E-Messages program in the Order Entry Setup folder to add an email message for packing slips. The message type should be "Order Confirmation."

Follow these steps to create your email message:

- Open Order Entry > O/E Setup > E-mail Messages.
- Click the New button and choose the "Order Confirmation" message type.
- Provide a name such as "PACKINGSLIP" and an email description "Emailed Packing Slip."
- You can use any of the variables in the next table in your email messages.

Note that if you use existing message templates with packing slips, some "\$ORDER_" variables will be treated as if they were "\$SHIPMENT_."

Email Message Variables

Value to Insert	Email Message Variable
CUSTOMER NUMBER	\$CUSTOMER_NUMBER
CUSTOMER NAME	\$CUSTOMER_NAME
CUSTOMER CONTACT	\$CUSTOMER_CONTACT
COMPANY NAME	\$COMPANY_NAME
COMPANY CONTACT	\$COMPANY_CONTACT
TELEPHONE NUMBER	\$COMPANY_PHONE
FAX NUMBER	\$COMPANY_FAX
ORDER NUMBER *	\$ORDER_NUMBER
ORDER DATE *	\$ORDER_DATE
ORDER AMOUNT *	\$ORDER_AMOUNT

* The Order Number and Order Date will be for the first order if the shipment includes multiple orders.

Value to Insert	Email Message Variable
ORDER DESCRIPTION	\$ORDER_DESCRIPTION
ORDER REFERENCE	\$ORDER_REFERENCE
PURCHASE ORDER NUMBER	\$PO_NUMBER
EXPECTED SHIP DATE	\$EXPECTED_SHIP_DATE
SHIPMENT NUMBER	\$SHIPMENT_NUMBER
SHIPMENT DATE	\$SHIPMENT_DATE
SHIPMENT AMOUNT	\$SHIPMENT_AMOUNT (\$ORDER_AMOUNT provides same value)
SHIPMENT DESCRIPTION	\$SHIPMENT_DESCRIPTION (\$ORDER_DESCRIPTION provides same value)
SHIPMENT REFERENCE INFORMATION	\$SHIPMENT_REFERENCE \$ORDER_REFERENCE provides same value)
SHIPMENT TRACKING NUMBER	\$SHIPMENT_TRACKING
SHIP VIA TRACKING URL *	\$TRACKING_URL
SHIP-VIA DESCRIPTION	\$SHIP_VIA_DESCRIPTION
SHIP-VIA INFORMATION	\$SHIP_VIA

* Use the Extended Ship Via screen in TaiRox Productivity tools to enter the Tracking URL. The field is not available in the standard Sage 300 Ship Via record.

* Note also that the \$TRACKING_URL variable lets you include any of the other substitution variables within it, even though the main purpose is to provide the tracking number to the shipper's website.

We also support the following variables from the ship via record:

Value to Insert	Email Message Variable
SHIP-VIA CODE	\$SHIP_VIA_CODE
SHIP-VIA NAME	\$SHIP_VIA_NAME
SHIP-VIA ADDRESS	\$SHIP_VIA_ADDRESS1 \$SHIP_VIA_ADDRESS2 \$SHIP_VIA_ADDRESS3 \$SHIP_VIA_ADDRESS4
SHIP-VIA CITY	\$SHIP_VIA_CITY
SHIP-VIA STATE/PROVINCE	\$SHIP_VIA_STATE
SHIP-VIA ZIP/POSTAL CODR	\$SHIP_VIA_ZIP
SHIP-VIA COUNTRY	\$SHIP_VIA_COUNTRY
SHIP-VIA PHONE NUMBER	\$SHIP_VIA_PHONE
SHIP-VIA FAX NUMBER	\$SHIP_VIA_FAX
SHIP-VIA CONTACT NAME	\$SHIP_VIA_CONTACT
SHIP-VIA COMMENT	\$SHIP_VIA_COMMENT
SHIP-VIA EMAIL ADDRESS	\$SHIP_VIA_EMAIL
SHIP-VIA CONTACT PHONE NUMBER	\$SHIP_VIA_PHONEC
SHIP-VIA CONTACT FAX NUMBER	\$SHIP_VIA_FAXC
SHIP-VIA CONTACT EMAIL ADDRESS	\$SHIP_VIA_EMAILC

Select "Email Packing Slips" in Options and in User Security Groups

Note:

- The Email Packing Slips program must be selected on the Menu tab of the Productivity Tools Options program in order to appear in Extended Order Entry and Extended Shipment.
- If you use security in Sage 300, you must add Email Packing Slips to users' security groups for them to use Email Packing Slips features.

Selection in Productivity Tools Options Program

SAMLTD - Options	-		×
Menu Item Quantities Order Entry Purchase Orders			
X/L Extended G/L Accounts			
X/L Extended G/L Account Groups			
X/L Accounting Status			
X/L Extended Create New Year			
X/L Extended Fiscal Calendar			
X/L Set Recurring Dates			
X/L User Management			
Order Entry Tools			
X/L Extended Order Entry			
X/L Extended Shipment Entry			
X/L Ship Orders			
X/L Invoice Shipments			
X/L Update Orders			
X/L Update Shipments			
X/L Delete Orders			
X/L Delete Quotes			
X/L Complete Orders			
X/L Extended Ship-Via Codes			
X/L Sales History Inquiry			
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X/L Extended PO Entry			
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Application	TaiRox Productivity Tools 6.1A	\sim	
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Group Description	Full Access to TPT		
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Extended AR Rec Delete BOMs Shipment Picking Extended Location Extended Reorder Kit Component Us Extended O/E De Email Packing Slip	eipt Entry Slips n Details -Quantities age Inquiry bit/Credit Note Entry		,

Add the Ship Via URL in Productivity Tools' Extended Ship Via Program

The Email Packing Slips program lets you include a link to the shipping company's web site so your customers can check the progress of shipments.

Follow these steps to provide a link to the shipper's website that includes the shipment tracking number:

 Add the tracking URL to the Ship Via code using the *Extended Ship-Via Codes* Productivity Tools program. The URL must include \$SHIPMENT_TRACKING – the shipment tracking number substitution variable – in place of the actual tracking number.

For example, the English language tracking URL for Federal Express in Canada is as follows. Note that "\$SHIPMENT_TRACKING" will be replaced by the tracking number for the shipment.

https://www.fedex.com/fedextrack/?action=track&tracknumbers=\$SHIPMENT_	TRACKING
&locale=en_CA&cntry_code=us	

Ship-Via Code Ship-Via Co <u>n</u> t	I∢ ∢ FEDEX ► ► I Q +
Name Telephone Fax	Dispatcher () - () -
Tracking URL	https://www.fedex.com/fedextrack/?action=track&tracknumbers=\$\$HIPMENT_TRACKIN

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Selection in User Security Groups

2. Add the URL to the email letter template, along with text stating that the customer should click the link to view shipping progress.



Note that the link will show the URL for the shipper's web site, including the tracking number – as in the example below:

Dear Mr. C	Carl Jenner:
Thank you confirmati	for your order. To view and print the attached confirmation, double-click on the order confirmation icon, and then choose File, Print when the on is displayed. To save the order confirmation, copy it from this e-mail to another folder on your computer.
If you have	e any questions regarding your order, please contact me at (123) 456-7890.
Note: You	require Adobe Acrobat Reader to view this attachment. Adobe Acrobat Reader is available from www.adobe.com
Regards,	
Ms. Smith	
Click the fo	ollowing link to track your shipment: vw.fedex.com/fedextrack/?action=track&tracknumbers=76509&locale=en_CA&cntry_code=us