

# 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:

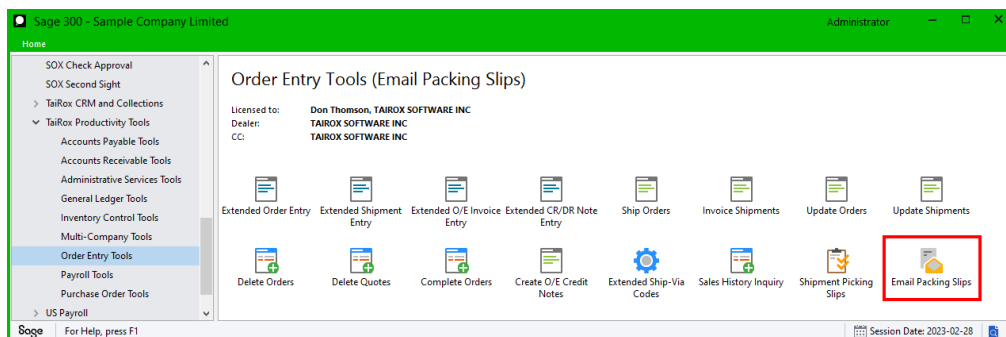
- Select the Crystal Report to use for packing slips.
- Sort items on packing slips by picking sequence, item number, or shipment line number.
- Select shipments using a range of shipment numbers.
- Select the email message text used for sending packing slips.
- Include a link on the email to track the 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 [Setting Up Order Entry to Print Packing Slips](#), in this guide.

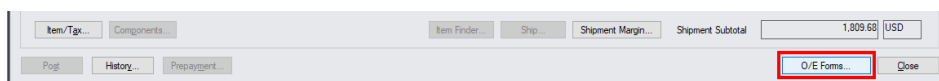
**Note:** Email Packing Slips requires Sage 300 version **2018** or later to run properly.

## 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.



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.



The Email Packing Slips screen appears as follows:

## To Email Packing Slips to customers and customer contacts

See [Setting Up Order Entry to Email Packing Slips](#) 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 E-mail 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.
- **E-mail To:** Specify an email recipient or select the customer or ship-to email addresses for sending packing slips.
- **E-mail:** If you choose “E-mail Address Entered”, enter the recipient’s email address.

If you choose Customer E-mail 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

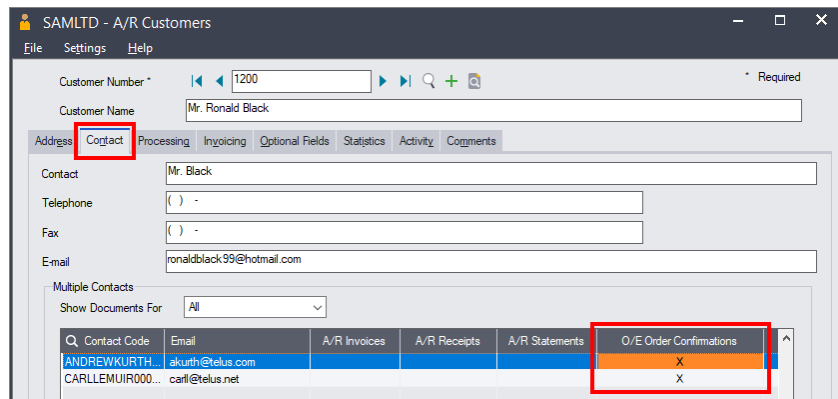
Setting up Order Entry to email packing slips involves the following steps:

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

- **Choose “Email” as a Delivery Method** for each of the customers to which you want to email packing slips.

- 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.



- **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").
- 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	E-mail 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	E-mail 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:

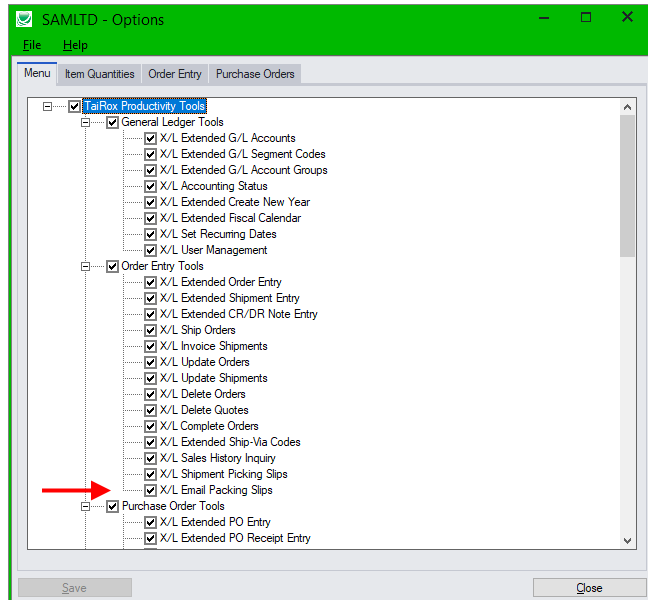
Value to Insert	E-mail Message Variable
SHIP-VIA CODE	\$SHIP_VIA_CODE
SHIP-VIA NAME	\$SHIP_VIA_NAME
SHIP-VIA ADDRESS	\$SHIP_VIA_ADDRESS1 \$SHIP_VIA_ADDRESS2 \$SHIP_VIA_ADDRESS3 \$SHIP_VIA_ADDRESS4
SHIP-VIA CITY	\$SHIP_VIA_CITY
SHIP-VIA STATE/PROVINCE	\$SHIP_VIA_STATE
SHIP-VIA ZIP/POSTAL CODR	\$SHIP_VIA_ZIP
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

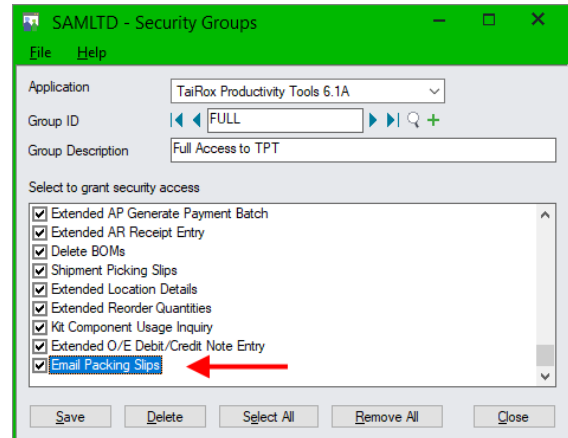
### Note:

- 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**



**Selection in User Security Groups**



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

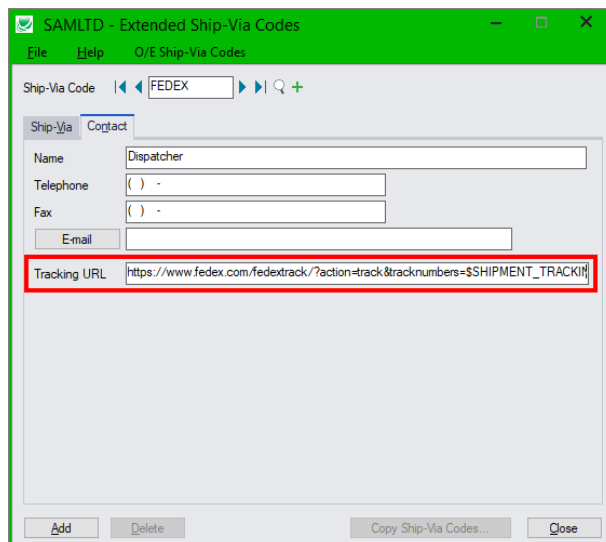
The Email Packing Slips program lets you include a link to the shipping company's web site so your customers can check the progress of shipments.

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

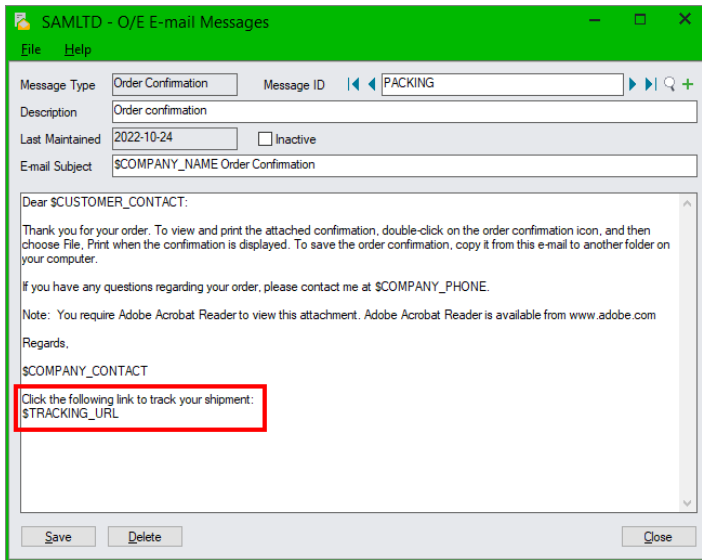
1. Add the tracking URL to the Ship Via code using the **Extended Ship-Via Codes** Productivity Tools program. The URL must include **\$\$SHIPMENT\_TRACKING** – the shipment tracking number substitution variable – in place of the actual tracking number.

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](https://www.fedex.com/fedextrack/?action=track&tracknumbers=$$SHIPMENT_TRACKING&locale=en_CA&cntry_code=us)**



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:

