

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:

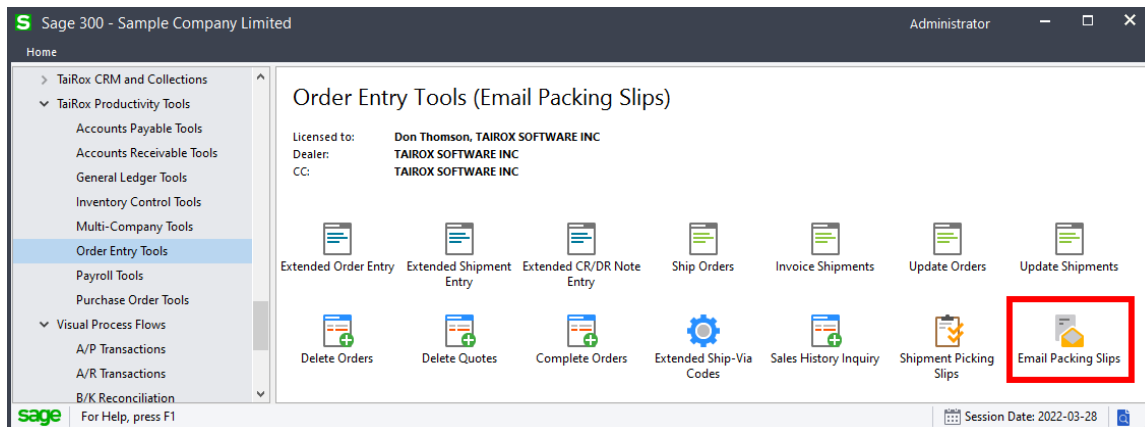
- Select the Crystal Report to use for packing slips.
- Sort items on packing slips by picking sequence, item number, or shipment line number.
- Select shipments using a range of shipment numbers.
- Select the email message text used for sending packing slips.
- Include the following information on packing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

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.

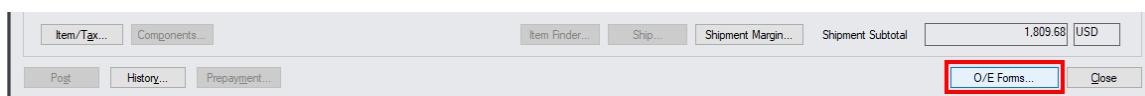
Note: Email Packing Slips requires Sage 300 version **2018** or later to run properly.

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.

The email addresses come from the A/R customer account record. You must 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 - Company Profile

File Help

Address Options **Email**

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 Test Email

Save Close

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

SAMLTD - A/R Customers

File Settings Help

Customer Number * 1200 * Required

Customer Name Mr. Ronald Black

Address Contact **Processing** Invoicing Optional Fields Statistics Activity Comments

Account Type Balance Forward Print Statements

Account Set USA Accounts Receivable, Other

Terms Code DUETBL Due by Invoice Date

Billing Cycle BILLWK Weekly Billing Cycle

Interest Profile INTRTL Interest Profile - Retail

Payment Code CHECK Check

Delivery Method Email (customer) Check Language ENG

Credit Bureau Information Mail

Number Email (customer) Email (contact) Email (multiple contacts) Date

Issue Credit Warning When

Total Outstanding Balance Exceeds the Credit Limit of 20,000.00

A/R Transactions Overdue by 0 Days or More Exceed the Overdue Limit of 0.00

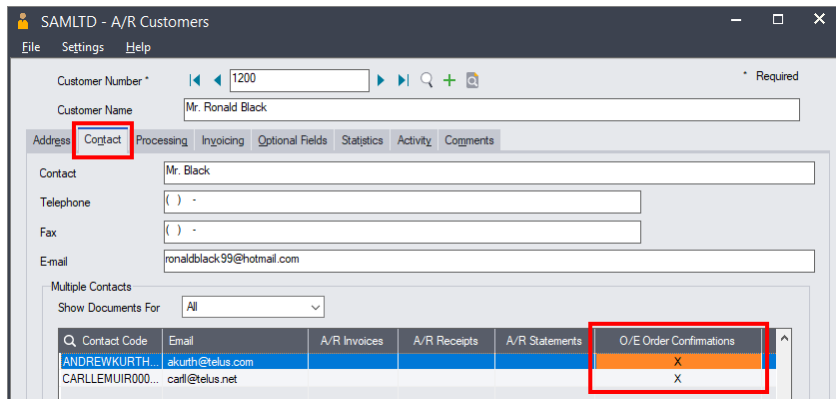
Currency USD U.S. Dollars

Rate Type SP Daily spot rate

Save Delete Close

- 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 two tables 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_."

Company Information Email Message Variables

Value to Insert	E-mail Message Variable
COMPANY CONTACT	\$COMPANY_CONTACT
COMPANY NAME	\$COMPANY_NAME
COMPANY CONTACT	\$COMPANY_CONTACT
CUSTOMER CONTACT	\$CUSTOMER_CONTACT
CUSTOMER NAME	\$CUSTOMER_NAME
CUSTOMER NUMBER	\$CUSTOMER_NUMBER
TELEPHONE NUMBER	\$COMPANY_PHONE
FAX NUMBER	\$COMPANY_FAX
PURCHASE ORDER NUMBER	\$PO_NUMBER

Packing Slip Email Message Variables

Value to Insert	E-mail Message Variable
EXPECTED SHIP DATE	\$EXPECTED_SHIP_DATE
ORDER NUMBER *	\$ORDER_NUMBER
ORDER DATE *	\$ORDER_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)
SHIP-VIA DESCRIPTION	\$SHIP_VIA_DESCRIPTION
SHIP-VIA INFORMATION	\$SHIP_VIA

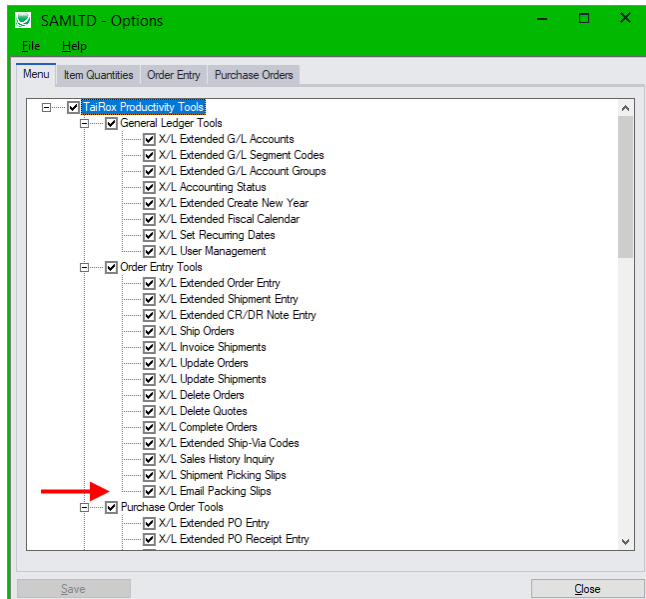
* The Order Number and Order Date will be for the first order *if the shipment includes multiple orders.*

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

