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Packaging Template Setup

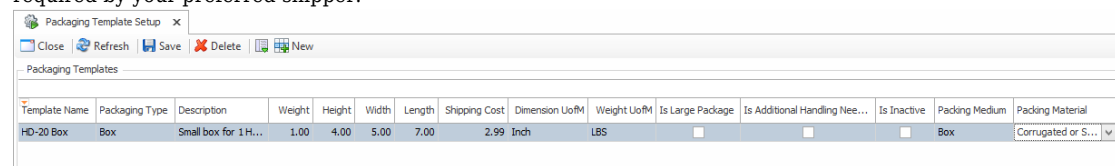
Megan De Freitas - 2024-12-03 - [Setup](#)

Overview

Packaging Template Setup is used to create package templates that are added to a document on the Shipment tab of the sales document entry screen. Templates created in this manner are also usable as package templates in ShipCenter.

Use

To create a new template, click the **New** button. Fill out the fields as desired, according to the specifications required by your preferred shipper.



The screenshot shows a web application window titled "Packaging Template Setup". It has a toolbar with buttons for Close, Refresh, Save, Delete, and New. Below the toolbar is a table titled "Packaging Templates". The table has the following columns: Template Name, Packaging Type, Description, Weight, Height, Width, Length, Shipping Cost, Dimension UoM, Weight UoM, Is Large Package, Is Additional Handling Nee..., Is Inactive, Packing Medium, and Packing Material. The first row of data is for a template named "HD-20 Box" with a packaging type of "Box", description "Small box for 1 H...", weight of 1.00, height of 4.00, width of 5.00, length of 7.00, shipping cost of 2.99, dimension UoM of Inch, weight UoM of LBS, and checkboxes for Is Large Package, Is Additional Handling Nee..., and Is Inactive, all of which are unchecked. The packing medium is "Box" and the packing material is "Corrugated or S..." with a dropdown arrow.

Template Name	Packaging Type	Description	Weight	Height	Width	Length	Shipping Cost	Dimension UoM	Weight UoM	Is Large Package	Is Additional Handling Nee...	Is Inactive	Packing Medium	Packing Material
HD-20 Box	Box	Small box for 1 H...	1.00	4.00	5.00	7.00	2.99	Inch	LBS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Box	Corrugated or S... ▾

Click **Save** for the changes to take effect.

Adding a Template to a Sales Document

1. From the Sales Document Entry screen, select the **Shipments** tab.
2. In the Packaging window, click **New**.
3. Choose a number for the package, then select a template from the dropdown list.

New Packaging

Number:

0000001

Template:

HD-20 Box

Type:

Box

Description:

Small box for 1 HD-20

Weight:

1.00

Weight UoM:

LBS

Height:

4.00

Width:

5.00

Length:

7.00

Dimension UoM:

Inch

Freight Class

--

Shipping Cost:

3.00

Tracking #:

Packing Medium:

Box

Packing Material:

Corrugated or Solid

☐ Large Package
☐ Additional Handling

OK

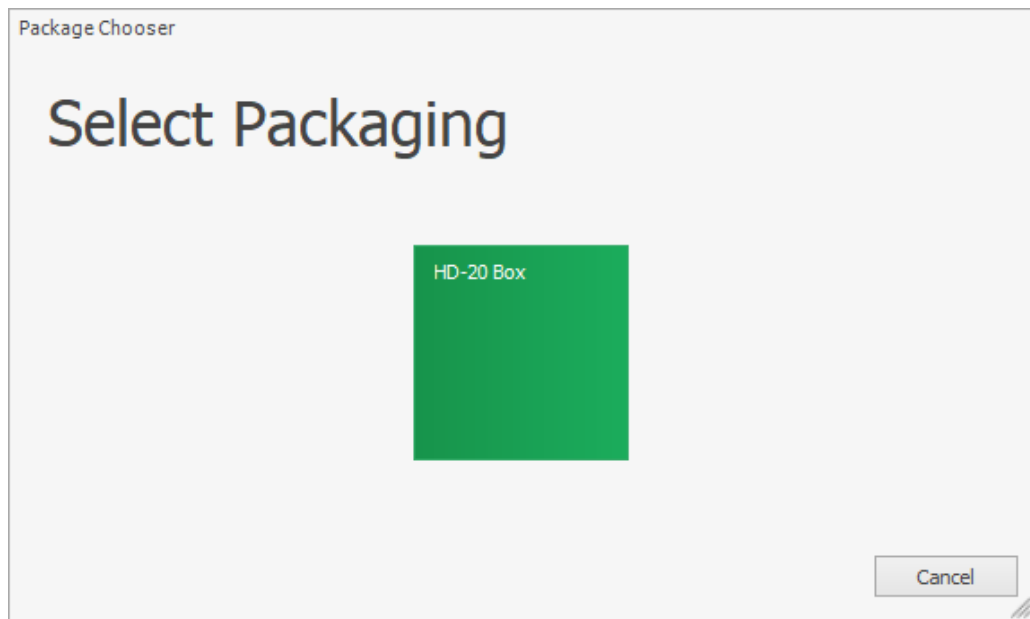
Cancel

- Verify that the information is correct and click **OK**. The packaging will now appear on the document.

Packaging						
<div> <div>New</div> <div>Delete</div> <div>Copy</div> <div>Nest Package</div> <div>Calculate Weight</div> </div>						
Type	Description	Weight	Height	Width	Length	Shipping Cost
Box	Small box for 1 ...	1.00	4.00	5.00	7.00	3.00

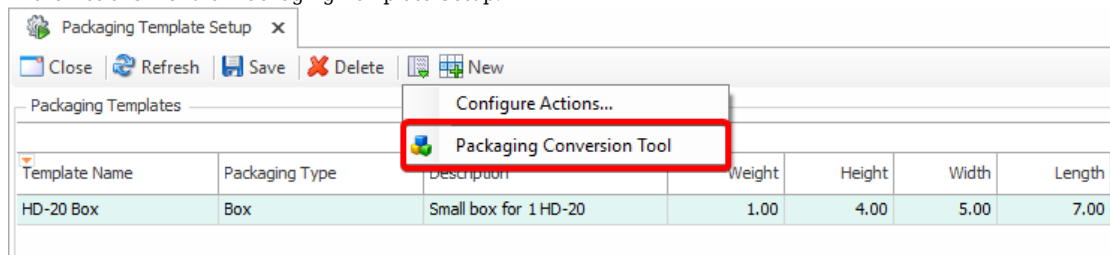
Adding a Template in ShipCenter

- From the Shipment Monitor, select the document you wish to ship.
- In the New Shipment window, click in the **Package Template** window pane.
- Select the desired template. The template information will populate the relevant fields for the new shipment.



Packaging Conversion Tool

The SQL tables that stored package data have moved from spPackage to spLicensePlate. This was done to allow compatibility between different applications. To port over any existing packages, run the conversion tool located in the Actions menu of Packaging Template Setup.



Security

Packaging Template Setup - Allows users to create templates for packages.

Sales Document Packages - Grants access to the Shipment tab on the sales document entry screen.

Packaging Conversion Tool - Allows users to convert pre-existing packages into the new format, moving the data to the spLicensePlate SQL tables.