Packaging Template Setup

Cavallo Support - 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

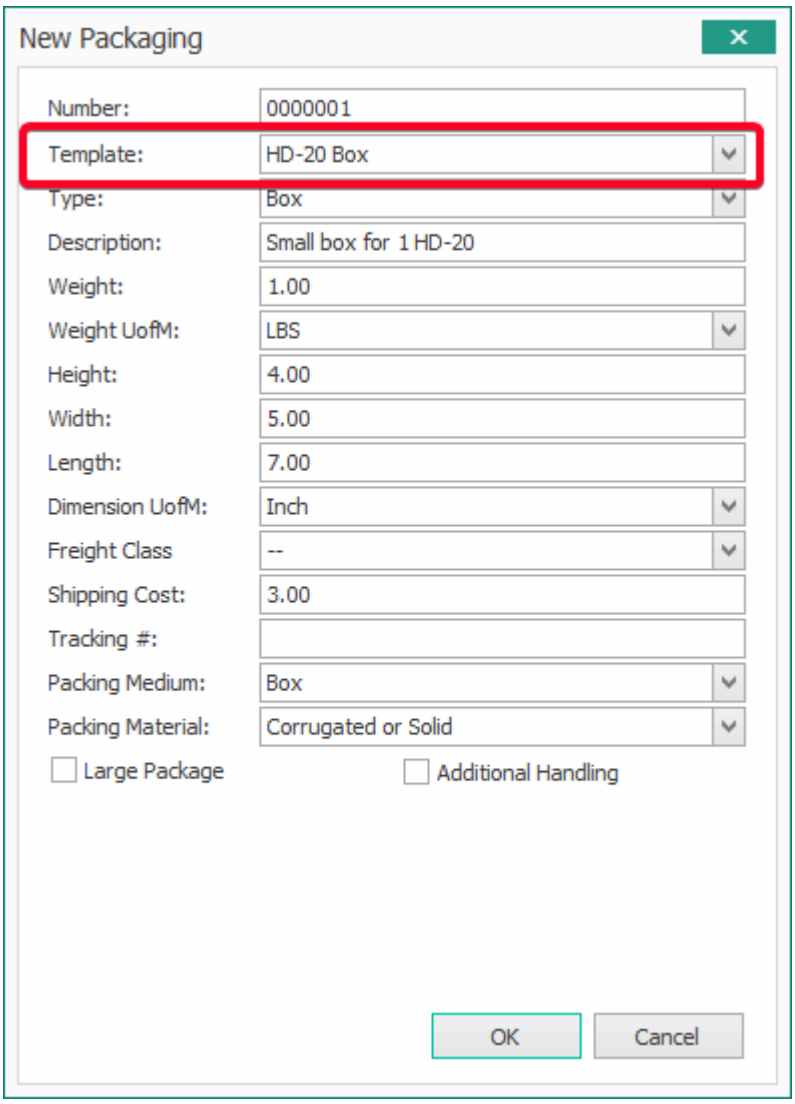
To create a new template, click the **New** button. Fill out the fields as desired, according to the specifications required by your preferred shipper.



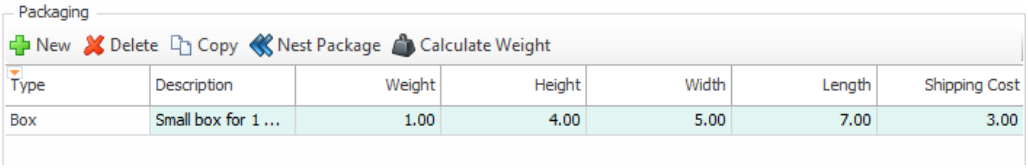
Click **Save** for the changes to take effect.

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.

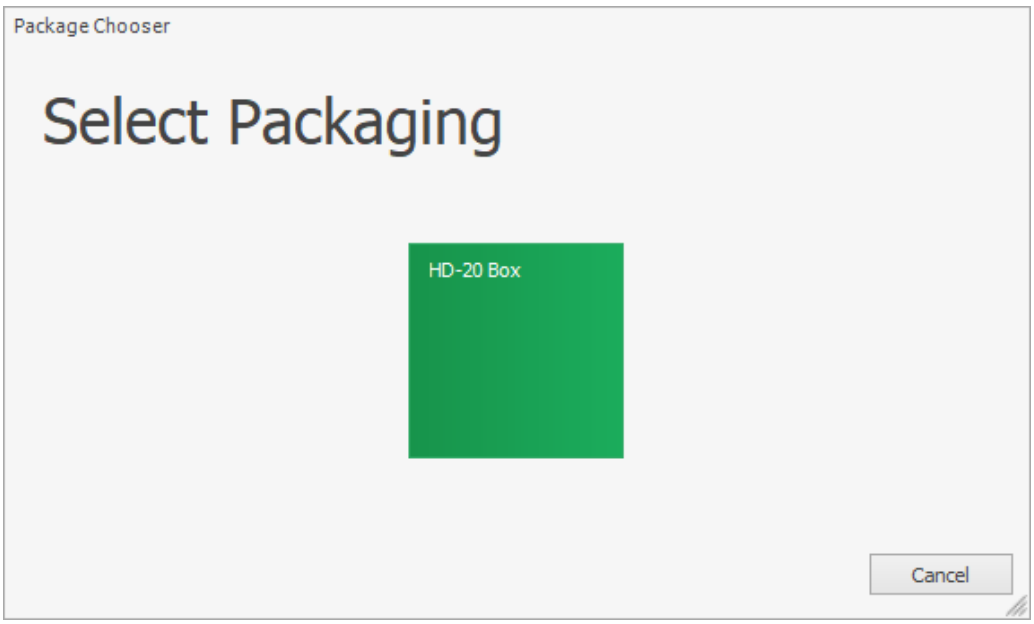


4. Verify that the information is correct and click **OK**. The packaging will now appear on the document.



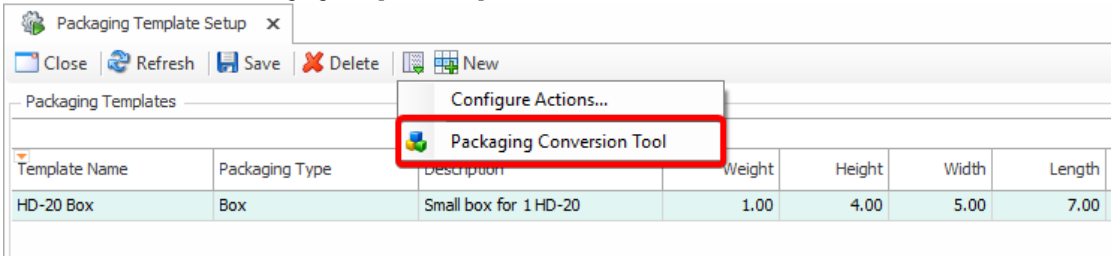
Adding a Template in ShipCenter

1. From the Shipment Monitor, select the document you wish to ship.
2. In the New Shipment window, click in the **Package Template** window pane.
3. 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.