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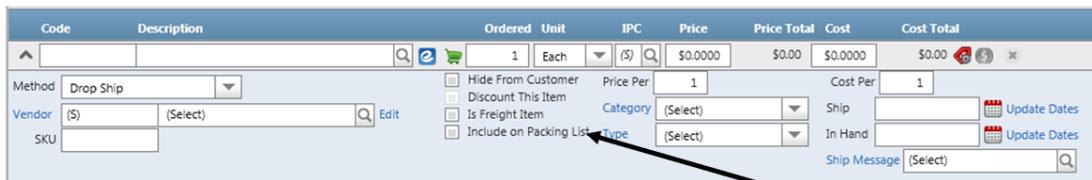
How Do You Print a Packing List?

Tammy Mason - 2022-07-20 - in Quotes, Orders & Invoices

How Do You Print a Packing List?

To include a product on the packing list, check Box on Product when entering an Order. Then select one of the print options.

Explanation: A packing list shows order information without any pricing or cost. Defaults can be set in Company Setup for your preferred Send Method, Email, and Instructions for the packing list form.



The screenshot shows a software interface for entering product information. At the top, there are columns for Code, Description, Ordered, Unit, IPC, Price, Price Total, Cost, and Cost Total. Below this, there are several input fields and checkboxes. A black arrow points to the 'Include on Packing List' checkbox, which is currently unchecked. Other checkboxes include 'Hide From Customer', 'Discount This Item', and 'Is Freight Item'. There are also dropdown menus for 'Method' (set to 'Drop Ship'), 'Vendor', 'SKU', 'Category', and 'Type'. The 'Price Per' and 'Cost Per' are both set to '1'. There are 'Update Dates' buttons for 'Ship' and 'In Hand' fields.

If you would like this product to print on the Packing List you must click the "Include on Packing List" checkbox. The default is to not print.

System Preferences has an Order Preferences setting allowing you to 'Include all products on packing list'.

Home System Preferences x

Save Cancel Close

▼ Company Wide

▼ Quote Preferences

▲ Order Preferences

Last Order Number Assign each order number

Automated Order Import User

Update order with Freight Only Bill-Apply information ?

Automatically close orders once the following associated transaction(s) are complete

Close orders

Tracking - Process Defaults

Customer Edit Vendor

Allow Proforma Invoice forms

Include all products on packing list

Note: This does not include AC (additional charge) items.

This option follows the similar logic of the same question within the program resource, if you use expanded inventory, including that it will not affect additional charges and will affect freight lines.

If the setting is checked, all new lines added to quotes/orders will default as checked to 'Include on packing list', unless the order contains a program. If an order contains a program, the setting from the program will take priority.

Order imports will only use the System Preference setting if there is no program in the file and the product in the file has no <IncludeOnPackingList> node.

Expanded Inventory Only:

If there is a program set up you can check to Include all products on packing list within the Program - Other Expander

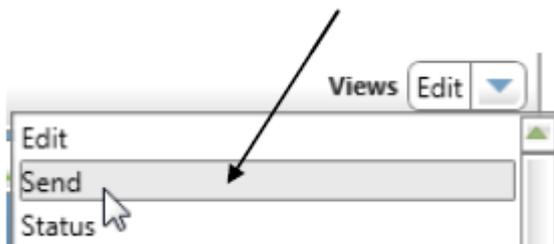
^ Other

Freight Table (Select)

Include all products on packing list

Handling Charge | General Ledger Defaults | Invoicing Defaults | Ecommerce | Points

Send View: Within an order, select Send in the Views list



Expand the packing list section and view the send history.

1. Change the default selections if needed.
2. Send the Packing list to the printer and as an email.
3. Preview the Packing List.

Send Order 827 Documents New documents reflect the most recent save.

Document	Contact/Company	Last Date	Send Method	Form	Send	Preview
Acknowledgement	Zuba Jovan / Zuba's Cafe		Email	Plain Paper	<input type="button" value="Send"/>	<input type="button" value="Preview"/>
Order-Commission	Wills West		Email	Plain Paper	<input type="button" value="Send"/>	<input type="button" value="Preview"/>
Order-Internal			Email	Plain Paper	<input type="button" value="Send"/>	<input type="button" value="Preview"/>
Packing List			Print	Plain Paper	<input type="button" value="Send"/>	<input type="button" value="Preview"/>
Purchase Order	Impressive Imprints		Email	Plain Paper	<input type="button" value="Send"/>	<input type="button" value="Preview"/>

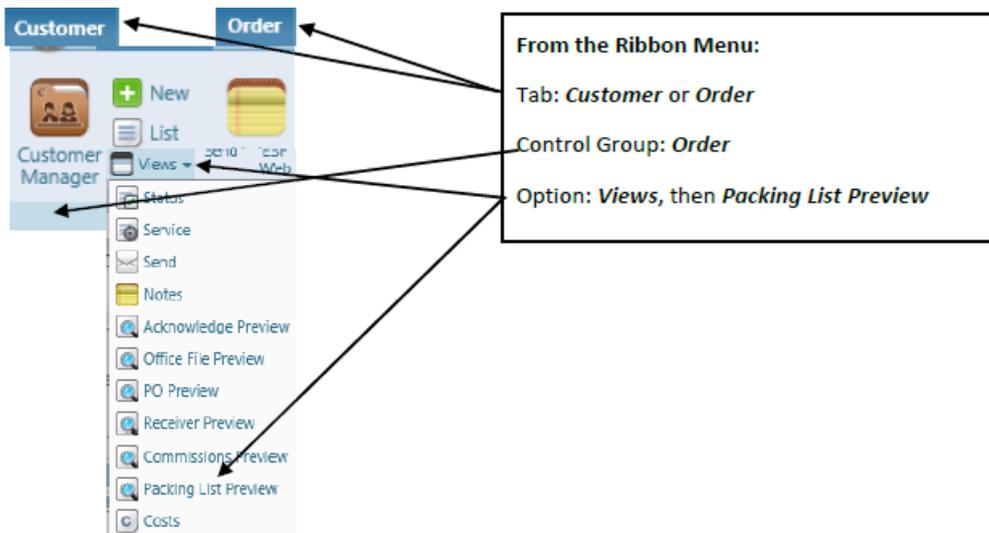
1. → (points to the 'Packing List' row)

2. → (points to the 'Send Method' dropdown for Packing List)

3. → (points to the 'Send' button for Packing List)

4. → (points to the 'Preview' button for Packing List)

Other Menu options for Printing the packing List:



OR within an order, change the Views:

