

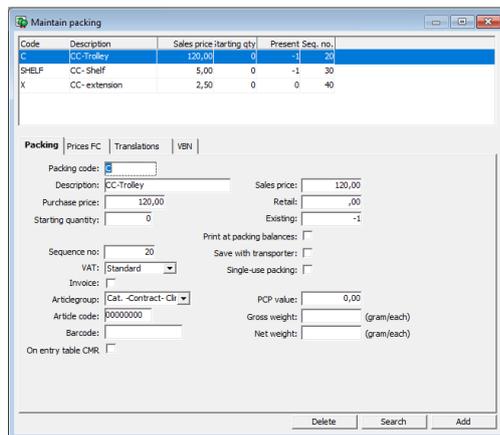
Packing

The following can be done with 'maintain packing':

- Add packing to the delivery note.
- Add packing to the invoice.
- Manual booking of packing, with or without invoicing.
- Maintain the packing stock.
- Extensive overview of packing.
- Printing of packing statistics.

After installing the 2019 version of WinTree® CONNECT, the 'packing' menu will be available. This menu contains the following elements: Maintain packing, in- and outgoing packing, display packing and invoice packing.

Before the packing can be booked, a table containing the required types of packing must be made. This is done with the **Packing → Maintain packing** menu.



Code	Description	Sales price	Starting qty	Present	Seq. no.
C	CC-Trolley	120,00	0	-1	20
SHELF	CC-Shelf	5,00	0	-1	30
X	CC-extension	2,50	0	0	40

A type of packing consists of:

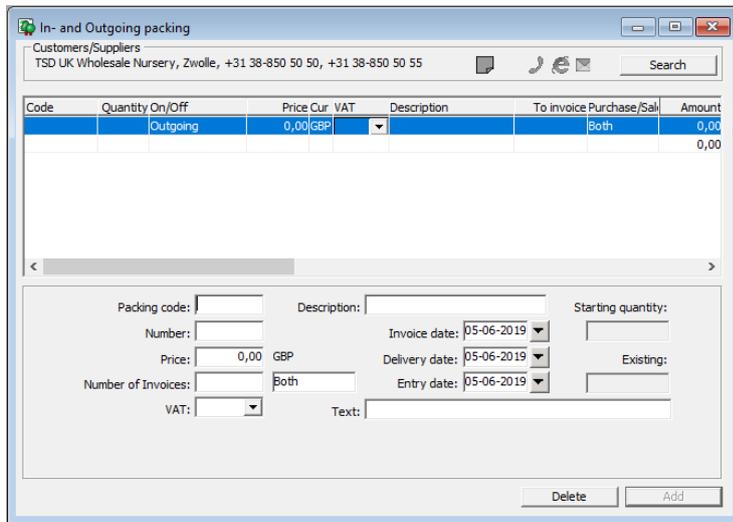
- Packing code (short name)
- Description (This will be displayed on lists)
- Purchase and selling price
- VAT rate ('high' by default).
- Sequence number, used for sorting
- An invoice check box ('Yes' by default)
- Starting quantity
- Existing quantity (the existing quantity will change based on the in- and outgoing of the packing).

WinTree® has multiple functions to maintain packing.

When invoicing or making a delivery note, a 'packing' tab is available to do this.

Multiple documents (Order confirmations, delivery notes, CMR and invoices) have a built-in printing function, to print the packing. These settings can be adjusted like other printing settings in **File → Settings → Tab 'Lists'**. Select the document in the corresponding type of report tab. Then, click on [print options]. The screen that opens can be used to toggle check boxes. Do not forget to click [Save] to save the changes.

The **Packing → In- and outgoing packing** menu can be used to manually book packing. First, select the customer the packing has to be booked for.



From there, the menu is simple to fill out. Keep the invoicing of packing alterations in mind. If the type of packing used has the 'invoice' option on, the 'Number of invoices' field will be filled with the quantity. This number can be adjusted manually. Keep in mind that the manual packing bookings will not be added to the plant lines on the invoice automatically. Manually booked packing can be invoiced using the **Packing → Invoice packing** menu. Using this screen is the same as the regular invoice screen.

IMPORTANT: outgoing packing is booked as a positive quantity. Incoming packing has to be booked as a negative (–) number. The text at the top of the screen will change to 'Incoming' and will be coloured red.

Packing added using the sales order or delivery note will always be added to the invoice. Toggle the 'Invoice unpaid packing' check box in the 'delivery..' selection screen when making an invoice to add the manually booked packing to the plant invoice.

The **Packing → Display packing** menu is used to display everything related to packing. Using File -> Print -> Packing, various packing documents can be printed.