Packaging

Turning invoice quantities into cartons, handling remainder cartons, and merging rows into carton groups.

- How packing works
- Building a packing list
- Grouping cartons
- Finding packing lists

How packing works

TL;DR

> The packing screen is a working area held in the browser: nothing is stored until you select Save, and leaving the screen or losing the connection first loses everything since the last Save, without warning. Editing or removing a row also discards every row after it for the same product. A packing list belongs to one invoice, and every row needs a gross weight above zero before that invoice can be marked complete. The list itself only locks when the invoice is marked complete.

The screen is a working area, not a saved list

Read this before anything else about packing.

The packing screen holds your work **in the browser**. Adding a row, changing one, removing one, grouping cartons, dragging rows into a new order: none of it is stored. Each action confirms with a message that says exactly that: "Added locally!", "Row updated locally!", "Deleted locally.", "Grouped locally.", "Group updated locally.", "Unlinked locally.". *Locally* means: on this screen only.

Nothing is stored until you select **Save**. Then everything on the screen is stored at once, and you see "Packaging list submitted successfully!".

> **Leaving the screen, closing the tab, or losing the connection before Save loses everything since the last Save.** No warning appears. Save whenever you have entered more than you would care to retype.

> **IMAGE PLACEHOLDER: how-packing-works-working-area-01** · infographic · status: pending

Shows: that packing rows live in the browser until Save stores them all at once

Must include: a browser window holding several packing rows with "locally" confirmation messages; a single Save button as the only path to stored data; a broken path labelled closing the tab or losing the connection, ending in the rows being lost

Must not show: any real product, customer, or invoice data; code or file names

Alt text (draft): Packing rows sit inside the browser window, each confirmed with a message ending in the word locally. One arrow, the Save button, carries all of them into stored data at once. A second, broken arrow shows that closing the tab or losing the connection before Save throws away everything entered since the last Save.

Changing a row throws away the rows after it

One more behaviour to know before you start. Each product's packing can spread over several rows: full cartons plus a leftover row, for example.

Editing a row removes every row that comes after it for the same product, without asking. The screen recalculates from your change and rebuilds what follows, so rows you filled in after that one vanish, along with their weights. Removing a row does the same: the row and everything after it for that product goes.

This is why packing is best entered in order and saved often.

What a packing list is

A packing list says how one shipment's goods are physically boxed: which products go into which cartons, how many pieces per carton, and what each carton weighs. It becomes the shipment's packing list paperwork.

Each packing list belongs to **one invoice**. The invoice must exist first, and only invoices that are not yet complete and do not already have a packing list can be picked. A customer with no such invoice shows: "No invoices found for this customer. Please create an invoice first.".

Cartons and the leftover row

You tell the screen how many pieces fit in a carton, and it works out the cartons. When the quantity does not divide evenly, the leftover becomes its own one-carton row, created for you with the message "A remainder carton row was auto-created.".

A leftover row starts with a gross weight of **zero**, and zero blocks completion. See the next section.

Building a packing list shows the arithmetic with a worked example.

Gross weight decides when the shipment can finish

Every row must carry a gross weight above zero before the invoice can be marked complete. The check is silent. Nothing on the packing screen warns you; the refusal appears later, when someone tries to complete the invoice.

Several actions put a weight back to zero:

- A leftover row is created, and it starts at zero (Building a packing list)
- A row is ungrouped or unlinked from a carton group (Grouping cartons)
- A dispatch quantity is changed on the invoice, and packing rows for that line are removed or reset (see the Invoices part of this guide)

After any of these, someone must re-enter the missing weights before the shipment can finish.

The two statuses

Status	What it means
Draft	Being worked on. Everything can still change.
Complete	The invoice was marked complete. The packing list locked with it.

Nothing on the packing screen completes a packing list. The status changes only when the invoice is marked complete, and every change here is then refused with "Packaging cannot be edited as it is not in draft state.".

What happens behind the scenes

- Rows already saved and then removed on screen are only marked for removal. They disappear from storage when you next select Save, not before.
- Saving replaces the stored list with what the screen holds, in the order shown. The order of rows is part of what is saved: it numbers the boxes.
- Each save recalculates the order's progress, which can move the purchase order's status forwards or backwards on its own. See Purchase order statuses.

FAQs

What does a message ending in "locally" actually mean?

It means the change exists on this screen only, in the browser. Nothing is stored until you select Save, at which point everything on the screen is stored at once.

I closed the tab before saving. Can I get my rows back?

No. Leaving the screen, closing the tab, or losing the connection before Save loses everything since the last Save, and no warning appears. Save whenever you have entered more than you would care to retype.

Why did rows I had already filled in vanish after I edited an earlier one?

Editing a row removes every row that comes after it for the same product, without asking, because the screen recalculates from your change and rebuilds what follows. Removing a row does the same, which is why packing is best entered in order and saved often.

Why can't the invoice be marked complete, when the packing screen showed no warning?

Every row must carry a gross weight above zero, and the check is silent: nothing on the packing screen warns you. The refusal only appears later, when someone tries to complete the invoice.

Why did a gross weight go back to zero on its own?

Several actions do this: a leftover row is created and starts at zero, a row is ungrouped or unlinked from a carton group, or a dispatch quantity is changed on the invoice and the packing rows for that line are removed or reset. The missing weights must be re-entered before the shipment can finish.

How do I mark a packing list Complete?

You cannot, not from the packing screen. The status changes only when the invoice is marked complete, and after that every change here is refused.

Related pages

- Building a packing list: the procedure, the carton arithmetic, the weights
- Grouping cartons: packing small items together, and what it costs in weights
- Finding packing lists: the list screen
- What Export ERP Does: where packing sits in the shipment's life

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Building a packing list

TL;DR

> This page covers filling in a packing list: cartons, pieces per carton, and weights, product by product. Two things catch people out. Nothing is stored until you select Save, and changing a row you have already entered discards every row added after it for that product.

What this is for

Filling in how one shipment's goods are boxed: product by product, cartons, pieces per carton, and weights. Read How packing works first. The screen holds everything in the browser until Save, and editing a row discards the rows after it.

Before you start

An invoice must exist for the customer, and it must be **not yet complete** and **without a packing list**. Only such invoices appear in the picker. If none exists you see "No invoices found for this customer. Please create an invoice first.".

Building a packing list

1. Open **Packaging** in the top menu and start a new packing list. The "Add Packaging" page opens.
2. Under "Select Context", pick the **Customer**, then the **Invoice**, then the invoice item. Items are listed as the product name followed by how much is still unpacked, for example "Steel Hinge (Pending : 200.000)".
3. Fill in the packing details. See the fields below.
4. Select **Add Packaging Row**. The row (and its leftover row, if any) joins the table below with "Added locally!".
5. Repeat for each item. Rows can be dragged into the order the boxes will be numbered.

6. Select **Save**. Everything on screen is stored, and you see "Packaging list submitted successfully!".

Saving with an empty table is refused: a dialog titled "No Items Added" says "Please add at least one packaging item before saving.".

How cartons are worked out

The screen divides the quantity by the pieces per carton and rounds down. That many full cartons become the main row. Whatever is left over becomes its own row.

> **IMAGE PLACEHOLDER: building-a-packing-list-split-01** · infographic · status: pending
>
> **Shows:** a quantity splitting into full cartons plus an automatically created leftover row
>
> **Must include:** an example quantity of 20 with 6 pieces per carton becoming a main row of 3 cartons holding 18 pieces, and a separate leftover row of 1 carton holding 2 pieces; the leftover row's gross weight shown as 0 and flagged as needing to be filled in
>
> **Must not show:** any real product or customer name
>
> **Alt text (draft):** A quantity of 20 pieces at 6 pieces per carton splits into two rows. The main row holds 3 full cartons of 6, which is 18 pieces. The leftover 2 pieces become their own one-carton row, created automatically, whose gross weight starts at zero and must be filled in before the shipment can be completed.

A worked example, using the system's own arithmetic. Quantity 20, and 6 pieces fit a carton:

- 20 ÷ 6 = 3 full cartons, holding 18 pieces, which is the main row.
- The remaining 2 pieces become the leftover row: 1 carton, 2 pieces per carton, 2 pieces in total.
- The message "A remainder carton row was auto-created." confirms it.

When the quantity divides evenly, there is no leftover row, and the calculation panel reads "Exact Fit" instead of showing a remainder.

> **The leftover row's gross weight starts at zero.** The main row's weights are copied from what you typed. The leftover carton's real weight is different and unknown, so the screen leaves it at zero. A zero gross weight blocks the invoice from being completed. Select the leftover row, enter its gross weight, and remember its edit follows the same rule as any edit: rows after it for the same product are discarded.

Filling in weights

Field	Unit	What it is
Brass Weight (grams)	grams	The weight of the goods themselves, per carton.
Other Weight (grams)	grams	Packing material and anything else, per carton.
Gross Weight (kg)	kilograms	The full carton as it will ship. This is the weight that must be above zero on every row before the invoice can complete.

The weights arrive pre-filled from the last time this product was packed, **by anyone, for any customer**. The system takes the most recent packing row of the same product, from any invoice in the whole system, and copies its three weights in. It is a starting point, not a measurement of this shipment. Check and correct them.

Quantity per carton and total cartons

- **Qty per Carton**: how many pieces fit one carton. You type this. The real rule: it must be **1 or more**, and no more than the quantity being packed. The error message for the minimum says "greater than 1", but entering exactly 1 is accepted everywhere. Trust the rule, not the message.
- **Total Cartons**: how many cartons the row covers. The screen calculates it, but the box can also be typed in, capped at the calculated figure. Lowering it grows the leftover.
- **Packaging Qty** and **Total Qty** are worked out and cannot be typed. Packaging Qty is what is still unpacked for the item: the dispatch quantity minus rows already added.

Errors you may see

What happened	What you see
No customer / invoice / item picked	"Please select a customer." / "Please select an invoice." / "Please select an invoice item."
No carton picked	"Please select a carton."

What happened	What you see
Qty per Carton empty	"Please enter a valid Qty per carton."
Qty per Carton below 1	"Qty per carton must be greater than 1." Despite the wording, 1 itself is accepted; only values below 1 are refused
Qty per Carton above the quantity	"Qty per carton must be less than or equal to packaging quantity."
Total Cartons empty or zero	"Please enter total cartons." / "Total Cartons must be at least 1."
A weight left empty	"Please enter brass weight." / "Please enter other weight." / "Please enter gross weight."
Saving an empty list	"No Items Added", then "Please add at least one packaging item before saving."
Saved rows exceed what the invoice dispatches	"Item "Steel Hinge" total packaged quantity (22.000) exceeds dispatch quantity (20.000). Please refresh and try again." The names and numbers shown are the real ones

What happens behind the scenes

- Weight totals per row are worked out from your entries: net weight from the per-carton weights and quantities, gross total from the gross weight times the cartons.
- Saving updates the invoice's totals, and recalculates the purchase order's status, which can move it forwards or backwards.
- The row order on screen becomes the box numbering in storage, in the order shown at the moment of Save.

FAQs

Why did a row I never added appear in the table?

When the quantity does not divide evenly by the pieces per carton, the leftover becomes its own one-carton row, created automatically. The message "A remainder carton row was auto-created." confirms it.

Why is the leftover row's gross weight zero?

The leftover carton's real weight is different from the main row's and unknown, so the screen leaves it at zero. A zero gross weight blocks the invoice from being completed, so select the leftover row and enter its weight.

Why do the weight boxes arrive already filled in?

The system copies the three weights from the most recent packing row of the same product, from any invoice in the whole system, by anyone, for any customer. It is a starting point, not a measurement of this shipment, so check and correct them.

The error says Qty per Carton must be greater than 1. Is 1 really refused?

No. The real rule is 1 or more, and entering exactly 1 is accepted everywhere; only values below 1 are refused. Trust the rule, not the message.

Why was my Save refused for exceeding the dispatch quantity?

The rows being saved pack more of an item than the invoice dispatches, for example a packaged total of 22 against a dispatch quantity of 20. Refresh and try again, as the message says.

Why can't I pick my invoice in the picker?

Only invoices that are not yet complete and do not already have a packing list appear. If none exists for the customer, you see "No invoices found for this customer. Please create an invoice first.".

Related pages

- How packing works: the browser-held working area, read first
- Grouping cartons: combining single cartons into one box
- Finding packing lists: where saved lists appear

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Grouping cartons

TL;DR

> This page covers joining several packing rows into one carton group, and taking a group apart again. Before you group anything, know that ungrouping clears gross weights and never puts back the ones the rows had before, so they must be typed in again.

What this is for

Sometimes several small items ship together in one physical box. Grouping joins their packing rows into one **carton group**: one shared carton type, one shared gross weight, one box.

Like everything on the packing screen, grouping happens in the browser and is stored only when you select **Save**. See How packing works.

Which rows can be grouped

Only rows with **exactly 1 total carton**: a single box each. Selecting anything else shows "Only items with exactly 1 total carton can be merged.".

At least **2 rows** must be selected: "You must select at least 2 items to create a group.". All rows must belong to the same packing list.

Grouping rows

1. Tick the rows to combine. A **Group Selected** button appears above the table.
2. Select it. The "Group Selected Rows" dialog opens.
3. Either create a new group, or add the rows to one that exists. For a new group, pick the **Carton Type** and enter the box's **Gross Weight (kg)**. For an existing one, use **Select Existing Group**, where groups are listed as "Group #7 — Master Carton (3 rows, 12.5 kg)".

4. Select **Apply Group**. You see "Grouped locally.", and it is held in the browser until Save, like everything here.

Grouped rows show a green badge with the group's number and carton name (for example "#7 Master Carton") and share one carton and one gross weight. A group's carton or weight can be changed later through its edit control, which opens the "Edit Carton Group" dialog; confirming shows "Group updated locally.".

Grouping rewrites the rows. Each member's carton count becomes 1 and its pieces-per-carton becomes its full quantity, and each member's own gross weight is replaced by the group's shared weight.

Ungrouping, and what it costs

> **IMAGE PLACEHOLDER: grouping-cartons-ungroup-01** · infographic · status: pending
>
> **Shows:** rows combined into one box, and gross weights dropping to zero when the group is taken apart
>
> **Must include:** three single-carton rows joining into one group box with one shared gross weight; the reverse arrow showing the group taken apart, with every affected row's gross weight reset to zero and marked as needing re-entry; a note that the weights from before grouping are not brought back
>
> **Must not show:** real product names or weights presented as real data
>
> **Alt text (draft):** Three single-carton rows combine into one group box sharing one gross weight. When the group is taken apart, the affected rows return as separate cartons, but their gross weights are reset to zero and must be typed in again. The weights they had before grouping are not brought back.

To take a row out of its group, select the unlink control on the row. The dialog asks "Unlink Row from Group?" with "This row will become ungrouped.", and offers **Yes, unlink!** and **Cancel**.

> **Weights are cleared, and not only on one row.** What happens depends on which row you unlink, and neither case can be undone.

What happens depends on which row you unlink:

- Unlinking the group's **first row**, or unlinking when the group has only two rows, dissolves the whole group, and **every member's gross weight is set to zero**.

- Unlinking any other row from a larger group frees only that row, and **that row's gross weight is set to zero**.

The weights the rows had before grouping are **not brought back**. The system remembers each row's earlier carton and carton count and restores those, but the gross weight is deliberately reset to zero in every case. Every cleared weight must be typed in again, and until then the invoice cannot be marked complete.

Removing or editing a grouped row has the same side effect: the row leaves its group first, with the same weight-clearing rules.

Errors and dialogs you may see

What happened	What you see
A selected row has more than one carton	"Only items with exactly 1 total carton can be merged."
Fewer than two rows selected	"You must select at least 2 items to create a group."
Removing a row from its group	"Unlink Row from Group?", then "This row will become ungrouped.", with **Yes, unlink!** / **Cancel**
Group applied	"Grouped locally."
Row unlinked	"Unlinked locally."
Group's carton or weight changed	"Group updated locally."

What happens behind the scenes

- The group's number in the badge is the system's own number for the group. It is not a box number and does not print on paperwork.
- Before grouping, each row's carton, carton count and pieces-per-carton are remembered, and ungrouping restores them. The gross weight is remembered too, but never restored; zero wins.
- A group whose rows have all left it disappears on the next Save.
- Changing a line's dispatch quantity on the invoice also strips its packing row out of any group, with the same zeroed weight. See the Invoices part of this guide.

FAQs

Why can't I group the rows I selected?

Only rows with exactly 1 total carton can be grouped, at least 2 rows must be selected, and all rows must belong to the same packing list. Selecting anything else shows the matching refusal message.

I unlinked one row, so why did every row's gross weight go to zero?

Unlinking the group's first row, or unlinking when the group has only two rows, dissolves the whole group and sets every member's gross weight to zero. Unlinking any other row from a larger group clears only that row's weight.

Does ungrouping bring back the weights the rows had before?

No. The system restores each row's earlier carton and carton count, but the gross weight is deliberately reset to zero in every case, and it cannot be undone. Every cleared weight must be typed in again, and until then the invoice cannot be marked complete.

Is the number in the green badge the box number on the paperwork?

No. It is the system's own number for the group; it is not a box number and does not print on paperwork.

Why did a row leave its group without me touching the packing screen?

Changing a line's dispatch quantity on the invoice strips its packing row out of any group, with the same zeroed gross weight. Removing or editing a grouped row also makes it leave its group first, under the same weight-clearing rules.

Is a group stored as soon as I see "Grouped locally."?

No. Like everything on the packing screen, grouping happens in the browser and is stored only when you select Save.

Related pages

- How packing works: the browser-held working area
- Building a packing list: the rows this page groups
- Finding packing lists: the list screen

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Finding packing lists

TL;DR

> This page covers the packing list screen: its columns, search, filters and exports. It also explains how a removed packing list appears, which is not the same as how a removed pallet manifest appears. Use it when a list you expected is missing, or looks live when it is not.

What this is for

The list under **Packaging** in the top menu shows every packing list, one row per shipment that has one. This page covers the columns, search, filters and exports, and how removed lists appear.

The list screen

The list shows ten rows at a time. The selector under the list offers 25, 50, 100, 500 and All. A search box at the top filters as you type, settling about a second after you stop.

The default order groups by status: Draft first, then Complete, with removed lists last. Complete lists sort newest invoice number first.

The columns:

- **ID**: the shipment's number in the system
- **Status**: Draft or Complete; see below
- **Company**
- **Customer**
- **Items**: how many different products the list packs, shown as "3 items"
- **Invoice Number**: the shipment's number: the real invoice number once completed, the temporary draft number before that
- **Date**: when the shipment was entered
- The last column always holds a **View Detail** icon. An **Edit** icon appears only on rows that are neither Complete nor removed, and only if you can make changes.

Long company and customer names are shortened. Rest the pointer on one to see the whole value.

Filters

Three dropdowns sit beside the search box: **Select Status** (All Statuses, Draft, Complete), **Select Company**, and **Select Customer**. Picking a company clears the customer choice.

There is no filter for removed lists. The Status choices are only Draft and Complete.

The statuses, and a trap with removed lists

Status	What it means
Draft	Still being worked on. Editable.
Complete	The invoice was marked complete; the packing list locked with it.

A packing list is removed only when its whole invoice is deleted. Removed lists stay in this list, but **how they look depends on what they were**:

- A removed **Draft** list shows a red **Delete** badge.
- A removed **Complete** list **still shows the green Complete badge**. The completed look wins over the removed state. The row looks like a live completed shipment; only its missing Edit icon and its deleted invoice give it away.

Sorting does know the difference. Removed lists of both kinds sort at the bottom, after Complete.

What you can do from here

- **View Detail**: always available, including on removed lists.
- **Edit**: only on Draft rows that are not removed, and only if you can make changes.
- **Packing lists cannot be removed from this screen.** There is no delete control here at all. A packing list disappears only when its invoice is deleted, from the Invoice screen.

Exporting the list

The **Export** menu offers Excel, Excel All, CSV, CSV All, PDF and PDF All. The plain versions cover the rows currently on screen; the "All" versions cover every row matching the current search and filters. All six are built in the browser.

Exports contain: ID, Status, Company, Customer, Items, Invoice Number and Date.

FAQs

How do I delete a packing list from this screen?

You cannot; there is no delete control here at all. A packing list disappears only when its invoice is deleted, from the Invoice screen.

Why does a removed packing list still show a green Complete badge?

A removed Complete list keeps its green Complete badge; the completed look wins over the removed state. Only its missing Edit icon and its deleted invoice give it away, though removed lists of both kinds sort at the bottom, after Complete.

Why is there no filter for removed lists?

The Status choices are only Draft and Complete; removed lists have no filter of their own. They can still be found because they sort at the bottom of the list, and their rows remain readable through View Detail.

Why does a row have no Edit icon?

The Edit icon appears only on Draft rows that are not removed, and only if you can make changes. Complete and removed rows offer View Detail only.

Why does the Invoice Number column show a number that later changed?

The column shows the shipment's number as it stands: the temporary draft number before completion, and the real invoice number once the invoice is completed.

Do the exports cover everything or just what is on screen?

The plain Excel, CSV and PDF versions cover the rows currently on screen; the "All" versions cover every row matching the current search and filters. All six are built in the browser.

Related pages

- How packing works: what a packing list is and how the screen behaves
- Building a packing list: creating and changing one
- Grouping cartons: combined boxes on a list

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