

2,6  
8 1/2

# DYNAMICS 365

## FINANCE AND OPERATIONS

### CREATE SHIPMENT

**LogTrade**

2018-12-07





# 1 GENERAL

To create a shipment go to LogTrade Connect->Shipments

The screenshot shows the Dynamics 365 interface for the 'Shipments' page. The navigation bar includes 'Dynamics 365', 'Finance and Operations', 'LogTrade Connect', 'Common', and 'Shipments'. The ribbon has 'SHIPMENT' and 'OPTIONS' tabs. The main content area displays a table of shipment records with columns for Consignment id, Shipment status, Shipment number, Shipment date, Mode of delivery, and Sender reference. Below the table, there are options to '+ Add', 'Remove', 'Packages', and 'Dangerous goods'. The 'Lines' section shows a table with columns for Number of pack, Package type group, Package type, Package type description, Shipping marks, Goods description, Gross weight, Volume, and Loading meters.

Consignment id	Shipment status	Shipment number	Shipment date	Mode of delivery	Sender reference
USMF-000271	Prepared	6626167222	8/3/2018	10	000773
USMF-000281			8/22/2018	10	000784
USMF-000285	Prepared	6629623916	8/22/2018	10	000787
USMF-000286	Prepared	6629643880	8/22/2018	PARTLOAD	000787

Number of pack...	Package type group	Package type	Package type description	Shipping marks	Goods description	Gross weight	Volume	Loading meters
1	Pall	EP	EUR-Pall		Material	100.00	1.00	0.00

Click New and select the reference you want to base the shipment on.

Reference can be Sales Orders, packing slip Picklist etc. Default reference type can be set in LogTrade parameters.

Mode of delivery is shown from the reference, and can be changed to match the correct delivery mode (which is mapped to a Carrier product)





Consignment id	Shipment status	Shipment number	Shipment date	Mode of delivery	Sender reference
USMF-000271	Prepared	6626167222	8/3/2018	10	000773
USMF-000281			8/22/2018	10	000784
USMF-000285	Prepared	6629623916	8/22/2018	10	000787
USMF-000286	Prepared	6629643880	8/22/2018	PARTLOAD	000787

Number of pack...	Package type group	Package type	Package type description	Shipping marks	Goods description
1	Pall	EP	EUR-Pall		Material

Click OK and the shipment is created.

Next step will be to add goods lines. Add number of packages, Package group type (this will give you correct package code, based on mapping), weight and volume/load meter.

There is a button validate the data against the LogTrade API.

Once the shipment is ready, click Send & Print and the shipment is sent to the LogTrade API and documents and labels are printed (based on how your setup looks)

Nothing is communicated to the carrier in this step, unless automatic booking is configured in the LogTrade API.

If you want book the shipment manually, there is a button for Book shipment (Not supported by all Carriers)





Final step is to release the shipment. This is done thru the period routine Release shipments (From the main menu)

SHIPMENTS	
Consignment id	
Shipment date	8/22/2018
Shipment status	Prepared
Mode of delivery	
Warehouse	

Here you can release all shipments that are prepared, and group them by delivery mode, so you will get one manifest per carrier and product.

This is normally done once a day when the truck arrives.

## 2 OTHER FUNCTIONS

### 2.1 BUTTONS

#### 2.1.1 UNLOCK FOR EDIT

If a shipment has been sent to the LogTrade API it is locked, and can't be edited anymore. If you need to change the shipment after sending it, you can use the Unlock for edit button. This will





Cancel the shipment in the LogTrade API and open up the shipment for editing, so you can send it back to the LogTrade API again.

### 2.1.2 ARCHIVE

Shipments in the status Prepared (Sent to the LogTrade API, but not released to the carrier) can be archived using the Archive button. This will Cancel the shipment in the LogTrade API, and flag the shipment as Archived in D365. If booking has been done (manually or automatically, they needs to be cancelled manually by contacting the carrier.

### 2.1.3 PRICE QUOTE

Some carriers support Price quote. This will fetch a price for the shipment from the carrier, and store on the shipment. This price can also be added to the sales order, with a percentage add-on, thru the Update sales order button. The Update sales order button will also add package material that is defined on the shipment, so you may bill the customer for it.

### 2.1.4 PACKAGE MATERIAL

Here you can define packaging material that you want to add on the sales order. In the Package type group form you can define packaging material that is automatically added to the shipment based on selected package type group on the goods lines.

## 2.2 TABS

### 2.2.1 GENERAL

The General tab will contain the most central information regarding the shipment. You can see the source (Customer or Vendor), the Source document (Sales order, Purch order etc) and the reference (Pick list, Packing Slip etc)

You can also see the delivery mode (And change it, however after changing delivery mode, you must verify all the data, since a lot of data on a shipment is automatically populated from the delivery mode, on some data might not work updating afterwards.

If you want to use an address template for the sender part, you can define it on this tab. (It can also be automated by defining a default value on the delivery mode setup.



### 2.2.2 RECIPIENT

Here you can edit the recipient address as well as contact info and the customer code (if recipient is invoice from carrier for freight charges).

If you want to use an address template, you can define it here.

### 2.2.3 ADDRESSES

Here you can manage all addresses defined on the shipment. Otherwise it is the same information as on the recipient tab.

### 2.2.4 SERVICES

On the services tab you can add services to the shipment. You can add a service group. A service group is a defined common name for a service, and then you map the carriers specific code to the service group. By selecting a service group on a shipment, the system will find the correct code thru the delivery mode.

These services can also be added automatically, by using the Default service group.

You can also add specific carrier services on a shipment, but these can't be automated (They need to be added to a defined service group for automation)

Every service added, has a number of parameters that needs to be set, either by using functions, or define a value (by using the function Set Value)

### 2.2.5 GOODS LINES

On the goods lines you can add a line with number of packages, package type (by using groups you will get the correct carrier specific code from mapping) weight and volume or load meter.

The weight, volume and load meter fields represent the sum for all the packages that you have entered.

If you need to define the weight, volume or load meter per package, you can click the Package button above the Goods lines, and define all the packages. The goods lines row will then automatically summarize the fields.