USER GUIDE

ORDER AUTOMATION

LogTrade

2019-02-26

1 GENERAL

In LogTrade Connect for Microsoft Dynamics NAV you can use functionality to create consignments automatically from different triggers. It is also possible to use functionality to automatically set *Number of Packages*, *Gross Weight* and what items that are shipped. By combining different setup parameters, you can reach different automation levels.
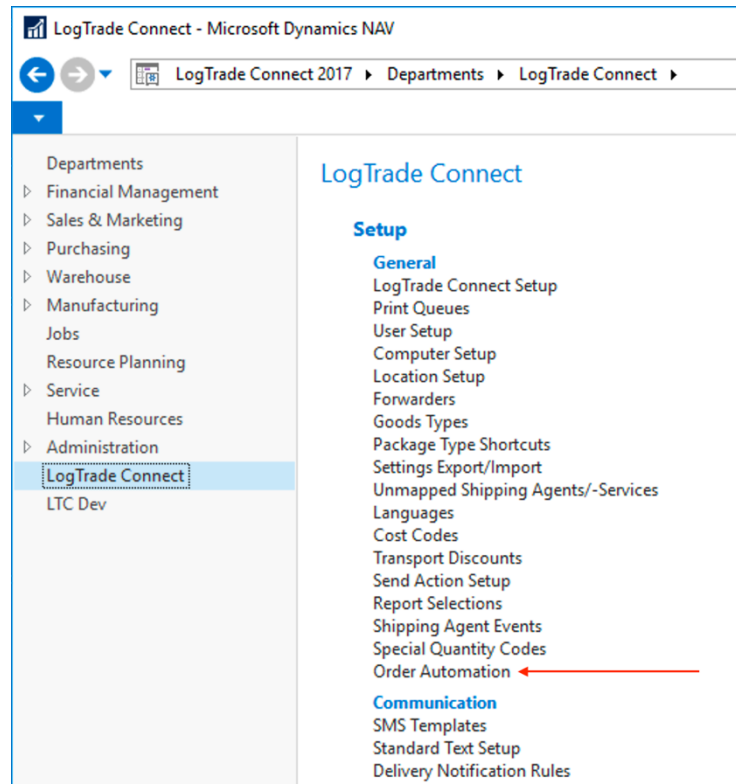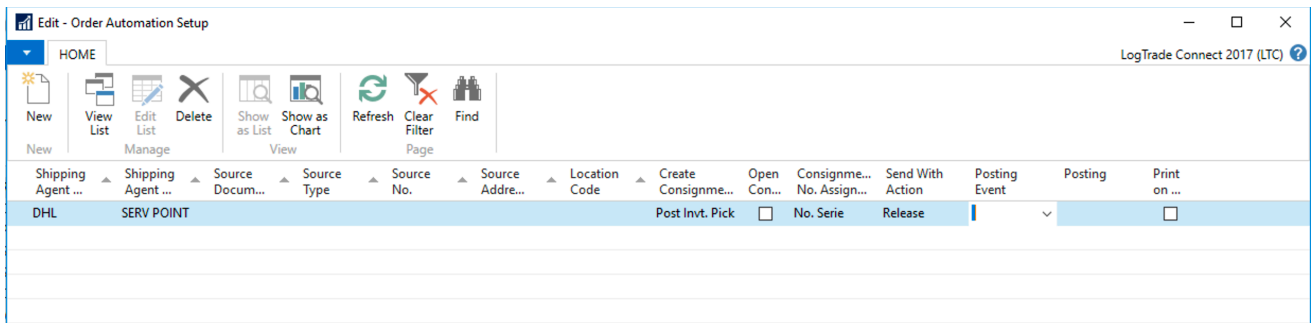
Some examples are:

- Posting an Inventory Pick; a consignment is created, labels are printed, transport instructions are sent as an EDI message to the carrier and a notification e-mail to the customer are sent with a shipment note attached to it.
- Releasing a sales order; a consignment is created with the status prepared and can be finished by the warehouse employees through a PDA or by voice commands through Amazon Alexa.

1.1 AUTOMATION SETUP

Open the settings for *Order automation* from the LogTrade Connect Department.

In *Order automation* there are several fields that make it possible to do a very flexible setting to control different workflows. The setting is made according to the same way as other LogTrade Connect settings, which means a number of filter fields that are used to filter if the current source document should be handled, and then a number of fields to control what should happen.

1.2 FILTER FIELDS

With below filter fields it is possible to control when order automation should start.

- Shipping Agent Code
- Shipping Agent Service Code
- Source Document Type
- Source Type (Customers or Vendors)
- Source No.
- Source Address Code
- Location Code

In the field *Create Consignment Event* you can set when a consignment should be created automatically. There are three different actions that can trigger a consignment. These are *Order Release, New Inventory Pick* and *Post Inventory Pick.*

1.3 ACTION FIELDS

The action fields define what will happen when the filter fields "find" a source document.

- *Open Consignment*; Defines if the consignment page should be opened automatically in Dynamics NAV.
- *Consignment No. Assignment*; Defines how the consignment id is set. If the number is supposed to be used by another application (Amazon Alexa or PDA) it is recommended that you choose *Source Document* or *Inventory Pick.* Otherwise just use regular No. Series.
- *Send With Action*; You can choose *Save, Prepare* or *Release.* With the two last choices a validation error will be shown in Dynamics NAV to help the user before continuing in another application. But if the purpose is to finalize the consignment in the web interface it might be better to just save the consignment.
- *Posting Event*; This controls when Dynamics NAV should post the source document. That means what status the consignment should have when the source document should be automatically

posted. Depending on the workflow a job queue might be needed to update Dynamics NAV with the LogTrade status. The selections are *Prepare, Prepare and Release* or *Release*.

- *Posting*; Defines if the document should be posted with only *Ship* or both *Ship and Invoice*.
- *Print on Posting*; Controls whether printing should be done in Dynamics NAV when posting.

2 AUTOMATIC FREIGHT PARAMETERS

2.1 NUMBER OF PACKAGES AND WEIGHT

To be able to reach a fully automatic solution it is important that at least *Number of Packages* and *Weight* is calculated automatic.

In *LogTrade Connect Setup* it is possible to define automatic calculation of *Gross Weight*. This is done based on the item weight and package type weight.

To create automatic goods lines/package lines it is possible to do different settings for each carrier product. It is possible to have default *Number of Packages* and *Package Type Code*. This is done on the fast tab *Package*, see screenshot below.

3 SHIPMENT NOTE

To be able to print a shipment note from LogTrade you must specify items shipped in the same call as when the consignment is created. This is practical when you finish the workflow from a PDA or Amazon Alexa but is unnecessary when creating the consignment in the background when posting a source document since then it is more convenient to use the shipment note from Dynamics NAV. See screenshot below for recommended settings.

4 EXAMPLE WORKFLOWS

4.1 PICKING IN DYNAMICS NAV

This example workflow means that a consignment is created automatically with the status *Released* when an *Inventory Pick* is posted. This means that transport instruction and notification e-mails/SMS messages is sent at once and no extra tasks are needed to release the consignment. If automatic price quote is activated there will also be a price quote made that can update the order including an additional percentage value. It is possible to send to *Prepared* in this workflow too but then the user has to do a few other tasks and some setup.

Number of Packages is calculated automatically based on the setting made for the current carrier product and weight based on the setting *Calculate Weight*. With the demo objects (from NAV 2017 as an extension, earlier versions as a fob-file) it is also possible to manually register *Number of Packages* and *Weight* for the *Inventory Pick* before it is posted. This is especially good for the consignments that differs from the default settings.

4.1.1 NEEDED SETUP

LogTrade Connect Setup:
- Calculate Weight; *Yes*

Forwarder Product Setup:
- Create Consignment Line; *Yes*
- Default Package Type Shortcut Code; *PARCEL (in this example)*
- Default Number of Packages; *1*

Order Automation Setup:
- Shipping Agent Code; *Empty or for a specific carrier. In this example DHL Freight is used.*
- Shipping Agent Service Code; *Empty or for a specific carrier product. In this example DHL Service Point is used.*
- Create Consignment Event; *Post Inventory Pick*
- Consignment No. Assignment; *No. Series*
- Send With Action; *Release*

The workflow will then be as below:

1. Register the sales order and release it
2. An Inventory Pick is created from the action pane on the sales order or through the batch job that creates inventory picks for your location.
3. Print picking list
4. Pick the goods on your warehouse

5. Pack the goods
6. Register picked quantity on the inventory pick card *(if Number of Packages or Weight should be different from calculated you register this in the fields on the inventory pick card)*
7. Post the inventory pick

After task 7 above the consignment will automatically be sent to LogTrade and a label print will be done. Since the consignment is released at once the setting that controls the manifest list in LogTrade is recommended to be set to *Manual* or *None.*

4.2 PICKING THROUGH AMAZON ALEXA (VOICE CONTROL)

This workflow means that a consignment is created automatically with the status *Prepare* and then updated to *Released* with a voice command from Amazon Alexa. This also means that the transport instruction is sent through EDI and notification e-mails/SMS-messages are sent at the same time as the label is printed. No extra tasks are needed to release the consignment afterwards. If automatic price quote is activated a price quote will be done based on the order quantity and the order can be updated with freight price including additional charges.

Number of Packages is calculated automatically based on the setting made for the current carrier product and weight based on the setting *Calculate Weight*. With the demo objects (from NAV 2017 as an extension, earlier versions as a fob-file) it is also possible to manually register *Number of Packages* and *Weight* for the *Inventory Pick* before it is posted. This is especially good for the consignments that differs from the default settings.

Create Consignment Event can be *Order Release* or *New Inventory Pick.* The example below is based on inventory pick since we recommend that warehouse tasks are made separately from the order.

LogTrade Connect Setup:
- Calculate Weight; *Yes*

Forwarder Product Setup:
- Create Consignment Line; *Yes*
- Default Package Type Shortcut Code; *PARCEL (in this example)*
- Default Number of Packages; *1*

Order Automation Setup:
- Shipping Agent Code; *Empty or for a specific carrier. In this example DHL Freight is used.*
- Shipping Agent Service Code; *Empty or for a specific carrier product. In this example DHL Service Point is used.*
- Create Consignment Event; *New Inventory Pick*

- Consignment No. Assignment; *Inventory Pick*
- Send With Action; *Prepare*
- Posting Event; *Release*
- Posting; *Ship*
- Print on Posting; *Prepare*
- Posting Event; *Release*
- Posting; *Ship*
- Print on Posting; *No*

The workflow will then be as below:

1. Register the sales order and release it
2. An Inventory Pick is created from the action pane on the sales order or through the batch job that creates inventory picks for your location.
3. Print picking list
4. Pick the goods on your warehouse
5. Pack the goods
6. Ask Amazon Alexa to print consignment with the command "Alexa, ask LogTrade to print order 1234" where 1234 is the picking list number. This command will change the status on the consignment from *Prepared* to *Released.*

After task 6 above it is important to update Dynamics NAV, so the order is posted and ready for invoicing.
This could be done by creating a *Job Queue* that asks LogTrade about consignment statuses instead of manually pushing the button "Get status from LogTrade" on the Consignment Worksheet.