



USER GUIDE

LOGTRADE CONNECT

PRINT PACKAGE LABELS

FROM SALES ORDERS

LogTrade Connect for Microsoft Dynamics 365 Business Central

V 2.0.0.0





1 GENERAL

This document describes how you print package labels and waybills based on a *Sales Order* in Microsoft Dynamics 365 Business Central. It is possible to print labels for one order at the time or to deliver several orders in the same package/consignment.

2 PREREQUISITES

This document does not handle setup needed to be done before shipping. That is explained in the document describing the Assisted Setup Wizard.

3 RECOMMENDED SETUP

The following setup is recommended to have the fastest and most convenient process when shipping goods. Based on your specific demands it might be a good idea to change some of the settings in *Delivery Setup*.

Confirm Status – If set to *Release* the electronic information (often called EDI) will be sent automatically to the shipping agent when the documents are printed. If you often need to modify a shipment after printing or you want to combine several orders/shipments to the same recipient, it is recommended to set this to *Prepare* instead. The release process is then done from the worksheet *Manage Multiple Consignments*.

Shipment Date – If the goods normally leave your warehouse the same day as you print the labels you should set this to *Workdate*. Otherwise the order *Shipment Date* will be used.

4 PROCESS EXPLANATION

Before posting shipment from the sales order the package labels and waybills should be printed. That will ensure that your posted sales shipment will have correct shipping data like *Shipping Agent*, *Shipping Agent Service*, *Package Tracking No.*, *No. of Packages* etc. The labels and waybills will be printed automatically or downloaded and opened automatically as pdf files (if *Integrated printing* is not in use).



5 SHIPPING DATA ON SALES ORDER

On a sales order there are some fields in the standard Microsoft Dynamics 365 Business Central solution for shipping, for example *Shipping Agent Code*, *Shipping Agent Service Code*, *Shipment Method Code* and *Package Tracking No.*. With LogTrade Connect you get several more fields to handle the shipping of goods, for example *No. of Packages*, *Package Type*, *Weight*, *Volume*, *Load Meters*, *Freight Payer*, *Note of Goods* etc. Some fields can be considered mandatory, for example *No. of Packages*, *Package Type*, *Weight* and *Freight Payer* and most others are optional but can be mandatory for some services or for specific processes. The fields are explained after the picture below.

The screenshot displays the Microsoft Dynamics 365 Business Central interface for a sales order. The order is for 'The Cannon Group PLC' with a work date of 28/01/2021. The 'Delivery' section is expanded, showing various shipping-related fields. The 'Customer Details' section provides information about the customer, including their name, phone number, email, fax number, credit limit, and contact person. The 'Sales Line Details' section shows the item number and required quantity. The 'Attachments' section shows the number of documents attached to the order.

5.1 MANDATORY FIELDS

These fields are always mandatory to fill in.





- *Shipping Agent Code* – This defines which shipping agent that you will use for the transport. During earlier setup this is connected to a shipping agent in LogTrade.
- *Shipping Agent Service Code* – This defines which service that you will use for the transport. During earlier setup this is connected to a shipping agent in LogTrade. For example, if it will be sent as a parcel shipment, a part load shipment or a full load shipment.
- *No. of Packages* – Total count of parcels, pallets or other types.
- *Package Type Code* – A predefined code for the package; parcels, pallets etc.
- *Weight* – Total gross weight for the packages
- *Sender Customer No.* – The customer number that will be sent to the shipping agent. Normally set based on a setting made earlier.

5.2 NON-MANDATORY FIELDS

These fields can be mandatory for some shipping agent services

- *Volume* – Total volume for the packages
- *Load Meters* – Total load meters for the packages
- *No. of Pallet Spaces* – Total number of pallet spaces
- *No. of EUR Pallets* – Total number of EUR pallets, used when member of EUR pallet pool.
- *Freight Payer* – Defines who will be invoiced from the shipping agent. This field will be set based on the payer settings for each Shipment Method. Always mandatory for domestic shipments.
- *Recipient Customer No.* – Recipient customer number for chosen shipping agent.
- *Recipient EUR Pallet Customer No.* - Recipient EUR Pallet customer number for chosen shipping agent.
- *Sender EUR Pallet Customer No.* - Sender EUR Pallet customer number for chosen shipping agent. Normally set based on a setting made earlier.
- *Goods Type* – Type of goods in the package. Recommended to use general descriptions and can be set based on the initial settings.
- *Note of Goods* – Often used as a description for the customer. Default it will be the order number.
- *Terms of Delivery Location* – Some terms of deliveries require a location where the goods will change owner from the sender to the recipient.



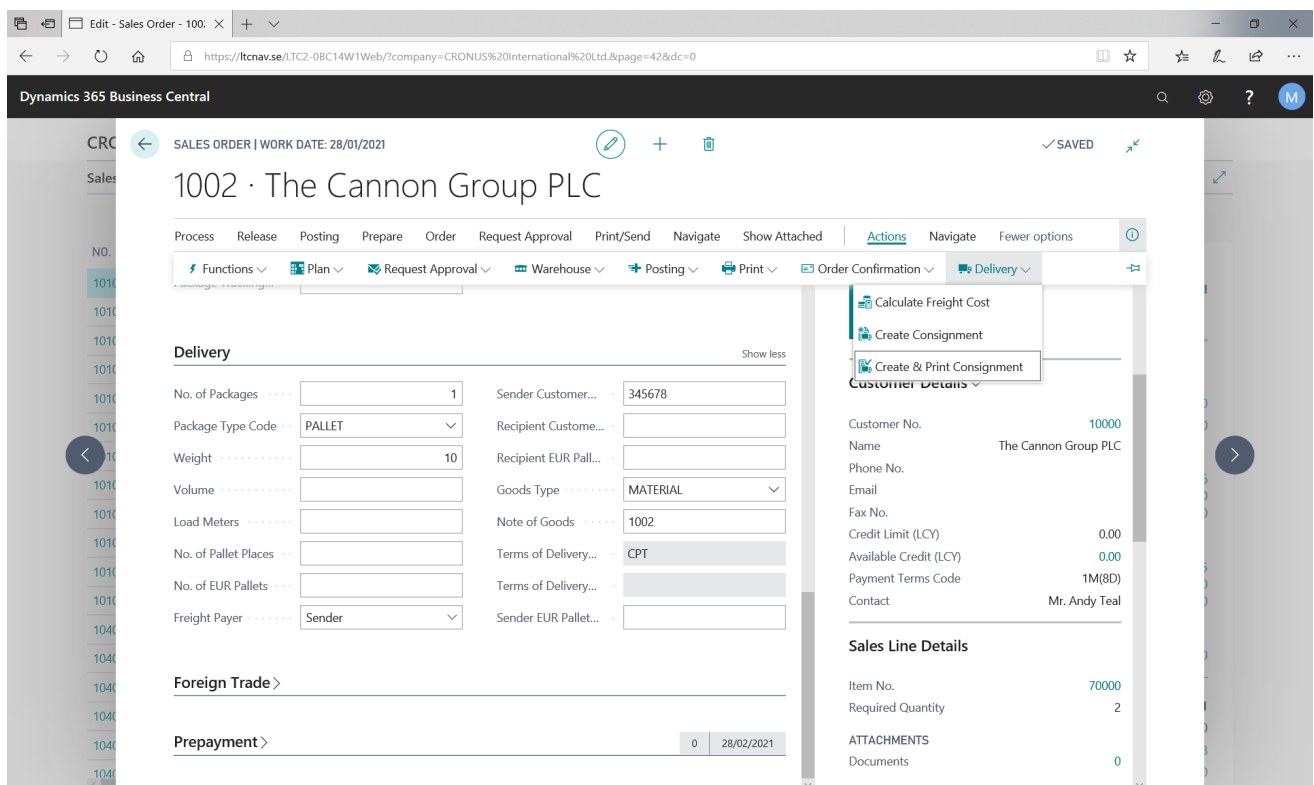
5.3 NON-EDITABLE FIELDS

- *Terms of Delivery Code* – For international shipments this field is normally mandatory and defines the shipment method code for that specific shipping agent. Will be set based on the shipment method mapping done during setup.

6 PRINTING SHIPPING DOCUMENTS

When you have filled in all the shipping data needed for your shipment you select *Actions/Delivery/Create & Print Consignment*. If you have installed the Integrated Printing software from LogTrade the documents will be printed on the printers at once. Otherwise a pdf will be downloaded. If you use pdf it is recommended to check the setting to always allow the pdf to open automatically.

Based on the shipping agent service different documents can be printed. That is predefined in LogTrade based on each shipping agent specifications. Normally package labels are needed for all shipments but waybills are not needed for parcel shipments.





6.1 PACKAGE LABEL EXAMPLE

The picture below shows an example of a package label for a shipping agent called *Own Logistics*.

	Own Logistics - Transport
From: CRONUS International Ltd. 5 The Ring Westminster GB-W2 8HG London United Kingdom	
CustNo: 345678 Phone: 0666-666-6666	
To: The Cannon Group PLC Mr. Andy Teal 192 Market Square GB-B27 4KT Birmingham United Kingdom	
Services	
Shipment id 656 543 975 6 1 / 1	
Sender ref 1002	
Rec. ref.	
Date 2019-06-17	
Pay cust. # 345678	
Weight 1000 / 1000 Kg	
Contents MATERIAL	
Ship. mark 1002	
	
Shipment ID:  656 543 975 6	
Package ID:  (00) 3 73 40030 648280303 2	

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7 AFTER PRINT

When the shipping documents have been printed you will see some updated information in Microsoft Dynamics 365 Business Central. *Package Tracking No.* is filled in on the order. That is the tracking number that can be used to track the shipment on the way to the recipient.

The screenshot displays the Microsoft Dynamics 365 Business Central interface for a sales order. The main header shows the order number '1002' and the customer name 'The Cannon Group PLC'. The 'Shipping and Billing' section is expanded, revealing various fields for shipping and billing information. The 'Package Tracking...' field is populated with the value '6565439756'. Other sections visible include 'Invoice Details', 'Customer Details', and 'Sales Line Details'.

Field	Value
Ship-to	Default (Sell-to Address)
Contact	Mr. Andy Teal
E-mail	
Phone No.	
Mobile Phone No.	
Gate Code	
SHIPMENT METHOD Code	CPT
Agent	OWN LOG.
Agent Service	TRANSPORT
Package Tracking...	6565439756
Bill-to	Default (Customer)
Location Code	BLUE
Shipment Date	17/06/2019
Shipping Advice	Partial
Outbound Whse...	
Shipping Time	1D
Late Order Shipping	Yes
Customer No.	10000
Name	The Cannon Group PLC
Phone No.	
Email	
Fax No.	
Credit Limit (LCY)	0.00
Available Credit (LCY)	0.00
Payment Terms Code	1M(8D)
Contact	Mr. Andy Teal
Item No.	70000
Required Quantity	2
Attachments Documents	0





8 CONSIGNMENT LIST

All the consignments made during the day can be found in the *Consignment List*. Search for *Consignments* and open the list. This is consignments that has not been released yet, see more information below about releasing consignments.

The screenshot shows the Dynamics 365 Business Central interface for 'CRONUS International Ltd.'. A search bar is open with the text 'Consignments' entered. The search results are categorized as follows:

- On current page (Sales Order Processor)**
 - Consignments
 - Released Consignments
- Go to Pages and Tasks**
 - Manage Multiple Consignments (Tasks)
 - Consignments (Lists)
- Go to Reports and Analysis**
 - Released Consignments (Archive)
 - Manage MultipleReleased Consignments (Archive)

The background interface includes a navigation menu with 'Sales Orders', 'Items', 'Customers', and 'Item Jour...'. A headline reads 'Want to learn more about Business Central?'. Below this, there are 'Activities' and 'SALES QUOTES - OPEN' (0) and 'SALES ORDER' (22). At the bottom, there are several KPI cards: 'READY TO SHIP' (6), 'PARTIALLY SHIPPED' (0), 'DELAYED' (14), 'AVERAGE DAYS DELAYED' (0.0), 'SALES RETUR... OPEN -' (0), 'SALES CREDIT... OPEN -' (1), and 'PENDING USER TASKS' (0).



View - Consignments - D X

https://ltnav.se/LTC2-08C14W1Web/?company=CRONUS%20International%20Ltd.&bookmark=31%3bsfu3AAJ7%2f0wAVABDADAAMAaAwADAAMAaAwADE%3d&page=12057523&d

Dynamics 365 Business Central

CONSIGNMENTS

Search + New Manage Print Release Book Manage Multiple Consignments Show Attached Open in Excel

NO.	STATUS	SHIPPING AGENT CODE	SHIPPING AGENT SERVICE CODE	LOCATION CODE	SHIPMENT DATE	SOURCE DOCUMENT TYPE	SOURCE DOCUMENT NO.
LTC0000001	Prepared	OWN LOG.	TRANSPORT	BLUE	17/06/2019	Sales Order	1002
LTC0000002	Prepared	OWN LOG.	TRANSPORT	BLUE	17/06/2019	Sales Order	101018
LTC0000003	Prepared	OWN LOG.	TRANSPORT	BLUE	17/06/2019	Sales Order	104007

Statistics

TRACKING

Sent to LogTrade 17/06/19 12:09
Status Prepared
Tracking No. 6565439756
Booking Status

COSTS

Freight Cost (LCY)
Suppl. Charge %
Discount %
Freight Charge (LCY)
Other Costs (LCY)
Total Charge (LCY)

Packages 1
Weight 1,000
Volume
Load Meters
Pallet Places
Item Lines 1
Services -
Linked Source Documents -
Consolidated Consignments -
Consolidated With No. -





9 RELEASE CONSIGNMENTS

It is important to release consignments. This is the moment when shipping instructions (often just called EDI) are sent to the shipping agent and if you use LogTrade advice services this is also when e-mails and/or SMS are sent. Until the consignment is released it is possible to change it.

With settings it is possible to send consignments to the status *Release* already when creating the consignment. If that setting is done this task does not need to be done.

Search for *Manage Multiple Consignments* to open a *Worksheet*.

The screenshot shows the Dynamics 365 Business Central interface. At the top, there is a search bar with the text "TELL ME WHAT YOU WANT TO DO". Below the search bar, the results for "Manage Multiple Consignments" are displayed. The interface includes a navigation menu on the left with "Sales Orders", "Items", "Customers", and "Item Jour". The main content area shows a headline "Want to learn more about Business Central?" and a section for "Activities" with "SALES QUOTES - OPEN" (0) and "SALES ORDERS - OPEN" (22). Below this, there are several cards for "SALES ORDERS RELEASED NOT SHIPPED" (READY TO SHIP: 6, PARTIALLY SHIPPED: 0, DELAYED: 14, AVERAGE DAYS DELAYED: 0.0), "RETURNS" (SALES RETURN OPEN: 0, SALES CREDIT OPEN: 1), and "MY USER TASKS" (PENDING USER TASKS: 0).

It is possible to filter the worksheet on different shipping agents etc. Normally you want to filter on only consignments with status *Prepared*. Click on *Change Status* and a dialog will open that is prepared for changing status to *Released*. The *Print Queue* is also set based on the settings for this user. The *Print Queue* is used to print a *Manifest List* of all consignments for this pickup by the shipping agent.



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LogTrade Dynamics 365 Business Central - MANAGE MULTIPLE CONSIGNMENTS

Status: Prepared | Shipping Agent Service Code: | Location Code: | To Shipment Date: 17/06/2019 | Shipping Agent: OWN LOG.

Manage: Get status from LogTrade | Change Status | Print | Book | More options

NO.	TRACKING NO.	STATUS	SHIPPING AGENT CODE	SHIPPING AGENT SERVICE CODE	DELIVERY NAME	DELIVERY CITY	SH DA
LTC0000001	6565439756	Prepared	OWN LOG.	TRANSPORT	The Cannon Grou...	Birmingham	17
LTC0000002	6565440119	Prepared	OWN LOG.	TRANSPORT	New Concepts Fur...	Atlanta	17
LTC0000003	6565440135	Prepared	OWN LOG.	TRANSPORT	Selangorian Ltd.	Coventry	17

Statistics: TRACKING Sent to LogTrade Status: 17/06/19 12:09 Tracking No. Booking Status: Prepared 6565439756

LogTrade Dynamics 365 Business Central - MANAGE MULTIPLE CONSIGNMENTS

Status: Prepared | Shipping Agent Service Code: | Location Code: | To Shipment Date: 17/06/2019 | Shipping Agent: OWN LOG.

Manage: Get status from LogTrade | Change Status | Print | Book | More options

Action: Save Prepare Release Archive

Print Queue: Standard

Statistics: TRACKING Sent to LogTrade Status: 17/06/19 12:09 Tracking No. Booking Status: Prepared 6565439756

COSTS: Freight Charge (LCY) Other Costs (LCY) Total Charge (LCY)

Package: 1, Weight: 1,000, Volume, Load Meters, Pallet Places, Items Lines: 1, Services





9.1 MANIFEST LIST EXAMPLE

The picture below shows an example of a *Manifest List* for a shipping agent called *Own Logistics*.

Manifest list				Page: 1
Own Logistics Transport			Shipment date: 2019-06-17	
Consignor code:		Phone: 0666-666-6666		
Consignor: CRONUS International Ltd.		Postal code: W2 8HG		
Customer code: 345678		City: London		
Shipment number	Consignee name Address Postal address	Sender reference Recipient reference Paying customer number	Number of packages Weight Volume Loading meters	
6565439756	The Cannon Group PLC 192 Market Square B27 4KT Birmingham GB	1002 345678	1 1000,0 kg	
373400306482803032				
6565440119	New Concepts Furniture 705 West Peachtree Street GA 31772 Atlanta US	101018 345678	1 10,0 kg	
373400306482805401				
6565440135	Selangorian Ltd. 153 Thomas Drive CV6 1GY Coventry GB	104007 345678	2 46,0 kg	
373400306482805609	373400306482805616			
TOTALS				
Number of packages	Gross weight	Volume	Number of shipments	
4	1056,0 kg		3	
Consignments cleared for shipping				
Date	Drivers signature	Car registration		
END OF LIST				
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