

WORKFLOW DESCRIPTION LOGTRADE CONNECT PRINT PACKAGE LABELS FROM SALES ORDERS

LogTrade Connect for Microsoft Dynamics 365 Business Central





1 GENERAL

This document describes how to 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 *Consignment Worksheet* and explained in the end of this document.

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

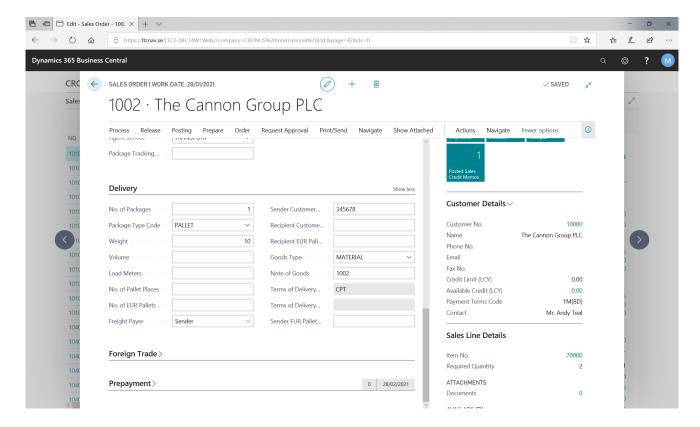
Before posting shipment from the sales order the package labels and waybills should be printed. That will ensure that your posted sales shipment will have correct shipping data like *Shipping Agent, Shipping Agent Service, Package Tracking No., No. of Packages* etc. The labels and waybills will be printed 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.



5.1 MANDATORY FIELDS

These fields are always mandatory to fill in.

FIELD NAME	DESCRIPTION
SHIPPING AGENT CODE	This defines which Shipping Agent that you will use for the transport.
SHIPPING AGENT SERVICE	This defines which service that you will use for the transport. 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.
GOODS TYPE	Type of goods in the package. It is recommended to use general descriptions and can be set based on the initial settings.
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.

FIELD NAME	DESCRIPTION
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. Normally set based on a setting made earlier.
RECIPIENT EUR PALLET CUSTOMER NO.	Recipient EUR Pallet customer number for chosen Shipping Agent. Normally set based on a setting made earlier.
NOTE OF GOODS	Often used as a description for the customer. Default it will be the order number.
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.
TERMS OF DELIVERY LOCATION	Some terms of deliveries require a location where the goods will change owner from the sender to the recipient.
SENDER EUR PALLET CUSTOMER NO.	Sender EUR Pallet customer number for chosen Shipping Agent. Normally set based on a setting made earlier.

6 PRINTING SHIPPING DOCUMENTS

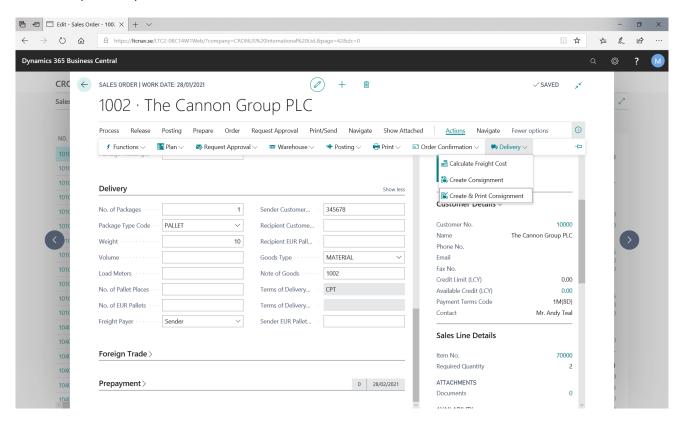
When you have filled in all the shipping data needed for your shipment you select *Actions/Delivery/Create & Print Consignment*. If you have installed and configured the Integrated Printing software from LogTrade the documents will





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*.



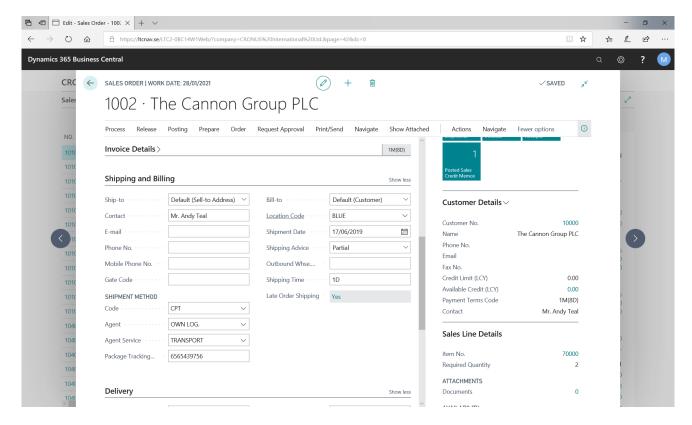






7 AFTER PRINT

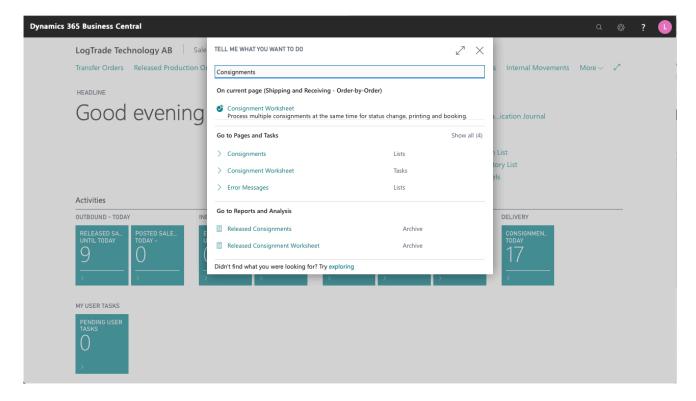
When the shipping documents have been printed you will see some updated information in Microsoft Dynamics 365 Business Central. *Package Tracking No.* is filled in on the order. That is the tracking number that can be used to track the shipment on the way to the recipient.



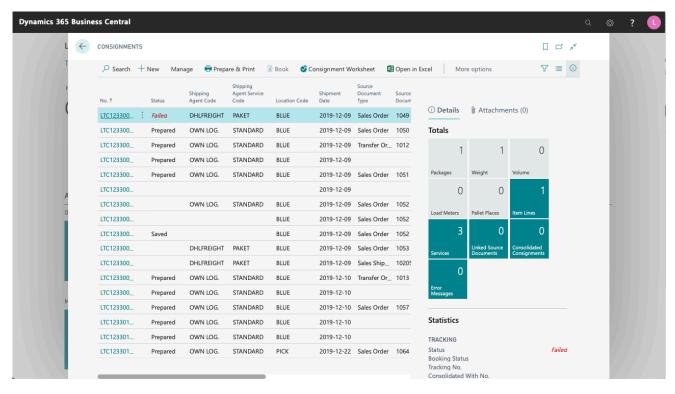


8 CONSIGNMENT LIST

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.







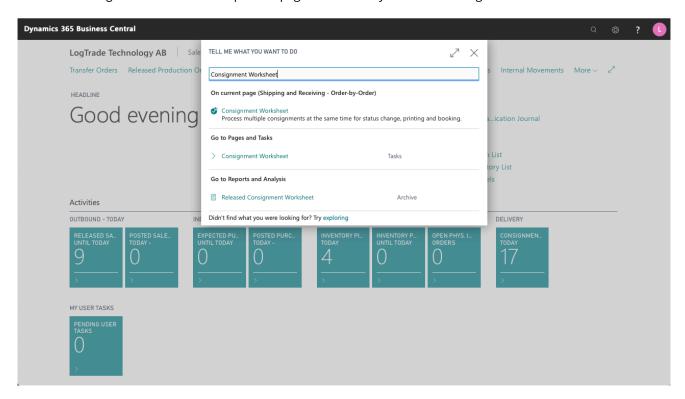


RELEASE CONSIGNMENTS

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.

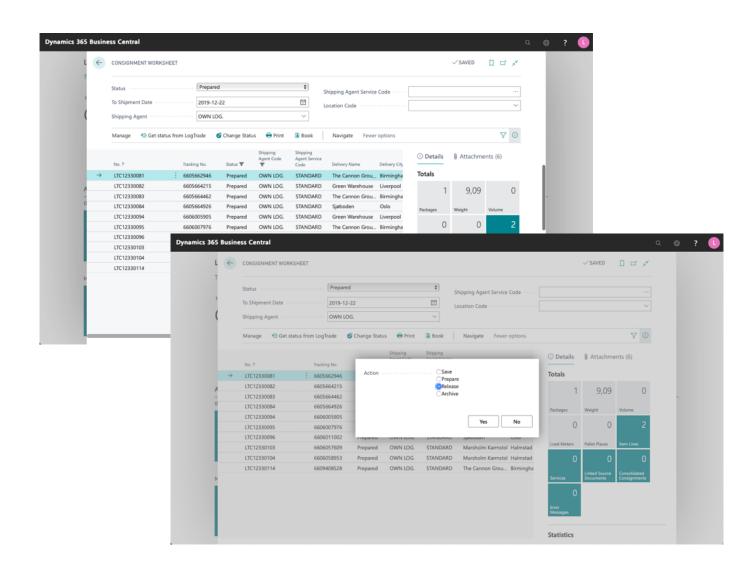
Search for Consignment Worksheet to open the page from where you release consignments.



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.











9.1 MANIFEST LIST EXAMPLE

The picture below shows an example of a Manifest List for a Shipping Agent called Own Logistics.

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· We Voli Loading me
Voli Loading me
Loading me
4000.0
40000
1000,0
10,0
46.0
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