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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.

SALES ORDER | WORK DATE: 28/01/2021

1002 · The Cannon Group PLC

Process Release Posting Prepare Order Request Approval Print/Send Navigate Show Attached Actions Navigate Fewer options

Functions Plan Request Approval Warehouse Posting Print Order Confirmation Delivery

Delivery Show less

No. of Packages	1	Sender Customer...	345678
Package Type Code	PALLET	Recipient Custome...	
Weight	10	Recipient EUR Pall...	
Volume		Goods Type	MATERIAL
Load Meters		Note of Goods	1002
No. of Pallet Places		Terms of Delivery...	CPT
No. of EUR Pallets		Terms of Delivery...	
Freight Payer	Sender	Sender EUR Pallet...	

Customer Details

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

Sales Line Details

Item No.	70000
Required Quantity	2

ATTACHMENTS

Documents	0
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Prepayment > 0 28/02/2021

6.1 PACKAGE LABEL EXAMPLE

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



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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.

SALES ORDER | WORK DATE: 28/01/2021

1002 · The Cannon Group PLC

Process Release Posting Prepare Order Request Approval Print/Send Navigate Show Attached Actions Navigate Fewer options

Invoice Details > 1M(8D)

Shipping and Billing Show less

Ship-to Default (Sell-to Address) Bill-to Default (Customer)

Contact Mr. Andy Teal Location Code BLUE

E-mail Shipment Date 17/06/2019

Phone No. Shipping Advice Partial

Mobile Phone No. ... Outbound Whse... ..

Gate Code Shipping Time 1D

SHIPMENT METHOD Late Order Shipping Yes

Code CPT

Agent OWN LOG.

Agent Service TRANSPORT

Package Tracking... .. 6565439756

Delivery Show less

Customer Details >

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

Sales Line Details

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. At the top, the header reads "Dynamics 365 Business Central". The main content area is titled "LogTrade Technology AB" and "Sales". A search bar is open with the text "Consignments". Below the search bar, a dropdown menu is visible with the following items:

- On current page (Shipping and Receiving - Order-by-Order)
 - Consignment Worksheet (Process multiple consignments at the same time for status change, printing and booking.)
- Go to Pages and Tasks (Show all (4))
 - Consignments (Lists)
 - Consignment Worksheet (Tasks)
 - Error Messages (Lists)
- Go to Reports and Analysis
 - Released Consignments (Archive)
 - Released Consignment Worksheet (Archive)

At the bottom of the search results, it says "Didn't find what you were looking for? Try exploring". The background of the interface shows various dashboard tiles, including "Good evening", "OUTBOUND - TODAY" with "RELEASED SA... UNTIL TODAY" at 9 and "POSTED SALE... TODAY -" at 0, and "MY USER TASKS" with "PENDING USER TASKS" at 0.



Dynamics 365 Business Central

CONSIGNMENTS

Search + New Manage Prepare & Print Book Consignment Worksheet Open in Excel More options

No. ↑	Status	Shipping Agent Code	Shipping Agent Service Code	Location Code	Shipment Date	Source Document Type	Source Document No.
LTC123300...	Failed	DHLFREIGHT	PAKET	BLUE	2019-12-09	Sales Order	1049
LTC123300...	Prepared	OWN LOG.	STANDARD	BLUE	2019-12-09	Sales Order	1050
LTC123300...	Prepared	OWN LOG.	STANDARD	BLUE	2019-12-09	Transfer Or...	1012
LTC123300...	Prepared	OWN LOG.	STANDARD	BLUE	2019-12-09		
LTC123300...	Prepared	OWN LOG.	STANDARD	BLUE	2019-12-09	Sales Order	1051
LTC123300...					2019-12-09		
LTC123300...		OWN LOG.	STANDARD	BLUE	2019-12-09	Sales Order	1052
LTC123300...				BLUE	2019-12-09	Sales Order	1052
LTC123300...	Saved			BLUE	2019-12-09	Sales Order	1052
LTC123300...		DHLFREIGHT	PAKET	BLUE	2019-12-09	Sales Order	1053
LTC123300...		DHLFREIGHT	PAKET	BLUE	2019-12-09	Sales Ship...	10205
LTC123300...	Prepared	OWN LOG.	STANDARD	BLUE	2019-12-10	Transfer Or...	1013
LTC123300...	Prepared	OWN LOG.	STANDARD	BLUE	2019-12-10		
LTC123300...	Prepared	OWN LOG.	STANDARD	BLUE	2019-12-10	Sales Order	1057
LTC123301...	Prepared	OWN LOG.	STANDARD	BLUE	2019-12-10		
LTC123301...	Prepared	OWN LOG.	STANDARD	BLUE	2019-12-10		
LTC123301...	Prepared	OWN LOG.	STANDARD	PICK	2019-12-22	Sales Order	1064

Details Attachments (0)

Totals

Packages	1	Weight	1	Volume	0
Load Meters	0	Pallet Places	0	Item Lines	1
Services	3	Linked Source Documents	0	Consolidated Consignments	0
Error Messages	0				

Statistics

TRACKING

Status Booking Status Tracking No. Consolidated With No. Failed



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

The screenshot shows the Dynamics 365 Business Central interface. At the top, the header reads "Dynamics 365 Business Central". Below this, the user is logged in as "LogTrade Technology AB". A search bar is open, displaying "Consignment Worksheet". The search results are categorized under "On current page (Shipping and Receiving - Order-by-Order)". The results include a link to "Consignment Worksheet" with a description: "Process multiple consignments at the same time for status change, printing and booking." Below this, there are sections for "Go to Pages and Tasks" and "Go to Reports and Analysis". The "Go to Pages and Tasks" section shows a link to "Consignment Worksheet" under the "Tasks" category. The "Go to Reports and Analysis" section shows a link to "Released Consignment Worksheet" under the "Archive" category. The background of the screenshot shows a dashboard with various metrics: "RELEASED SA... UNTIL TODAY" (9), "POSTED SALE... TODAY -" (0), "EXPECTED PU... UNTIL TODAY" (0), "POSTED PURC... TODAY -" (0), "INVENTORY PL... TODAY" (4), "INVENTORY P... UNTIL TODAY" (0), "OPEN PHYS. L... ORDERS" (0), and "CONSIGNMEN... TODAY" (17). There is also a "MY USER TASKS" section showing "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.



Dynamics 365 Business Central

CONSIGNMENT WORKSHEET

Status: Prepared
To Shipment Date: 2019-12-22
Shipping Agent: OWN LOG.

Shipping Agent Service Code:
Location Code:
Manage: Get status from LogTrade, Change Status, Print, Book, Navigate, Fewer options

No. 1	Tracking No.	Status	Shipping Agent Code	Shipping Agent Service Code	Delivery Name	Delivery City
LTC12330081	6605662946	Prepared	OWN LOG.	STANDARD	The Cannon Grou...	Birmingham
LTC12330082	6605664215	Prepared	OWN LOG.	STANDARD	Green Warehouse	Liverpool
LTC12330083	6605664462	Prepared	OWN LOG.	STANDARD	The Cannon Grou...	Birmingham
LTC12330084	6605664926	Prepared	OWN LOG.	STANDARD	Sjæboden	Oslo
LTC12330094	6606005905	Prepared	OWN LOG.	STANDARD	Green Warehouse	Liverpool
LTC12330095	6606007976	Prepared	OWN LOG.	STANDARD	The Cannon Grou...	Birmingham
LTC12330096						
LTC12330103						
LTC12330104						
LTC12330114						

Details Attachments (6)

Totals	Packages	Weight	Volume
	1	9,09	0
	0	0	2

Dynamics 365 Business Central

CONSIGNMENT WORKSHEET

Status: Prepared
To Shipment Date: 2019-12-22
Shipping Agent: OWN LOG.

Shipping Agent Service Code:
Location Code:
Manage: Get status from LogTrade, Change Status, Print, Book, Navigate, Fewer options

No. 1	Tracking No.	Status	Shipping Agent Code	Shipping Agent Service Code	Delivery Name	Delivery City
LTC12330081	6605662946	Prepared	OWN LOG.	STANDARD	The Cannon Grou...	Birmingham
LTC12330082	6605664215	Prepared	OWN LOG.	STANDARD	Green Warehouse	Liverpool
LTC12330083	6605664462	Prepared	OWN LOG.	STANDARD	The Cannon Grou...	Birmingham
LTC12330084	6605664926	Prepared	OWN LOG.	STANDARD	Sjæboden	Oslo
LTC12330094	6606005905	Prepared	OWN LOG.	STANDARD	Green Warehouse	Liverpool
LTC12330095	6606007976	Prepared	OWN LOG.	STANDARD	The Cannon Grou...	Birmingham
LTC12330096	6606011002	Prepared	OWN LOG.	STANDARD	Marsholm Karmstol	Halmstad
LTC12330103	6606057609	Prepared	OWN LOG.	STANDARD	Marsholm Karmstol	Halmstad
LTC12330104	6606058953	Prepared	OWN LOG.	STANDARD	Marsholm Karmstol	Halmstad
LTC12330114	6609408528	Prepared	OWN LOG.	STANDARD	The Cannon Grou...	Birmingham

Action: Save, Prepare, Release, Archive

Yes No

Details Attachments (6)

Totals	Packages	Weight	Volume
	1	9,09	0
	0	0	2

Load Meters	Pallet Places	Item Lines
0	0	0

Services	Linked Source Documents	Consolidated Consignments
0	0	0

Error Messages: 0

Statistics





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:	CRONUS International Ltd.	Phone: 0666-666-6666		
Customer code: 345678		Postal code: W2 8HG		
		City: London		
Shipment number	Consignee name	Sender reference	Number of packages	
Phone	Address	Recipient reference	Weight	
Fax	Postal address	Paying customer number	Volume	
			Loading meters	
6565439756	The Cannon Group PLC	1002	1	
	192 Market Square		1000,0 kg	
	B27 4KT Birmingham GB	345678		
373400306482803032				
6565440119	New Concepts Furniture	101018	1	
	705 West Peachtree Street		10,0 kg	
	GA 31772 Atlanta US	345678		
373400306482805401				
6565440135	Selangorian Ltd.	104007	2	
	153 Thomas Drive		46,0 kg	
	CV6 1GY Coventry GB	345678		
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				
LogTrade, version 19.3a.10 - Copyright© 2007-2019, LogTrade Technology AB.				

