



USER GUIDE

SALES ORDER DELIVERY

VALIDATION RULES

LogTrade Connect for Microsoft Dynamics 365 Business Central





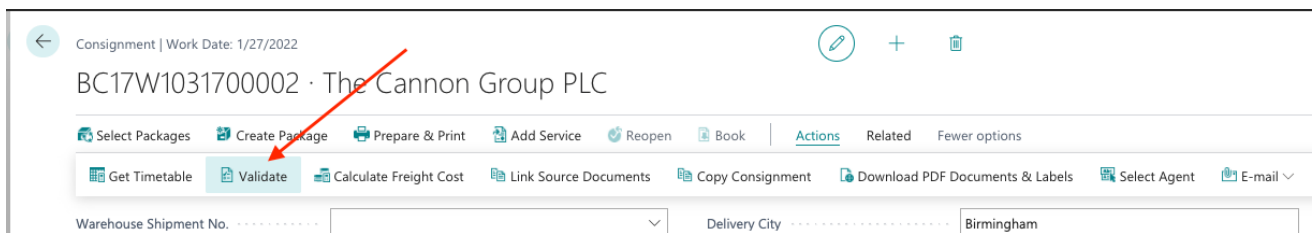
1 GENERAL

There can be multiple reason why you would like to check if data on a sales order is correct before it is handed over to the warehouse. One reason could be to make sure zip code is correct, that the weight of the items isn't too heavy based on what carrier product and service that should be used, that mobile phone number exists if advice should be used and so on.

2 PROCESS

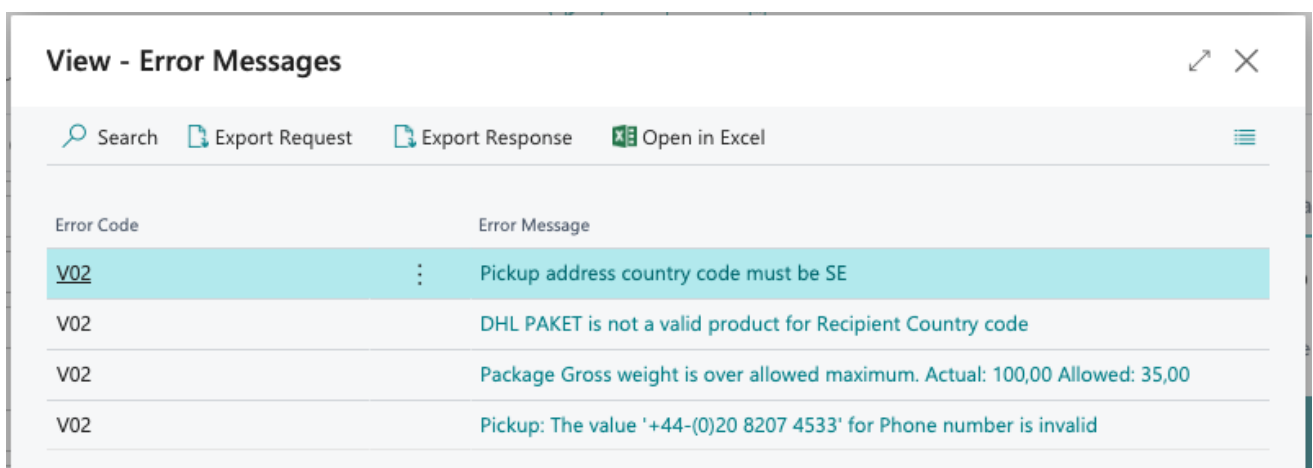
2.1 MANUAL CONSIGNMENT VALIDATION

When creating a consignment, it is possible to do a manual validation. Just push Actions / Validate. There is no actual need for this since a validation is always done when clicking for example *Prepare & print*. But if you for any reason want to do a pre-validation without creating the shipment this is the way to do it.



2.1.1 EXAMPLE OF ERROR MESSAGE

If the validation results in an error and you have manually pushed the button *Validate Delivery* a pop-up window will open showing exactly what is wrong based on the settings. See example below. The error is not shown or saved if this process is running in the background as a job queue.





2.2 SALES ORDER DELIVERY VALIDATION RULES

Validation can be done manually or automatically when the sales order is released. For example, it is recommended to have the automatic control running for e-commerce.

Every time a validation is done the order will be marked as *Failed* or *Approved*. If the validation is done manually with the command *Validate Delivery* as shown in screenshot below a confirmation message will appear if approved. If the validation could not be approved, you will instead see the error message in a pop-up window.

The screenshot shows the Dynamics 365 Business Central interface for a sales order. The header includes 'Dynamics 365 Business Central' and 'Sales Order | Work Date: 1/27/2022'. The main title is '1002 · The Cannon Group PLC'. Below the title is a navigation bar with tabs: Process, Release, Posting, Prepare, Order, Request Approval, Print/Send, Navigate, Actions, Related, and Fewer options. The 'Actions' tab is active, showing a dropdown menu with options: Functions, Plan, Request Approval, Warehouse, Posting, Print, Order Confirmation, and Delivery. The 'Delivery' dropdown is open, showing options: Calculate Freight Cost, Validate Delivery (highlighted), Create Consignment, and Create & Print Consignment. A red arrow points to the 'Validate Delivery' option.

2.2.1 VALIDATION RESULT

The validation result is shown in the field *Delivery Validation Status*, see example in screenshot below. This result is shown both if the validation is done on release or if it is done manually.

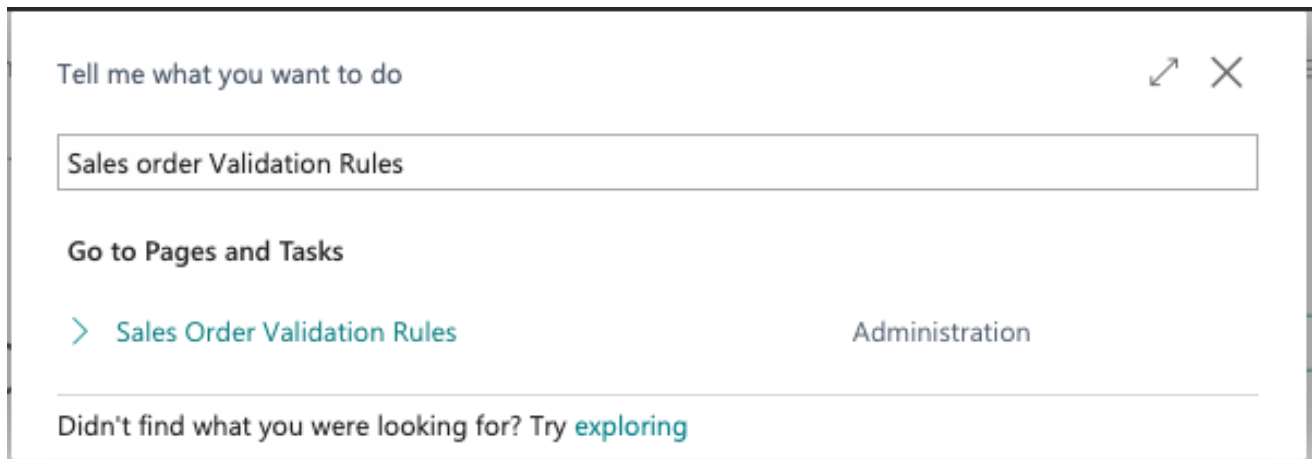
The screenshot shows the 'Delivery' section in Dynamics 365 Business Central. The section is titled 'Delivery' and has a 'Show more' link. It contains several fields for delivery details, arranged in two columns. The 'Delivery Validation Status' field is highlighted in grey and shows the value 'Approved'. A red arrow points to this field.

Delivery		Show more	
No. of Packages		Sender Customer No.	
Package Type Code		Recipient Customer No.	
Weight		Goods Type	
Volume		Note of Goods	
Load Meters		Terms of Delivery Code	
No. of Pallet Places		Terms of Delivery Location	
Freight Payer		Delivery Validation Status	Approved



3 SALES ORDER VALIDATION RULES

For sales order it is needed to setup rules to trigger the validation. Search for *Sales Order Validation Rules* to open the setup page.



To be able to validate an order it is important that the consignment created in the background has all values filled in such as *No. of Packages*, *Weight* etc. This can be done either by specifying default values or by using calculated values based on item weights etc.

It is also possible to define whether a validation should be done automatically when a sales order is released or not, see screenshot below. If an order will fail in validation, it will not be released. For that reason, it could be good to think about a “workaround” the salesperson is not capable of registering correct parameters to get the order validated. For example, if all rules use both shipping agent and shipping agent service the user can erase the value in shipping agent service on the order before releasing. This will not trigger a validation since all rules would demand that the shipping agent service is used. But remember that this is only a way of pushing the problem further to the warehouse.

User ID ↑	Shipping Agent Code ↑	Shipping Agent Service Code ↑	Location Code ↑	Validate On Release	No. of Packages	Weight	Volume	Load Meters
	DHL	HOMEDEL		<input checked="" type="checkbox"/>	1	1		
	BUDBEE	PRELIMINAR		<input checked="" type="checkbox"/>	1	50		
→	SCHENKER	SYSTEM		<input type="checkbox"/>	1	200	0.4	

3.1 DEFAULT VALUES

By specifying default values in the validation rules page these values will be used unless values can be calculated based on settings for the specific shipping agent service. When running validation rules you always need to have a *Default Package Type* specified for each shipping agent service you will use.





The screenshot below shows three examples of validation rules that will apply under specific circumstances.

Line 1 = This will apply for all shipping agents and products unless specified on other lines. The validation will be done automatically when the order is released with 1 package and 1 kg as gross weight.

Line 2 = If the shipping agent is DHL and the service is HOMEDEL validation will be done automatically when the order is released with 1 package and 50 kg as gross weight.

Line 3 = If the shipping agent is SCHENKER and the service is SYSTEM validation will NOT be done automatically when the order. Validation can only be triggered manually by pushing *Validate Delivery*. The validation will then be for 1 package, 200 kg as gross weight and 0,4 m³ as volume.

User ID †	Shipping Agent Code †	Shipping Agent Service Code †	Location Code †	Validate On Release	No. of Packages	Weight	Volume	Load Meters
				<input checked="" type="checkbox"/>	1	1		
	DHL	HOMEDEL		<input checked="" type="checkbox"/>	1	50		
→	SCHENKER	SYSTEM		<input type="checkbox"/>	1	200	0.4	

3.2 CALCULATED VALUES

If your base data on items and package types is up to date you can instead use these calculated values when validating. Below you see three example lines.

Line 1 = If the shipping agent is DHL and the service is PAKET validation will be done automatically when the order is released. *No. of Packages*, *Weight* etc. will be calculated automatically based on setup for DHL PAKET as Shipping Agent Service, see screenshot 2 below. Package Type will be BOX, No. of Packages will be 1 and both weight and volume will be calculated automatically based on item specifications.

Line 2 = If the shipping agent is BUDBEE and the service is PRELIMINAR validation will be done automatically when the order is released. *No. of Packages*, *Weight* etc. will be calculated automatically based on setup for BUDBEE PRELIMINAR as Shipping Agent Service in the same way as the example of DHL PAKET above.

Line 3 = If the shipping agent is SCHENKER and the service is SYSTEM validation will be done automatically when the order is released. *Weight* etc. will be calculated automatically based on setup for SCHENKER SYSTEM as Shipping Agent Service but *No. of Packages* and *Load Meters* will use default values as stated in line 3 example.

User ID †	Shipping Agent Code †	Shipping Agent Service Code †	Location Code †	Validate On Release	No. of Packages	Weight	Volume	Load Meters
	DHL	PAKET		<input checked="" type="checkbox"/>				
	BUDBEE	PRELIMINAR		<input checked="" type="checkbox"/>				
→	SCHENKER	SYSTEM		<input checked="" type="checkbox"/>	1			0.4



Package

Default Package Type...	<input type="text" value="BOX"/>	Split Package Nos. as ...	<input type="checkbox"/>
Create Consignment L...	<input checked="" type="checkbox"/>	Calculate Weight	<input type="text" value="Yes"/>
Default No. of Packag...	<input type="text" value="1"/>	Calculate Volume	<input type="text" value="Yes"/>

Examples of automatic values for DHL PAKET

3.3 EXAMPLE OF SIMPLE SETUP WITH CALCULATED VALUES

If your items are up to date with weight etc. you can use an extremely simple setup. This can be very useful for e-commerce workflows for example. The screenshot shows the simple setup specifying that all orders should be validated with automatically calculated *No. of Packages*, *Weight* etc.

User ID †	Shipping Agent Code †	Shipping Agent Service Code †	Location Code †	Validate On Release	No. of Packages	Weight	Volume	Load Meters
->				<input checked="" type="checkbox"/>				