



User Documentation Dynamics 365 for Finance and Operations





This document describes

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Version Management

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1. Introduction

The Carriers and Empties equipment is mainly used for the administration of the Carriers and Empties equipment balances.

This is applicable on the following levels.

- Customers,
- Vendors,
- Freight companies and
- Warehouses / Sites

The extensions can be seen in the following areas of Dynamics 365 for Operations,

- Sales orders
- Purchase orders
- Transfer order
- Shipments
- Route planning (separate module).

The bundling equipment information can be requested from various reports (packing list, invoice) or via balance enquiries (masks). Various correcting possibilities of the bundling units are also available.

2. Settings / Parameters

The setups for the Carriers and Empties equipment (logistic units) are made in product information management module.

Navigation: Product information management \rightarrow Setup \rightarrow Carriers and Empties equipment \rightarrow Carriers and Empties equipment group or \rightarrow Carriers and Empties equipment.

2.1 Carriers and Empties equipment group

Carriers and Empties equipment group is used for group-based assignment of released products to logistic units. When creating a new record in the *Carriers and Empties equipment group* the label for the Carriers and Empties equipment group as well as the description are individually definable.

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The assignment to a Carriers and Empties equipment group must be configured in the released product under the *Engineer* fast tab:

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2.2 Carriers and Empties equipment

In the Carriers and Empties equipment logistic units can be created and an assignment to a released product performed. When a logistic unit is in the inventory and/or should be billable, an assignment to a product is required. From this form, one click on the button Configure logistic units lets you switch to the mask Carriers and Empties equipment configuration.

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Note: The table was enhanced with the field No inventory journal. Which means that for nonbillable inventory items, no inventory journal transaction is created.

2.3 Carriers and Empties equipment configuration

In this you can centrally define an assignment and a validity for every single area of the Carriers and Empties equipment management:

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	Logistic unit	Account number	relation type	Valid for	Account number	Item code	Item relation	Expiration	Invoiceable
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1) Account relation type

- Customer
- Vendor
- Transport (Vendor)
- Warehouse
- Site

- 2) The assignment (Table / Group / All) to the account numbers / account groups is defined in the columns Valid for and Account number.
- 3) Assignments per Item, Carriers and Empties equipment group or for all items can be configured in the columns Item code and Item relation.
- 4) The expiration of the validity of the assignment is defined in the Expiration column.
- 5) If in the column Billable the checkbox is activated (only possible with Account relation type Customer), sales order lines are generated for the logistic units which can be billed.
- 6) Units:
 - Inventory unit (for Customer, Vendor, Warehouse, Site, Freight company (Vendor))
 - Sales unit (for Customer, Freight company (Vendor))
 - Purchase unit (for Vendor, Freight company (Vendor))
 - Packing unit (for Customer, Vendor, Freight company (Vendor))
- 7) The number of logistic units per 'Multiple quantity' of the selected unit to be generated on the basic record (for instance sales order line), is defined in the column Quantity logistic unit.
- 8) The button View lets you display on the one hand Current assignments only and on the other hand all assignments and the expiration periods can be edited.

Note: The checkbox 'No Inventory journal' is checked when the empty equipment / cases are sold. This is to avoid double time issue of the item for the same sales order. (one through Carriers and Empties transaction & other one through sales order).

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	Table	D0008	Never		 ✓ 		1.00 Inventory unit				1.0	

2.4 Settings for Carriers and Empties equipment journals

- 1) Navigate to Inventory management > Setup > Inventory and warehouse management parameters [Journals]
- 2) Select the journal type in the field 'Inventory journal for Carriers and Empties equipment', which will subsequently determine the number sequence for the Carriers and Empties equipment journal.

	Dynamics 365	Operations	Inventory management >	ameters U	SMF	Q	-	:	۲	?	S.		
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	Inventory a	nd warehou	use managemen	t parameters									
	General	^	Select journal names	for inventory									
			Movement	Counting	Item arrival	Batch merge	1 I						
	Journals		Mov ~	ICnt 🗸	WArr 🗸	~							
	Bills of materials		Inventory adjustment	BOM V	Production input	Ownership change	1						
	Bills of materials		Transfer	Tag counting	Catch weight journal	Inventory journal for bundle a]						
	Locations			ITag ~	Catch weight journal	KCS BLE	na ioadin.						
	Locations							J					
	Inventory accounti	ng											
	Transport												
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	Inventory dimensio	ons											
	Product compliance	~											

3. Sales sequence

3.1 Creation of Carriers and Empties equipment transactions

- 1) The setups made in the previous section are mandatory to create Carriers and Empties transactions.
- 2) Carriers and Empties equipment transactions can be created for those customers and for those items, that are selected in 'Configure logistic unit' form of the Carriers and Empties equipment created.
- 3) The Carriers and Empties transactions along with the sales order lines for billable logistic units are generated in the sales order header after clicking on the button *Release order* based on the sales order lines.

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	✓ T Variant number	ltem number	Product name	5	Sales category		CW qui	antity CW unit		Qu	antity	Unit		D,
		M0001	Wiring Harness							20	00.00	ea		^

4) The corresponding transactions can be seen under General tab >Carriers and Empties equipment transactions:

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	Click the edit butto	n to make changes.											×
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	0.5LEW		Sales order	000791	Customer	US-007	Open	~

Note: The logistic unit (Carriers and Empties equipment) is considered as billable if the 'Invoiceable' checkbox is checked while configuring the logistic unit in 'Configure logistic unit' form.

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	stic unit	Account number relation type	1	Valid for	Account number	Item code	Item relation	Expiration		Invoiceable	Ν
	Container 🗸 🗸	Customer	\sim /	All 🗸	~	Table 🗸	D0008 ~	Never		✓	^

Since the logistic unit (Carriers and Empties equipment) is invoiceable, when the 'Release sales order' is performed, a sales order line gets created for Carriers and Empties equipment as well.

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	avanade	

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	Service order	Cancel	Payments	From all	Totals	Order cr		Notes	Email n	otification log							
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	000833 Sales orde + Add line	r lines		Remove				Inventory N Sales category	✓ Produ-		✓ Upd: CW quantity	ate line ∨			Unit	Open (0
	OOO833 Sales orde + Add line ✓ T Var	r lines + Add lines	Add products	Remove	Sales order Product nam		S		✓ Produ			ate line ∨		Ise V			

3.2 Posting of Carriers and Empties equipment

1) When posting a packing slip and an invoice, the Carriers and Empties equipment open transactions are initialized in the posting dialog (Tab *Carriers and Empties equipment*).

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▼	000828							~
		Bundle and loading eq						^
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	+ Add line							
	✓ T Vi							
								~
						ОК	Cancel	Batch

- 2) These quantities change automatically, when the posting basis (Field *Quantity*) or the quantity of the initial sales order line is changed in the posting dialog.
- 3) Posting the packing slip will change the status of the Carriers and Empties transactions to 'Delivered', posting the invoice will change the status to 'Sold' or 'Purchased'.
- 4) For inventory, posting the packing slip causes an automatic posting of an inventory adjustment, which corrects the inventory.
- 5) Depending on the setup in the accounts receivable master, posting a packing slip or an invoice will either print various information on the Carriers and Empties equipment receipts or execute a balance update (Checkbox *Print balance on invoice*)¹:

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7	US-007 : Desert V	Vholesales	NV					
	Invoice template PSAProjInvoice.Report	Delivery terms FOB	Tax exempt number		E AND LOADING EQUIPMENT			
	FULFILLMENT RATE	Mode of delivery 20	Prices include sales tax		ansactions on invoice			
	0.00	Delivery reason	Packing duty license num	ber Print ba	alance on invoice			÷
	Transportation BILL OF LADING							^ 、

6) The references to the packing slip number, invoice number and to the inventory adjustment journal are collected in the Carriers and Empties equipment transaction:

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7	000828 : DESERT WHOLESALES Bundle and loadin & Filter	g equipment transac	ctions								
	Receipt status	Quantity Description	Invoiceable	Packing slip	Invoice	Journal		License p	olate		Corre
		-2.00		SPK-00001984		00166					~
				L							

3.3 Carriers and Empties equipment transactions enquiries

The generated transactions in the Carriers and Empties equipment can be checked in the form 'Carriers and Empties equipment transactions', accessible by clicking the Carriers and Empties equipment transactions button under General in the ribbon:

	Dynamics 365	Operat	ions									USMF	Q	Ð	0	3	?	s
=	🖉 Edit + New	🗊 Delete	SALES ORDER	SELL	MANAGE	PICK AND PACK	INVOICE	RETAIL	GENERAL	WAREHOUS	TRAN	SPORTATION	م ،		٥))		
	SET UP Print management Summary	CUSTOMER Trade agreeme Activities 〜 Cases 〜	Send ca		MAINTAII Suppleme	1 entary sales items	RELATED INFO Related orders Postings Line quantity	Purchas Commit	e order tted costs d sales agreeme	Bundle	and loading and loading	ING EQUIPMEN equipment tra equipment co equipment sta	insactions rrection	ion				
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V					ent tran		Reference I	D	Account	t number relatio	n type	Account	number		lssue sta	tus		

Additionally, billable logistic units are displayed as sales order lines.

Transactions can also be displayed in the sales order regarding a specific sales order line by clicking the *Sales order line* button:

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	Click the edit butt	on to make changes.		Attachments Notes							~ ×
	(i) Operation comple			RETURN ORDERS							~2 ×
V	000828 :	Desert Wh	olesales	Return order lines				Lines H	leader	I	Delivered
=	Address 123 Purple Roa	d	Simulate delivery Confirmed ship da	DISPLAY Dimensions							^
	Boulder City, N USA	V 89005	Confirmed receipt	VIEW Broker commissions Line events	0						
	Sales order li	nes		Bundle and loading equipment transactions	~						
	+ Add line 🕂	Add lines Add p	roducts 📋 Remove	Sales order line 🗡 🛛 Financials 🌱	Inventory 🗸	Product and supply `	✓ Update line ✓	Wareho	ouse 🗸		
	✓ T Variant	number I	tem number	Product name	Sales category		CW quantity CW unit		Quantity	Unit	D
			M0001	Wiring Harness					2.00	ea	<u> </u>

3.4 Carriers and Empties equipment transactions – Returns / Corrections

Returns or corrections of Carriers and Empties equipment transactions can be performed in the form *Carriers and Empties equipment correction*, in a sales order with the button *Carriers and Empties equipment correction* in the ribbon under *General*:

	Dynamics 365	Operations								USM	م ۽	₽.	٢	3	?	S.
	🖉 Edit 🛛 🕂 New	🗊 Delete SALES	ORDER SELL	MANAGE	PICK AND PACK	INVOICE	RETAIL	ENERAL WA	REHOUSE	TRANSPORTATIC	N A		٥	0	С С	3 ×
	SET UP Print management Summary	CUSTOMER Trade agreements ∨ Activities ∨ Cases ∨	Contact details Send catalog Customer service	MAINTAIN Supplemen	tary sales items	RELATED INFOR Related orders Postings Line quantity	Purchase or Committed		Bundle an Bundle an	ND LOADING EQUIPM d loading equipment t d loading equipment o d loading equipment s	ransactions]				~
	Click the edit but	on to make changes.													~	×
7	SALES ORDER DETA 000828 : Address	Ls Desert Whc	lesales Simulate deli	very dates		K	_				Lines	Heade	er		Deli	vered
	🖉 Edit 🛛 + Ne	ew 🗊 Delete 🛛 Cor	rect OPTIONS	Q									0	Û	Ö	c'>
	Click the edit	outton to make changes.														>
Y	Bundle	wholesales and loading	equipme	ent corr	ection											
	。 P Filter															
	Logistic unit	Issue statu	5	Receipt status	c	Quantity new	Quantity pos	t Original quan	tity Account	t number relation type	8	Account r	number		Refe	erence type
	0.5LEW	Delivered						-2	.00 Custor	ner		US-007			Sale	es order

To record a return or a correction for an existing logistic unit, enter under each logistic unit in the field *Quantity new* the actual delivered quantity (correction) or the delivered quantity minus the returned quantity (return). In the field, '*Quantity post'* the difference between the initial quantity and the Quantity new will be recalculated.

The button 'Correct' generates the return and correction transactions.

3.5 Automatic quantity adjustments

The quantities in the Carriers and Empties equipment transactions are automatically updated when 'Deliver remainder' quantity is changed or cancelled based on the modified quantity in the initial sales order.

3.6 Customer-based balance and transaction enquiries

The balances for customer-based Carriers and Empties equipment can be checked in the form *Carriers and Empties equipment balance*, via the button *Carriers and Empties equipment balance* located under *General* in the ribbon: Form *Carriers and Empties equipment balance*:

	Dynam	nics 365	Operations	Accounts receivable	> Orders > All	sales orders					USMF	Q	Ē	٢	۲	?		s.
=	🖉 Edit	+ New	Delete CUSTOMI	er sell invoice	COLLECT PROJ	ECTS SERVICE	MARKET	RETAIL	ENERAL	OPTIONS	Q			٥	0	Ö	പ	×
	NEW Case	ACTIVITI Activities		SET UP Business classification Responsibilities Intercompany	Print management Scripts	STATISTICS Financial Item statistics	Bundle and	D LOADING EQU loading equipm loading equipm	ent transac	-								>
	Click t	he edit button	to make changes.															\times
7	US-		esert Whole	esales	K		_											स
	🖉 Edit	+ New 1	Delete OPTIONS	م										đ	0	Ö	c 	×
	Click th	e edit button	to make changes.															×
7				uipment bala	ance													
	Logistic	unit	Account number re	elation type Acc	ount number	Bundle and loadir	ng equip	Quantit	у									
	0.5LEW		Customer	US-	007	Open		-7.00	0									~
	0.5LEW		Customer	US	007	Delivered		-2.00	D									
	1LEW		Customer	US-	007	Open		-5.00	D									
	Emptyc	ases	Customer	US-	007	Open		-1.00	0									

Likewise, customer-based Carriers and Empties equipment transactions can be checked in the form *Carriers and Empties equipment transactions*, via the button *Carriers and Empties equipment transactions* located under *General* in the ribbon:

	Dynamics	s 365 🛛 O	perations	Accounts receivab	le 🕻 Orders	> All sales	orders					USMF	Q	ē	٢	۲	?	s.
=	🖉 Edit 🛛 🕂	New 🗎 De	elete CUSTOME	r sell invoici	COLLECT	PROJECTS	SERVICE	MARKET	RETAIL	GENERAL	OPTIONS	Q			٥	0	ບ ⊔	3 ×
	NEW Case	ACTIVITIES Activities \checkmark	ACCOUNTS Prospect Cases Transaction log	SET UP Business classification Responsibilities Intercompany	n Print manage Scripts	ement Fin	ATISTICS ancial m statistics	Bundle and I	D LOADING EC	ment transac								~
	Click the e	dit button to ma	ke changes.															\times
V	US-00		ert Wholes	sales		,												ास
=	🖉 Edit +	New 🗎 De	lete OPTIONS	Q											٥	0	5 5	1 ×
	Click the e	dit button to mai	ke changes.															\times
7	Bundl	ert wholesale e and Ic		uipment tra	Insactior	าร												
	Logistic unit		Date	Reference ty	pe	Ret	ference ID	۵	Account numb	er relation ty	pe 🍸 🚽	Account num	ber	Ŀ	ssue statu	IS		Rece
	0.5LEW			Sales orde	r	00	0791	c	Customer			US-007		C	Open			~
	1LEW			Sales orde	r	00	0792	c	Customer			US-007		C	Open			
	Emptycase	25		Sales orde	r	00	0799	c	Customer			US-007		C	Open			
	Emptycase	25	6/12/2017	Sales orde	r	00	0800	c	Customer			US-007		0	Delivered	ł		

4. Transfer order sequence

Carriers and Empties equipment transactions, based on preferences, can be generated either at site or warehouse-level.

The setup is done in the form Carriers and Empties *equipment configuration*, in the field Account relation type (Site or Warehouse).

	Dynamics 365	Operations	Product inform	ation manag ゝ Setu 🔉	 Bundle and loading equip 	> Bundle and l	oading equipment	USMF 🔎) È	\odot	٢	?	S.
=	🖉 Edit 🛛 🕂 New	🗊 Delete 🛛 Configui	re logistic unit OF	PTIONS P						٥	Û	<u>ව</u> ප	×
	Click the edit button	to make changes.											\times
7	₽ Filter		1	and loading e	quipment							1	
		^	General					transfer ca	ses Transfe	er cases f	for beer	T0001	^
	1 Lt Beer 1Lt beer bottle		Logistic unit transfer case		Description Transfer cases for bee	r	Item number						
	TET DEET DOTAE		transfer case.		mansier cases for bee		On stock						
	1LEW						Yes						
	1 Litre soft drink		\checkmark										
=	🖉 Edit 🛛 🕂 New	🗊 Delete View 🗸	OPTIONS 🔎							0	٥	0 5	×
	Click the edit button	to make changes.											\times
7	transfer cases : tra Bundle and		quipment o	configuration									
	₽ Filter												
	Logistic unit	Account number	relation type	Valid for	Account number	ltem code	Item relatio	'n	Expiration			Invoice	eable
	transfer cases	Site		All		Group	0.5 Lt		Never				~

4.1 Creation of Carriers and Empties equipment transactions

The creation of Carriers and Empties equipment transactions on the transfer orders occurs within the homonymic mask via the button *Release order* based on the transfer order lines:

	Dynamics 365	Operations	Inventory management > Inbo	und orders > Transfer ord	er	USMF 🔎	₽ © ©	? s.
≡	🖉 Edit 🛛 + New	Delete OPTION	م s				ា ខ) Ľ X
	Click the edit button	to make changes.						×
7	000010:6/14/2017 Bundle and P Filter	d loading eo	quipment transactior	าร				
	Logistic unit	Date	Reference type 🍸	Reference ID	Account number relation type	Account number	Issue status	Rece
	transfer cases		Transfer order	000010	Site	51	Open	^
	transfer cases		Transfer order	000010	Site	51	Open	

4.2 Posting of Carriers and Empties equipment

The posting of Carriers and Empties equipment occurs with the sequence step 'Ship transfer order'. In the posting dialog, a separate *Carriers and Empties equipment* tab is displayed:

=	Dynamics	Shipment						?
	OPERATIONS Release to ware! Generate picking	Late selection						
	Generate picking	OVERVIEW GENERAL Printer setup Display dimensions						^
	Click the edi	SHIPMENT Trackin	g ID	OPTIONS	Print transfe	er shipment		
		Update		Explode lines	No			
7	Filter	All V Worker		No	Print produc	ct labels		
U	> Filter	Posting date	\sim	Autoreceive	No			
	✓ Transfei	9/4/2017		No	Print shelf la	abels		~
	000001							
	000002	LINES GENERAL DIMENSIONS BUT	IDLE AND LOADING EQUIPME	NT				
	000003	✓ Logistic unit Qu	ntity Issue status	Receipt status	Packing slip			^
	000004	transfer cases	1.00 Open					
	00000!							
	✓ 00000€							
	00000							
	000008							\checkmark
	00000							\vee
	00001					ОК	Batch	Cancel

After posting, the selected Carriers and Empties equipment transactions status switch to either 'Sold' or 'Purchased'. For inventory logistic units, an inventory adjustment journal is booked. Quantities, if needed, can be changed in the tab *Carriers and Empties equipment*.

4.3 Carriers and Empties equipment transactions inquiries

The generated transactions can be inquired for the entire transfer order or regarding single lines via the button 'Carriers and Empties transactions'.

	Dynamics 365	Operations	Inventory man	agement >	Inbound or	ders 冫 Transfer order		USM	F ,O	Ē (9	٢	?	S.
≡	🖉 Edit 🛛 🕂 New	Delete TRANSP	ER ORDER SHIP	RECEIVE	OPTIONS	م				l	1	0 C		×
	Transfer overview	VIEW Transfer order history Bundle and loading equip Bundle and loading equip	ment correction B	lelease order lundle and load	ling equipment	status correction								^
	Click the edit buttor	n to make changes.												\times
7	transfer orders Transfer o	rder: 00000	6						Lines	Header			Cre	ated
=	Transfer order	r header								1	1 1	3 Crei	ated	^ ^
	OVERVIEW		From warehouse			Ship date	STATUS							
	Transfer number		11			6/13/2017	Transfer status							
	000006		To warehouse			Receipt date	Created							
			13			6/13/2017								
	Transfer order	rlines												
	+ Add ++ Add	products 📋 Remove	Work details	Charges	Deliver rema	ainder Inventory 🗸	Bundle and loading equipment tr	ansactions						
	✓ Item number	Transfer	quantity CW transfe	er qty Ship dat	te	Receipt date	Product name	Rese	rve items	Packing qu	antity			
	P0001		10.00	7/14/2	017	7/14/2017	AcousticFoamPanel							^

	Dynamics 365 Operations	Inventory management	> Inbound or	ders 💙 Transfer order		USMF 🔎	P O		? s.
≡	🖉 Edit 🛛 🕂 New 🗂 Delete 🛛 TRANS	GFER ORDER SHIP RECEIV	e options	Q			đ	00	d X
	PRINT VIEW Transfer overview Transfer order history Bundle and loading equi Bundle and loading equi		er loading equipment	status correction					>
	Click the edit button to make changes.								×
Y	transfer orders Transfer order: 00000	06				Lines	Header		Created
=	Transfer order header						11	13 Create	ed ^ 🔨
	OVERVIEW	From warehouse		Ship date	STATUS				
	Transfer number	11		6/13/2017	Transfer status				
	000006	To warehouse		Receipt date	Created				
		13		6/13/2017					
	Transfer order lines								
	+ Add + Add products 📋 Remov	e Work details Charges	Deliver rem	ainder Inventory 🗸	Bundle and loading equipment trans	actions			
	✓ Item number Transfe	r quantity CW transfer qty Ship	date	Receipt date	Product name	Reserve items	Packing quanti	ty	
	P0001	10.00 7/1	4/2017	7/14/2017	AcousticFoamPanel				^
									~

4.4 Carriers and Empties equipment transactions – Returns / Corrections

Here corrections can be made similarly to the sales order module (refer in that respect to point 3.4):

	Dynamics 365 Operations	Inventory management	> Inbound orders	> Transfer order		USMF	Q	F 0	e '	?	5.
=	🖉 Edit 🛛 🕂 New 📋 Delete 🛛 TRANSF	ER ORDER SHIP RECEIVE	OPTIONS	C				٥	0		×
	PRINT VIEW Transfer overview Transfer order history Bundle and loading equip Bundle and loading equip		vading equipment statu	us correction							~
	Click the edit button to make changes.										\times
7	transfer orders Transfer order: 00000	6					Lines H	leader		Create	ed
=	Transfer order header							11	13 Create	d ^	^
	OVERVIEW	From warehouse	Sł	hip date	STATUS						
	Transfer number	11	6	6/13/2017	Transfer state	15					
	p00006	To warehouse	Re	eceipt date	Created						
		13	6	6/13/2017							
	Transfer order lines										
	+ Add 🔸 Add products 📋 Remove	Work details Charges	Deliver remaind	ler Inventory 🗸	Bundle and loading equipmen	t transactions					
	✓ Item number Transfer (quantity CW transfer qty Ship	date	Receipt date	Product name	Reserve	items	Packing quantit	У		
	P0001	10.00 7/14	/2017	7/14/2017	AcousticFoamPanel					~	
											~

4.5 Warehouse-based / site-based balance and transaction enquiries

At warehouse / site level, Carriers and Empties equipment balances can be checked in the form *Carriers and Empties* equipment balance.

Navigate to Inventory management \rightarrow SETUP \rightarrow Inventory breakdown \rightarrow Warehouses or Sites (*Carriers and Empties equipment balance*, warehouse-level example)

	Dynamics 365	Operations Warehou	se management 💙 Set	up > Warehouse > Warehouses		USMF	Q	4	٢	۵	?		S.
=	🖉 Edit 🛛 🕂 New 👔	Delete WAREHOUSE OPTIC	ons ,o						J	0	Ö		
₽	MAINTAIN Copy locations Update warehouse levels Location Wizard	SET UP VIEW Transport days Inventory aisles External codes Inventory locat		equipment transactions equipment balance									立
	Site 1 - Raw Materials 12 Site 1- WIP	Genera		Quarantine warehouse	REFERENCE	÷						^	
=	🖉 Edit + New 🏾 🏛	j Delete OPTIONS 🔎							٥	0	U	C°	×
	Click the edit button to	make changes.											×
8	Bundle and	loading equipmer	nt balance										
	, P Filter												
	Logistic unit	Account number relation type	Account number	Bundle and loading equip	Quantity								
	transfer cases	Warehouse	11	Open	12.00								\sim
	transfer cases	Warehouse	11	Sold/purchased	1.00								

Likewise, Carriers and Empties equipment transactions at warehouse or site level can be checked in the form *Carriers* and *Empties equipment transactions*.

	Dynamics 365	Operations	Warehouse management > Setup	> Warehouse > Ware	houses	USMF 🔎	ē 😳 🔅	? s.
≡	🖉 Edit 🛛 🕂 New 👘	Delete WAREHOUS	e options ,0				0	O L X
₽	MAINTAIN Copy locations Update warehouse levels Location Wizard		w entory aisles entory locations Bundle and loading equ					
	Site 1 - Raw Materials 12 Site 1- WIP		No Print BOL beforeenfirming shipment	Financial negative inve No	ntory Consolidate s No	ipment at release to w		¤-
	Click the edit button	Delete OPTIONS	Q				1	× ⊐ Ŭ ×
Y	11 : SITE 1 - RAW MATE	RIALS	ipment transactions					
	Logistic unit	Date	Reference type	Reference ID	Account number relation type ∇	Account number	lssue status	Rece
	transfer cases		Transfer order	000003	Warehouse	11	Open	^
	transfer cases		Transfer order	000005	Warehouse	11	Open	
	transfer cases		Transfer order	000006	Warehouse	11	Open	
	transfer cases	6/14/2017	Transfer order	000007	Warehouse	11	Sold	

5. Purchase sequence

Carriers and Empties equipment transactions run at vendor-level.

	Dynamics 365	Operations	Product inf	ormation manag ゝ Setu 🎗	 Bundle and loading ed 	quij 🔰 Bundle and	loading equipment US	MF ,O	₽ ©	۲	?	S.
=	🖉 Edit 🛛 🕂 New	🗊 Delete 🛛 Config	ure logistic unit	OPTIONS ,					۵	0	Ū (
	Click the edit button	to make changes.										×
7	₽ Filter		Bundle	e and loading e	quipment							
	0.5 LT		General					0.5 LT 0	.5 Lts water bottle	purchas	e D000	04 ^
	0.5 Lts water bottle purch	lase	Logistic uni 0.5 LT		Description 0.5 Lts water bottle	nurshaaa	Item number D0004					
	0.5I FW	K	0.5 LI		0.5 Lts water bottle	purchase	00004					
≡	🖉 Edit 🛛 🕂 New	🗊 Delete 🛛 View 🗸		م					٥	١	Ö	⊐ ×
	Click the edit button	to make changes.										×
V	0.5 LT : 0.5 LTS WATER Bundle and		quipmen	t configuration								
	P Filter											
	Logistic unit	Account numb	er relation type	Valid for	Account number	Item code	Item relation		Expiration		Invo	iceable
	0.5 LT	Vendor		All		Table	M0001		Never			~
	Empty cases		/									

5.1 Creation of Carriers and Empties equipment transactions

Transactions for Carriers and Empties equipment are generated with the button *Release order*, based on the purchase order lines:

	Dynamics 365 Operations Accounts payable > Vendors > All vendors USMF P P @	• ?	S.
	🗟 Save 🕂 New 🖻 Delete 🛛 PURCHASE ORDER PURCHASE MANAGE RECEIVE INVOICE RETAIL WAREHOUSE TRANSPORTATION 🔎 🛛 … 🐧	្រា ្	×
	NEWMAINTAINCOPYVIEWFrom a sales orderRequest changeFrom allTotalsCancelFrom journalRelease orderFrom journal		^
7	PURCHASE ORDER 000000079 : 1001 - Acme Office Supplies Lines Header Open order	Approve	ed ң
=	Purchase order header		\sim
	Purchase order lines		
	+ Add line 🕂 Add lines 🛛 Add products 📋 Remove 🛛 Purchase order line 🗸 🛛 Financials 🗸 Inventory 🗸 Product and supply 🌱 Update line 🛩 Work details		
	✓ T Budget check re Line number Item number Product name Product name Site	Wareh	lous
	✓ M0005 ✓ Enclosure ✓ 1	× 11	~
			~
	<	>	
	Line details		\sim

	Dynamics 365	Dperations Accou	unts payable > Vendors > All ve	endors		USMF 🔎 関	☺ ☺ ?	S.
=	☐ Save + New 💼	Delete OPTIONS 🔎					1))]	×
7	00000079 : ACME OFFICE SU Bundle and lo ア Filter		nent transactions					
	Logistic unit	Date	Reference type 🍸	Reference ID	Account number relation type	Account number	Issue status	Rece
	0.5 LT		Purchase order	00000079	Vendor	1001		c,

5.2 Posting of Carriers and Empties equipment

When posting a product receipt, Carriers and Empties equipment transactions are automatically initialized in the posting dialog (Tab *Carriers and Empties equipment*). The quantities change automatically as per the posting basis (Field *Quantity*) or the quantity post of the basis purchase order line.



::: =	Dynamics	Posting pro	duct receipt						7
	GENERATE		Purchase order	Name	Product receipt	Product receipt dat	e Document date	Terms of payment	^
	Receipts list Product receipt Intercompany pi	eipt	0000079	Acme Office Supplies	2345	9/6/2017			~ ^
₽ =	Operation c PURCHASE OR OOOOOO(Purchase Purchase	5							Ŷ
	+ Add line	Lines							~
	Product name	Details							^
	Enclosure	GENERAL PURC	CHASES FIXED ASSETS	BUNDLE AND LOADING EQ	UIPMENT				
		✓ Logistic unit	Quantity	Issue status	Receipt status	Packing slip			
		0.5 LT	3.00		Open				~
									~
	<						ОК	Cancel	Batch

5.3 Carriers and Empties equipment transactions – Display / Corrections

The generated transactions can be viewed for the entire purchase order or regarding specific purchase order lines:

	Dynamics 365	Operatio	NS Accoun	ts payable 💙 V	/endors >	All vendors						USM	م ج	-	0	٢	?	S.
≡	🖫 Save 🛛 🕂 New	Delete P	URCHASE ORDER	PURCHASE	MANAGE	RECEIVE	INVOICE	RETAIL	WAREHOU	ISE TRA	NSPORTAT	ion 🔎)		0	0	വ്	×
	SET UP Print management Summary	VENDOR Trade agreement Activities ∨	✓ Cases ✓ Contact details	MAINTAIN Supplementar	ry items	RELATED INFOR Related orders Postings Line quantity		purchase orde		se agreemer red to supply	t Bundl	LE AND LOA le and loadir le and loadir le and loadir	ng equipmo ng equipmo	ent transac ent correct	ion			
																		$^{\sim}$
	i Operation comple	ted																×
7	PURCHASE ORDER) : 1001 - ,	Acme Offi	ce Suppli	es				Lines	Heade	r	Open	order			Con	firme	ed 💽
=	Purchase ord	ler header															`	~
	Purchase ord	er lines																
	+ Add line 4	Add lines Add	products 📋 Re	move Purchas	se order line	e 🗸 🛛 Finan	cials \checkmark	Inventory	V Prod	uct and su	pply 🗸	Update lir	ne 🗸	Work det	tails			
	Product name		Procurement catego	ry	Variant nur	mber	Site		Wa	rehouse		CW	quantity	CW unit		Q	uantity	Ur
	Enclosure						~ 1		× 11		\sim						3.00	~

Display at purchase order line level:

	Dynamics 365	Operatio	ons A	Accounts pay	BOM I	ines		^						USM	م =	È	\odot	\$?	S.
=	🗟 Save 🛛 + New	🗊 Delete	PURCHASE O	RDER PU		JLATE ementary items			RETAIL WA	AREHO	USE	TRANSP	ORTATI	on 🔎)		J.	0	0 5	3 ×
	SET UP Print management Summary	VENDOR Trade agreement Activities \checkmark	t∨ Cases ∖ Contact	✓ s	u ATTA Attach	CHMENTS ments		ļ	purchase orders ed costs		ase agre wed to s		Bundle Bundle	e and loadin and loadin and loadin and loadin	ng equipi ng equipi	ment transa ment correc	ction	n		
	(i) Operation complet	ed			DISPL	AY														~ ×
7	PURCHASE ORDER	: 1001 -	Acme (Office	Dimer S RETAI					Line	s He	ader		Open	order			(Confirm	ned 📧
=	Purchase ord	er header			Create	lines from package														\sim
	Purchase ord	er lines			Bundle	and loading equipme	nt transaction	s ~	•											
	+ Add line +	Add lines Ad	dd products	📋 Remove	Purc	nase order line 🗸	Financials	\sim	Inventory V	Pro	duct an	nd supply	\sim	Update lii	ne 🗸	Work d	etails			
	Product name		Procurement	t category		Variant number	5	Site		Wa	arehouse	e		CW	quantity	CW unit			Quantity	y Ur
	Enclosure						\sim	1		~ 11			\sim						3.00	0 🔨

Here corrections can be made similarly to the sales order module (please also refer to point 3.4) or the transfer orders.

5.4 Vendor-based balance and transaction enquiries

Carriers and Empties equipment balances can be checked at vendor level in the form *Carriers and Empties equipment balance*, accessed through the accounts payable master with the button *Carriers and Empties equipment balance*, located under *General* in the ribbon:

Carriers and Empties equipment balance:

	Dynamics 365	Operations Accounts	payable > Vendors >	All vendors			USMF 🔎 📮	٢	۵	?	S.
=	🖉 Edit 🛛 + New	Delete VENDOR PROCURE	MENT INVOICE GENE					0	0	0	3 ×
	Resp	JP ness classifications Print management onsibilities Categories company	NEW ACCOUNTS Create case Cases Prospect	Transaction log Knowledge articles	MARKET Campaign Call list Mailings	STATISTICS Period statistics Prospect	BUNDLE AND LOADING EQUIPMENT Bundle and loading equipment transactions Bundle and loading equipment balance				^
	Click the edit butto	n to make changes.									×
7	all vendors 1001 : Acn	ne Office Supplies				K					€
=		Delete OPTIONS						J	0	Ö	r x
	Click the edit butto	on to make changes.									×
7	1001 : ACME OFFICE Bundle ar P Filter	supplies nd loading equipme	nt balance								
	Logistic unit	Account number relation type	Account number	Bundle and loading	g equip	Quantity					
	0.5 LT	Vendor	1001	Open		32.00					~
	0.5 LT	Vendor	1001	Sold/purchased		1.00					
	0.5LEW	Vendor	1001	Delivered		3.00					
	Teet1	Vandaa	1001	Delivered		1.00					

Likewise in the accounts payable master, transactions at vendor level can be checked in the form *Carriers and Empties equipment transactions*, accessible via the button *Carriers and Empties equipment transactions* under *General* in the ribbon:

	Dynamics 365	Operations Acco	ounts payable 💙 Ve	endors > All vendors		USMF 🔎 🖫	•	٢	? s.
≡	🖉 Edit 🛛 🕂 New 👔] Delete VENDOR PROG	CUREMENT INVOIC	CE GENERAL OPTIONS	م		đ	0	с х
	ACTIVITIES SET UP Activities V Business Respons Intercon	2	NEW Create case	ACCOUNTS Cases Transaction log Prospect Knowledge articles	MARKET STATISTICS Campaign Period statistics Call list Prospect Mailings	BUNDLE AND LOADING EQUIPMENT Bundle and loading equipment transaction Bundle and loading equipment balance	ins		^
	Click the edit button to	o make changes.							×
7	all vendors 1001 : Acmé	e Office Supplies	S		/				E
=	General						40	Not Active	^ ^
≡	🖉 Edit 🛛 + New 🧻	Delete OPTIONS 🔎					đ	0 O	ч×
	Click the edit button to	o make changes.							×
Y	1001 : ACME OFFICE SUF Bundle and	l loading equipr	ment transa	ctions					
	₽ Filter								
	Logistic unit	Date	Reference type	Reference ID	Account number relati	on type 🗸 Account number	lssue st	atus	Rece
	0.5 LT		Purchase order	00000052	Vendor	1001			C^
	0.5 LT		Purchase order	00000054	Vendor	1001			С
	05IT		Purchase order	0000055	Vendor	1001			0

6. Route planning sequence

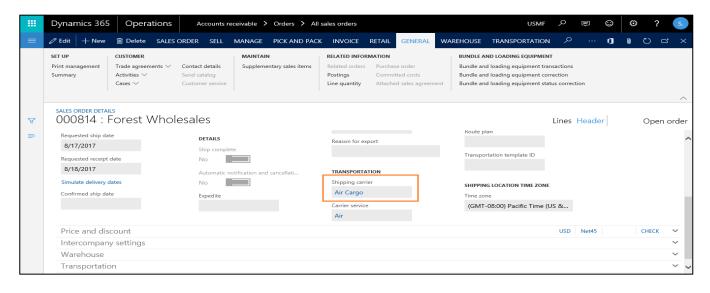
Carriers and Empties equipment transactions run at vendor level. The freight company – which must be assigned to a vendor – must be indicated in the shipment. The Carriers and Empties equipment transactions are generated once the tour is activated.

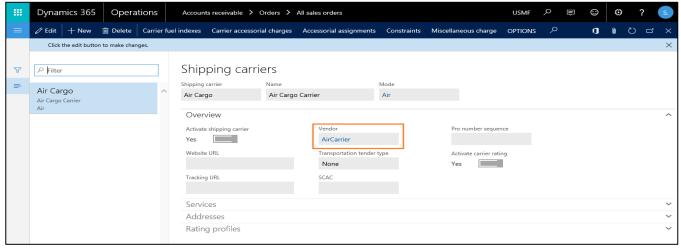
	Dynamics 365	Operations	Product infor	mation manag	Setu > Bundle and	d loading equi	> Bundle and loadi	ng equipment	USMF	¢ ا	٢	٢	?	S.
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	Logistic unit	Account number	relation type	Valid for	Account nu	ımber	Item code	Item relation		Expiration			Invo	iceable
	Emptycases	Freight compar	ny (Vendor)	All			Table	L0001		Never				~

The freight company reference field defines that the freight vendor reference is given at which point of the Sales order cycle. There are two points defined for freight company reference, namely Sales Order & Load.

 a) If the reference selected is 'Sales order' while Carriers and Empties equipment configuration, then the reference for freight vendor (by selecting shipping carrier) is given in Sales order header during the creation of sales order.

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	Click the edit butto	n to make chang	jes.												X
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	L0001	Ne	ever					1.00	Inventory unit		1.00 Sal	es orde	r		^
											_				'





Transactions for Carriers and Empties equipment for freight vendor are generated with the button *Release order* on sales order.

	Dynamics 365	Operations	Accounts rece	eivable	Orders 冫 All s	ales orders					USMF	Q	The second secon	٢	۲	?	S.
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7	sales order detail 000814:F	orest Whole	esales									Lines	Heade	er		Open	order
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	Logistic unit	Date		nce type 🍸		Reference ID			umber relation typ		Account num	nber		ssue stat	tus		Rece
	1 Lt Beer		Sales	order		000814		Freight o	ompany (Vendo	r)	AirCarrier		(Open			^

The Carriers and Empties transactions for freight vendor can be seen at both sales order level & freight vendor level.

	Dynamics 365	Operations	Accounts payable > V	endors > All vend	lors				USMF	Q	Ē	٢	\$?		s.
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	Click the edit button to	o make changes.													2	\times
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	Logistic unit	Date	Reference type	Re	eference ID	Account n	umber relation	type 🏹	Account num	ber	I	ssue statu	15		F	Rece
	0.5 LT		Purchase order	00	0000050	Vendor			AirCarrier						(~
	1 Lt Beer		Sales order	00	00814	Freight c	ompany (Ver	ndor)	AirCarrier		(Open				

b) If the reference selected is 'Load' while Carriers and Empties equipment configuration, then the reference for freight vendor (by selecting shipping carrier) is given on the Load generated for sales order and posting of which would generate the Carriers and Empties transactions for freight vendor.

	Dynamics 365 $ \smallsetminus $	Operations	Product info	ormation mana $$	Seti ゝ	Bundle and loading equ	> Bundle and load	ing equipment	USMF	Q	41	٢	3	?	S.
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	Item relation	Expiration	Invoi	ceable No inve	entory jo.	WHS integration	Quantity logistic unit	Per Unit		Multiple	e quantity	Freigh	t compan	/ referenc	:e
	1000	Never					1.00	Inventory unit			1.00	Load			^

One more setup needs to be done on Container types form. Assign the Carriers and Empties equipment created in the first step to a container type.

	Dynamics 365 Ope	erations	Warehouse management	> Setup > Co	ontainers 冫 Cont	ainer types	ι	JSMF	Q	ē	\odot	٢	?	S.
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	Click the edit button to make	changes.												×
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	Test1	-												^ ^
	Box-Medium Medium box 1LEW		WEIGHT Tare weight		MAXIMUMS Volume		tribute 1							
	Box-Small		5.00		200.00									
	Small box		Maximum net weight		Length	At	tribute 2							
	PALLET 36X36		50.00		2.00 Width		tribute 3							
	PALLET 36X36		CONTAINER DIMENSIONS		Width 10.00	A	tribute 3							
			Container length		Height	At	tribute 4							
	PALLET 48X48 PALLET 48X48		0.00 Container width		10.00									
	SmallBox		0.00											
	Small box for pack station		Container height											
		\sim	0.00											~

Create a sales order, reserve the quantity by clicking Inventory > Reservation on sales order line.

	Dynamics 365 🗸 Opera	tions Accounts r	receivable > Orders >	All sales orde	MAINTAIN	^	USMF	Q) @	≱?	S.
=		SALES ORDER SELL M		CK INVOICE	Reservation	HOUSE	TRANSPORTATION	0		•	ر) د	z x
		ALES ORDER SELL IN	MANAGE PICK AND PAC		Batch reservation	HOUSE	TRAINSPORTATION	/-	(0 1	· ^ !
	SET UP CUSTOMER		MAINTAIN	RELATED INFO	Marking	3UNDLE AN	ID LOADING EQUIPMEN	т				
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	,	Send catalog		Postings	VIEW		l loading equipment co					
	Cases V	Customer service		Line quantity	On-hand inventory	bundle and	I loading equipment sta	tus correcti	ion			
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	Click the edit button to make change	5.			Transactions							×
	SALES ORDER DETAILS				Consolidated on-hand							
Y	Print management CUSTOMER Print management Trade agreements ~ Activities ~ Cases ~ Click the edit button to make changes Click the edit button to make changes SALES ORDER DETAILS 0000832 : Contoso Ref Address 456 Silver Road Pasadena, CA 91103 USA Sales order lines + Add line Add lines Add lines Add pres	Retail Los Ang	geles		Additional information			Lines	Header		Open	order
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	USA	Confirmed receip	ot date		On-hand							
					Remove link							
	Sales order lines				TRACE	~						-
					TRACE							
	+ Add line + Add lines Ad	ld products 📋 Remove	Sales order line 🗸	Financials 🗸	Inventory V Product an	nd supply 🗸	′ Update line ∨	Wareh	nouse 🗸			
	✓ T Variant number	Item number	Product name	S	ales category	CV	N quantity CW unit		Quan	tity Unit		D,
		Shoe	Shoe						2.	00 pcs		~
												~

Load is generated for a sales order once the work created on performing 'Release to warehouse' step on the sales order is closed.

Assigning the freight vendor on the load, will generate Carriers and Empties transactions which can be seen on Load level, sales order level & freight vendor level.

	Dynamics 365 N	 Operations 	Accounts recei	vable > Orders >	All sales orders		USMF	¢ ا	٢	٢	?	S.
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	Click the edit button t	to make changes.										×
Y	LOAD DETAILS :: 000832 USMF-0000	016 : Outbou	nd							Lines	s Heade	er 🖪
=	Transportation										^	^
	Route		Master bill of lading		Reason for late ship	oping	Tractor number					
	Shipping carrier Air Cargo		Pro number		Transportation stat	us master	Car number					
	Carrier service Air		Inspection seal		Voyage number		Load reference number					l
	Mode Air		House bill		Vessel name		Loader					
	Broker ID		Booking number		Trailer number							~

6.1 Posting of Carriers and Empties equipment

The posting of Carriers and Empties equipment occurs upon sending of the tour. In the process, transaction statuses switch from 'Open' to 'Sold' or 'Purchased'.

Load level:

	Dynamics 365	 Operations 	Accounts receivable > Orders	> All sales orders		USMF ,O	P 🙂	© ? S.
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	ACTIONS Change work location	WORK Reverse work Skip non-mandatory wor	RELATED INFORMATION Wave details Load seal numbers rk Work Load history Posting errors	Containers Container structure	PRINT Pick list Load list report Load details Bundle and loading equ	ipment transactions		^
	Click the edit button	to make changes.						×
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V	USMF-000016: OUTBO Bundle and		uipment transactions	2				
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	Logistic unit	Date	Reference type 🔽	Reference ID	Account number relation type	Account number	Issue sta	tus Rece
	0.5 LT	9/6/2017	Load	USMF-000016	Freight company (Vendor)	AirCarrier	Sold	^
								~

Freight vendor level:

	Dynamics 365	Operations Account	ts payable > Vendors > All	vendors		USMF 🔎 関	0	• ?	S.
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		ss classifications Print management nsibilities Categories		MARU Transaction log Camp Knowledge articles Call li Maili	aign Period statistics st Prospect	BUNDLE AND LOADING EQUIPMENT Bundle and loading equipment transaction Bundle and loading equipment balance	s		^
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=	General					K	40 No	ot Active	^ ^
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	₽ Filter								
	Logistic unit	Date	Reference type	Reference ID	Account number relatio	n type 🍸 🛛 Account number	Issue status		Rece
	0.5 LT		Purchase order	0000050	Vendor	AirCarrier			°~
	1 Lt Beer	:	Sales order	000814	Freight company (Ve	endor) AirCarrier	Open		
	0.5 LT	9/6/2017	Load	USMF-000016	Freight company (Ve	endor) AirCarrier	Sold		

6.2 Carriers and Empties equipment transactions – Display / Corrections

Corrections on the Carriers and Empties transactions are made on the form 'Carriers and Empties transaction correction'.

	Dynamics 365	5 🗸 🛛 Ope	rations	Accoun	ts receivable	> Orders > ,	All sales orders				ι	JSMF 🔎		٢	۲	?	S.
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	Name			Requested sh	ip date		Customer ref	erence			e status						
	Contoso Retail	Los Angeles		9/6/2017						Rele	ased						- 11
	Delivery address			Requested re	ceipt date		Customer rec	quisition		TRAN	SPORTATION						
	Contoso Retail	Los Angeles	+	9/6/2017						Route	s						
	Address			Simulate deli	-		DISCOUNTS										
	456 Silver Road Pasadena, CA S			Confirmed sh	ip date		Total discour	it %									
	USA	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,						0.00									
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Here corrections can be made similarly to the sales order module (please also refer to point 3.4) or the transfer orders.

6.3 Freight company-based balance and transaction enquiries

Since every freight company is assigned to a vendor, Carriers and Empties equipment balance and transactions inquiries can be made at freight company level in the accounts payable master. See point 0.

7. Warehouse management integration (WHS integration)

Warehouse management module can also be integrated during Carriers and Empties equipment configuration. This setup would lead to make use of warehouse management setups and functionalities in Sales sequence & Purchase sequence to generate the Carriers and Empties equipment transactions.

7.1 Sales sequence with WHS integration

1) The WHS integration can be activated just by checking a checkbox on 'Configure logistic unit' form for Customer.

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- 2) Typical deviations from the normal sales sequence procedure are as follows
 - Installation & configuration of 'Dynamics 365 for operations warehousing' mobile app.
 - Generation of 'Work' for the sales order
 - Performing 'Sales picking' from the warehousing mobile app to close the work generated.
 - Posting 'outbound shipment' on the 'load' following which the normal 'packing slip' & 'invoice posting' of the sales order is done.
- 3) The following link would guide in installing & configuring 'Dynamics 365 for operations warehousing' mobile app.

<u>https://docs.microsoft.com/en-us/dynamics365/unified-operations/supply-chain/warehousing/install-configure-</u> warehousing-app

- 4) Once the warehousing mobile app is installed and creation of the mobile app user is done, all the warehouse management setups should be done to get the work & load created for the sales order.
- 5) Refer to the below document for all the required warehouse management setups for Sales sequence (outbound process).



Outbound process using Advanced war

6) Once all the required warehouse management setups are done, assign the logistic unit created in the first step to the container type. (Warehouse management > Setup > Containers > Container types)

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	1LEW		Tare weight 5.00		Volume 200.00	At	tribute 1						
	Box-Small												
	Small box		Maximum net weight		Length	At	tribute 2						

7) Create a sales order and reserve the quantity of the item used in sales order.

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V	sales order 000834 : Contoso F	Retail Los Ange	es		Transactions Consolidated on-hand			Line	es Header			Open o	order
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	✓	Shoe	Shoe							2.00	pcs	\sim	~

8) After the quantity reservation, perform 'Release to warehouse' action under 'Warehouse' tab on the action pane.

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	456 Silver Road Pasadena, CA 91103 USA		Confirmed ship Confirmed rece			DISCOUNTS Total discoun	nt % 0.00												
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	✓ T Variant number	Item nu	mber	Product	name	Sal	les category			CW qu	antity	CW unit		Qu	antity	Unit		Di	
	✓	🗸 Shoe		Shoe											2.00	pcs		~ ^	l

9) The wave gets posted when the 'Release to warehouse' action is performed.

- 888 -	Dynam	ics 365	Opera	ations	Accounts	receivable >	Orders > All s	ales orders				USM	4F ,0	Ð	0	۲	?	s.
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				2.00	pcs	✓ Stock		\sim		0.0	00000 1	~	Test Wave	2	\sim		20.00	1

10) Select the sales order line and click 'Warehouse > Work details' on the above bar.

	Dynar	mics 365	Operations	Accou	ints receivable	> Orde	rs 💙 All sales or	ders		US	MF ,P	Þ	\odot	0	?	
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-	000834 WO															
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	Tra	ansactions	User actions Ci	ustom data	Cancel work		isplay dimensions		Product		Work or	ant it.	Pompining			
	Tra	ansactions			Cancel work	tine D			Product	name	Work qu	uantity 2.00	Remaining	qua 2.00	Unit	

11) Login to Warehousing – mobile app to perform sales picking.

Dynamics 365 for Operations - Warehousing	—	\times
MAIN MENU		Â
Inbound		
Outbound		
Inventory		
Production		
Quality		
Change Warehouse		
About		

12) Click Outbound > Sales picking – System.

Dynamics 365 for Operations - Warehousing	_	\times
OUTBOUND		Â
Sales Picking		
Sales Picking - System		
LP Consolidation		
Sales Loading		
Cluster Pick Create		
Cluster Pick		
Pick to Container		
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13) Enter the Work Id, License plate id of the item and click 'OK' to complete the work.

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	NES GENERAL Transactions U	ser actions Custom c	lata Cancel work line	ation	S	Product name Shoe	Work quantity 2.00		Unit

14) Click on the 'Target License Plate Id' on the Work record to assign container type to the target license plate. Assign the container type that has Carriers and Empties logistic unit selected in the initial steps to the target LP.

	Dynamics 365	Operations	Accounts receivable > Orders	> All sales or	lers		US	MF ,) È	0	۵	?	S.
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	0000000				57772011	_							\sim

- 15) Go to Load form by selecting the sales order line and clicking 'Warehouse > Load details' on the above menu bar.
- 16) Click on 'outbound shipment' button under the tab 'Ship and Receive' on the action pane of the load form to post the outbound shipment and generate the Carriers and Empties transactions.

	Dynamics 365	Operations	Accounts receivable > Or	Orders > All sa	ales orders			USMF	Q	Ð	٢	۵	?	S.
=	🗟 Save 🛛 🕂 New	🗊 Delete LOADS	SHIP AND RECEIVE TRANS	SPORTATION	OPTIONS	Q					đ	0 0) []	5 ×
		Product receipt Packing structure	GENERATE REVERSE Bill of lading Reverse shipment of Packing slip Cancel packing slip: Send ASN Cancel product rece	0S										~
▼	USMF-0000		bund									Lines	Hea	-
	INFORMATION Load ID		Load status Loaded		Load arrival da		Cut off date and time							
	USMF-000017 Invalid		Work status 100.00% of work completed		ETA		Load shipped confirmat	on date an	d time					
	No Load template ID	~	Order number 000834		Required sail d		WEIGHT Actual gross weight							
	Equipment		DATES Scheduled load shipping date an 9/7/2017 07:00:00 AM		Sail UTCdate ti	me	 0.00 Actual tare weight 0.00							
	Load lines			-										~

17) The Carriers and Empties transactions created can be seen on the sales order. The status of the transactions change as and when the packing slip & invoice posting is done.

	Dynamics 365	Operations	Accounts receivable > Orders > A	Il sales orders		USMF 🔎	Þ	٢	۵	? s.
=	☐ Save + New	Delete OPTIONS	م					J	ت ا) Ľ ×
7	000834 : CONTOSO RET. Bundle and		uipment transactions							
	₽ Filter									
	Logistic unit	Date	Reference type 🍸	Reference ID	Account number relation type	Account number		Issue sta	tus	Rece
	1LEW		Sales order	000834	Customer	US-002		Open		^

7.2 Purchase sequence with WHS integration

1) The WHS integration can be activated just by checking a checkbox on 'Configure logistic unit' form for Vendor.

	Dynamics 365	Operations							US	SMF	چ	٢	٢	?	S.
=	🖉 Edit 🛛 🕂 New 🧃	🗊 Delete 🛛 Configur	e logistic unit	OPTIONS	Q							J	0 (5 d	×
	Click the edit button t	o make changes.													\times
Υ	Filter ILt Beer It beer bottle ILEW Customer with WHS intege CC-Container CC Container Emptycases Empty cases Test1 Vendor with WHS integrat transfer cases Transfer cases	ration	Bundle General Logistic uni Test1		oading e	Quipment Description Vendor with Wi	1S integration	ltem numt 1000 On stock Yes	er	Test	Vendor	with WHS in	tegration	1000	<u>^</u>
											0		~	0	
	Dynamics 365	Operations							US	SMF	¢ ₽	: :::::::::::::::::::::::::::::::::::::	٢	?	S.
≡			OPTIONS	Q								J	0 (D d	×
	Click the edit button t	-													×
7	Bundle and	d loading ec	quipmen	t config	guration										
	𝒫 Filter														
	Logistic unit	Account number	relation type	Valid for	r	Account number	ltem code	ŀ	em relation	1	Expirat	ion		Invoicea	ble
	Test1	Vendor		All			All	ŀ	0002		Neve				^

	🖉 Edit 🛛 + New	🗊 Delete 🛛 View 🗸	options ${\cal P}$					0	U I	с х
	Click the edit but	ton to make changes.								×
Y		nd loading equ	ipment config	guration						
	item code	Item relation	Expiration	Invoiceable	No inventory jo WHS integration	n Quantity logistic unit	Per Unit	N	/lultiple quan	tity Freigh
	All	A0002	Never		~	1.00	Inventory unit		1	.00

- 2) This Purchase process with WHS integration is similar as Sales process with WHS integration.
- 3) Assign the logistic unit to container type. (Warehouse management > Setup > Containers > Container types).

	Dynamics 365 Operations	Warehouse management	> Setup > Containers > Cont	ainer types	USMF	, A la	₽ ©	@?s.
=	🖉 Edit 🛛 🕂 New 🛅 Delete OPTIONS	م :					đ	
	Click the edit button to make changes.							×
7	₽ Filter	Container type	es Description	Logistic unit	1			
	Box-Large	Box-Large	Large box	Test1				
	Large box Test1							
	Box-Medium Medium box	WEIGHT	MAXIMUMS		IBUTES			^ ^
	1LEW	Tare weight 5.00	Volume 400.00	Attrib	ute 1			
	Box-Small Small box			Attrib				
	Small box	Maximum net weight 100.00	Length 4.00	Attrib	ute 2			
	PALLET 36X36	100.00	Width	Attrib	uta 3			
	PALLET 36X36	CONTAINER DIMENSIONS	10.00	Attib	ate 5			
	PALLET 48X48	Container length 0.00	Height 10.00	Attrib	ute 4			
	PALLET 48X48	Container width	10.00					
	SmallBox	0.00						
	Small box for pack station	Container height						
	~	0.00						~

4) All the warehouse management setups should be done to create the work for the purchase order to get the Carriers and Empties transactions created. Refer to the below document for all the required warehouse management setups for purchase sequence (Inbound process).



Inbound Process using Advance Ware

- 5) Create a Purchase order and perform 'Release order'.
- 6) Login to warehousing app and select Inbound > Purchase Receive.
- 7) Enter the PO number, and quantity, Item number in Details.

Dynamics 365 for Operations - Warehousing		- 0	\times
PURCHASE RECEIVE	TASK	DETAILS	\equiv
ITEM		1 🗸	
	00	000080, 1	
			>
Dynamics 365 for Operations - Warehousing		- 0	\times
PURCHASE RECEIVE	TASK	DETAILS	=
QTY		A0002 🗸	
1	C	0000080, HDMI	12'
< A0002	pcs >		

- 8) Select the 'Container type' and finish the Purchase receive activity on the mobile app.
- 9) Confirm the Purchase order and post the product receipt to generate the Carriers and Empties equipment transactions.

	Dynamics 365	Operations	Accounts payable > Purchase of	orders > All purchase orders		USMF 🔎 🛙	₹ © \$? s.
=		Delete OPTIONS	Q				0 0 C) Ľ ×
	Click the edit button to	o make changes.						×
7	00000077 : ACME OFFICE Bundle and P Filter		ipment transactior	าร				
	Logistic unit	Date	Reference type 🍸	Reference ID	Account number relation type	Account number	Issue status	Rece
	Test1	8/17/2017	Purchase order	0000077	Vendor	1001		D

Note: To get the 'Container type' field displayed in the mobile app during purchase receive. Navigate to Warehouse management module > Setup> Mobile device > Mobile device menu items.

Select Purchase receive menu item from the list displayed on the left side of the form. Enable the 'Display container type' checkbox.

	Dynamics 365	Operat	ions	Warehouse management	> Setup > Mob	ile device > Mobile devi	ce menu items	USMF	Q,	Ē	٢	۲	?	S.
=	🖉 Edit + New	🗊 Delete	Default dat	ta Work confirmation setu	p Cycle counting						٥	• •	5 C	
	Click the edit buttor	n to make chang	jes.											×
7	P Filter Production pick		^	Mobile device	Title	Mode	Use existing work	k						
	Deside at a set			Purchase Receive	Purchase Receive	Work	No							
	Production put Production put		- 61	General Use default data	0	enerate license plate	Disalari kat	tch disposition code						~
	Production Start			No	Y		No							
	Production Start			Work creation process		ork template	Print label							
	Purchase Put-aw	ay		Purchase order item rec	-	splay disposition code	No	ving with ASN item in	<i>6</i>					
	Purchase Put-away			Yes	N		No	Ving with Asia item in	lionn					
	Purchase Receive	e					Display con Yes	ntainer type						
	QMS create put- Create put-away from Q													
	QMS put-away		~											

7.3 Transfer sequence with WHS integration

1) The WHS integration can be activated just by checking a checkbox on 'Configure logistic unit' form for warehouse/site.

	Dynamics 365	Operations	Product infe	ormation manag > Setu >	Bundle and loading equi	> Bundle and loadin	ng equipment USM	AF 🔎 🛡	©	9?	S.
=	🖉 Edit 🛛 🕂 New 🗊	Delete Configur	e logistic unit	OPTIONS ,P					0	С С	
	Click the edit button to	make changes.									×
7	₽ Filter		Bundle	e and loading e	quipment						
	0.5 LT 0.5 Lts water bottle purchas	ie 🔨	General Logistic unit 0.5LEW		Description 0.5 Litres bottle		em number	0.5LEW	0.5 Litres bo	ttle D0002	^
	0.5LEW þ.5 Litres bottle					Or Ye	n stock				
	1 Lt Beer 1Lt beer bottle	_									
≡	🖉 Edit 🛛 🕂 New 🗊	Delete View 🗸	OPTIONS	Q					0	0 5	×
	Click the edit button to	make changes.									×
7	0.5Lew : 0.5 LITRES BOTT Bundle and		quipmen	t configuration							
	P Filter										
	Logistic unit	Account number	relation type	Valid for	Account number	ltem code	Item relation	Expiratio	n	Invoic	eable
	0.5LEW	Warehouse		All		All	Shoe	Never			^

≡	🖉 Edit 🛛 + New 🗊	Delete View V OP	tions 🔎						0 D	U c	⊐' >	<
	Click the edit button to	make changes.									>	×
7	0.5LEW : 0.5 LITRES BOTTI Bundle and	loading equip	oment config	guration								
	𝒫 Filter											
	Item relation	Expiration	Invoiceable	No inventory jo	WHS integration	Quantity logistic unit	Per Unit	Multiple quantity	Freight com	oany refer	ence	
	Shoe	Never			~	1.00	Inventory unit	1.00				~

- 2) This Transfer process with WHS integration is similar as Sales process with WHS integration.
- 3) Assign the logistic unit to container type. (Warehouse management > Setup > Containers > Container types).

	Dynamics 365 Operations	Warehouse management > Setup >	Containers > Container types	USMF	م :	¢ O	@?s.
=		م ; 2				0) Ü 🗗 🗙
	Click the edit button to make changes.						×
Y	P Filter Box-Large Large box Test1	Container types Container type code Box-Small Small box	Logistic unit 0.5LEW				
	Box-Medium Medium box 1LEW	WEIGHT Tare weight	MAXIMUMS Volume	ATTRIBUTES Attribute 1			^ ^
	Box-Small §mall box 0.5LEW	5.00 Maximum net weight 20.00	100.00 Length 1.00	Attribute 2			
	PALLET 36X36		Width	Attribute 3			

- 4) All the warehouse management setups should be done to create the work for the transfer order to get the Carriers and Empties transactions created.
- 5) Create a Transfer order. (Mark 'Reserve Items' checkbox on the transfer order line)
- 6) Perform 'Release to Warehouse' action to create work.

	Dynamics 365 Operations	Inventory management	> Outbound orders > Transfer	order	USMF 🔎 🛡 😳	©? S.
≡	🗟 Save 🕂 New 🖻 Delete TRAN	SFER ORDER SHIP RECEIV	re options 🔎		0	। N R R ×
	OPERATIONS Release to warehouse Picking list registration Generate picking list Ship transfer order	VIEW Picking list Load de Shipment details Bill of la				^
Y	transfer orders Transfer order: 00003	31			Lines Header	Created
=	Transfer order header				Test_Wave	40 Created
	OVERVIEW	From warehouse	Ship date	STATUS		
	Transfer number	Test_Wave	9/13/2017	Transfer status		
	000031	To warehouse	Receipt date	Created		
		40	9/13/2017			
	Transfer order lines					
	+ Add + Add products 📋 Remov	e Work details Charges	Deliver remainder Inventory	 Bundle and loading equipment 	transactions	
	✓ Item number Transfer	quantity CW transfer qty Ship	date Receipt date	Product name	Reserve items Packing quant	ity
	✓ Shoe	1.00 9/1-	4/2017 🖾 9/14/2017	🖾 Shoe	✓ 1.	

000031 : SHOE Work 2 Show closed ✓ Work priority Locked by Work ID ↑ ♡ Work status Site Warehouse Work pool ID Target license plat \$0 USMF-000040 Open 1 Test_Wave ✓ ✓ Target license plat \$0 USMF-000040 Open 1 Test_Wave ✓ ✓ ✓ USMF-000040 Open 1 Test_Wave ✓ ✓ ✓ USMF-000040 Open 1 Test_Wave ✓ ✓ ✓ ✓ USMF-000040 Open 1 Test_Wave ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓	🖫 Save	WORK SHIPMENT	RELATED INFORM	ATION OPTIONS	Q				0	Ö
OVERVIEW GENERAL ✓ Work priority Locked by Work ID ↑ \$\Triangleter Work status Site Warehouse Work pool ID Target license plan \$50 USMF-000040 Open 1 Test_Wave ✓ ✓ Transactions Custom data Cancel work line Display dimensions ✓ Work status Work type Location Item number Product name Work quantity Remaining qua Unit										
✓ Work priority Locked by Work ID ↑ ♡ Work status Site Warehouse Work pool ID Target license plant	S	how closed								
jo USMF-000040 Open 1 Test_Wave Image: Control of the state of the	OVE	GENERAL								
 LINES GENERAL Transactions User actions Custom data Cancel work line Display dimensions ✓ Work status Work type Location Item number Product name Work quantity Remaining qua Unit	~	Work priority Locked b	y N	Work ID ↑ 🍸	Work status	Site	Warehouse	Work pool ID	Target lic	ense plat
Interview of the second secon		50		JSMF-000040	Open	1	Test_Wave		\sim	
Open Pick Shoe Shoe 1.00 1.00 pcs	т			Cancel work line	Display dimensions					
	т	ransactions User action					Product name	Work quantity	Remaining qua	

- 7) Login to warehousing app and select Inbound > Transfer picking.
- 8) Enter the Work ID, Location, License Plate ID and complete the transfer picking to close the work created.

Dynamics 365 for Operations - Warehousing		– 🗆 X
TRANSFER PICKING	TASK	DETAILS ≡
ID		Scan a Work Id / Li
USMF-000040		
		>

9) Once the work is closed, click on the 'Target License Plate ID' to provide the container type to which the Logistic unit has been assigned in the previous steps.

	Dynamics 365	Operations	Inventory management > O	utbound orders $ ightarrow$	Transfer order	USMF	Q	☺	3	?	S.
=	☐ Save + New [Delete On-hand li	ist Transactions OPTIONS	م				1	0 () d	×
Y	License plat	tes									
	License plate $\uparrow \nabla$	Parent license plate	Container type	License plate le	Aging date						
	456		Box-Small	~ 0	9/14/2017						~

10) Preform 'Confirm Shipment' action by clicking the button on the work details form action pane.

	WORK SHIPMENT	RELATED INFORMATION OF					a i	
E Save	WORK SHIPMENT	RELATED INFORMATION OF	TIONS 72				Ű	
SHIPME	NT							
Confirm	shipment							
		Work status	123-			larget license plate ID	Work order type	
	Work ID T Y				Vork pool ID			
	USMF-000040	Closed	1	Test_Wave	~	456	Transfer issue	
<								>
LIN	ES GENERAL							
	GENERAL							
	ransactions User action	s Custom data Cancel we	ork line Display dimensio	205				
		Work type	Location	ltem number	Product name	Work	quantity Remaining qua	Unit
т	Work status		Floor1					
т	Work status	D1 1		Shoe	Shoe		1.00 0	.00 pcs
т	Work status Closed	Pick	110011					.00 pcs

11) Close the work form, open 'Carriers and Empties transactions' form on the transfer order.

	Dynamics 365	Operations	der	USMF 🔎	₽ © ₿ ?	S.		
	☐ Save + New	Delete OPTIONS	م				1 0	ц х
7	000031 : 9/13/2017 Bundle and P Filter	l loading equ	ipment transactions	S				
	Logistic unit	Date	Reference type 🍸	Reference ID	Account number relation type	Account number	Issue status	Rece
	0.5LEW	9/14/2017	Transfer order	000031	Warehouse	Test_Wave	Sold	_
	0.5LEW		Transfer order	000031	Warehouse	40		С

12) Perform Transfer receive by clicking 'Receive' button on the action pane under 'Receive' tab.

8. Correction journals

To rectify balances, it is possible to create and post correction journals.

Thus, Carriers and Empties equipment transactions with a receipt or issue status 'Correction' are created.

Navigate to Product information management \rightarrow Periodic \rightarrow Carriers and Empties equipment \rightarrow Carriers and Empties equipment journal.



Dynamics 365	Operations A	Accounts payable > Vendors > All vendo	rs	USMF 🔎 🗐 😳	?
Cost management Credit and collections Demo data Expense management Fixed assets Fileet management General ledger Human resources	roduct ze riant model	Released products Released products by category Released product variants Product configuration models Bills of materials and formulas Bills of materials Formulas	All released products with no active cost All released products to configure Inquiries and reports Bill of materials lines Bill of materials where-used Calculation details for cost and price	Product relationship types Product nomenclature Bills of materials and formulas Dimension and variant groups Categories and attributes Product compliance	
Inventory management Master planning Organization administration Payroll Product information management Production control	adiness for anufacturing adiness for inufacturing	 Cases All cases My cases Open cases Open cases My overdue cases Cases assigned to me 	 Periodic tasks Open product releases Report as finished Costing versions Recalculate BOM levels Bills of materials and formulas Product conversions 	Product compliance Bundle and loading equipment Bundle and loading equipment Bundle and loading equipment correction journal	
Project management and accounting Questionnaire Retail and commerce Sales and marketing Service management	t masters	Cases assigned to my queues Lean manufacturing Lean schedule groups Kanban rules Circulating cards	Froduct conversions Cost conversions Populate distinct product table Setup Product information management		
System administration Tax	~ <	▲ Costing	parameters		> 3

8.1 Journal header

On the journal header, the 'Account relation type' and the corresponding 'Account number' can be defined. The journal lines inherit those settings.

	Dynamics 365	Operations	Product information m > Bundle an	d loading 🤅 🔪 Bundle a	nd loading equipm	ent correction journal	USMF 🔎 🛡	٢	۵	?	s.
≡	🖉 Edit 🛛 🕂 New	Delete ACTION	IPANETAB OPTIONS 🔎					ŋ	0 (U C	×
	Click the edit buttor	to make changes.									×
7		d loading e	quipment correction jou	urnal				Shc			
	₽ Filter							AI	<u> </u>		~
	Journal ↑ D	escription	Account number relation type	Account number	Posted	Posted by	Date/time posted				
	5435		Customer	US-003	~	s.c.karanam	8/29/2017 10:03:0	4 AM			
	fdsafdsa		Vendor	1001	V	AVA1	8/31/2017 08:58:1	0 AM			

A click on the button Lines opens the mask Carriers and Empties equipment journal lines.

8.2 Journal lines

In this form, receipts can be created with positive amounts, and issues with negative amounts.

	Dynamics 365	Operations F	Product information m	Bundle and loading (> Bundle an	d loading equipment correction	on journal USMF	,¢ Ę	•	۲	?	S.
=		Delete ACTIONPANE	TAB OPTIONS 🔎					đ	• •	5 B	
	Click the edit button to make changes.										
7	5435 : YES Bundle and loading equipment journal lines										
	Date	Line n	umber Logistic unit	Account number relation type	Account number	Quantity De	escription		ble		
	8/29/2017	1.000000	00000 0.5 LT	Customer	US-002	2.00					~

Clicking the button *Post* generates the Carriers and Empties equipment transactions with a receipt or issue status 'Correction'.

9. Permissions

- a) Roles & process cycle
- b) Duties, Privileges and Entry points

10. Installation

- a) Licensing
- b) Configuration

In the form, *License configuration* under *Carriers and Empties equipment* it is possible to activate or deactivate every single area (Purchase, Route planning, Transfer orders and Sales).

Navigation: System administration \rightarrow Setup \rightarrow Licensing \rightarrow License configuration

	Dynamics 365	Operations	System administration > S	Setup	> License configuration	USMF	Q	Đ	0	œ	?		S.
=	OPTIONS 🔎								٥		C		
	A This form is read-on	ly unless the system is in	the maintenance mode. Maintenance m	ode ca	in be enabled in this environment by running maintenance job from LCS, or using	Deployment.S	etup too	locally					\times
7	License co	nfiguration											
	CONFIGURATION	KEYS CONFIGURA	ATION KEY GROUPS										
	Administ	ration										~	
	🖻 🗹 Bank												
		nd loading equipmen											
	🗹 Bundle	and loading equipme	ent administration - loads									- 1	
	🗹 Bundle	and loading equipme	ent administration - purch										
	🗹 Bundle	and loading equipme	ent administration - sales										
	🗹 Bundle	and loading equipme	ent administration - shipments										
	🗹 Bundle	and loading equipme	ent administration - transfer orders	5									
	🗹 Case oni	ine request configura	tion key										
	Correspo	ndence											
	Cost acc	ounting											
	Country/	Regional specific feat	tures										
	Currency												
	🔽 Data imp	ort export framework	k										
	Dotoboo	Log										~	1

11. Workspace

Avanade Loading and Empties has a 360 degrees cockpit view of all the operations that can be performed in the workspace area which comes as an advantage to the module and solution.



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