

Avanade Loading Carriers and Empties management

User Documentation

Dynamics 365 for Finance and Operations



This document describes

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Version Management

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Table of Contents

1. Introduction.....	4
2. Settings / Parameters	4
2.1 Carriers and Empties equipment group.....	4
2.2 Carriers and Empties equipment	5
2.3 Carriers and Empties equipment configuration.....	6
2.4 Settings for Carriers and Empties equipment journals	8
3. Sales sequence	9
3.1 Creation of Carriers and Empties equipment transactions	9
3.2 Posting of Carriers and Empties equipment	11
3.3 Carriers and Empties equipment transactions enquiries	13
3.4 Carriers and Empties equipment transactions – Returns / Corrections.....	14
3.5 Automatic quantity adjustments	15
3.6 Customer-based balance and transaction enquiries	15
4. Transfer order sequence.....	16
4.1 Creation of Carriers and Empties equipment transactions.....	17
4.2 Posting of Carriers and Empties equipment.....	17
4.3 Carriers and Empties equipment transactions inquiries	18
4.4 Carriers and Empties equipment transactions – Returns / Corrections.....	19
4.5 Warehouse-based / site-based balance and transaction enquiries.....	19
5. Purchase sequence	20
5.1 Creation of Carriers and Empties equipment transactions.....	21
5.2 Posting of Carriers and Empties equipment.....	21
5.3 Carriers and Empties equipment transactions – Display / Corrections.....	22
5.4 Vendor-based balance and transaction enquiries.....	23
6. Route planning sequence	24

6.1 Posting of Carriers and Empties equipment.....	29
6.2 Carriers and Empties equipment transactions – Display / Corrections.....	30
6.3 Freight company-based balance and transaction enquiries	30
7. Warehouse management integration (WHS integration)	30
7.1 Sales sequence with WHS integration	30
7.2 Purchase sequence with WHS integration	37
7.3 Transfer sequence with WHS integration	40
8. Correction journals	43
8.1 Journal header	44
8.2 Journal lines	44
9. Permissions.....	45
10. Installation	45
11. Workspace.....	454

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.

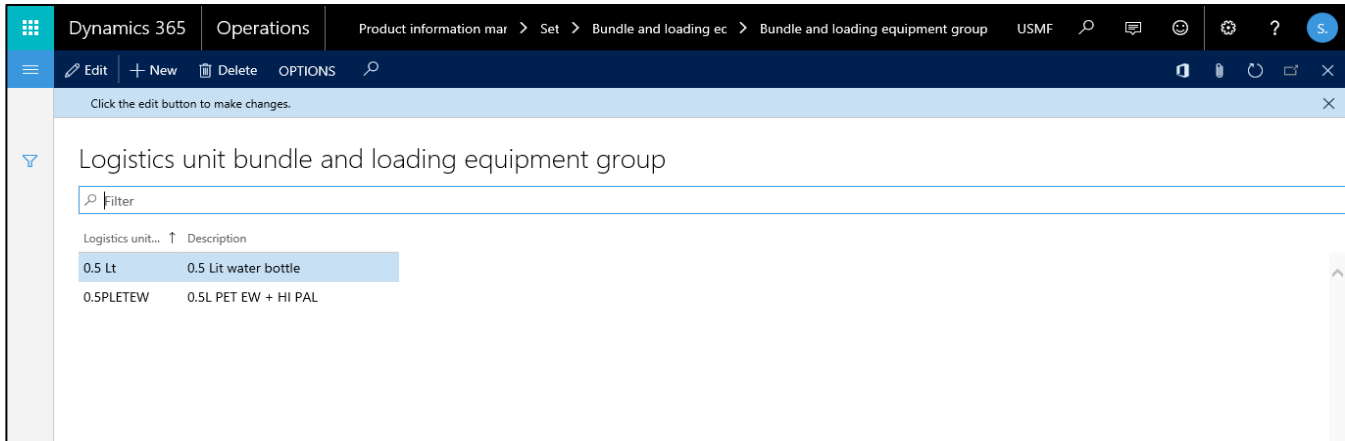
2. Settings / Parameters

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

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

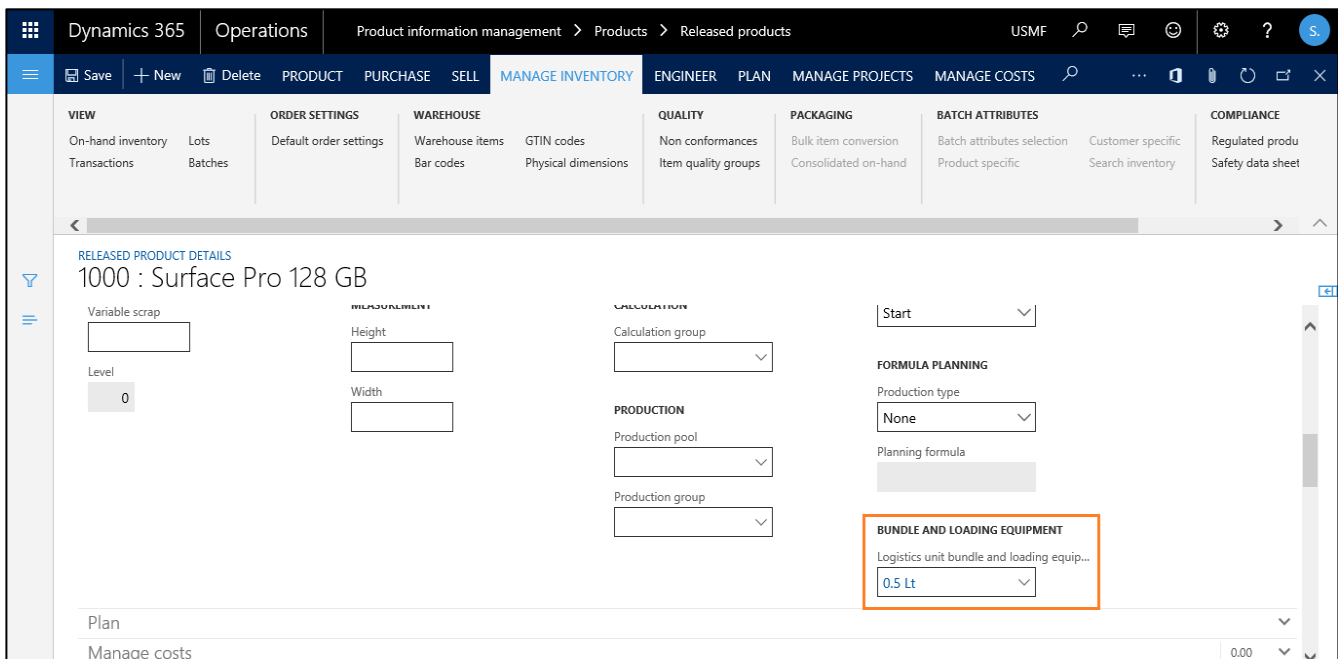
2.1 Carriers and Empties equipment group

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.



Logistics unit...	Description
0.5 Lt	0.5 Lit water bottle
0.5PLETEW	0.5L PET EW + HI PAL

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

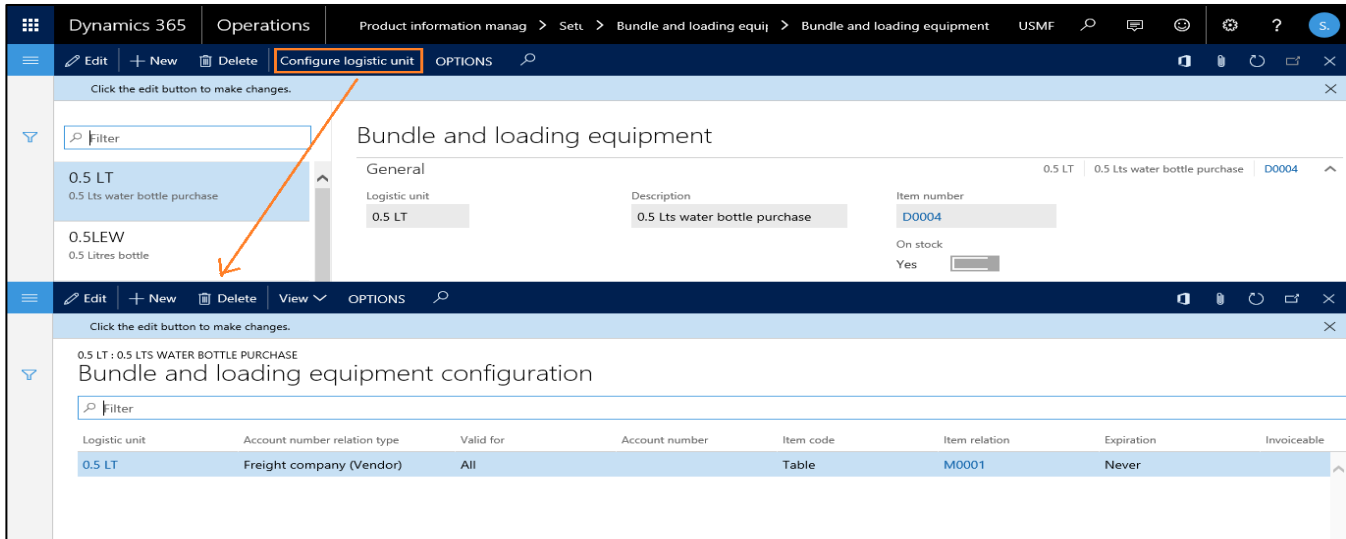


RELEASED PRODUCT DETAILS
1000 : Surface Pro 128 GB

BUNDLE AND LOADING EQUIPMENT
Logistics unit bundle and loading equip...
0.5 Lt

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.



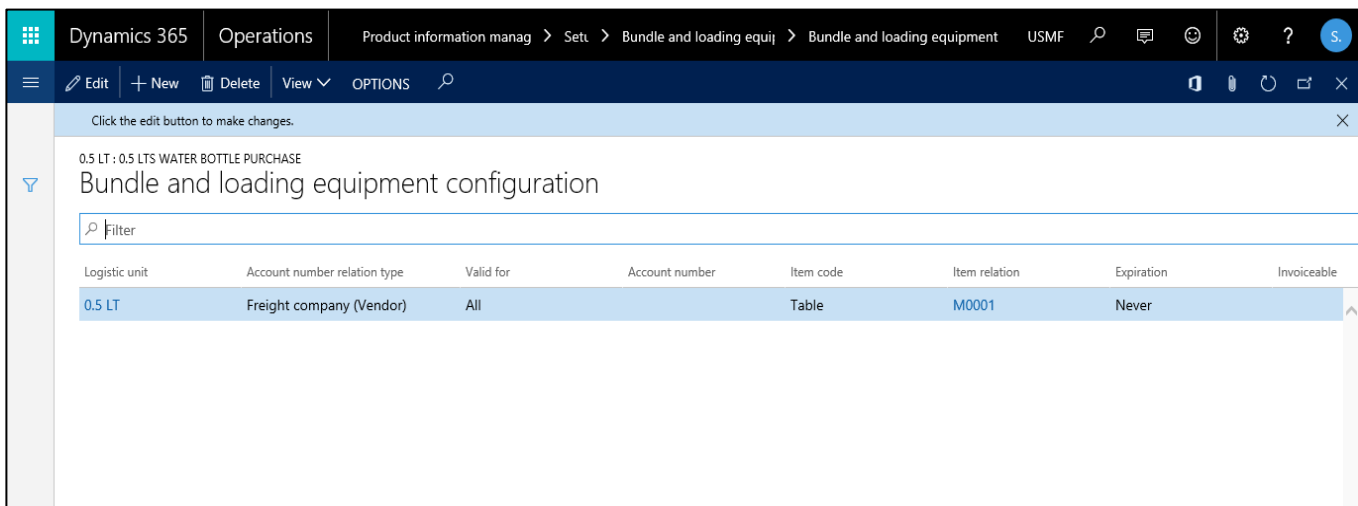
The screenshot shows the Dynamics 365 Operations interface. The top navigation bar includes 'Dynamics 365', 'Operations', and a breadcrumb trail: 'Product information manag > Setu > Bundle and loading equi > Bundle and loading equipment'. The main area is titled 'Bundle and loading equipment' and shows a configuration for '0.5 LT : 0.5 Lts water bottle purchase'. A table below shows the configuration details:

Logistic unit	Account number relation type	Valid for	Account number	Item code	Item relation	Expiration	Invoiceable
0.5 LT	Freight company (Vendor)	All		Table	M0001	Never	

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:



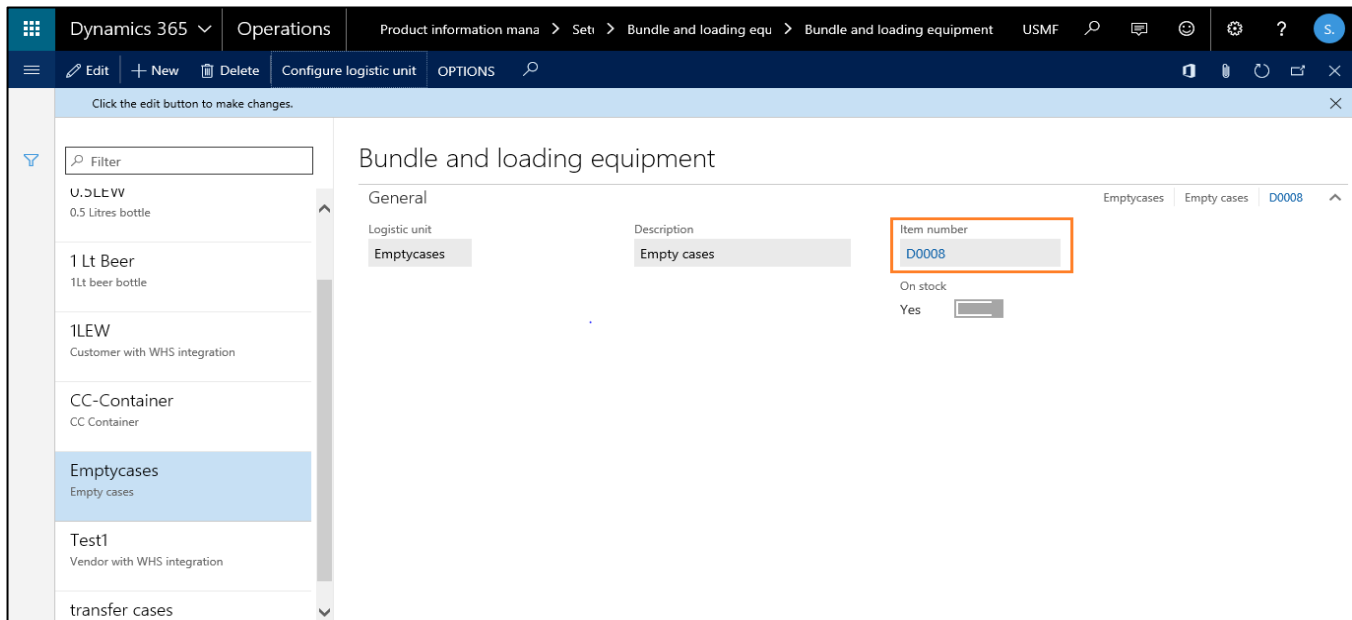
The screenshot shows the Dynamics 365 Operations interface. The top navigation bar includes 'Dynamics 365', 'Operations', and a breadcrumb trail: 'Product information manag > Setu > Bundle and loading equi > Bundle and loading equipment'. The main area is titled 'Bundle and loading equipment configuration' and shows a table with configuration details:

Logistic unit	Account number relation type	Valid for	Account number	Item code	Item relation	Expiration	Invoiceable
0.5 LT	Freight company (Vendor)	All		Table	M0001	Never	

- 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).



The screenshot displays the Dynamics 365 Operations interface for configuring logistic units. The left pane shows a list of items, with 'Emptycases' selected. The main pane shows the configuration for 'Emptycases' under the 'General' tab. The 'Logistic unit' is set to 'Emptycases', the 'Description' is 'Empty cases', the 'Item number' is 'D0008', and the 'On stock' checkbox is checked. The 'Item number' field is highlighted with a red box.

Click the edit button to make changes.

EMPTYCASES : EMPTY CASES

Bundle and loading equipment configuration

Filter

Logistic unit	Account number relation type	Valid for	Account number	Item code	Item relation	Expiration	Invoiceable
Emptycases	Customer	All		Table	D0008	Never	

Click the edit button to make changes.

EMPTYCASES : EMPTY CASES

Bundle and loading equipment configuration

Filter

Item code	Item relation	Expiration	Invoiceable	No inventory jo...	WHS integration	Quantity logistic unit	Per Unit	Multiple quantity
Table	D0008	Never		✓		1.00	Inventory unit	1.00

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 > Setup > Inventory and warehouse management parameters | USMF

Inventory and warehouse management parameters

General

Journals

Bills of materials

Locations

Inventory accounting

Transport

Quality management

Inventory dimensions

Product compliance

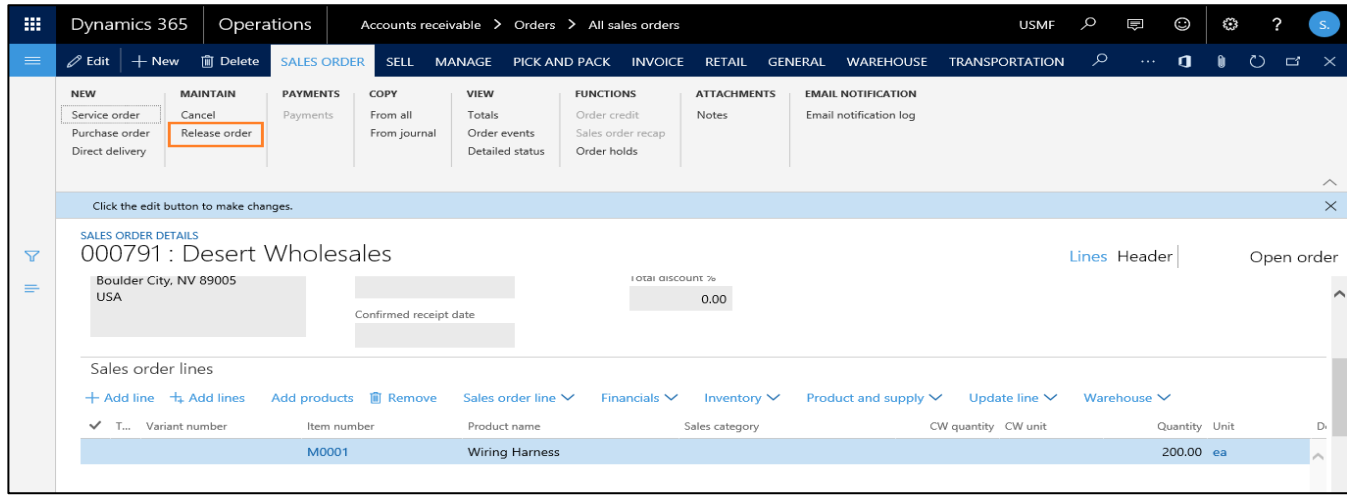
Select journal names for inventory

Movement Mov	Counting ICnt	Item arrival WArr	Batch merge
Inventory adjustment IAdj	BOM IBOM	Production input WProd	Ownership change
Transfer ITrf	Tag counting ITag	Catch weight journal	Inventory journal for bundle and loadin... KCS BLE

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.



SALES ORDER | **SELL** | **MANAGE** | **PICK AND PACK** | **INVOICE** | **RETAIL** | **GENERAL** | **WAREHOUSE** | **TRANSPORTATION**

NEW | **MAINTAIN** | **PAYMENTS** | **COPY** | **VIEW** | **FUNCTIONS** | **ATTACHMENTS** | **EMAIL NOTIFICATION**

Service order | Cancel | **Release order** | Payments | From all | Totals | Order credit | Notes | Email notification log
Purchase order | Direct delivery | From journal | Order events | Sales order recap | Order holds

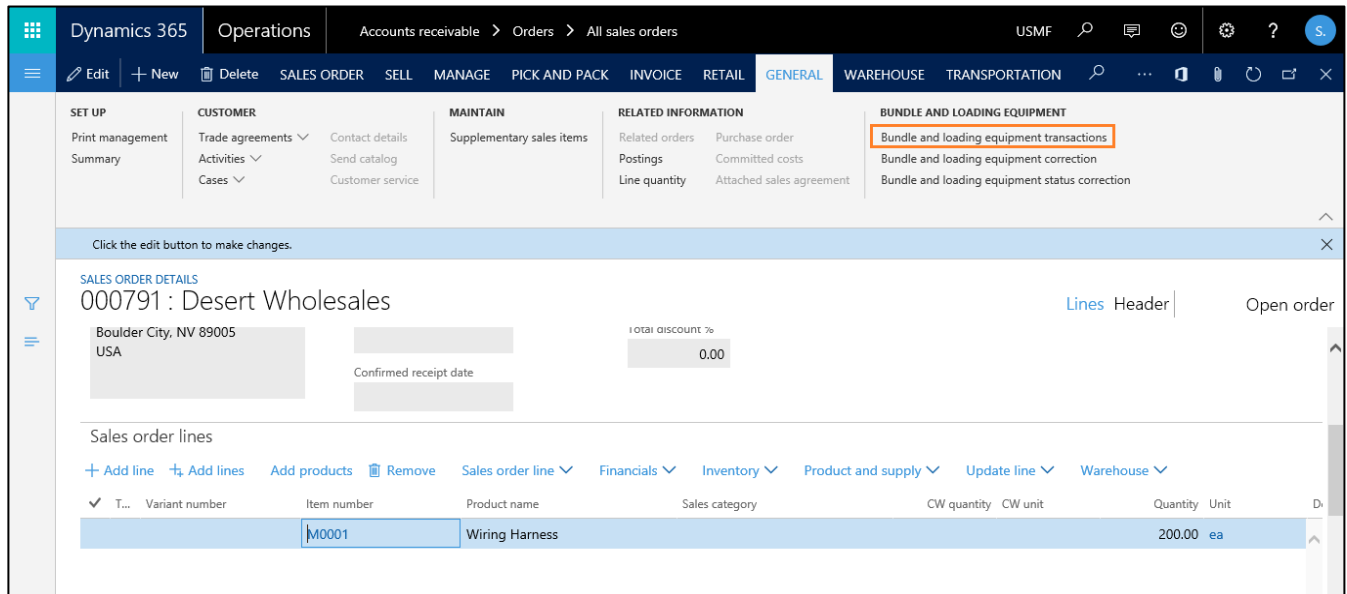
Click the edit button to make changes.

SALES ORDER DETAILS
000791 : Desert Wholesales
Boulder City, NV 89005 USA
Confirmed receipt date
TOTAL DISCOUNT % 0.00

Sales order lines

Variant number	Item number	Product name	Sales category	CW quantity	CW unit	Quantity	Unit
	M0001	Wiring Harness				200.00	ea

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



GENERAL | **WAREHOUSE** | **TRANSPORTATION**

SET UP | **CUSTOMER** | **MAINTAIN** | **RELATED INFORMATION** | **BUNDLE AND LOADING EQUIPMENT**

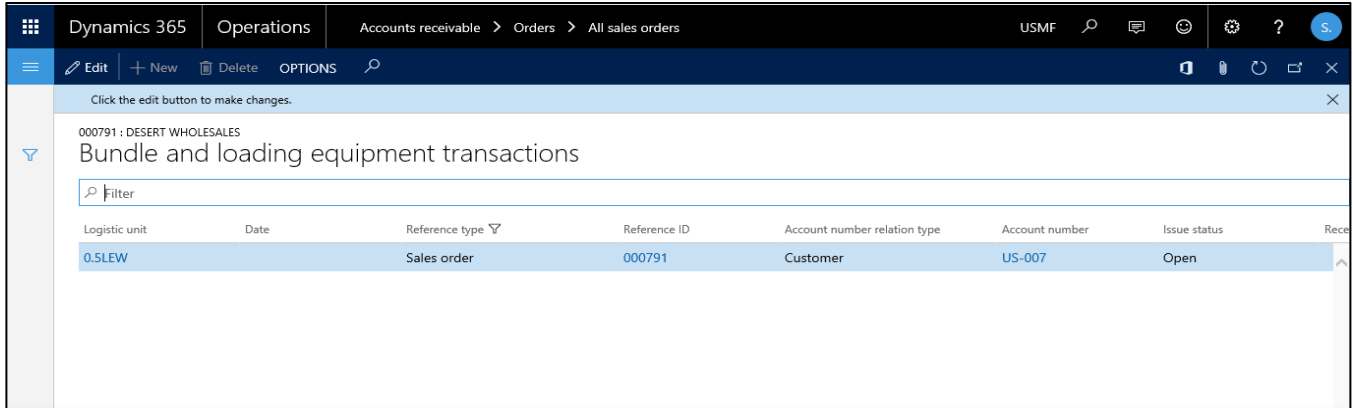
Print management | Trade agreements | Contact details | Supplementary sales items | Related orders | Purchase order | **Bundle and loading equipment transactions**
Summary | Activities | Send catalog | Line quantity | Committed costs | Bundle and loading equipment correction
Cases | Customer service | Attached sales agreement | Bundle and loading equipment status correction

Click the edit button to make changes.

SALES ORDER DETAILS
000791 : Desert Wholesales
Boulder City, NV 89005 USA
Confirmed receipt date
TOTAL DISCOUNT % 0.00

Sales order lines

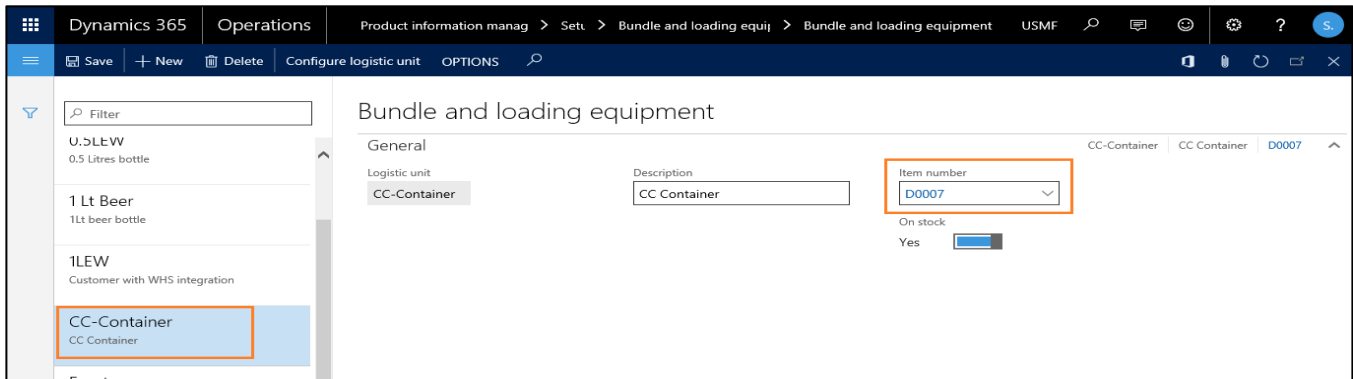
Variant number	Item number	Product name	Sales category	CW quantity	CW unit	Quantity	Unit
	M0001	Wiring Harness				200.00	ea



000791 : DESERT WHOLESALERS
Bundle and loading equipment transactions

Logistic unit	Date	Reference type	Reference ID	Account number relation type	Account number	Issue status	Received
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.



Bundle and loading equipment

General

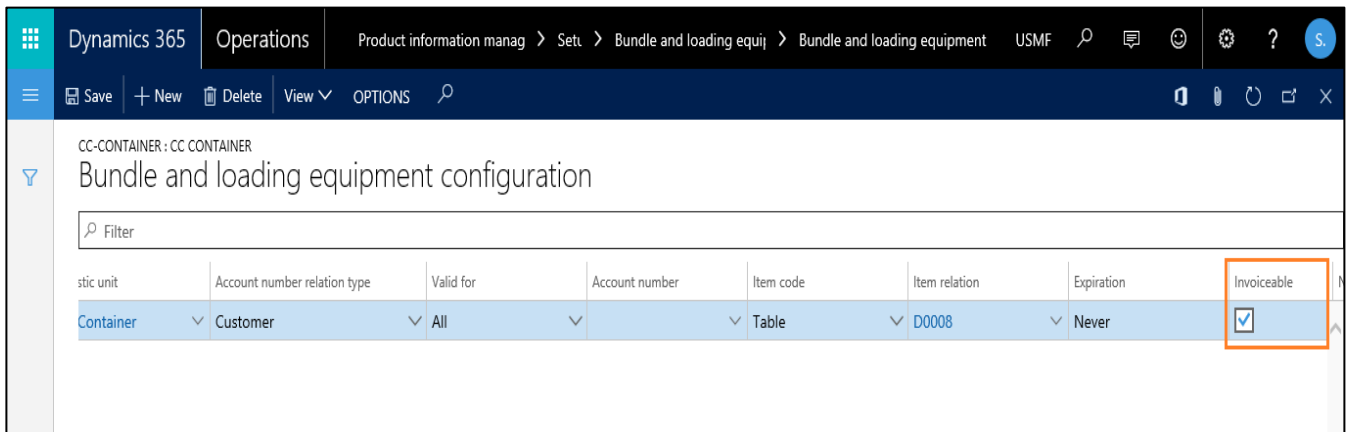
Logistic unit: CC-Container

Description: CC Container

Item number: D0007

On stock: Yes

CC-Container: CC Container



CC-CONTAINER : CC CONTAINER
Bundle and loading equipment configuration

Logistic unit	Account number relation type	Valid for	Account number	Item code	Item relation	Expiration	Invoiceable
Container	Customer	All		Table	D0008	Never	<input checked="" type="checkbox"/>

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.

Dynamics 365 Operations Accounts receivable > Customers > All customers USMF

Save + New Delete SALES ORDER SELL MANAGE PICK AND PACK INVOICE RETAIL GENERAL WAREHOUSE TRANSPORTATION

NEW: Service order, Purchase order, Direct delivery
 MAINTAIN: Cancel, Release order
 PAYMENTS: Payments
 COPY: From all, From journal
 VIEW: Totals, Order events, Detailed status
 FUNCTIONS: Order credit, Sales order recap, Order holds
 ATTACHMENTS: Notes
 EMAIL NOTIFICATION: Email notification log

SALES ORDER 000833 : Sparrow Retail Lines Header Open order

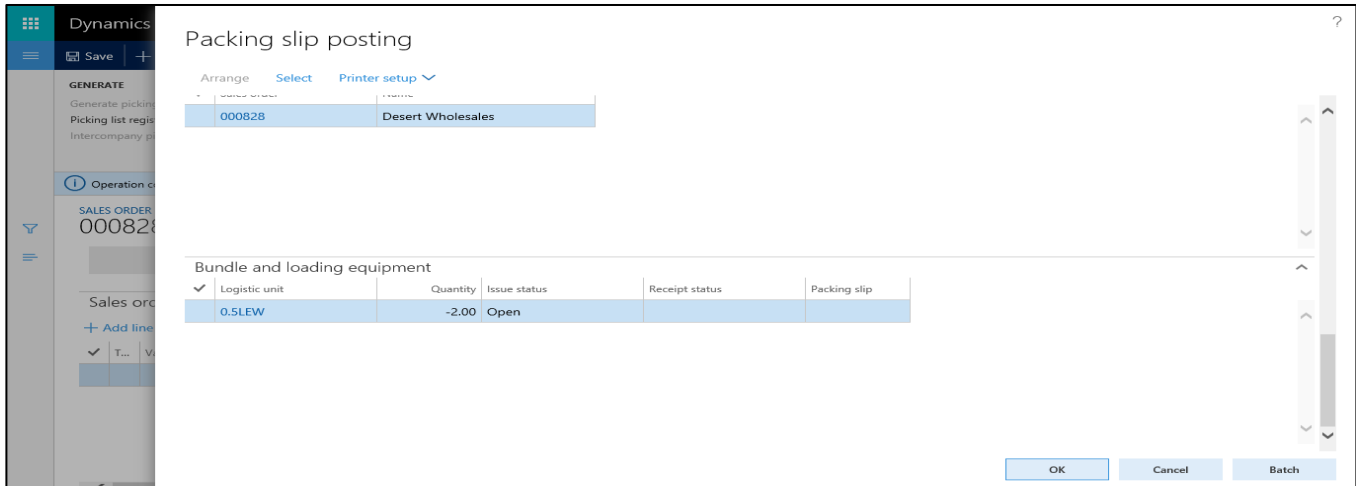
Sales order lines

+ Add line + Add lines Add products Remove Sales order line Financials Inventory Product and supply Update line Warehouse

✓	T...	Variant number	Item number	Product name	Sales category	CW quantity	CW unit	Quantity	Unit	D...
		VN-000139	D0008	Licensed High End Speaker / Hi...	Speakers			2.00	ea	
			D0007	Speaker Pro Kit				2.00	ea	

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*).



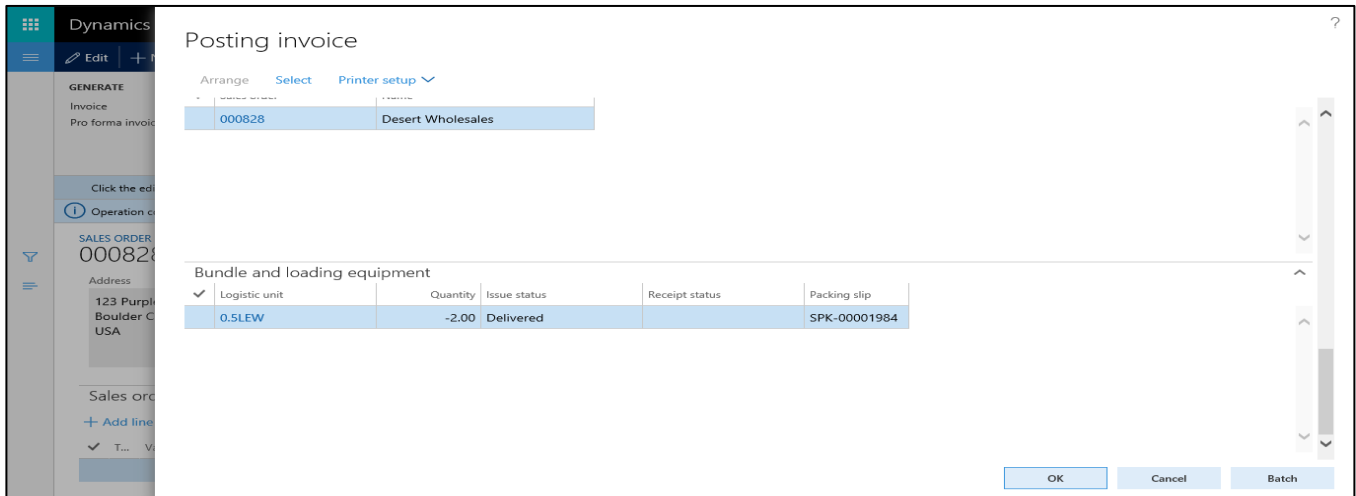
Packing slip posting

Arrange Select Printer setup

Logistic unit	Quantity	Issue status	Receipt status	Packing slip
0.5LEW	-2.00	Open		

OK 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:

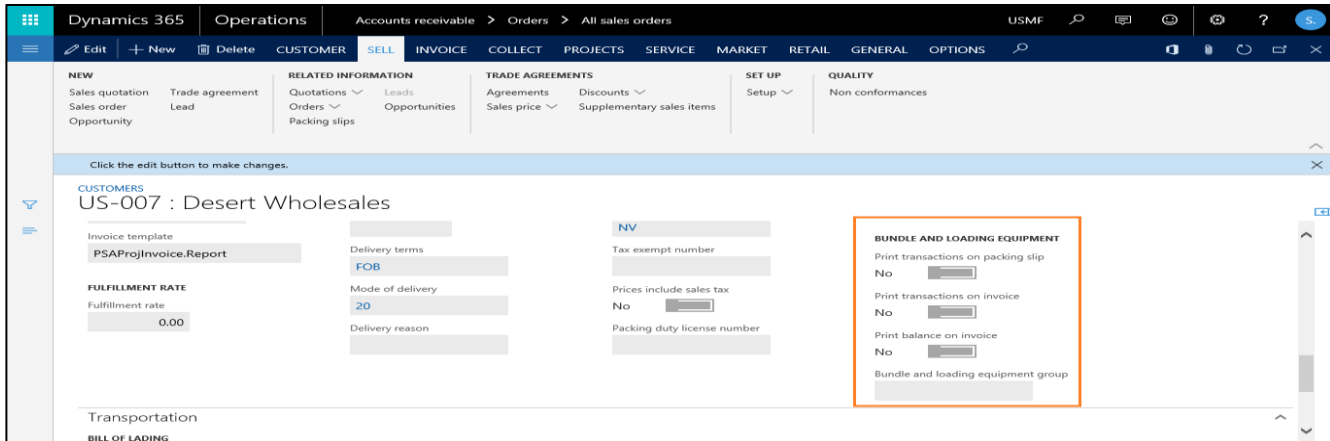


Posting invoice

Arrange Select Printer setup

Logistic unit	Quantity	Issue status	Receipt status	Packing slip
0.5LEW	-2.00	Delivered		SPK-00001984

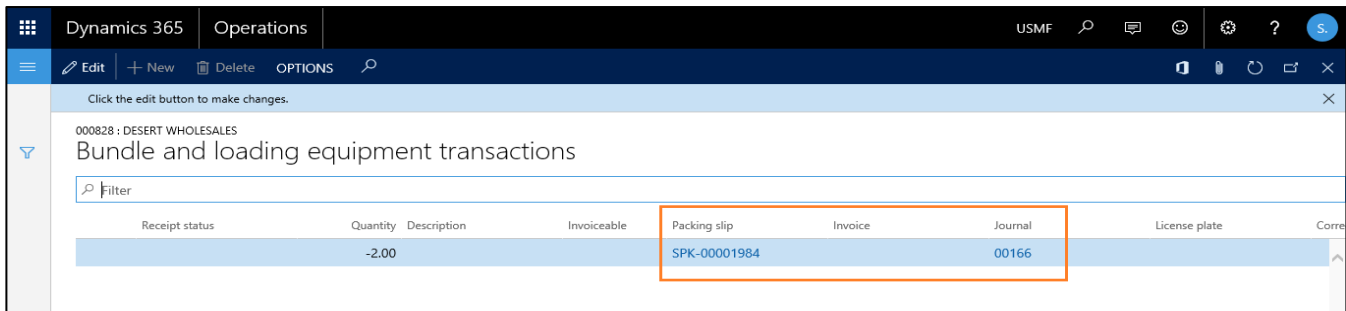
OK Cancel Batch



The screenshot shows the Dynamics 365 Operations ribbon for a sales order. The 'BUNDLE AND LOADING EQUIPMENT' section is highlighted with a red box. It contains the following options:

- Print transactions on packing slip: No
- Print transactions on invoice: No
- Print balance on invoice: No
- Bundle and loading equipment group: (dropdown menu)

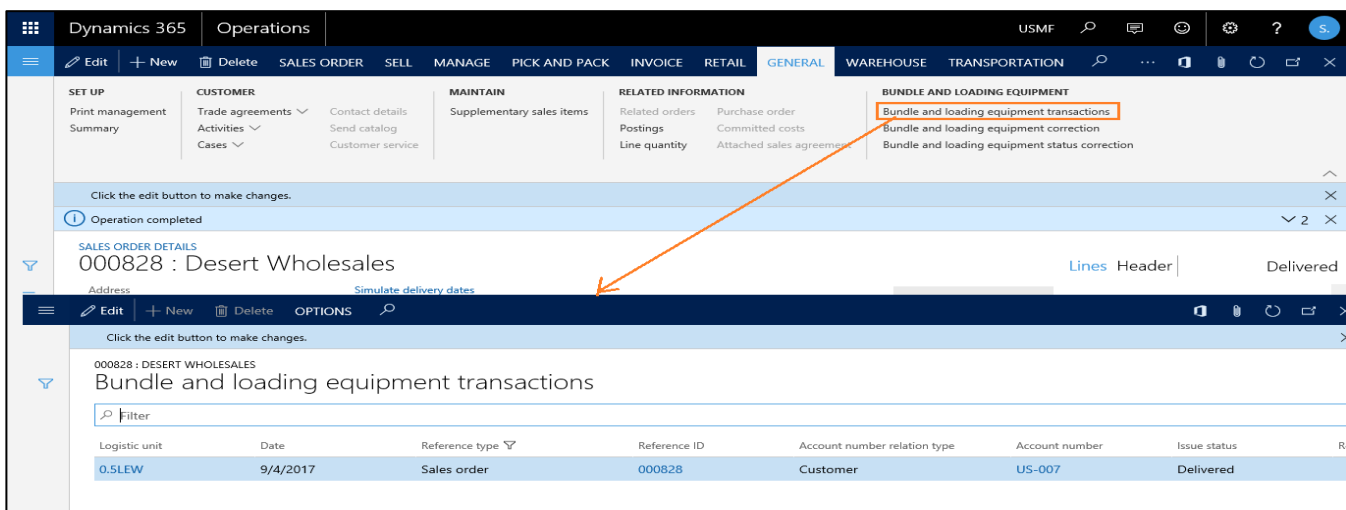
- 6) The references to the packing slip number, invoice number and to the inventory adjustment journal are collected in the Carriers and Empties equipment transaction:



Receipt status	Quantity	Description	Invoiceable	Packing slip	Invoice	Journal	License plate	Corre
	-2.00			SPK-00001984		00166		

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:



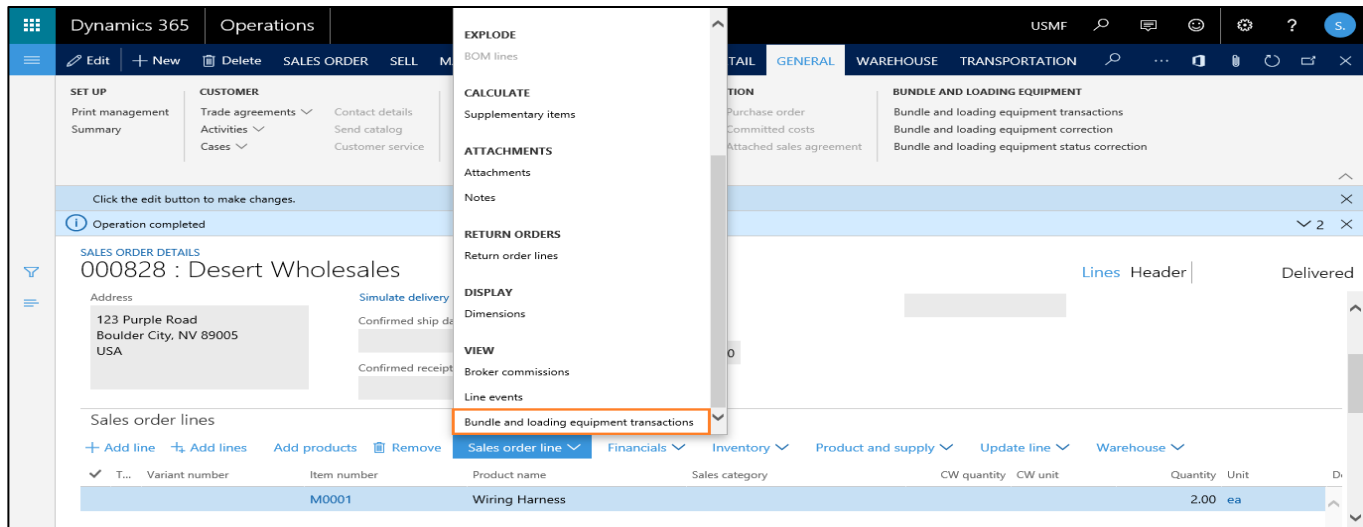
The screenshot shows the Dynamics 365 Operations ribbon for a sales order. The 'BUNDLE AND LOADING EQUIPMENT' section is highlighted with a red box, and the 'Bundle and loading equipment transactions' button is specifically highlighted. An orange arrow points from this button to the 'Bundle and loading equipment transactions' form below.

The 'Bundle and loading equipment transactions' form shows the following details:

- SALES ORDER DETAILS: 000828 : Desert Wholesales
- Logistic unit: 0.5LEW
- Date: 9/4/2017
- Reference type: Sales order
- Reference ID: 000828
- Account number relation type: Customer
- Account number: US-007
- Issue status: Delivered

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

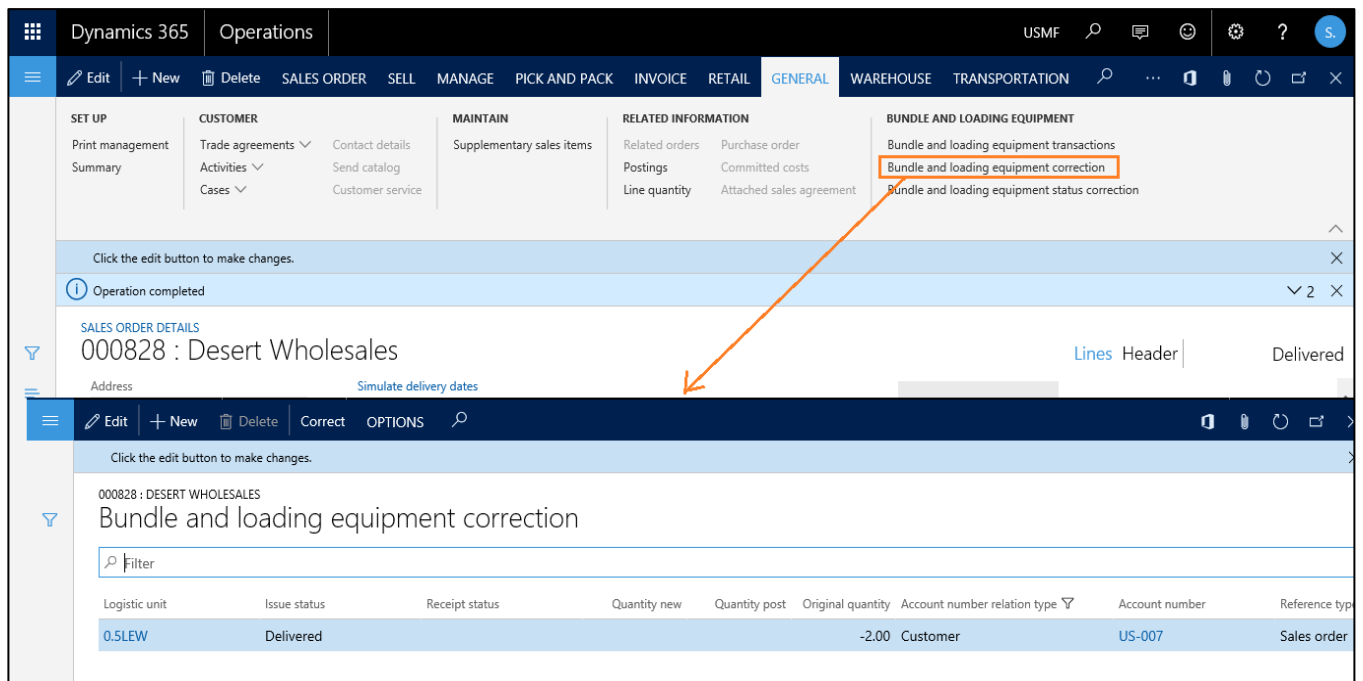
Transactions can also be displayed in the sales order regarding a specific sales order line by clicking the *Sales order line* button:



The screenshot shows the Dynamics 365 Operations interface. The top ribbon includes 'Operations' and 'SALES ORDER'. The left sidebar shows 'SET UP' and 'CUSTOMER' sections. The main area displays 'SALES ORDER DETAILS' for 'Desert Wholesales' with address '123 Purple Road, Boulder City, NV 89005, USA'. Below this, 'Sales order lines' are listed, including a line for 'Wiring Harness' with item number 'M0001'. A context menu is open over the 'Wiring Harness' line, showing options like 'EXPLODE', 'CALCULATE', 'ATTACHMENTS', 'RETURN ORDERS', 'DISPLAY', and 'VIEW'. The 'Bundle and loading equipment transactions' option is highlighted in the menu.

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*:



The screenshot shows the Dynamics 365 Operations interface. The top ribbon includes 'Operations' and 'GENERAL'. The left sidebar shows 'SET UP', 'CUSTOMER', and 'MAINTAIN' sections. The main area displays 'SALES ORDER DETAILS' for 'Desert Wholesales' with address '123 Purple Road, Boulder City, NV 89005, USA'. Below this, the 'Bundle and loading equipment correction' form is open. The form title is '000828 : DESERT WHOLESALES Bundle and loading equipment correction'. The form contains a table with columns for 'Logistic unit', 'Issue status', 'Receipt status', 'Quantity new', 'Quantity post', 'Original quantity', 'Account number relation type', 'Account number', and 'Reference type'. The table contains one row with values: '0.5LEW', 'Delivered', 'Receipt status', '-2.00', 'Customer', 'US-007', and 'Sales 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.

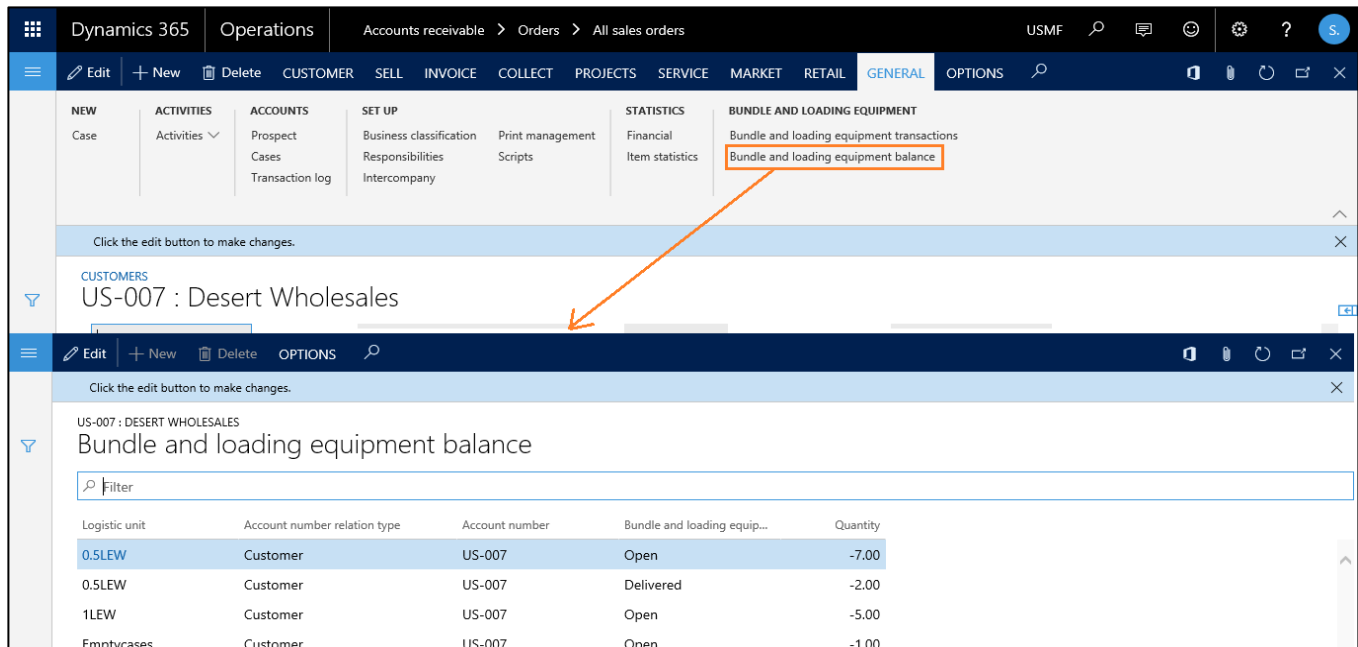
The button '*Correct*' generates the return and correction transactions.

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.

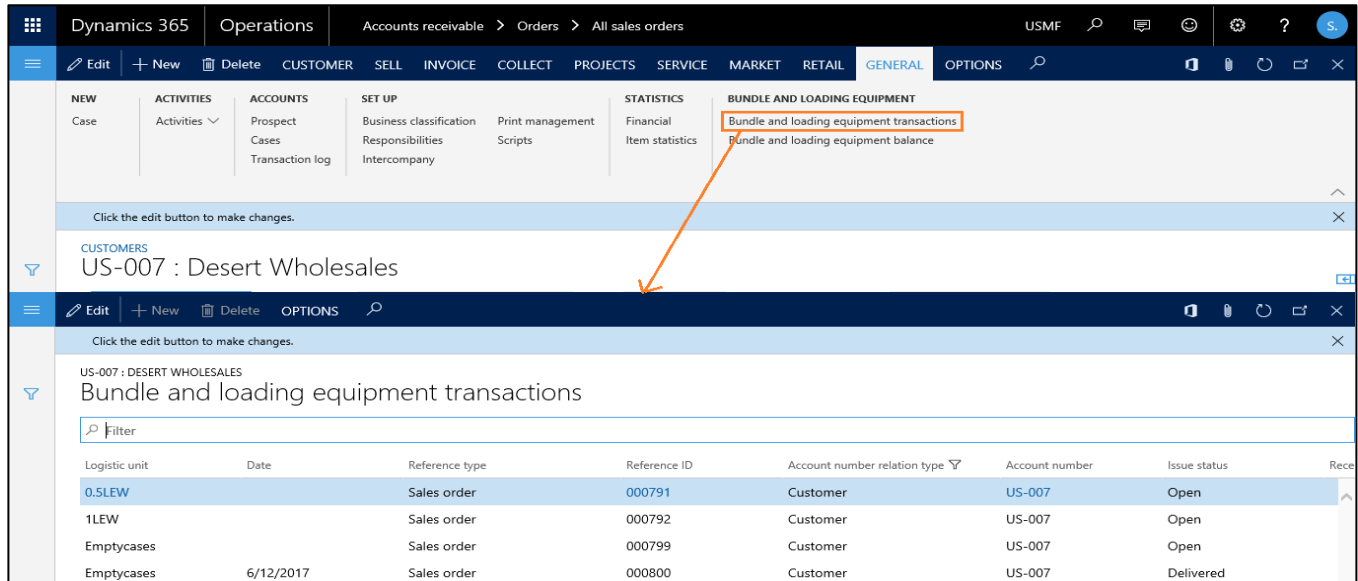
3.6 Customer-based balance and transaction enquiries

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*:



Logistic unit	Account number relation type	Account number	Bundle and loading equip...	Quantity
0.5LEW	Customer	US-007	Open	-7.00
0.5LEW	Customer	US-007	Delivered	-2.00
1LEW	Customer	US-007	Open	-5.00
Emptycases	Customer	US-007	Open	-1.00

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:



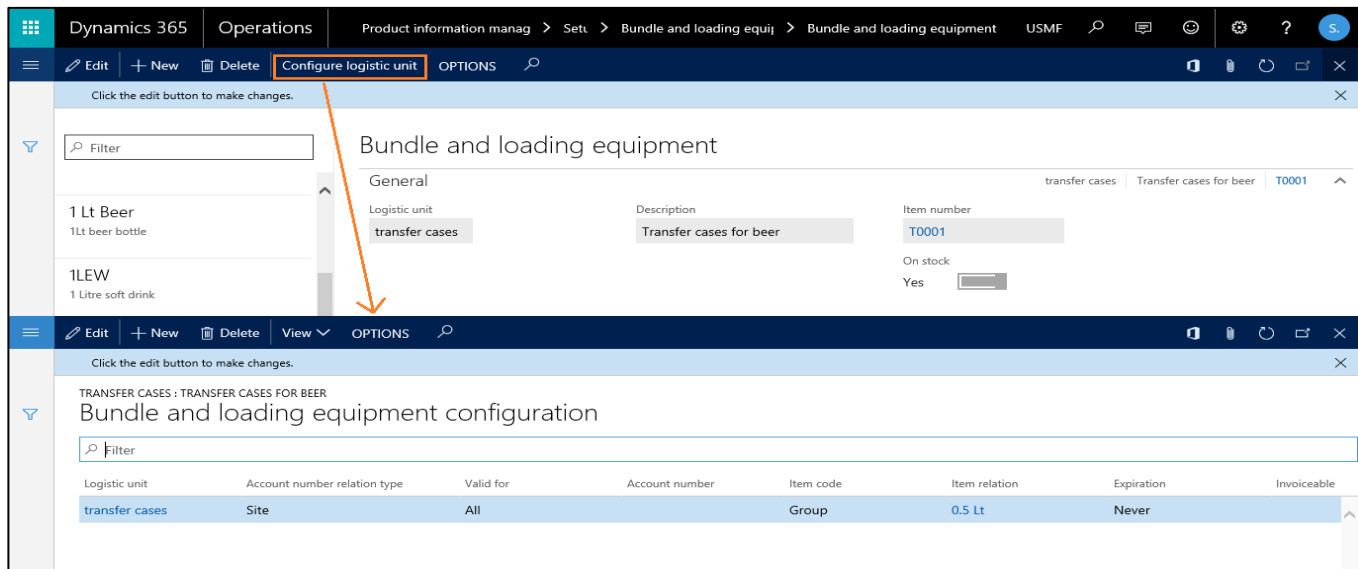
The screenshot shows the Dynamics 365 Operations interface. The ribbon is set to 'GENERAL'. Under the 'BUNDLE AND LOADING EQUIPMENT' group, the 'Bundle and loading equipment transactions' button is highlighted with an orange box and an orange arrow. Below the ribbon, the form title is 'US-007 : DESERT WHOLESALES Bundle and loading equipment transactions'. The form contains a table with the following data:

Logistic unit	Date	Reference type	Reference ID	Account number relation type	Account number	Issue status	Rece
0.5LEW		Sales order	000791	Customer	US-007	Open	
1LEW		Sales order	000792	Customer	US-007	Open	
Emptycases		Sales order	000799	Customer	US-007	Open	
Emptycases	6/12/2017	Sales order	000800	Customer	US-007	Delivered	

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).

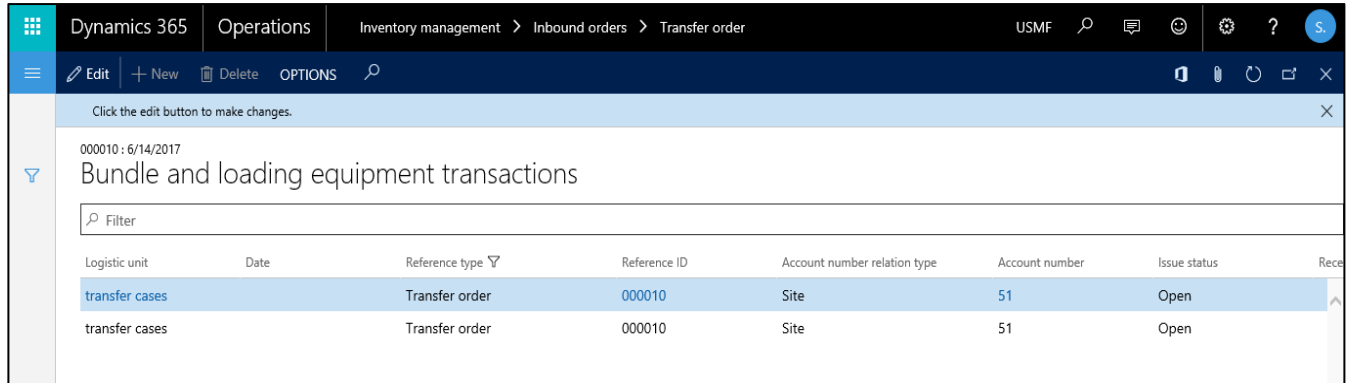


The screenshot shows the Dynamics 365 Operations interface. The ribbon is set to 'Configure logistic unit'. Below the ribbon, the form title is 'TRANSFER CASES : TRANSFER CASES FOR BEER Bundle and loading equipment configuration'. The form contains a table with the following data:

Logistic unit	Account number relation type	Valid for	Account number	Item code	Item relation	Expiration	Invoiceable
transfer cases	Site	All		Group	0.5 Lt	Never	

4.1 Creation of Carriers and Empties equipment transactions

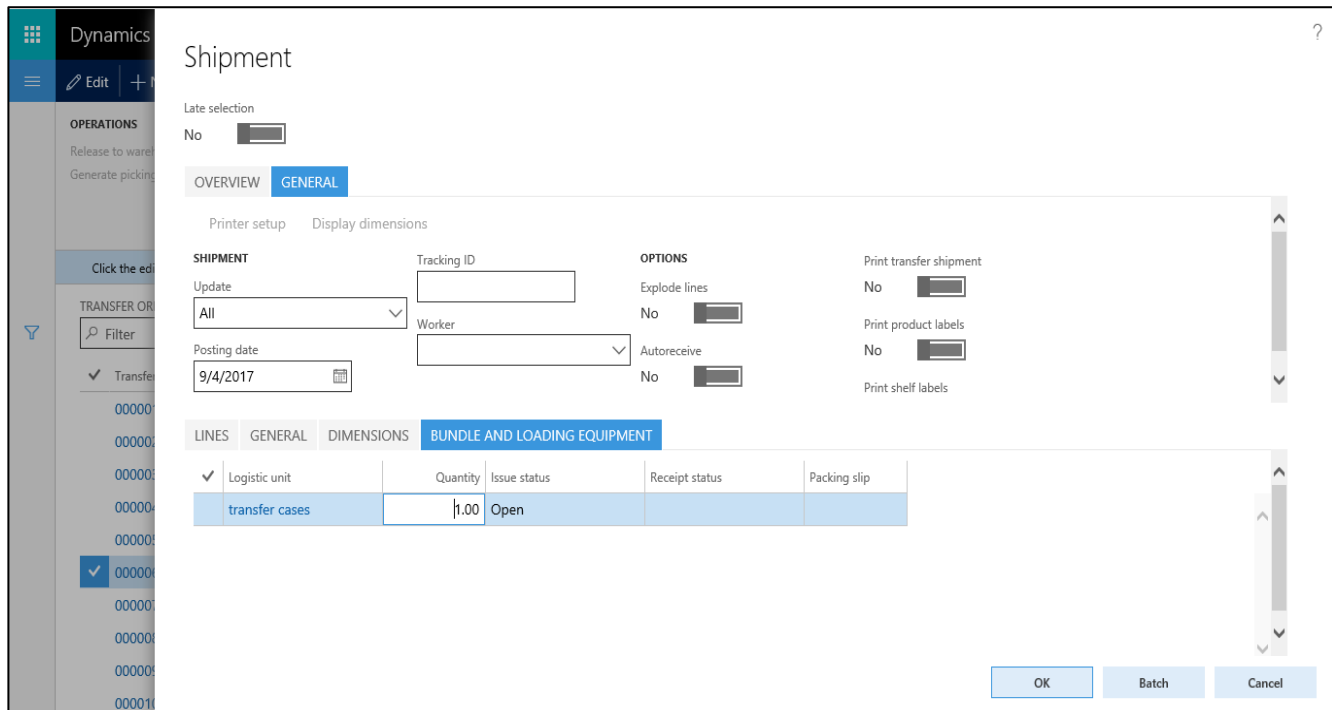
The creation of Carriers and Empties equipment transactions on the transfer orders occurs within the homonymic mask via the button *Release order* based on the transfer order lines:



Logistic unit	Date	Reference type	Reference ID	Account number relation type	Account number	Issue status	Receipt status
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:

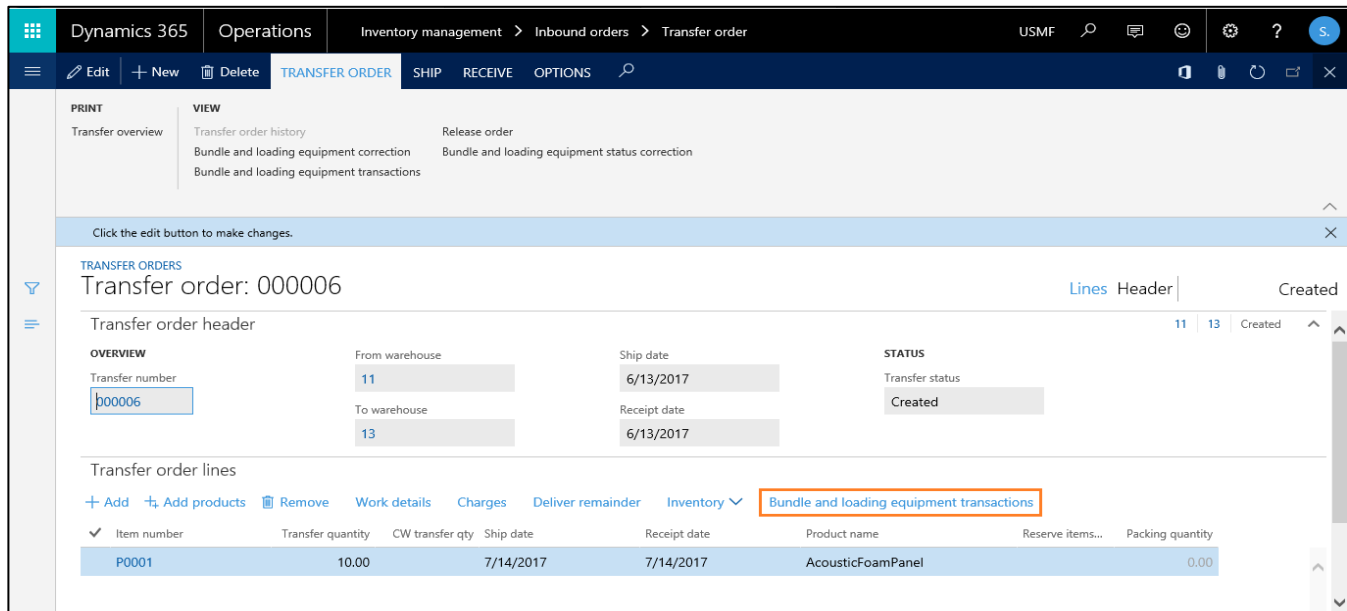


Logistic unit	Quantity	Issue status	Receipt status	Packing slip
transfer cases	1.00	Open		

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'.



TRANSFER ORDERS
Transfer order: 000006

Transfer order header

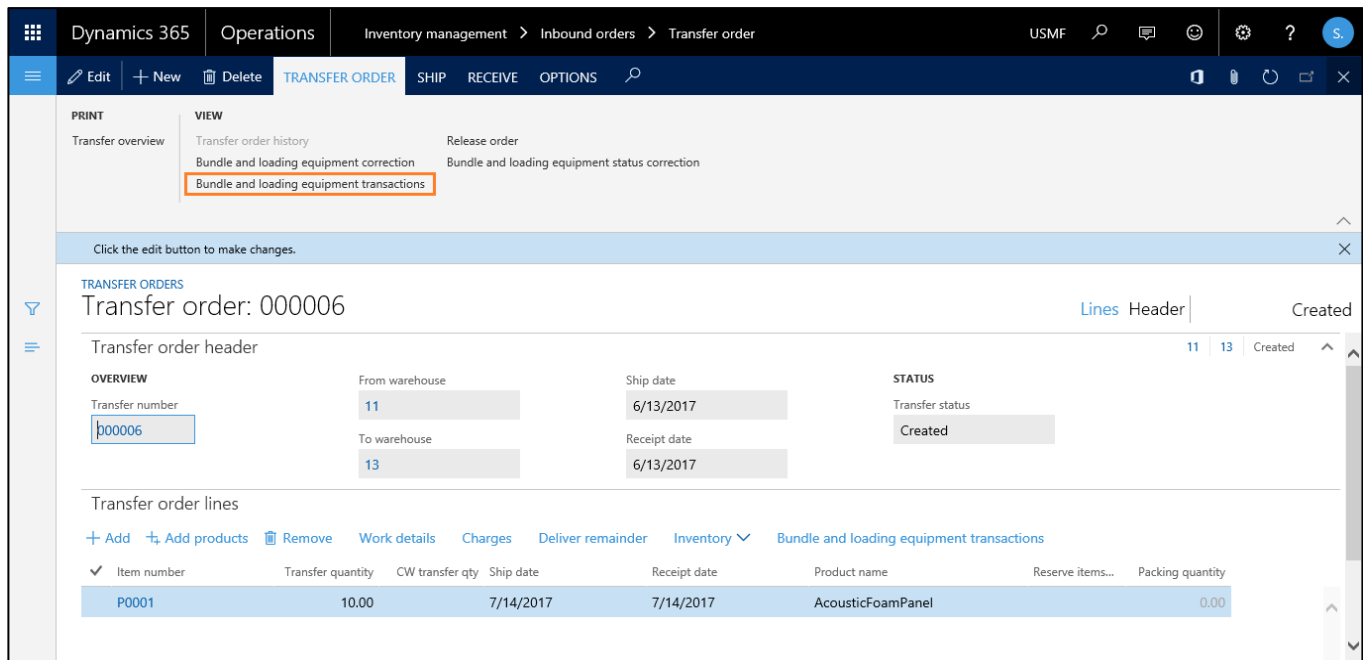
OVERVIEW

Transfer number	From warehouse	Ship date	STATUS
000006	11	6/13/2017	Transfer status
	To warehouse	Receipt date	Created
	13	6/13/2017	

Transfer order lines

+ Add + Add products Remove 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 quantity
P0001	10.00		7/14/2017	7/14/2017	AcousticFoamPanel		0.00



TRANSFER ORDERS
Transfer order: 000006

Transfer order header

OVERVIEW

Transfer number	From warehouse	Ship date	STATUS
000006	11	6/13/2017	Transfer status
	To warehouse	Receipt date	Created
	13	6/13/2017	

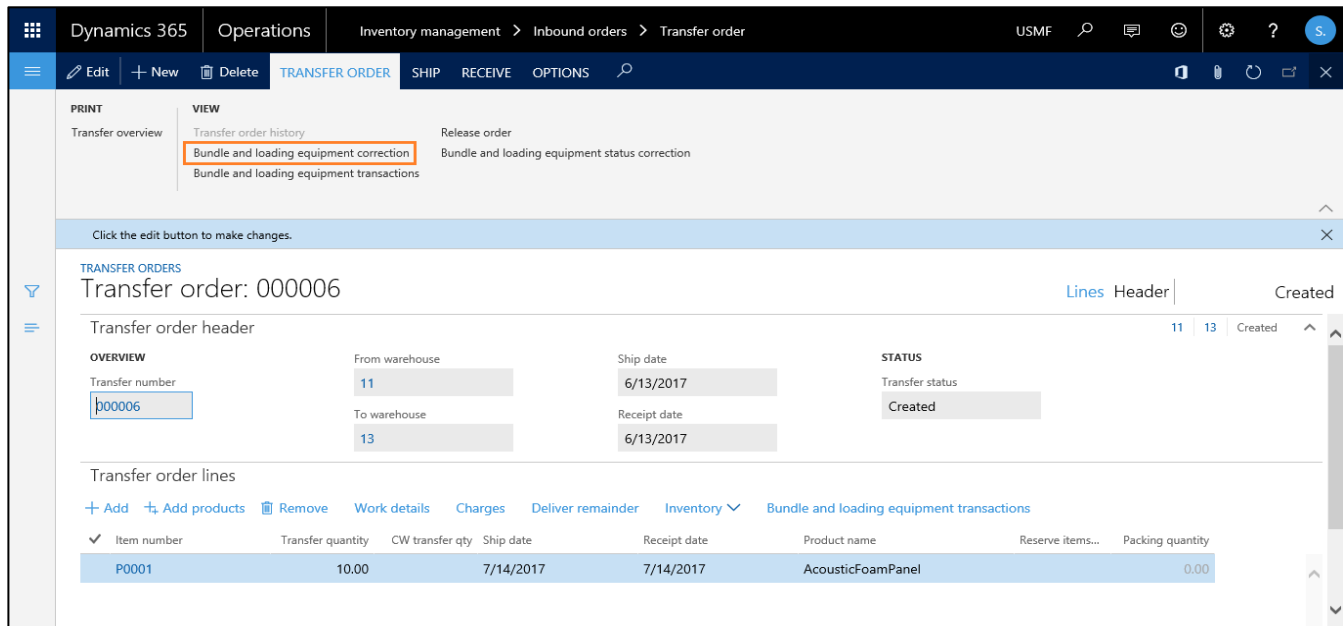
Transfer order lines

+ Add + Add products Remove 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 quantity
P0001	10.00		7/14/2017	7/14/2017	AcousticFoamPanel		0.00

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):

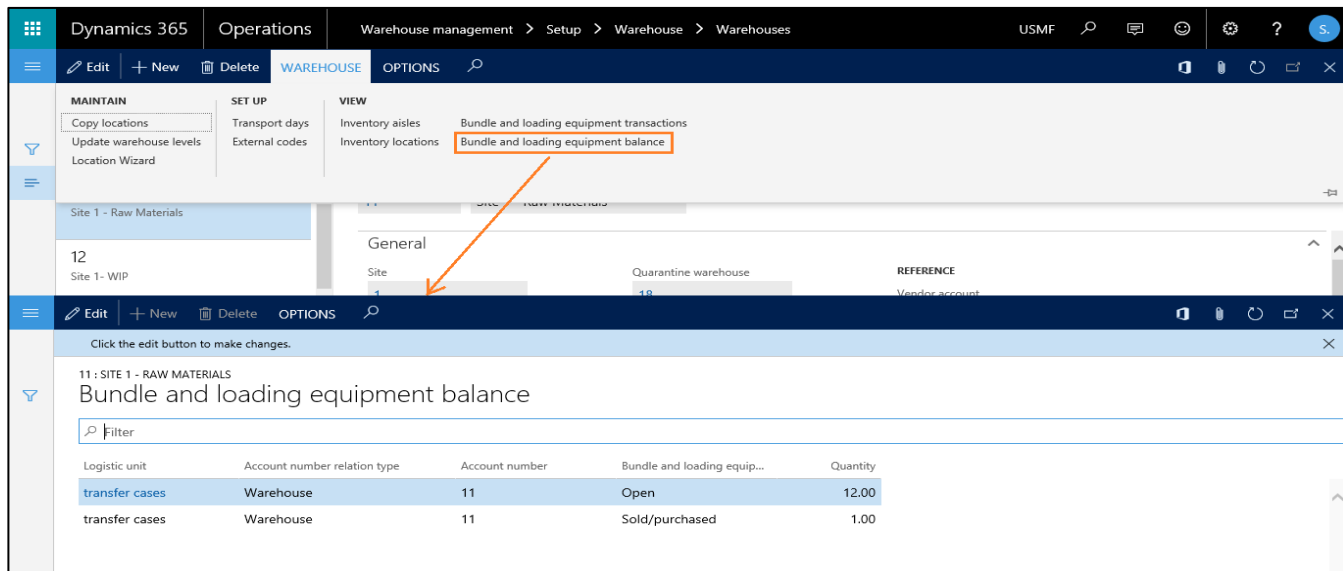


The screenshot shows the Dynamics 365 Operations interface for a Transfer Order. The top navigation bar includes 'Dynamics 365', 'Operations', and 'Inventory management > Inbound orders > Transfer order'. The left sidebar has 'Edit', '+ New', and 'Delete' buttons. The main area is titled 'TRANSFER ORDER' and includes tabs for 'SHIP', 'RECEIVE', and 'OPTIONS'. The 'VIEW' tab is active, showing a 'Transfer order: 000006'. The 'Overview' section displays fields for 'Transfer number' (000006), 'From warehouse' (11), 'To warehouse' (13), 'Ship date' (6/13/2017), 'Receipt date' (6/13/2017), and 'Status' (Created). The 'Transfer order lines' section shows a table with columns: Item number, Transfer quantity, CW transfer qty, Ship date, Receipt date, Product name, Reserve items..., and Packing quantity. The table contains one row: P0001, 10.00, 7/14/2017, 7/14/2017, AcousticFoamPanel, 0.00.

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

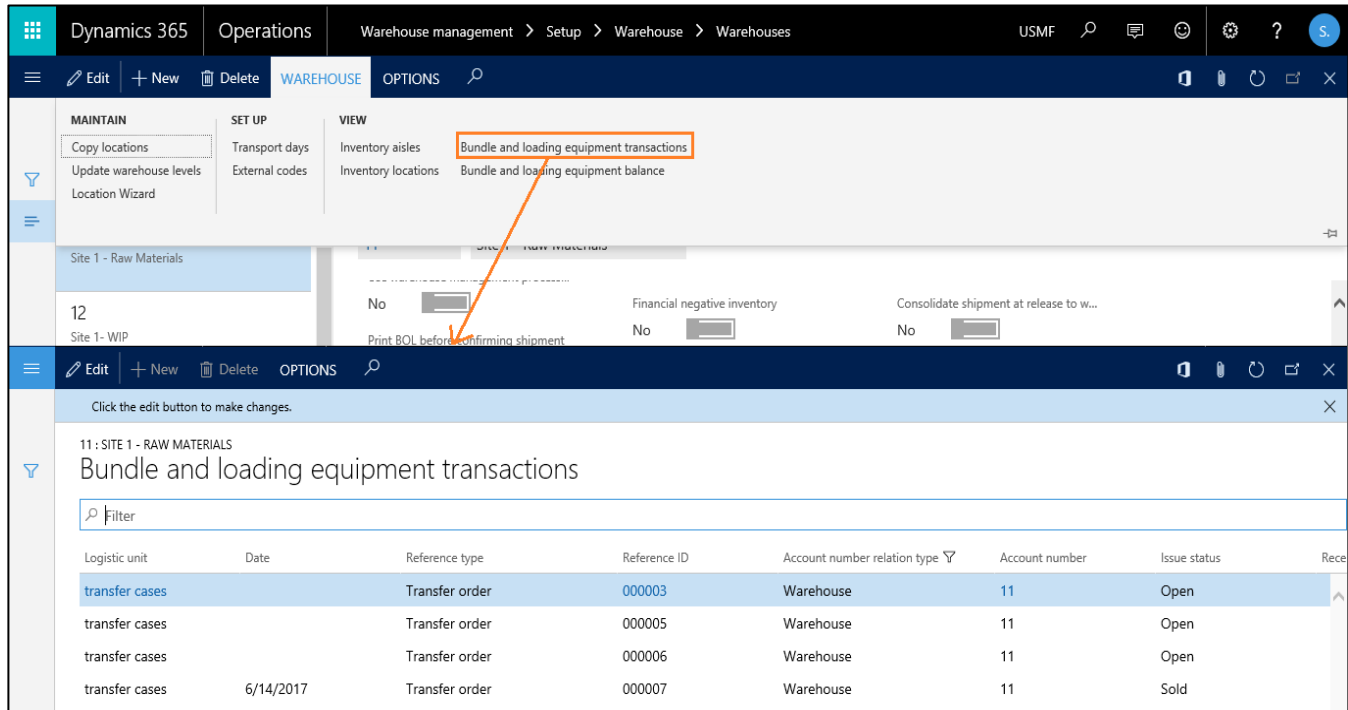
At warehouse / site level, Carriers and Empties equipment balances can be checked in the form *Carriers and Empties equipment balance*.

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



The screenshot shows the Dynamics 365 Operations interface for Warehouse Setup. The top navigation bar includes 'Dynamics 365', 'Operations', and 'Warehouse management > Setup > Warehouse > Warehouses'. The left sidebar has 'Edit', '+ New', and 'Delete' buttons. The main area is titled 'WAREHOUSE' and includes tabs for 'OPTIONS' and 'VIEW'. The 'VIEW' tab is active, showing a 'Bundle and loading equipment balance' form. The form displays a table with columns: Logistic unit, Account number relation type, Account number, Bundle and loading equip..., and Quantity. The table contains two rows: transfer cases, Warehouse, 11, Open, 12.00; and 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*.

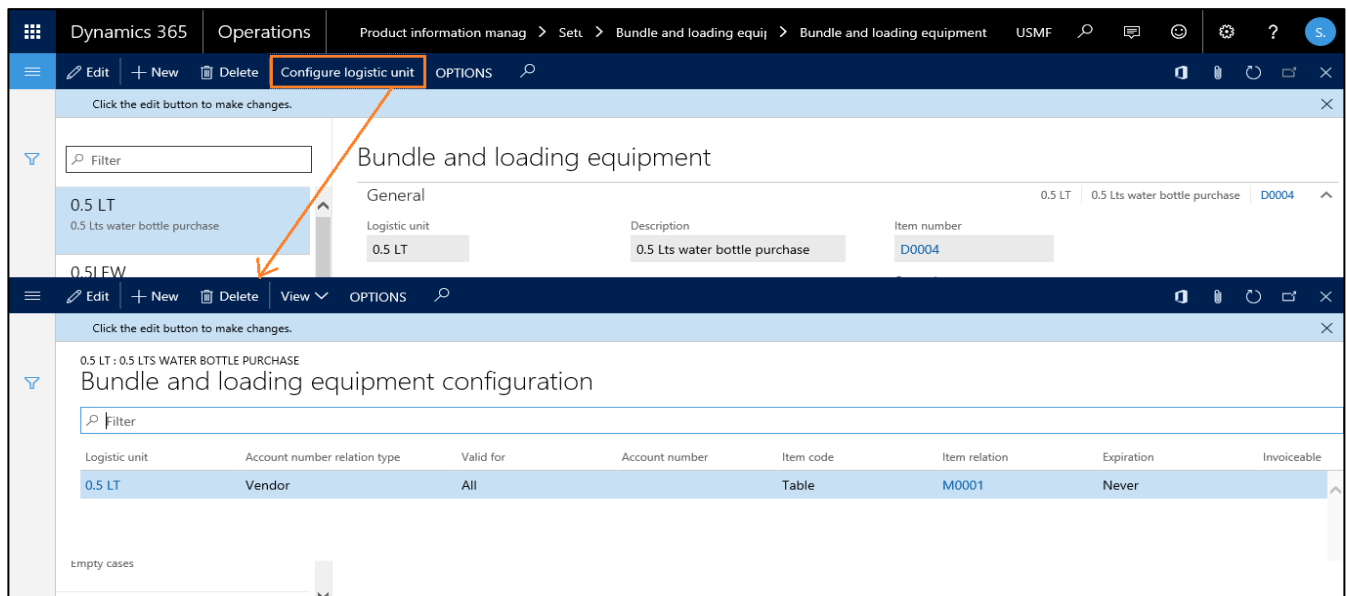


The screenshot shows the Dynamics 365 Operations interface for Warehouse management. The breadcrumb trail is: Warehouse management > Setup > Warehouse > Warehouses. The left sidebar has a 'WAREHOUSE' tab selected. The main area shows 'Bundle and loading equipment transactions' for 'Site 1 - Raw Materials'. A table lists transactions with columns: Logistic unit, Date, Reference type, Reference ID, Account number relation type, Account number, Issue status, and Receipt. The table contains four rows of data for 'transfer cases'.

Logistic unit	Date	Reference type	Reference ID	Account number relation type	Account number	Issue status	Receipt
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.

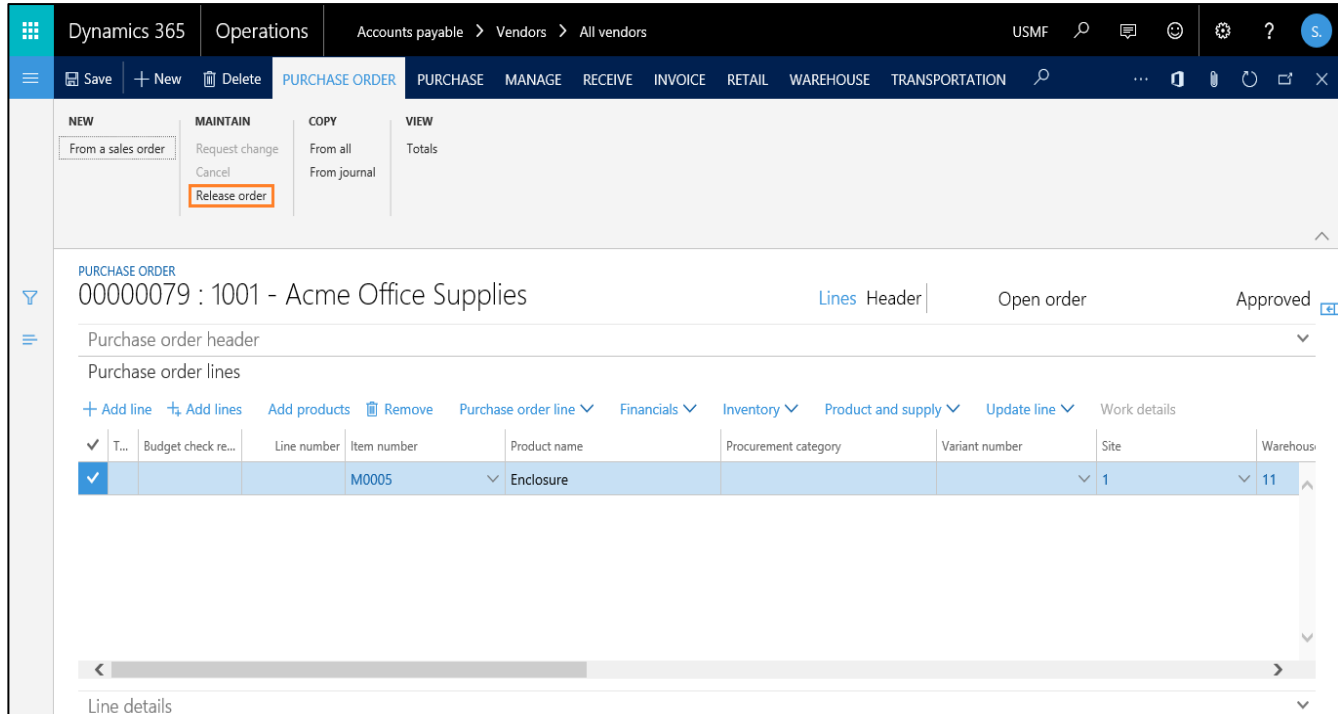


The screenshot shows the Dynamics 365 Operations interface for Product information management. The breadcrumb trail is: Product information management > Setup > Bundle and loading equipment > Bundle and loading equipment. The left sidebar has a 'Configure logistic unit' tab selected. The main area shows 'Bundle and loading equipment configuration' for '0.5 LT : 0.5 LTS WATER BOTTLE PURCHASE'. A table lists configurations with columns: Logistic unit, Account number relation type, Valid for, Account number, Item code, Item relation, Expiration, and Invoiceable. The table contains one row of data for '0.5 LT'.

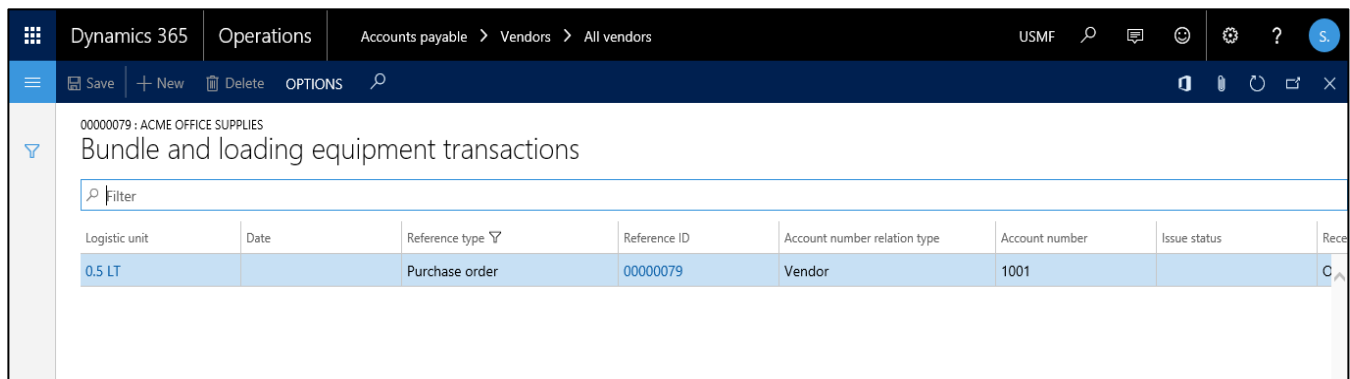
Logistic unit	Account number relation type	Valid for	Account number	Item code	Item relation	Expiration	Invoiceable
0.5 LT	Vendor	All		Table	M0001	Never	

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:



The screenshot shows the Dynamics 365 Operations interface. The top navigation bar includes 'Dynamics 365', 'Operations', and 'Accounts payable > Vendors > All vendors'. The main menu bar has 'PURCHASE ORDER' selected, with other options like 'PURCHASE', 'MANAGE', 'RECEIVE', 'INVOICE', 'RETAIL', 'WAREHOUSE', and 'TRANSPORTATION'. The 'NEW' section has a 'From a sales order' button. The 'MAINTAIN' section has 'Request change', 'Cancel', and 'Release order' buttons. The 'COPY' section has 'From all' and 'From journal' buttons. The 'VIEW' section has 'Totals' button. The main content area shows 'PURCHASE ORDER 00000079 : 1001 - Acme Office Supplies'. Below this, there is a 'Purchase order header' section and a 'Purchase order lines' section. The 'Purchase order lines' section has a table with columns: 'Line number', 'Item number', 'Product name', 'Procurement category', 'Variant number', 'Site', and 'Warehouse'. The first line is highlighted with a blue checkmark and contains the values: '1', 'M0005', 'Enclosure', '1', '1', and '11'.



The screenshot shows the Dynamics 365 Operations interface. The top navigation bar includes 'Dynamics 365', 'Operations', and 'Accounts payable > Vendors > All vendors'. The main menu bar has 'OPTIONS' selected. The main content area shows '00000079 : ACME OFFICE SUPPLIES' and 'Bundle and loading equipment transactions'. Below this, there is a 'Filter' input field and a table with columns: 'Logistic unit', 'Date', 'Reference type', 'Reference ID', 'Account number relation type', 'Account number', 'Issue status', and 'Rece'. The first row of the table contains the values: '0.5 LT', 'Purchase order', '00000079', 'Vendor', '1001', and '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.

Posting product receipt

	Purchase order	Name	Product receipt	Product receipt date	Document date	Terms of payment
Receipt	00000079	Acme Office Supplies	2345	9/6/2017		

Details

GENERAL	PURCHASES	FIXED ASSETS	BUNDLE AND LOADING EQUIPMENT
Logistic unit	Quantity	Issue status	Receipt status
0.5 LT	3.00		Open

OK 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 Operations Accounts payable > Vendors > All vendors

USMF

Save + New Delete PURCHASE ORDER PURCHASE MANAGE RECEIVE INVOICE RETAIL WAREHOUSE TRANSPORTATION

SET UP Print management Summary

VENDOR Trade agreement Cases Activities Contact details

MAINTAIN Supplementary items

RELATED INFORMATION Related orders Postings Line quantity Planned purchase orders Committed costs Purchase agreement Approved to supply

BUNDLE AND LOADING EQUIPMENT Bundle and loading equipment transactions Bundle and loading equipment correction Bundle and loading equipment status correction

Operation completed

PURCHASE ORDER 00000079 : 1001 - Acme Office Supplies

Lines Header Open order Confirmed

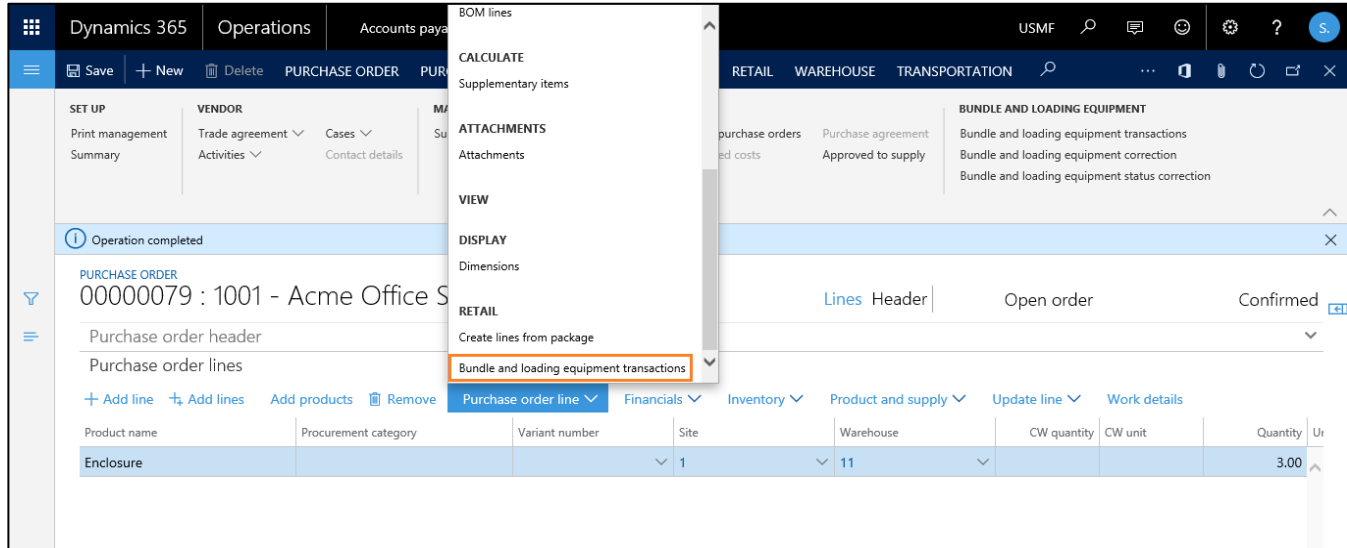
Purchase order header

Purchase order lines

+ Add line + Add lines Add products Remove Purchase order line Financials Inventory Product and supply Update line Work details

Product name	Procurement category	Variant number	Site	Warehouse	CW quantity	CW unit	Quantity	Unit
Enclosure			1	11			3.00	

Display at purchase order line level:



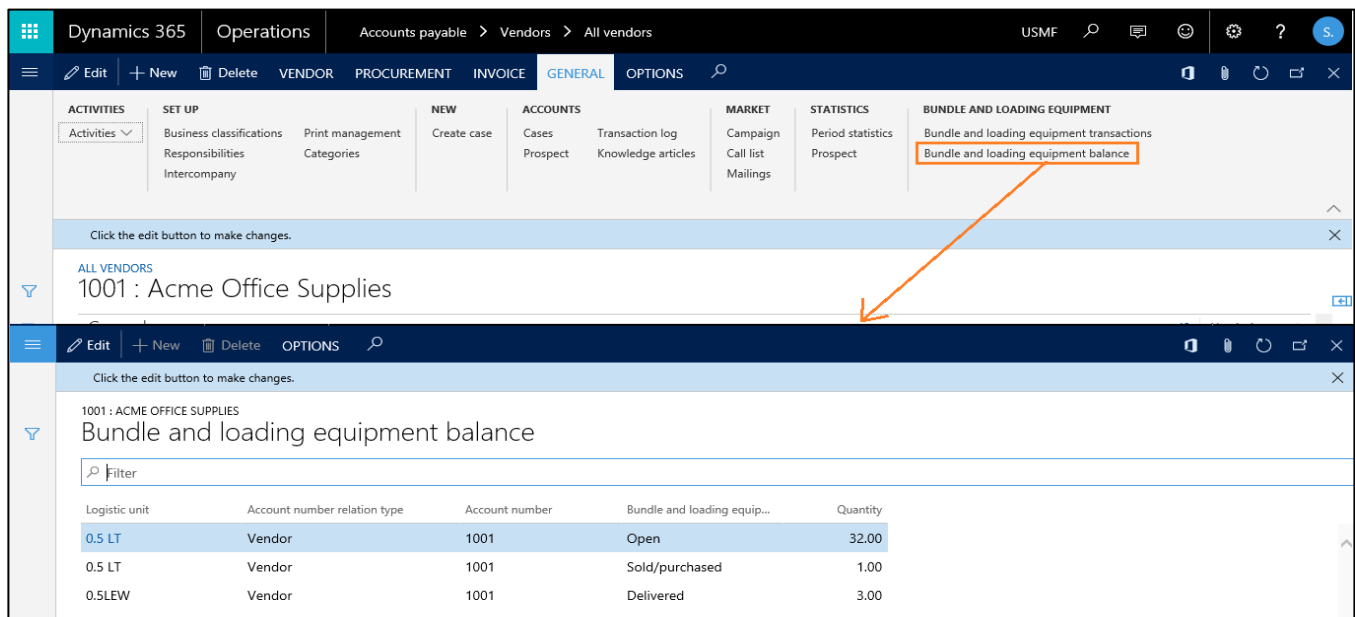
The screenshot shows the Dynamics 365 Operations interface. A context menu is open over a purchase order line, with the option 'Bundle and loading equipment transactions' highlighted. The background shows a purchase order for 'Acme Office Supplies' with a line item for 'Enclosure'.

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:

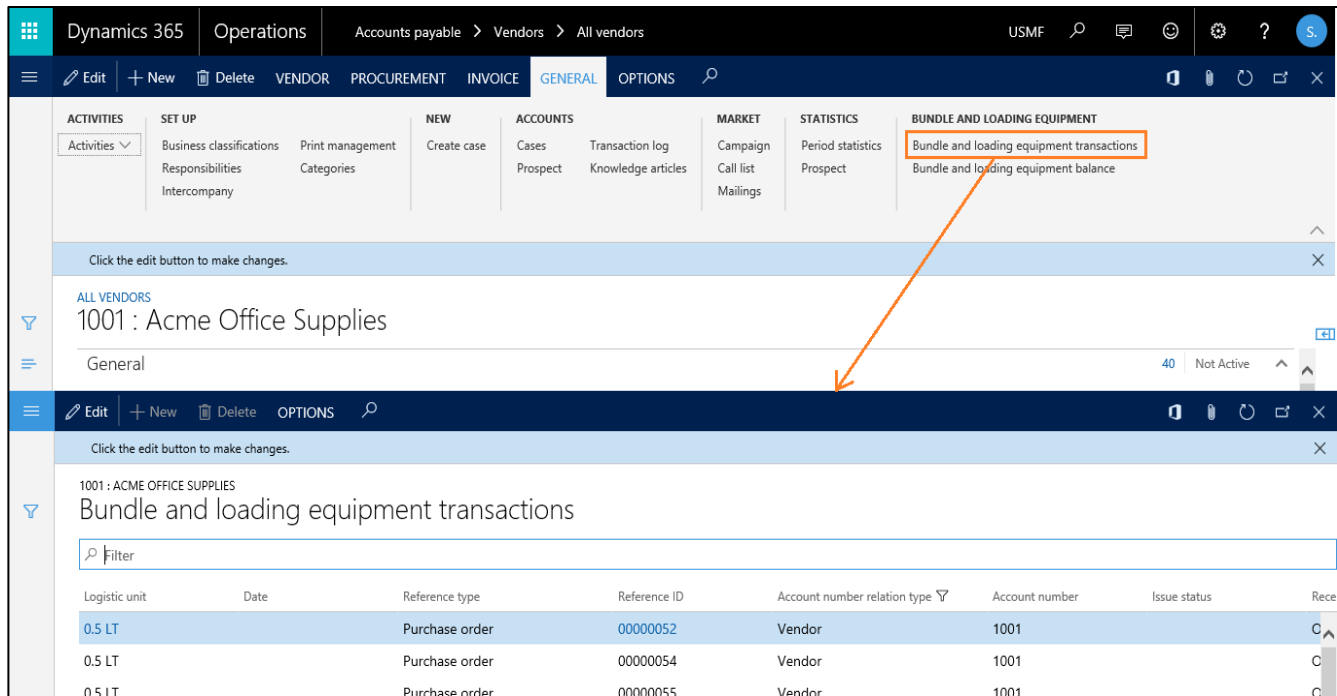
Carriers and Empties equipment balance:



The screenshot shows the Dynamics 365 Operations interface. The 'GENERAL' ribbon is active, and the 'Bundle and loading equipment balance' button is highlighted. Below, the 'Bundle and loading equipment balance' form is displayed for vendor 1001, showing a table of equipment balances.

Logistic unit	Account number relation type	Account number	Bundle and loading 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

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:

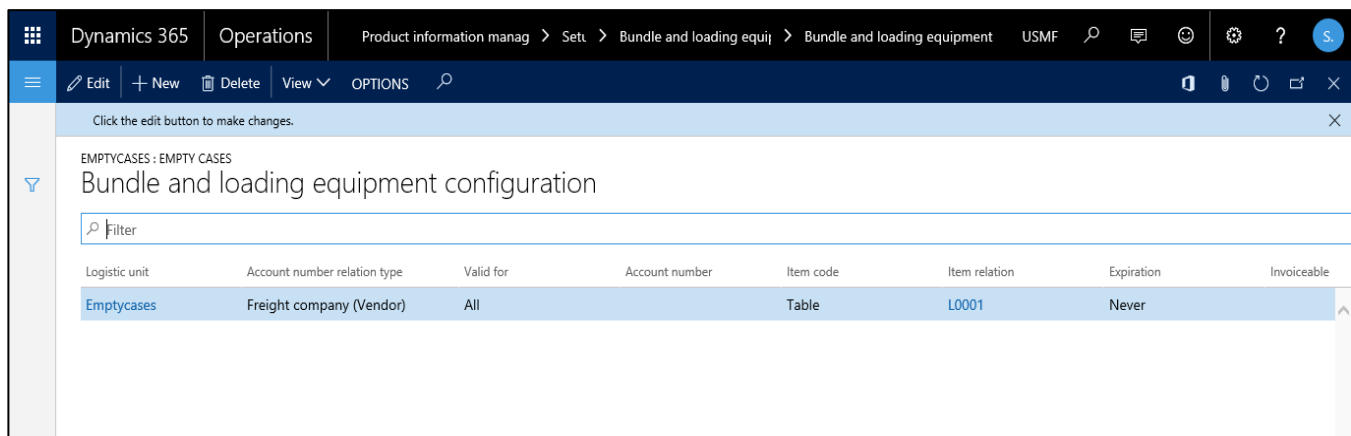


The screenshot shows the Dynamics 365 interface for the 'Accounts payable > Vendors > All vendors' path. The 'GENERAL' ribbon is active, and the 'BUNDLE AND LOADING EQUIPMENT' group contains the 'Bundle and loading equipment transactions' button, which is highlighted with an orange box. An orange arrow points from this button to the 'Bundle and loading equipment transactions' form for vendor '1001: Acme Office Supplies'. The form displays a table of transactions:

Logistic unit	Date	Reference type	Reference ID	Account number relation type	Account number	Issue status	Receivable
0.5 LT		Purchase order	00000052	Vendor	1001		C
0.5 LT		Purchase order	00000054	Vendor	1001		C
0.5 LT		Purchase order	00000055	Vendor	1001		C

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.



The screenshot shows the Dynamics 365 interface for the 'Product information management > Setup > Bundle and loading equipment > Bundle and loading equipment' path. The 'BUNDLE AND LOADING EQUIPMENT' ribbon is active, and the 'Bundle and loading equipment configuration' form is displayed. The form shows a table of configurations:

Logistic unit	Account number relation type	Valid for	Account number	Item code	Item relation	Expiration	Invoiceable
Emptycases	Freight company (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.

Click the edit button to make changes.

EMPTYCASES : EMPTY CASES

Bundle and loading equipment configuration

Filter

Item relation	Expiration	Invoiceable	No inventory jo...	WHS integration	Quantity logistic unit	Per Unit	Multiple quantity	Freight company reference
L0001	Never				1.00	Inventory unit	1.00	Sales order

Dynamics 365 | Operations | Accounts receivable > Orders > All sales orders | USMF

SALES ORDER | SALES ORDER | SELL | MANAGE | PICK AND PACK | INVOICE | RETAIL | GENERAL | WAREHOUSE | TRANSPORTATION

SET UP | CUSTOMER | MAINTAIN | RELATED INFORMATION | BUNDLE AND LOADING EQUIPMENT

SALES ORDER DETAILS

000814 : Forest Wholesales

Requested ship date: 8/17/2017

Requested receipt date: 8/18/2017

Simulate delivery dates

Confirmed ship date

DETAILS

Ship complete: No

Automatic notification and cancellati...: No

Expedite

Reason for export

TRANSPORTATION

Shipping carrier: Air Cargo

Carrier service: Air

Route plan

Transportation template ID

SHIPPING LOCATION TIME ZONE

Time zone: (GMT-08:00) Pacific Time (US &...)

Price and discount: USD Net45

Intercompany settings

Warehouse

Transportation

Dynamics 365 | Operations | Accounts receivable > Orders > All sales orders | USMF

Carrier fuel indexes | Carrier accessorial charges | Accessorial assignments | Constraints | Miscellaneous charge | OPTIONS

Click the edit button to make changes.

Filter

Air Cargo

Air Cargo Carrier

Air

Shipping carriers

Shipping carrier: Air Cargo

Name: Air Cargo Carrier

Mode: Air

Overview

Activate shipping carrier: Yes

Vendor: AirCarrier

Pro number sequence

Website URL

Transportation tender type: None

Activate carrier rating: Yes

Tracking URL

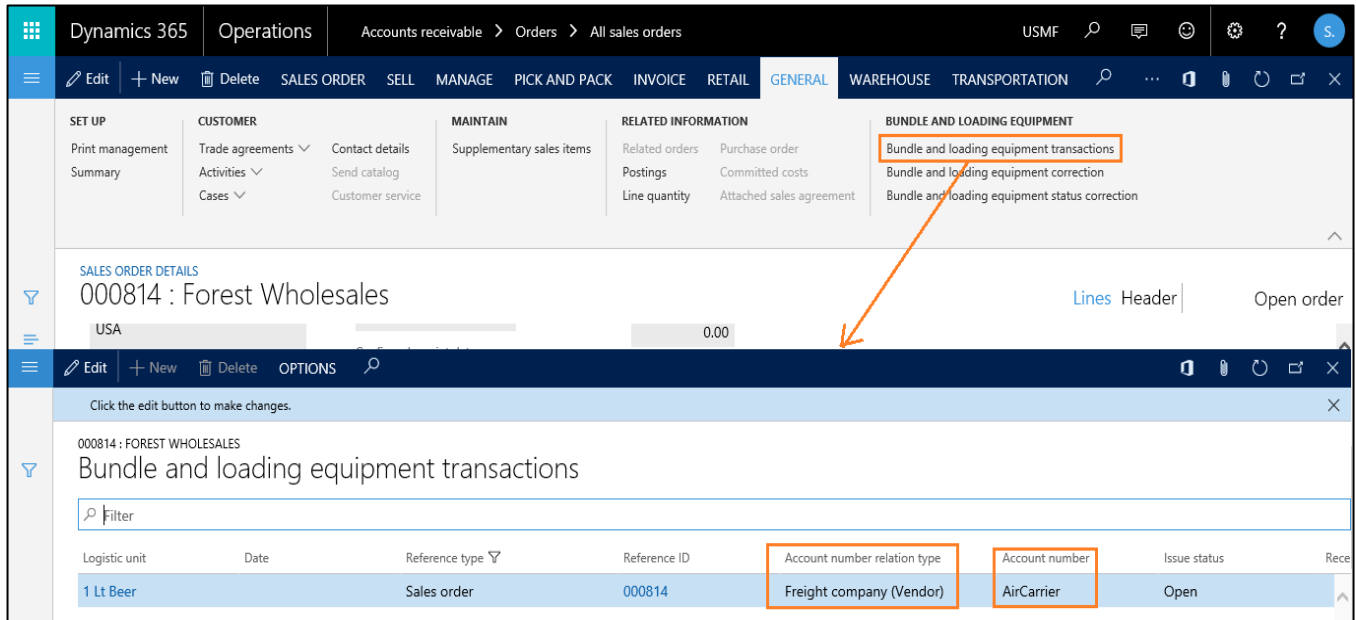
SCAC

Services

Addresses

Rating profiles

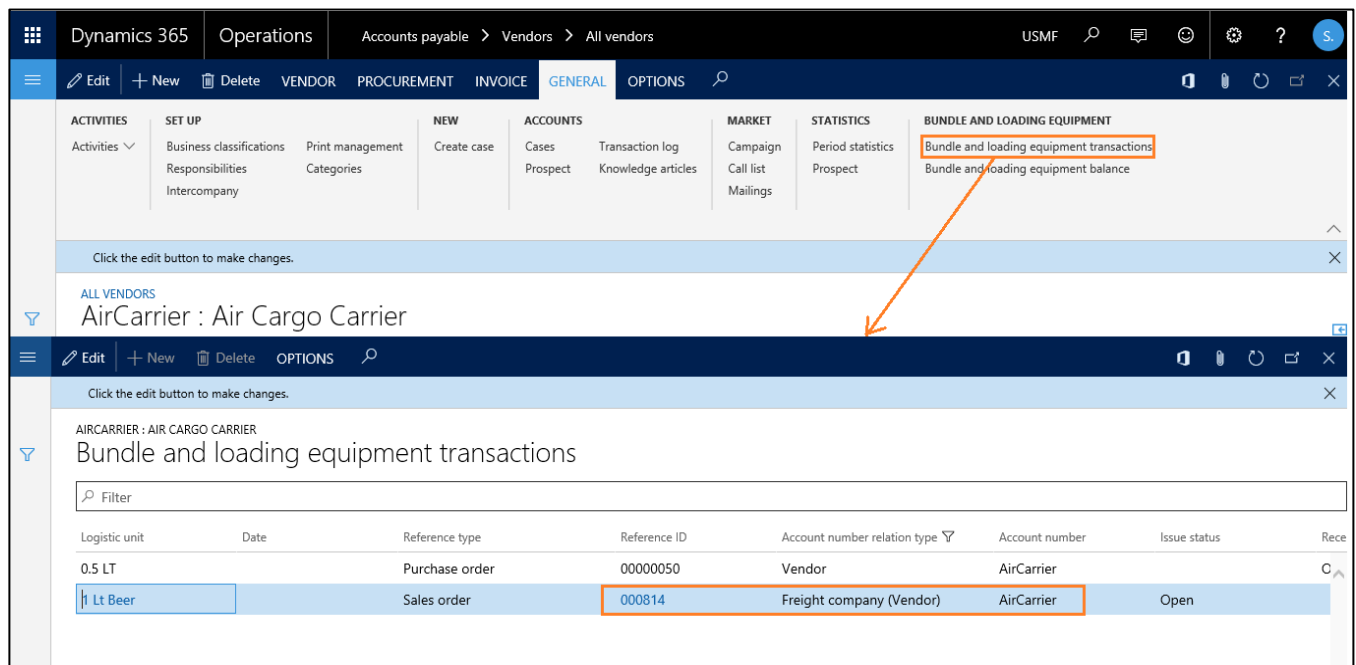
Transactions for Carriers and Empties equipment for freight vendor are generated with the button *Release order* on sales order.



The screenshot shows the Dynamics 365 Operations interface. The top navigation bar includes 'Dynamics 365', 'Operations', and 'Accounts receivable > Orders > All sales orders'. The main area displays the 'Bundle and loading equipment transactions' for sales order 000814: Forest Wholesales. The 'Account number relation type' is 'Freight company (Vendor)' and the 'Account number' is 'AirCarrier'. The 'Issue status' is 'Open'.

Logistic unit	Date	Reference type	Reference ID	Account number relation type	Account number	Issue status	Receivable
1 Lt Beer		Sales order	000814	Freight company (Vendor)	AirCarrier	Open	

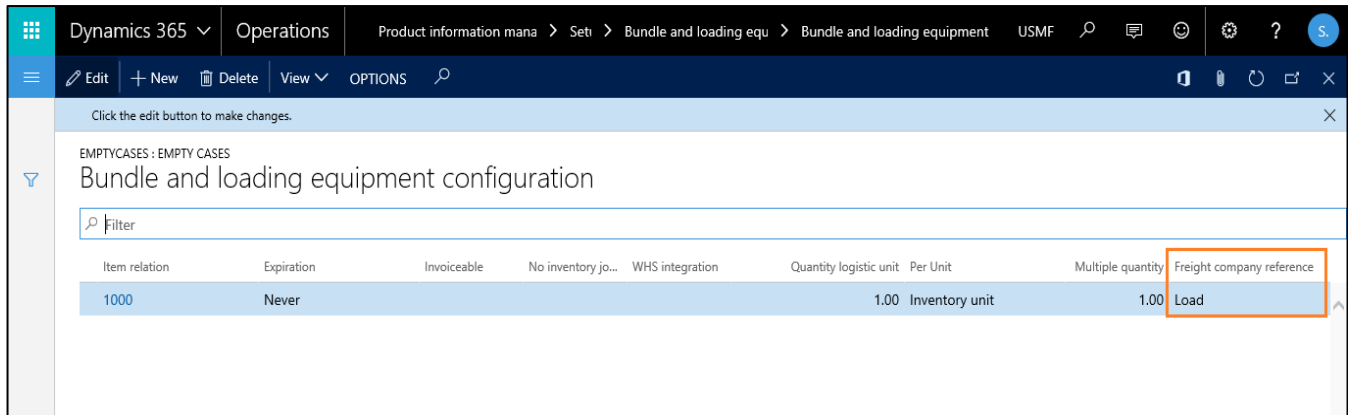
The Carriers and Empties transactions for freight vendor can be seen at both sales order level & freight vendor level.



The screenshot shows the Dynamics 365 Operations interface. The top navigation bar includes 'Dynamics 365', 'Operations', and 'Accounts payable > Vendors > All vendors'. The main area displays the 'Bundle and loading equipment transactions' for vendor AirCarrier: Air Cargo Carrier. The 'Account number relation type' is 'Vendor' and the 'Account number' is 'AirCarrier'. The 'Issue status' is 'Open'.

Logistic unit	Date	Reference type	Reference ID	Account number relation type	Account number	Issue status	Receivable
0.5 LT		Purchase order	00000050	Vendor	AirCarrier		
1 Lt Beer		Sales order	000814	Freight company (Vendor)	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.



Click the edit button to make changes.

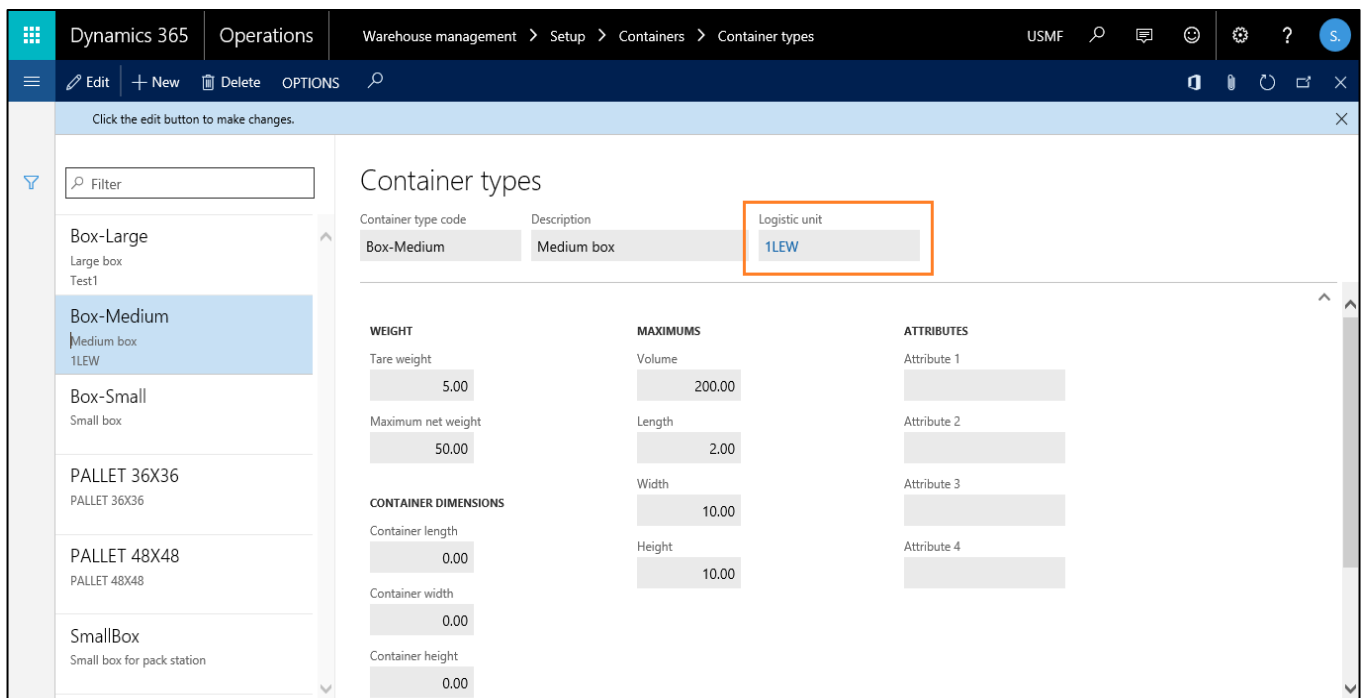
EMPTYCASES : EMPTY CASES

Bundle and loading equipment configuration

Filter

Item relation	Expiration	Invoiceable	No inventory jo...	WHS integration	Quantity logistic unit	Per Unit	Multiple quantity	Freight company reference
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.



Click the edit button to make changes.

Filter

Box-Large

Large box

Test1

Box-Medium

Medium box

1LEW

Box-Small

Small box

PALLET 36X36

PALLET 36X36

PALLET 48X48

PALLET 48X48

SmallBox

Small box for pack station

Container types

Container type code	Description	Logistic unit
Box-Medium	Medium box	1LEW

WEIGHT

Tare weight

5.00

Maximum net weight

50.00

MAXIMUMS

Volume

200.00

Length

2.00

Width

10.00

Height

10.00

ATTRIBUTES

Attribute 1

Attribute 2

Attribute 3

Attribute 4

CONTAINER DIMENSIONS

Container length

0.00

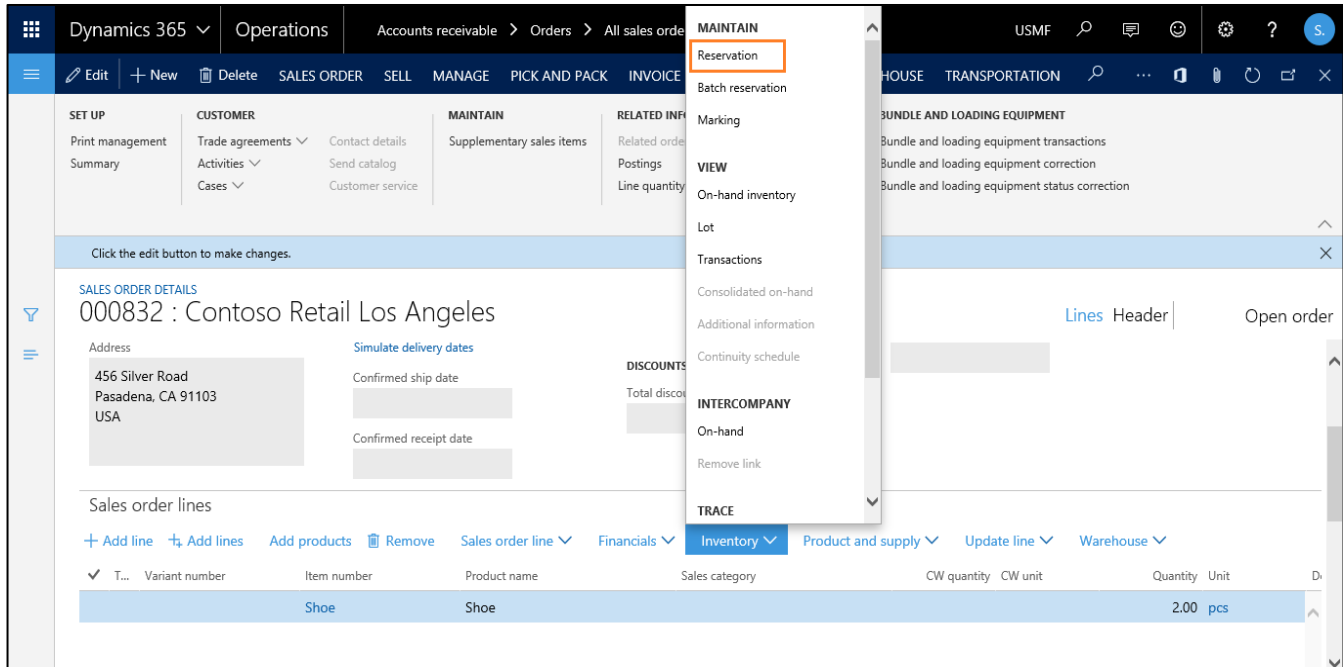
Container width

0.00

Container height

0.00

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



MAINTAIN

- Reservation
- Batch reservation
- Marking
- VIEW
- On-hand inventory
- Lot
- Transactions
- Consolidated on-hand
- Additional information
- Continuity schedule
- INTERCOMPANY
- On-hand
- Remove link
- TRACE

SALES ORDER DETAILS
000832 : Contoso Retail Los Angeles

Address: 456 Silver Road, Pasadena, CA 91103, USA

Simulate delivery dates

Confirmed ship date: [Field]

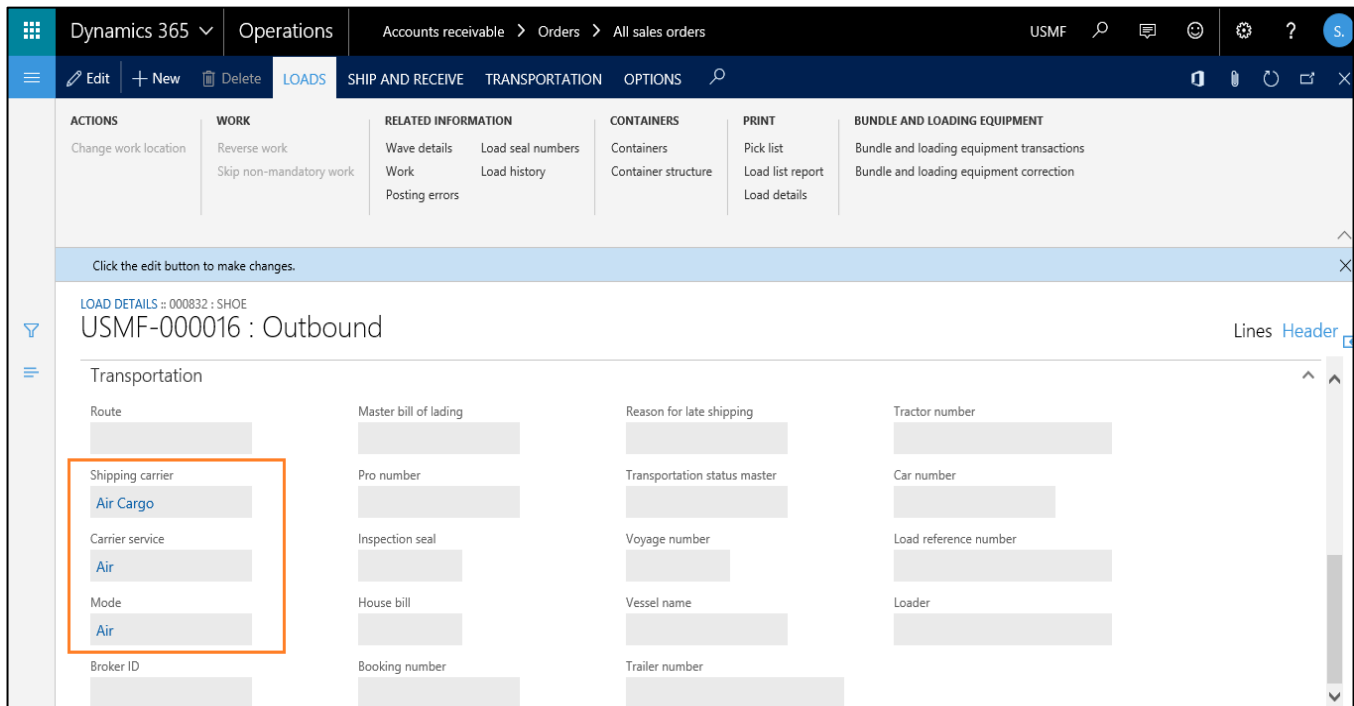
Confirmed receipt date: [Field]

Sales order lines

Variant number	Item number	Product name	Sales category	CW quantity	CW unit	Quantity	Unit
		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.



LOADS

LOAD DETAILS = 000832 : SHOE
USMF-000016 : Outbound

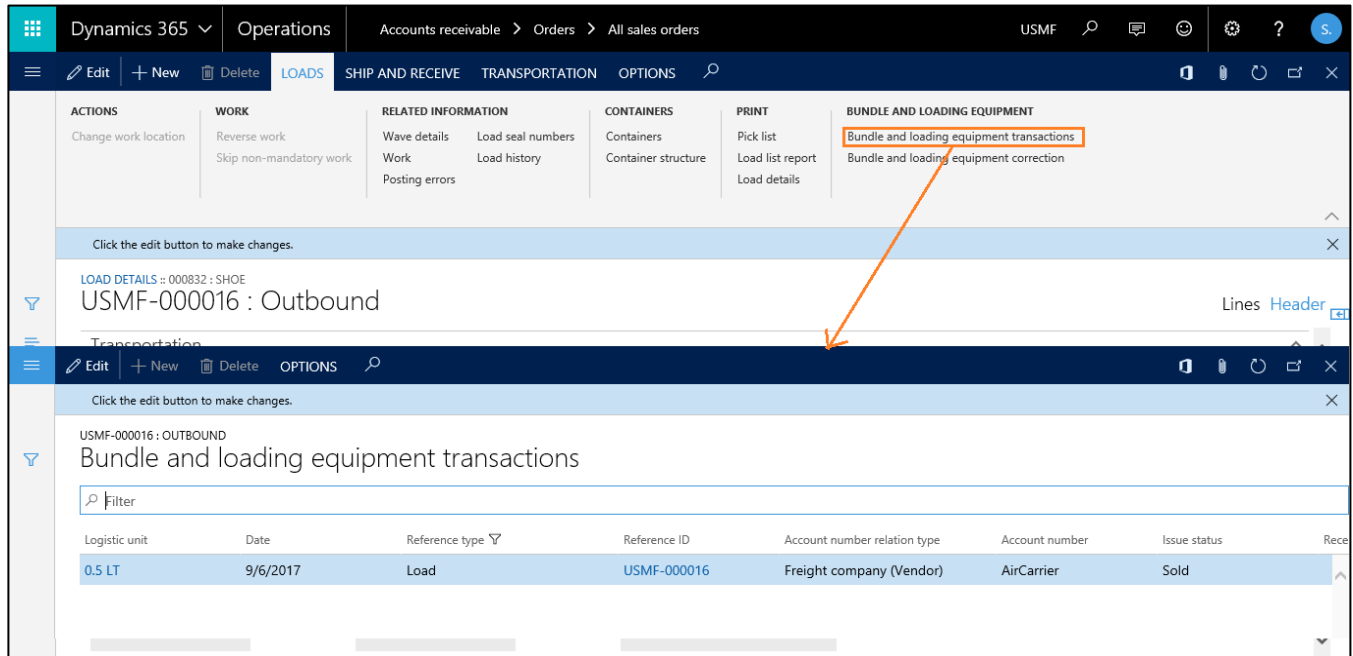
Transportation

Route	Master bill of lading	Reason for late shipping	Tractor number
Shipping carrier Air Cargo	Pro number	Transportation status master	Car number
Carrier service Air	Inspection seal	Voyage number	Load reference number
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'.

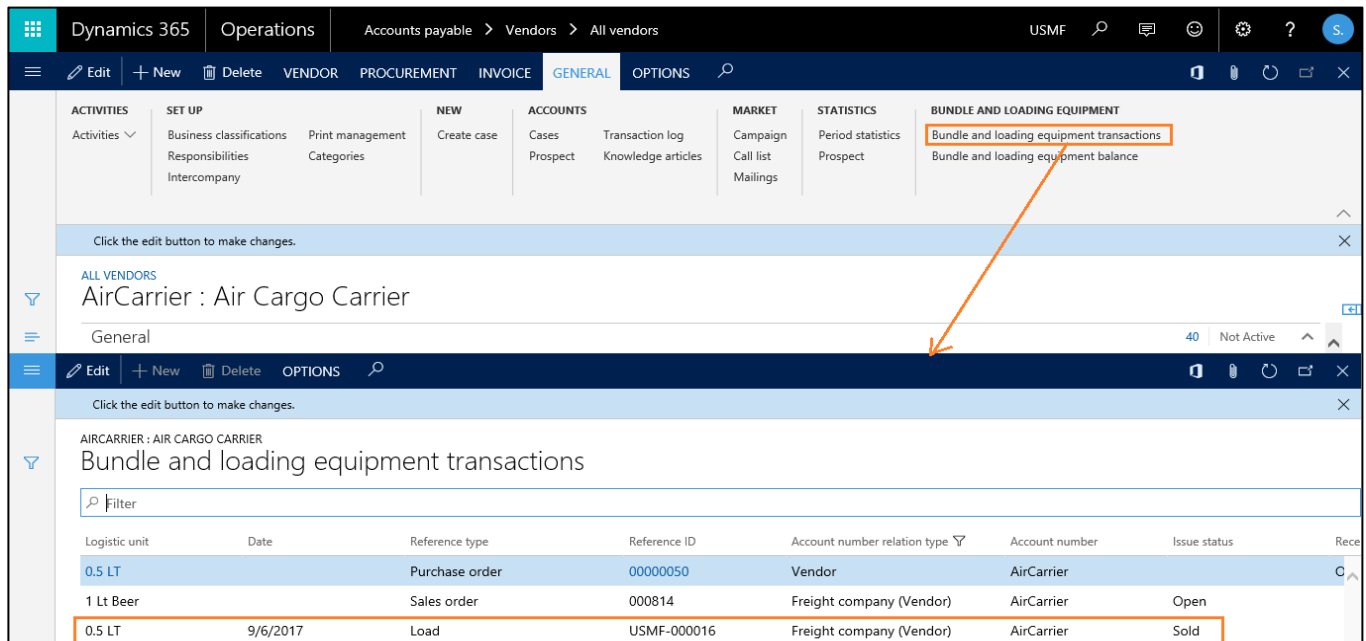
Load level:



The screenshot shows the Dynamics 365 Operations interface. The top navigation bar includes 'Dynamics 365', 'Operations', and a breadcrumb trail: 'Accounts receivable > Orders > All sales orders'. The main area is titled 'USMF-000016 : Outbound'. Below this, there's a section for 'Bundle and loading equipment transactions' with a table of data.

Logistic unit	Date	Reference type	Reference ID	Account number relation type	Account number	Issue status
0.5 LT	9/6/2017	Load	USMF-000016	Freight company (Vendor)	AirCarrier	Sold

Freight vendor level:

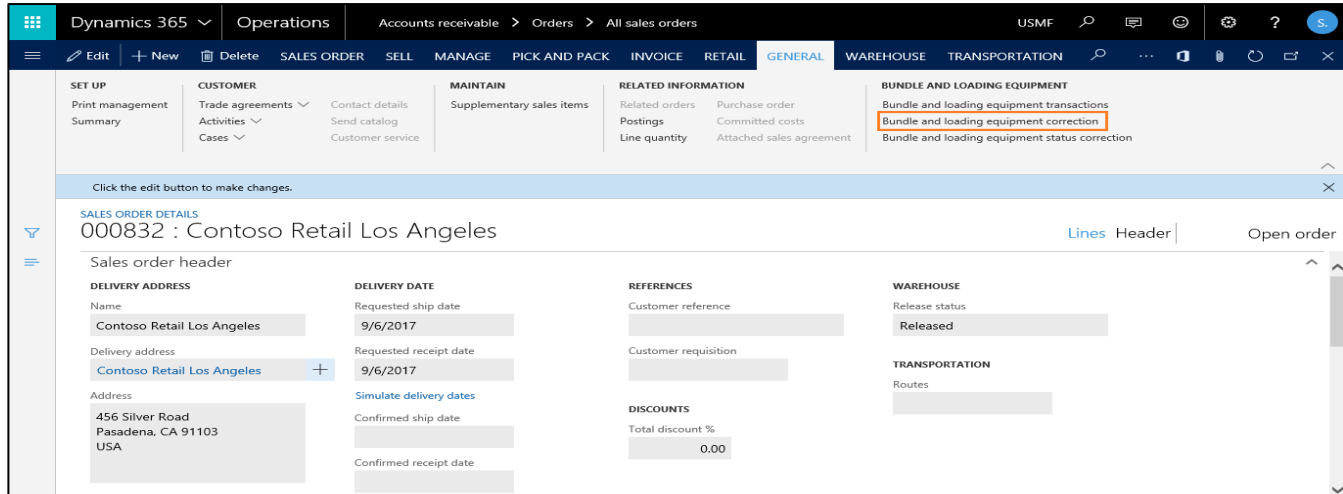


The screenshot shows the Dynamics 365 Operations interface. The top navigation bar includes 'Dynamics 365', 'Operations', and a breadcrumb trail: 'Accounts payable > Vendors > All vendors'. The main area is titled 'AirCarrier : Air Cargo Carrier'. Below this, there's a section for 'Bundle and loading equipment transactions' with a table of data.

Logistic unit	Date	Reference type	Reference ID	Account number relation type	Account number	Issue status
0.5 LT		Purchase order	00000050	Vendor	AirCarrier	
1 Lt Beer		Sales order	000814	Freight company (Vendor)	AirCarrier	Open
0.5 LT	9/6/2017	Load	USMF-000016	Freight company (Vendor)	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'.



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.

Dynamics 365 Operations Product information manag > Setu > Bundle and loading equij > Bundle and loading equipment USMF

1LEW : CUSTOMER WITH WHS INTEGRATION
Bundle and loading equipment configuration

Filter

Logistic unit	Account number relation type	Valid for	Account number	Item code	Item relation	Expiration	Invoiceable
1LEW	Customer	All		All		Never	<input type="checkbox"/>

Dynamics 365 Operations Product information manag > Setu > Bundle and loading equij > Bundle and loading equipment USMF

1LEW : CUSTOMER WITH WHS INTEGRATION
Bundle and loading equipment configuration

Filter

r relation type	Valid for	Account number	Item code	Item relation	Expiration	Invoiceable	No inventory jo...	WHS integration
	All		All		Never	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

- 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.

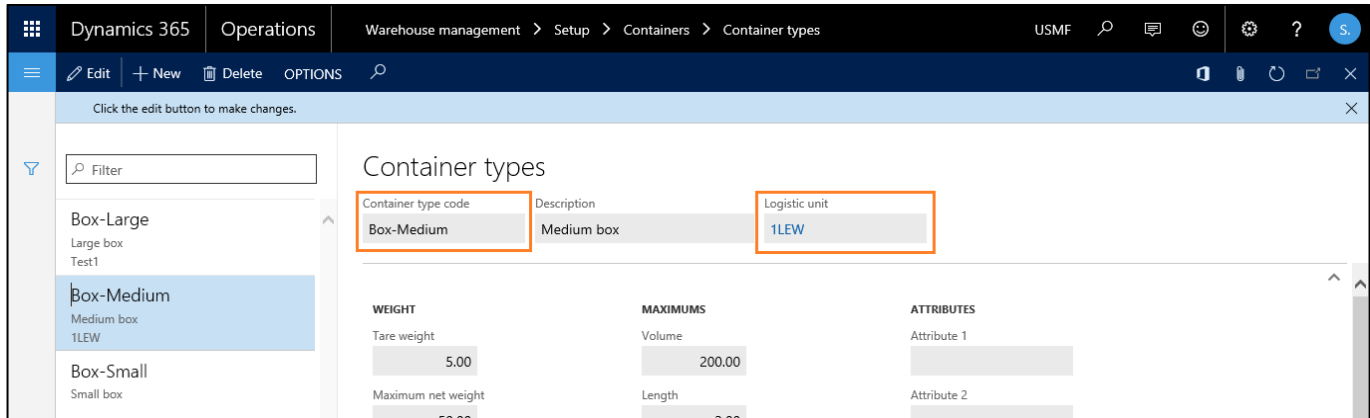
<https://docs.microsoft.com/en-us/dynamics365/unified-operations/supply-chain/warehousing/install-configure-warehousing-app>

- 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)



Click the edit button to make changes.

Filter

Box-Large
Large box
Test1

Box-Medium
Medium box
1LEW

Box-Small
Small box

Container types

Container type code: Box-Medium Description: Medium box Logistic unit: 1LEW

WEIGHT

Tare weight: 5.00

Maximum net weight: 50.00

MAXIMUMS

Volume: 200.00

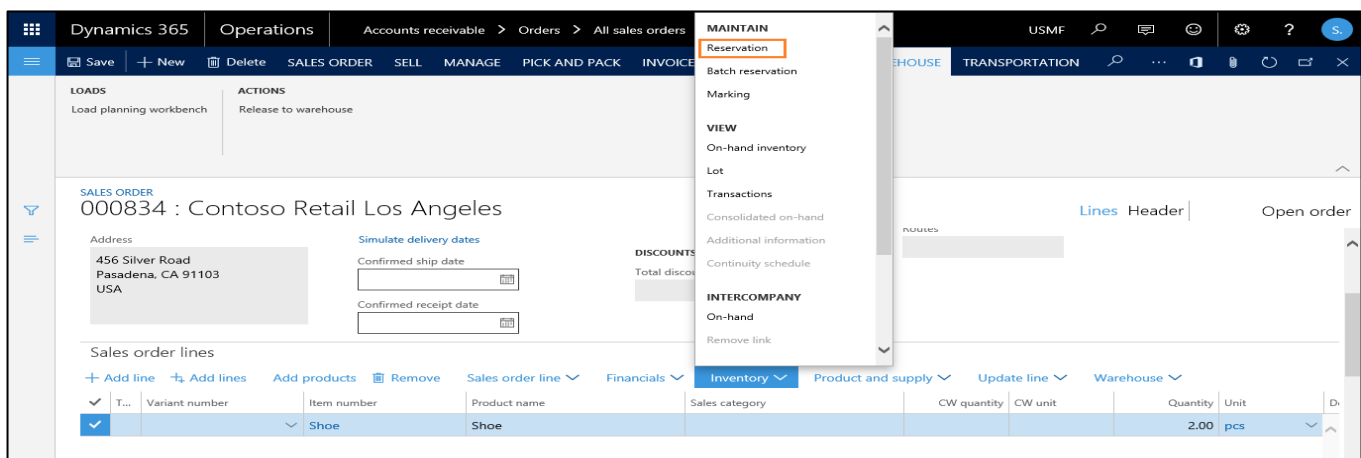
Length: 2.00

ATTRIBUTES

Attribute 1

Attribute 2

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



Dynamics 365 Operations Accounts receivable > Orders > All sales orders

Save + New Delete SALES ORDER SELL MANAGE PICK AND PACK INVOICE

LOADS Load planning workbench ACTIONS Release to warehouse

SALES ORDER 000834 : Contoso Retail Los Angeles

Address 456 Silver Road Pasadena, CA 91103 USA

Simulate delivery dates

Confirmed ship date

Confirmed receipt date

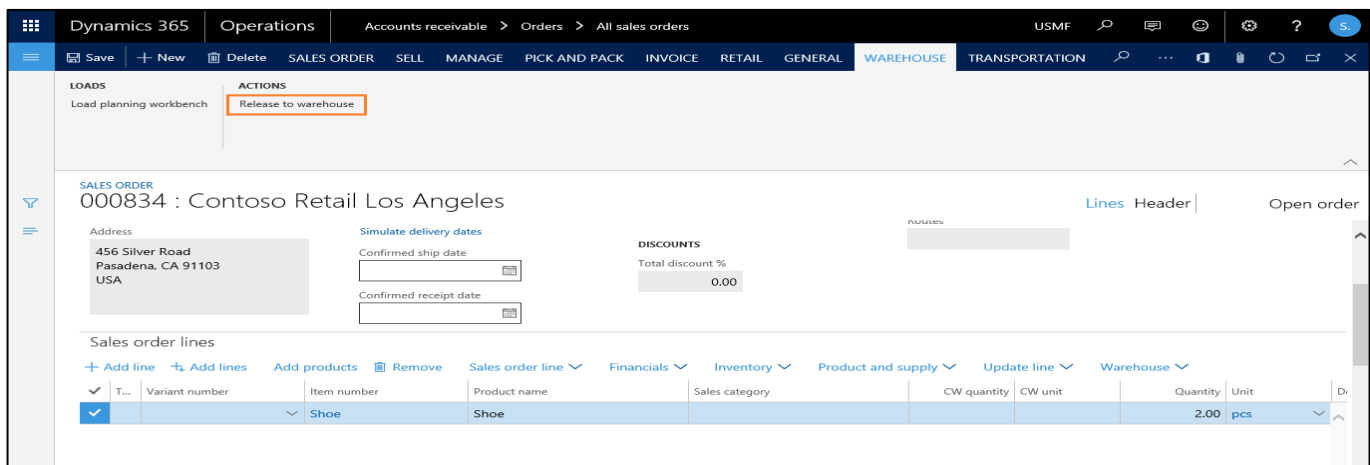
DISCOUNTS Total discount

Sales order lines

+ Add line + Add lines Add products Remove Sales order line Financials Inventory Product and supply Update line Warehouse

✓	T...	Variant number	Item number	Product name	Sales category	CW quantity	CW unit	Quantity	Unit	D
✓			Shoe	Shoe				2.00	pcs	

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



Dynamics 365 Operations Accounts receivable > Orders > All sales orders

Save + New Delete SALES ORDER SELL MANAGE PICK AND PACK INVOICE RETAIL GENERAL WAREHOUSE TRANSPORTATION

LOADS Load planning workbench ACTIONS Release to warehouse

SALES ORDER 000834 : Contoso Retail Los Angeles

Address 456 Silver Road Pasadena, CA 91103 USA

Simulate delivery dates

Confirmed ship date

Confirmed receipt date

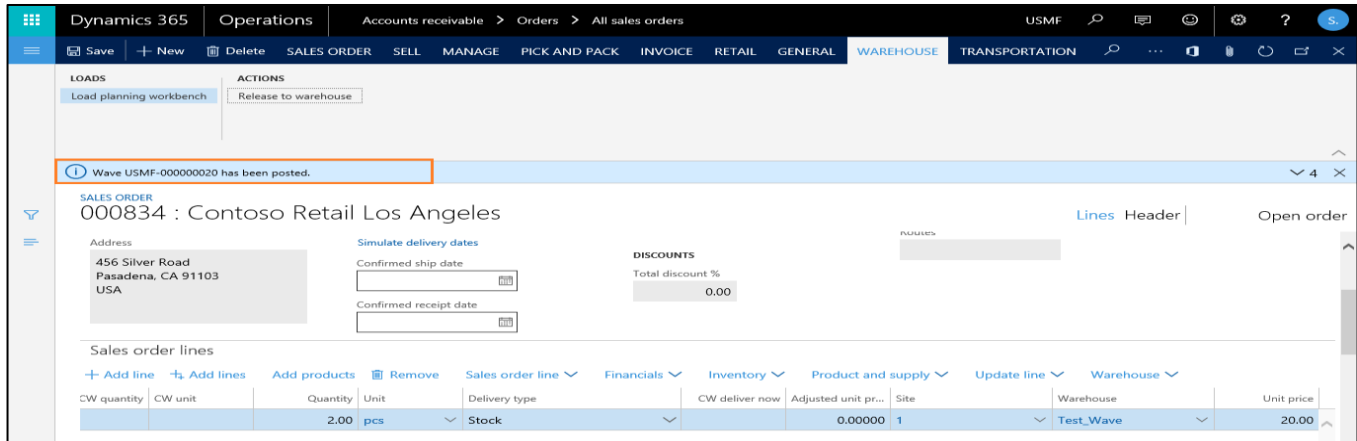
DISCOUNTS Total discount % 0.00

Sales order lines

+ Add line + Add lines Add products Remove Sales order line Financials Inventory Product and supply Update line Warehouse

✓	T...	Variant number	Item number	Product name	Sales category	CW quantity	CW unit	Quantity	Unit	D
✓			Shoe	Shoe				2.00	pcs	

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



SALES ORDER
000834 : Contoso Retail Los Angeles

Address: 456 Silver Road, Pasadena, CA 91103, USA

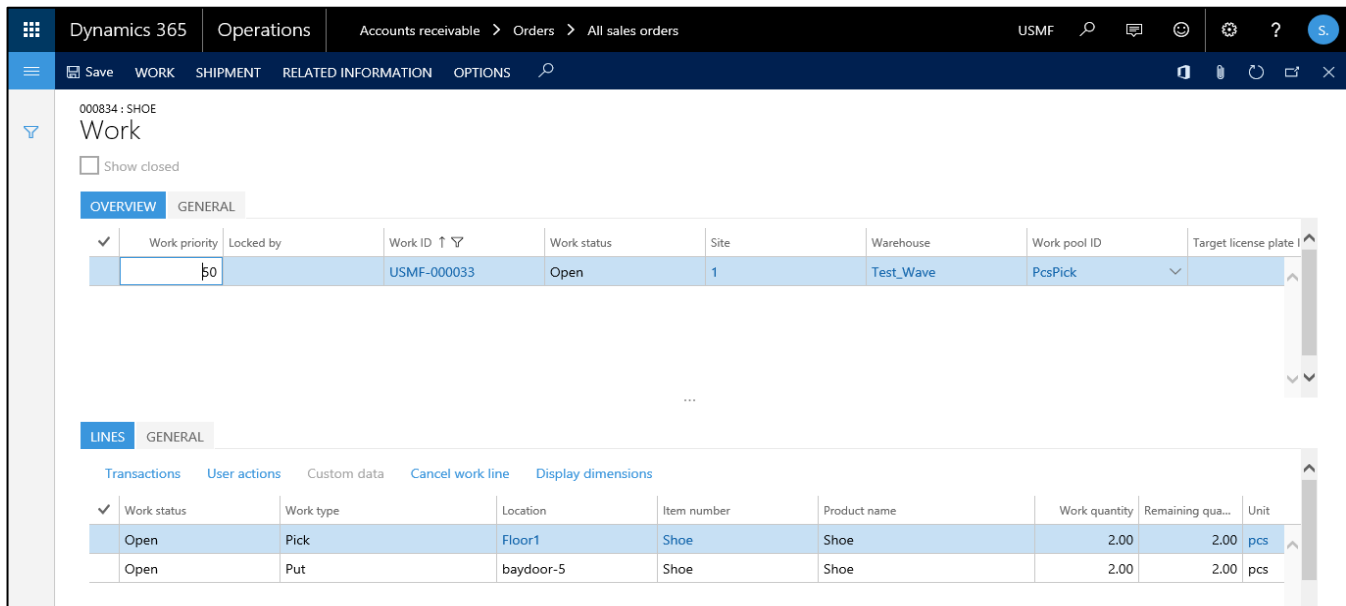
Simulate delivery dates
Confirmed ship date:
Confirmed receipt date:

DISCOUNTS
Total discount %: 0.00

Sales order lines

CW quantity	CW unit	Quantity	Unit	Delivery type	CW deliver now	Adjusted unit pr...	Site	Warehouse	Unit price
		2.00	pcs	Stock		0.00000	1	Test_Wave	20.00

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



000834 : SHOE
Work

☐ Show closed

OVERVIEW GENERAL

Work priority	Locked by	Work ID ↑ ▾	Work status	Site	Warehouse	Work pool ID	Target license plate
50		USMF-000033	Open	1	Test_Wave	PcsPick	

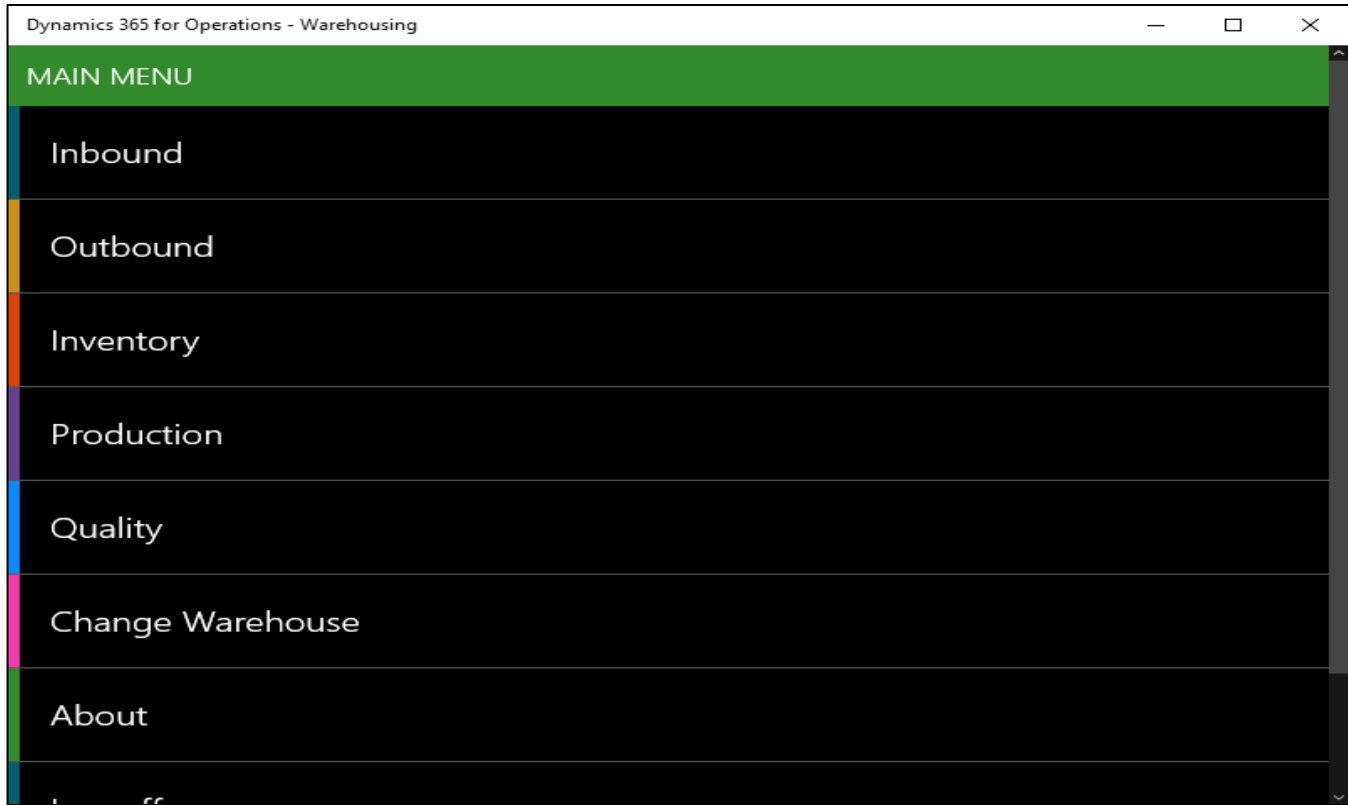
...

LINES GENERAL

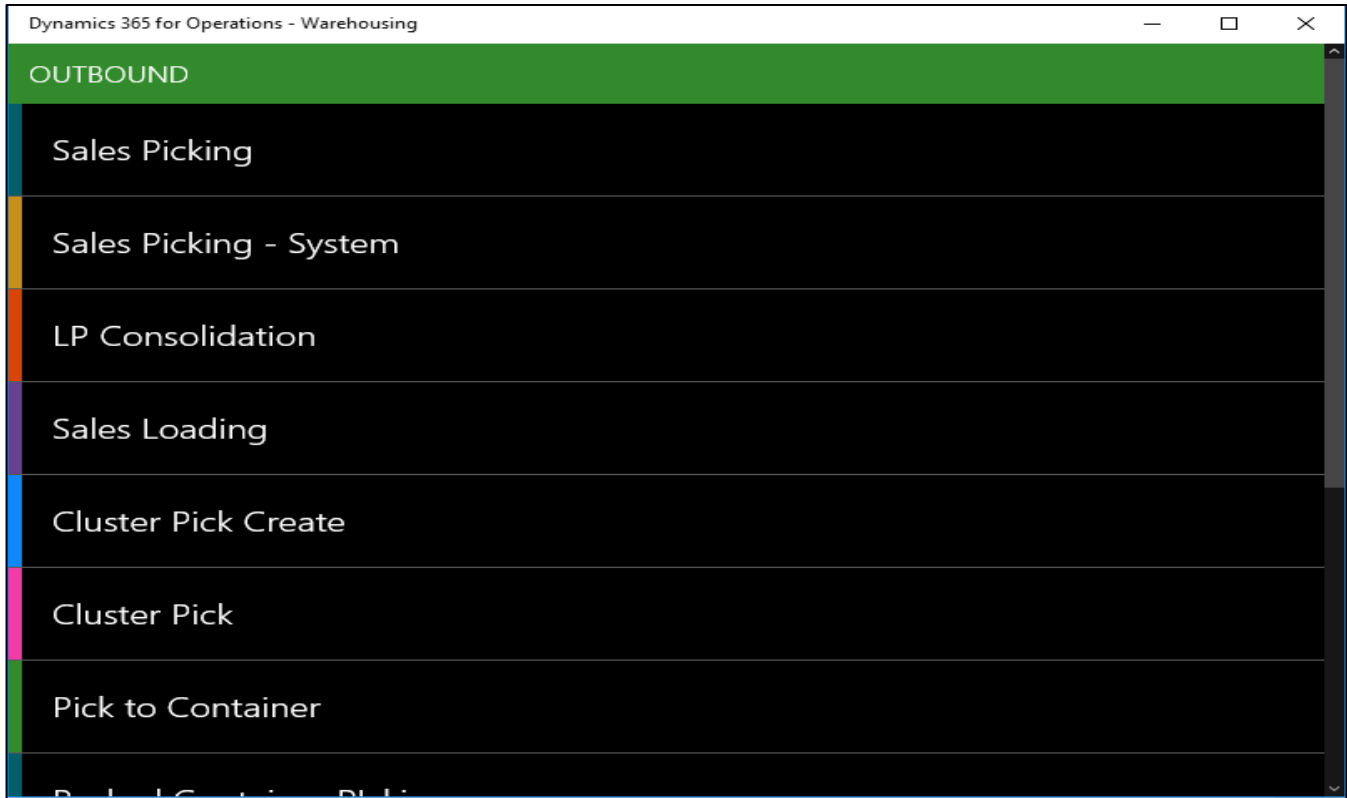
Transactions User actions Custom data Cancel work line Display dimensions

Work status	Work type	Location	Item number	Product name	Work quantity	Remaining qua...	Unit
Open	Pick	Floor1	Shoe	Shoe	2.00	2.00	pcs
Open	Put	baydoor-5	Shoe	Shoe	2.00	2.00	pcs

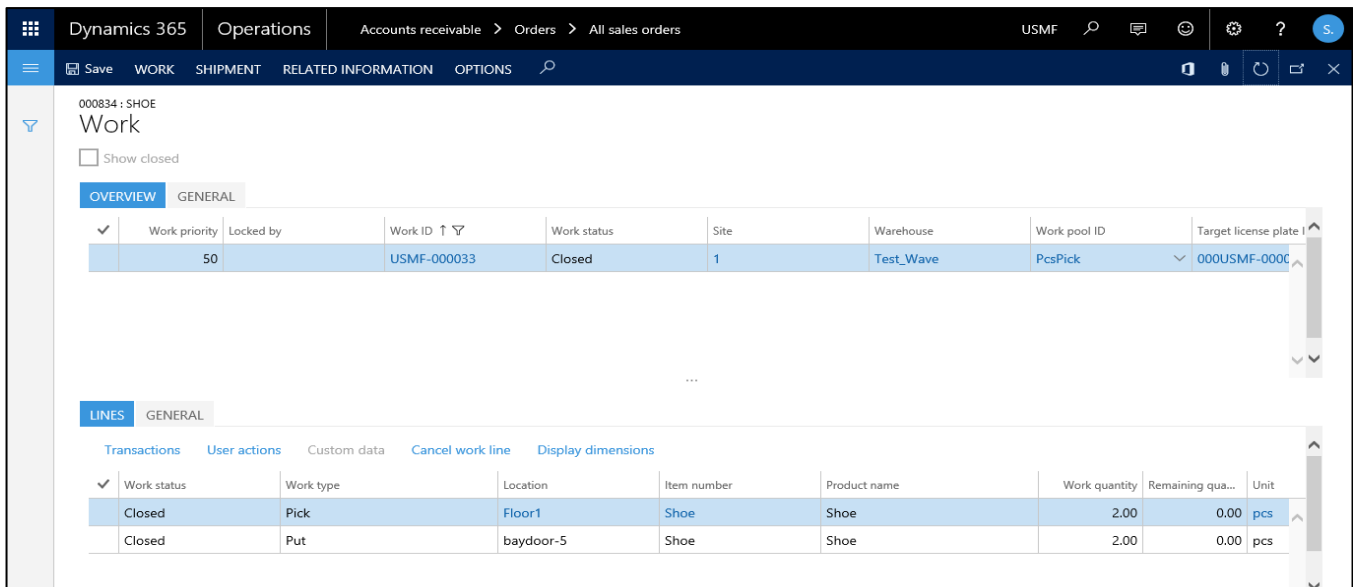
11) Login to Warehousing – mobile app to perform sales picking.



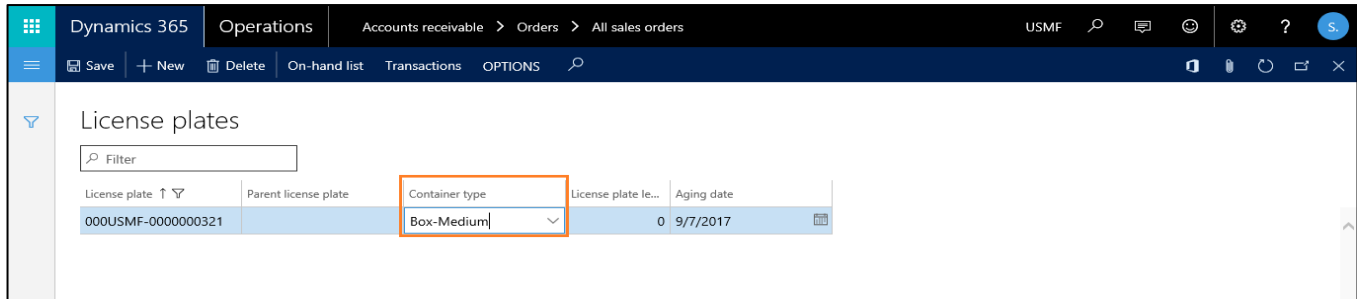
12) Click Outbound > Sales picking – System.



13) Enter the Work Id, License plate id of the item and click 'OK' to complete the work.

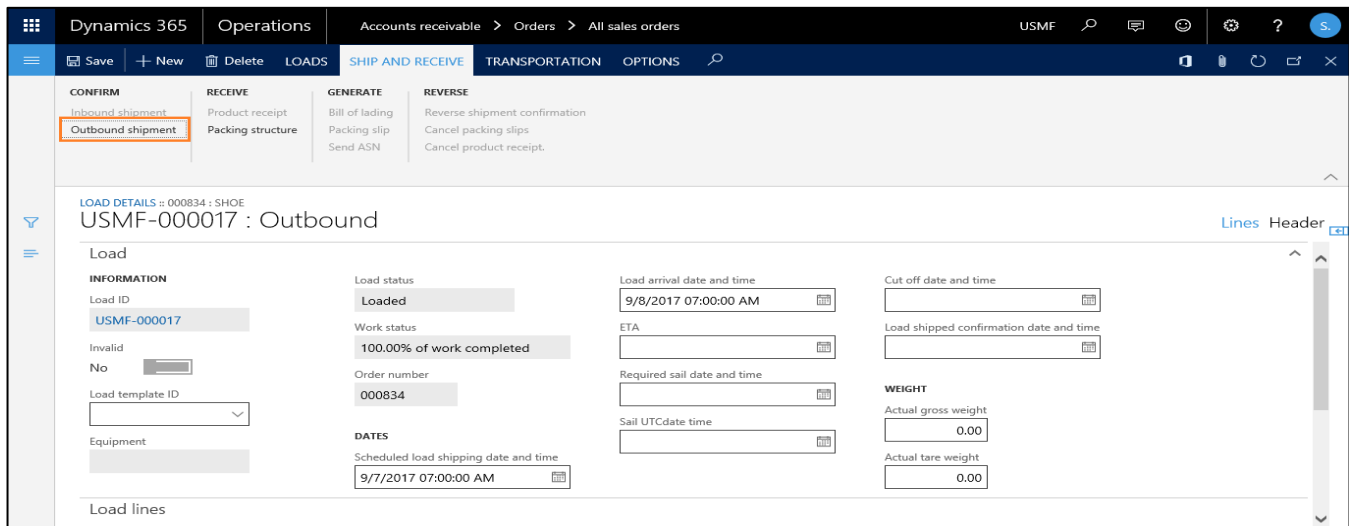


- 14) Click on the 'Target License Plate Id' on the Work record to assign container type to the target license plate. Assign the container type that has Carriers and Empties logistic unit selected in the initial steps to the target LP.



The screenshot shows the 'License plates' form in Dynamics 365. The 'Container type' dropdown menu is highlighted with a red box, showing 'Box-Medium' as the selected option. The form includes fields for License plate, Parent license plate, License plate le..., and Aging date.

- 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.



The screenshot shows the 'Load' form in Dynamics 365. The 'Outbound shipment' button is highlighted with a red box. The form displays various fields including Load ID (USMF-000017), Load status (Loaded), Work status (100.00% of work completed), Order number (000834), and various dates and times. The 'SHIP AND RECEIVE' tab is active, and the 'Outbound shipment' button is highlighted.

- 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 > All sales orders

USMF

Save + New Delete OPTIONS

000834 : CONTOSO RETAIL LOS ANGELES

Bundle and loading equipment transactions

Filter

Logistic unit	Date	Reference type	Reference ID	Account number relation type	Account number	Issue status	Receivable
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 | USMF

Edit + New Delete Configure logistic unit OPTIONS

Click the edit button to make changes.

Bundle and loading equipment

General

Logistic unit: Test1

Description: Vendor with WHS integration

Item number: 1000

On stock: Yes

Test1 Vendor with WHS integration 1000

1 Lt Beer
1Lt beer bottle

1LEW
Customer with WHS integration

CC-Container
CC Container

Emptycases
Empty cases

Test1
Vendor with WHS integration

transfer cases
Transfer cases for beer

Dynamics 365 | Operations | USMF

Edit + New Delete View OPTIONS

Click the edit button to make changes.

TEST1 : VENDOR WITH WHS INTEGRATION

Bundle and loading equipment configuration

Filter

Logistic unit	Account number relation type	Valid for	Account number	Item code	Item relation	Expiration	Invoiceable
Test1	Vendor	All		All	A0002	Never	

Click the edit button to make changes.

TEST1 : VENDOR WITH WHS INTEGRATION

Bundle and loading equipment configuration

Filter

Item code	Item relation	Expiration	Invoiceable	No inventory jo...	WHS integration	Quantity logistic unit	Per Unit	Multiple quantity	Freight
All	A0002	Never			✓	1.00	Inventory unit	1.00	

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

Dynamics 365 | Operations | Warehouse management > Setup > Containers > Container types | USMF

Click the edit button to make changes.

Container types

Filter

Box-Large

Large box

Test1

Box-Medium

Medium box

1LEW

Box-Small

Small box

PALLET 36X36

PALLET 36X36

PALLET 48X48

PALLET 48X48

SmallBox

Small box for pack station

Container type code	Description	Logistic unit
Box-Large	Large box	Test1

WEIGHT

Tare weight

5.00

Maximum net weight

100.00

MAXIMUMS

Volume

400.00

Length

4.00

Width

10.00

Height

10.00

CONTAINER DIMENSIONS

Container length

0.00

Container width

0.00

Container height

0.00

ATTRIBUTES

Attribute 1

Attribute 2

Attribute 3

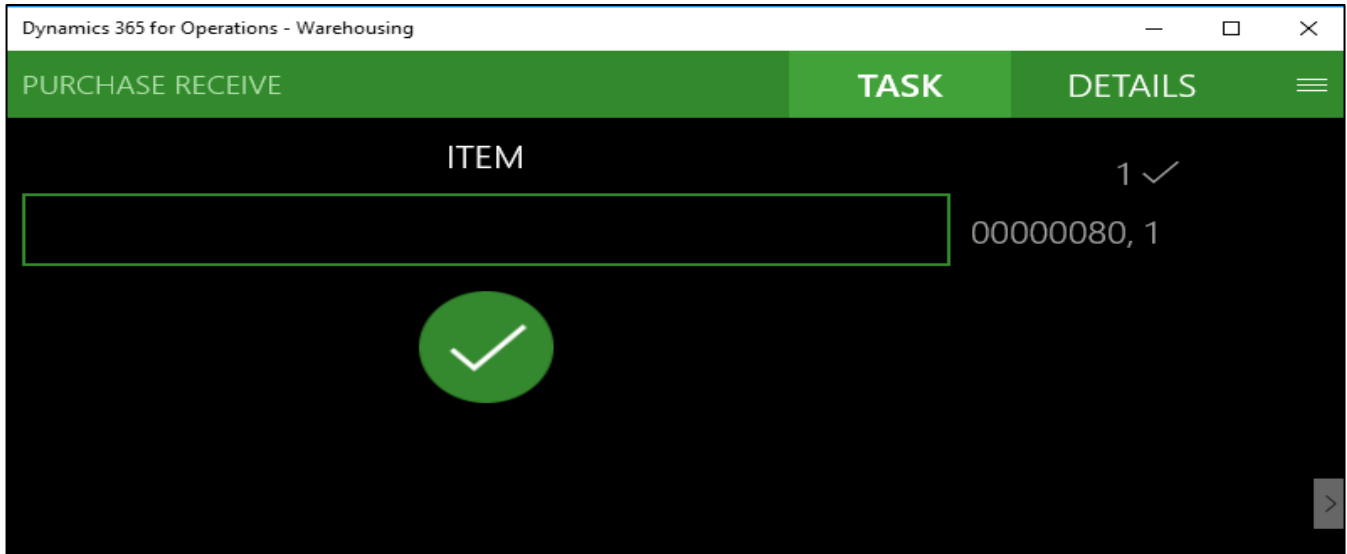
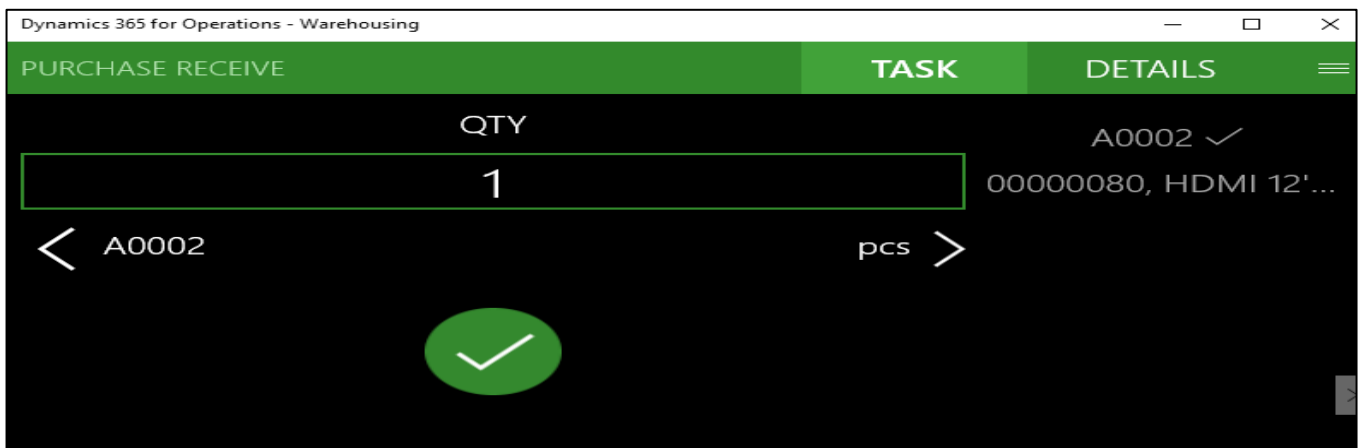
Attribute 4

- 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).

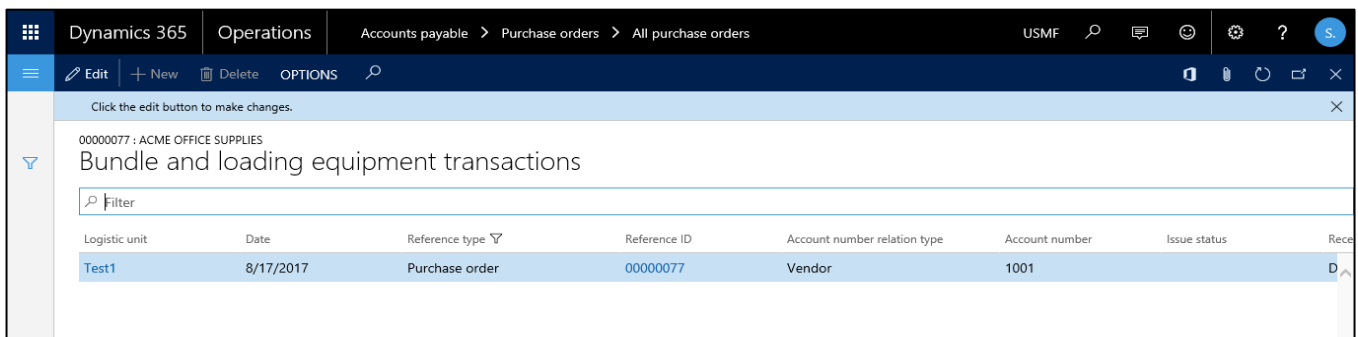


Inbound Process
using Advance Ware

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

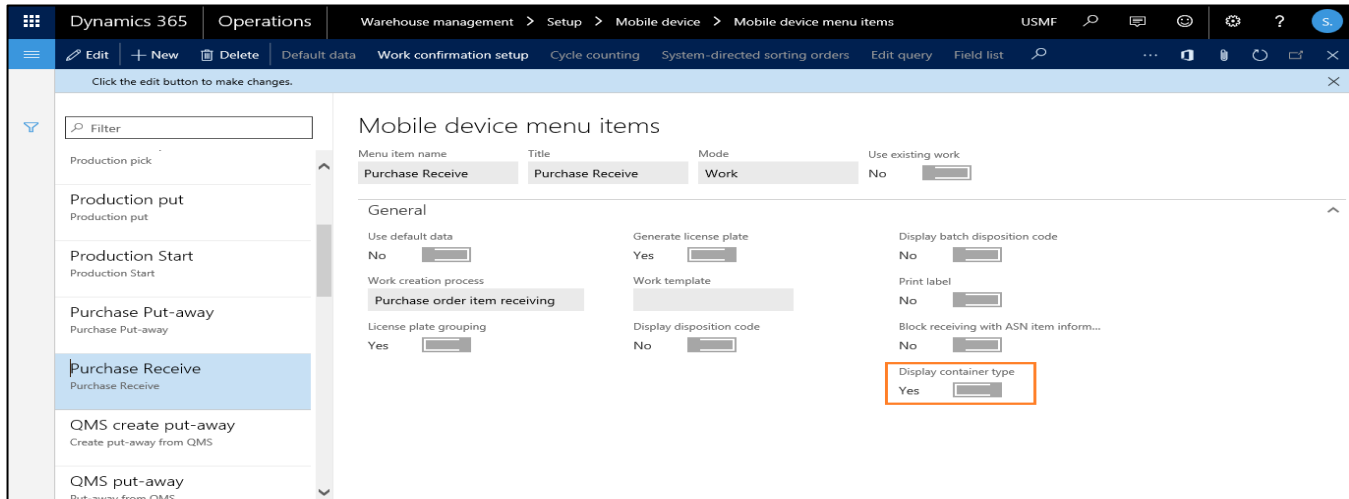
- 8) Select the 'Container type' and finish the Purchase receive activity on the mobile app.
- 9) Confirm the Purchase order and post the product receipt to generate the Carriers and Empties equipment transactions.



Logistic unit	Date	Reference type	Reference ID	Account number relation type	Account number	Issue status	Rece
Test1	8/17/2017	Purchase order	00000077	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.



The screenshot shows the 'Mobile device menu items' form in Dynamics 365. The left sidebar lists various menu items, with 'Purchase Receive' selected. The main form area shows the 'Purchase Receive' configuration. The 'Display container type' checkbox is highlighted with a red box and is checked.

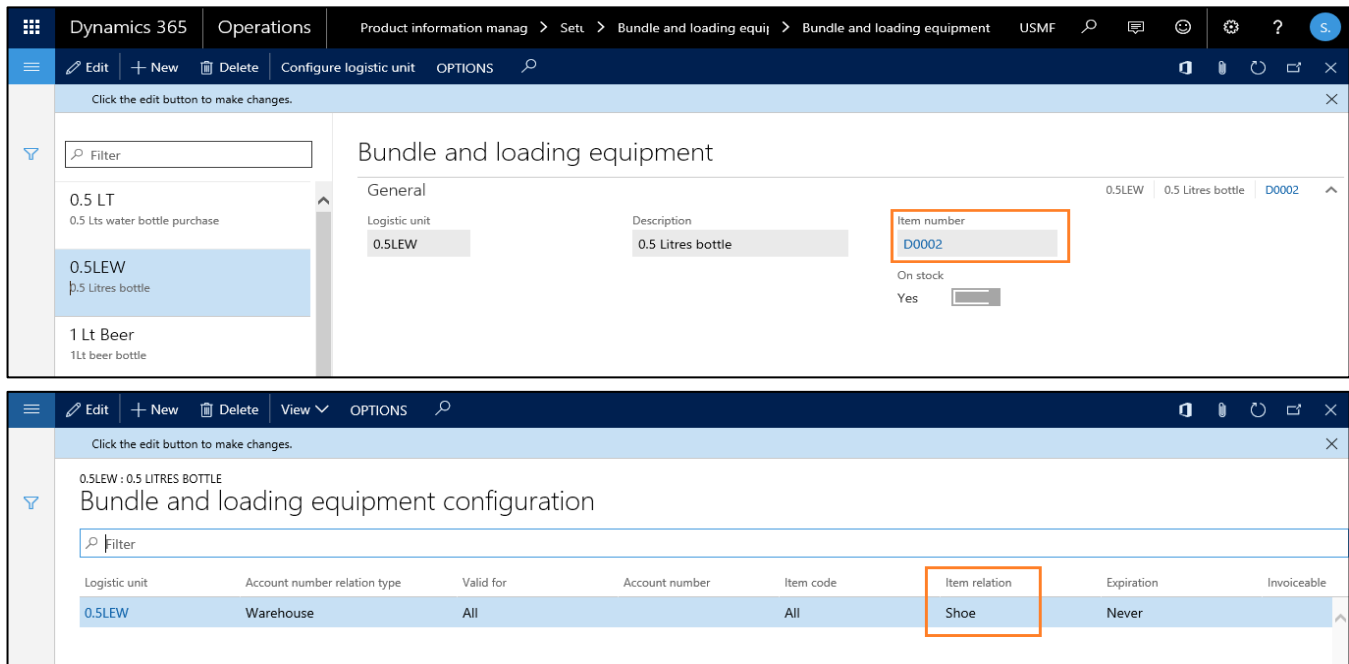
Menu item name	Title	Mode	Use existing work
Purchase Receive	Purchase Receive	Work	No

General

Use default data	Generate license plate	Display batch disposition code
No	Yes	No
Work creation process	Work template	Print label
Purchase order item receiving		No
License plate grouping	Display disposition code	Block receiving with ASN item inform...
Yes	No	No
		Display container type
		Yes

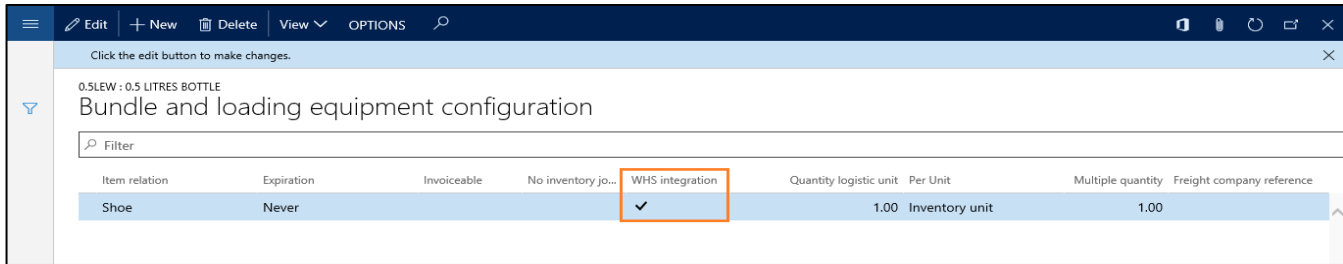
7.3 Transfer sequence with WHS integration

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



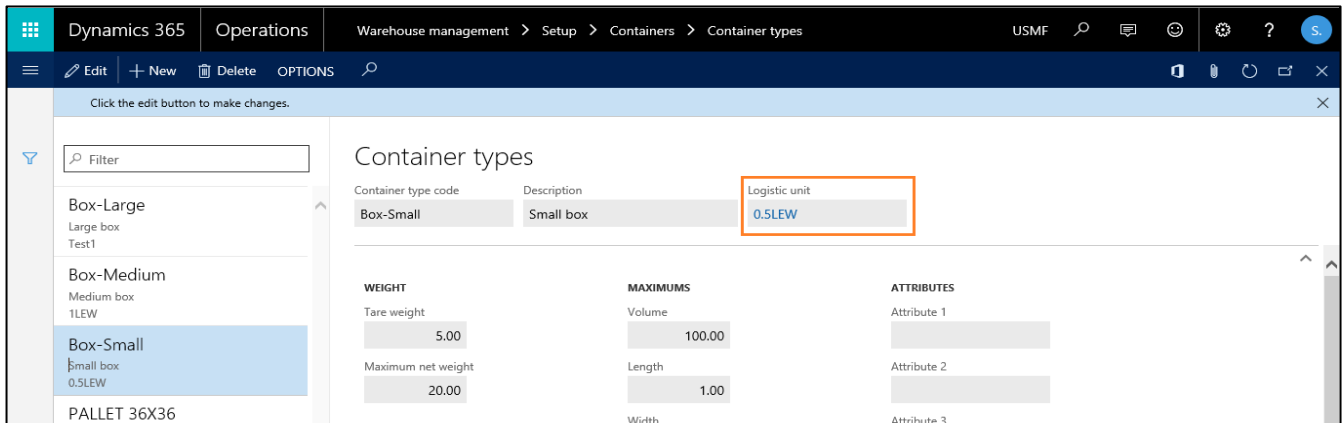
The screenshot shows the 'Bundle and loading equipment' form in Dynamics 365. The left sidebar lists various equipment items, with '0.5LEW' selected. The main form area shows the '0.5LEW' configuration. The 'Item number' field is highlighted with a red box and contains the value 'D0002'. Below the form, a table shows the configuration for the selected item.

Logistic unit	Account number relation type	Valid for	Account number	Item code	Item relation	Expiration	Invoiceable
0.5LEW	Warehouse	All		All	Shoe	Never	



Item relation	Expiration	Invoiceable	No inventory jo...	WHS integration	Quantity logistic unit	Per Unit	Multiple quantity	Freight company reference
Shoe	Never			<input checked="" type="checkbox"/>	1.00	Inventory unit	1.00	

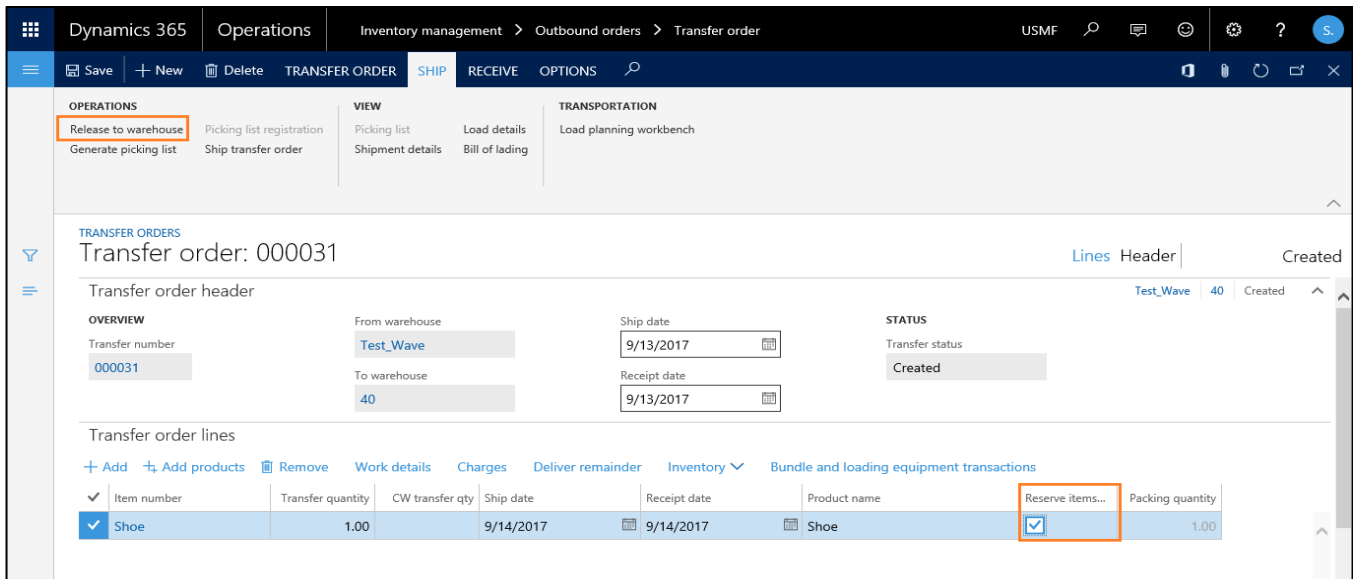
- 2) This Transfer process with WHS integration is similar as Sales process with WHS integration.
- 3) Assign the logistic unit to container type. (Warehouse management > Setup > Containers > Container types).



Container type code	Description	Logistic unit
Box-Small	Small box	0.5LEW

WEIGHT		MAXIMUMS		ATTRIBUTES	
Tare weight	5.00	Volume	100.00	Attribute 1	
Maximum net weight	20.00	Length	1.00	Attribute 2	
		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.



OPERATIONS

Release to warehouse (highlighted)

TRANSFER ORDERS

Transfer order: 000031

Transfer order header

Overview

Transfer number: 000031

From warehouse: Test_Wave

To warehouse: 40

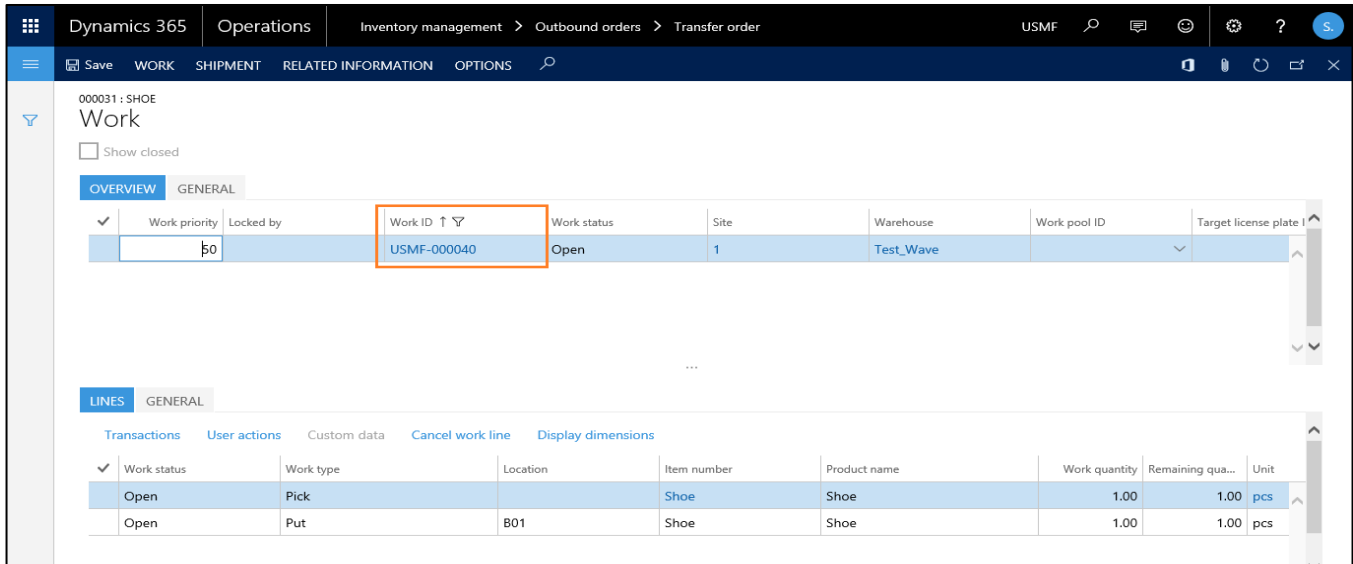
Ship date: 9/13/2017

Receipt date: 9/13/2017

Status: Created

Transfer order lines

Item number	Transfer quantity	CW transfer qty	Ship date	Receipt date	Product name	Reserve items...	Packing quantity
Shoe	1.00		9/14/2017	9/14/2017	Shoe	<input checked="" type="checkbox"/>	1.00



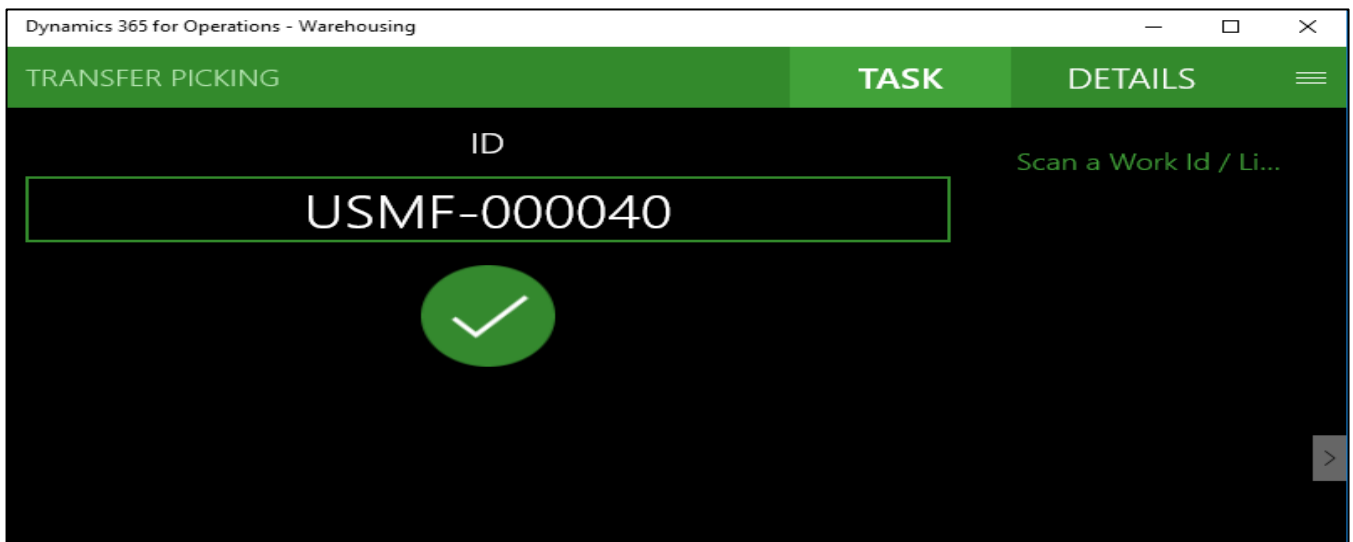
The screenshot shows the 'Transfer order' form in Dynamics 365 Operations. The 'Work' tab is active, displaying a table with the following data:

Work ID	Work status	Site	Warehouse	Work pool ID	Target license plate ID
USMF-000040	Open	1	Test_Wave		

The 'LINES' tab is also visible, showing a table with the following data:

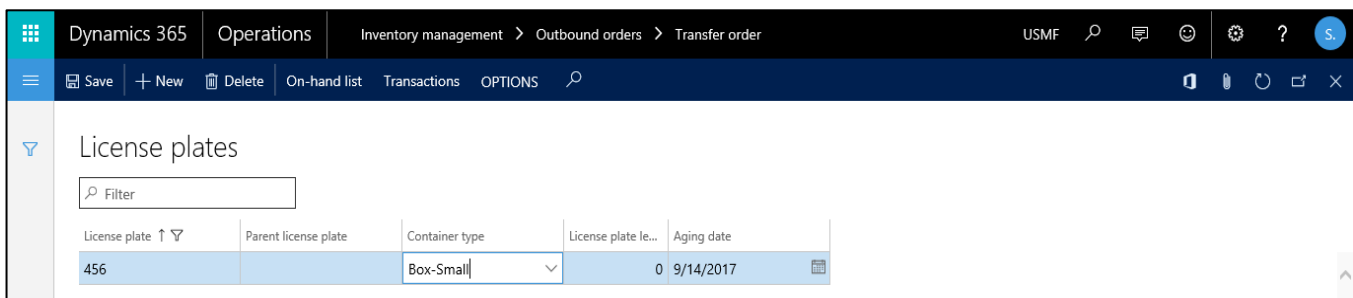
Work status	Work type	Location	Item number	Product name	Work quantity	Remaining quantity	Unit
Open	Pick		Shoe	Shoe	1.00	1.00	pcs
Open	Put	B01	Shoe	Shoe	1.00	1.00	pcs

- 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.



The screenshot shows the 'TRANSFER PICKING' screen in the Dynamics 365 for Operations - Warehousing app. The 'TASK' tab is active, displaying a large input field for the 'ID' with the value 'USMF-000040'. A green checkmark icon is visible below the input field, indicating successful completion. The 'DETAILS' tab is also visible, showing a 'Scan a Work Id / Li...' button.

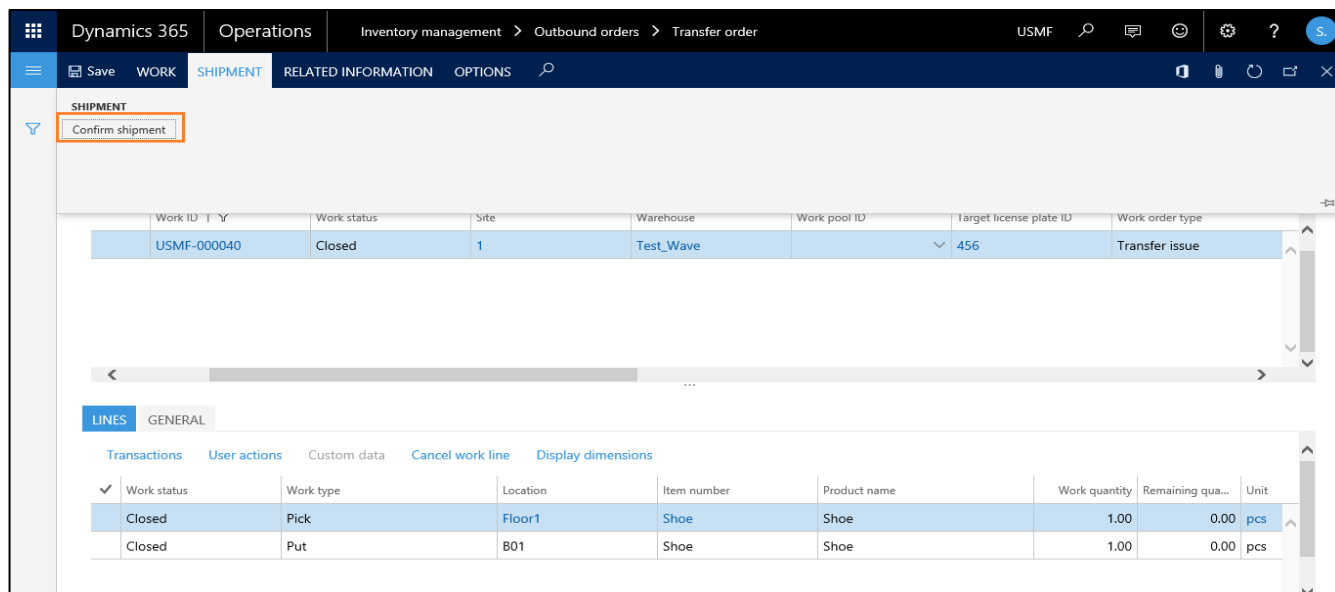
- 9) Once the work is closed, click on the 'Target License Plate ID' to provide the container type to which the Logistic unit has been assigned in the previous steps.



The screenshot shows the 'License plates' form in Dynamics 365 Operations. The 'Filter' field is empty. The table below displays the following data:

License plate	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.



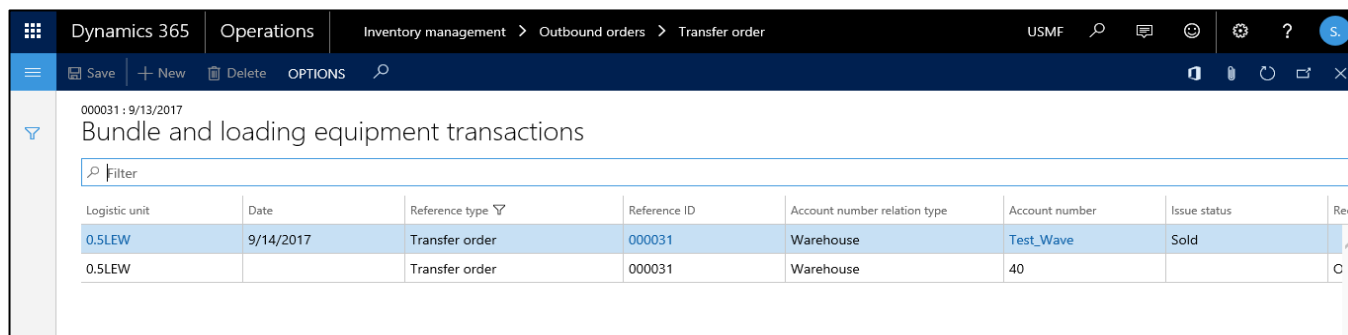
The screenshot shows the Dynamics 365 Operations interface for a 'Transfer order'. The 'SHIPMENT' tab is active, and the 'Confirm shipment' button is highlighted with a red box. Below the button, there is a table with the following data:

Work ID	Work status	Site	Warehouse	Work pool ID	Target license plate ID	Work order type
USMF-000040	Closed	1	Test_Wave		456	Transfer issue

Below the table, there is a 'LINES' section with a 'GENERAL' tab. It contains a table with the following data:

Work status	Work type	Location	Item number	Product name	Work quantity	Remaining qua...	Unit
Closed	Pick	Floor1	Shoe	Shoe	1.00	0.00	pcs
Closed	Put	B01	Shoe	Shoe	1.00	0.00	pcs

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



The screenshot shows the Dynamics 365 Operations interface for a 'Transfer order'. The 'Bundle and loading equipment transactions' form is open, displaying a table with the following data:

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		C

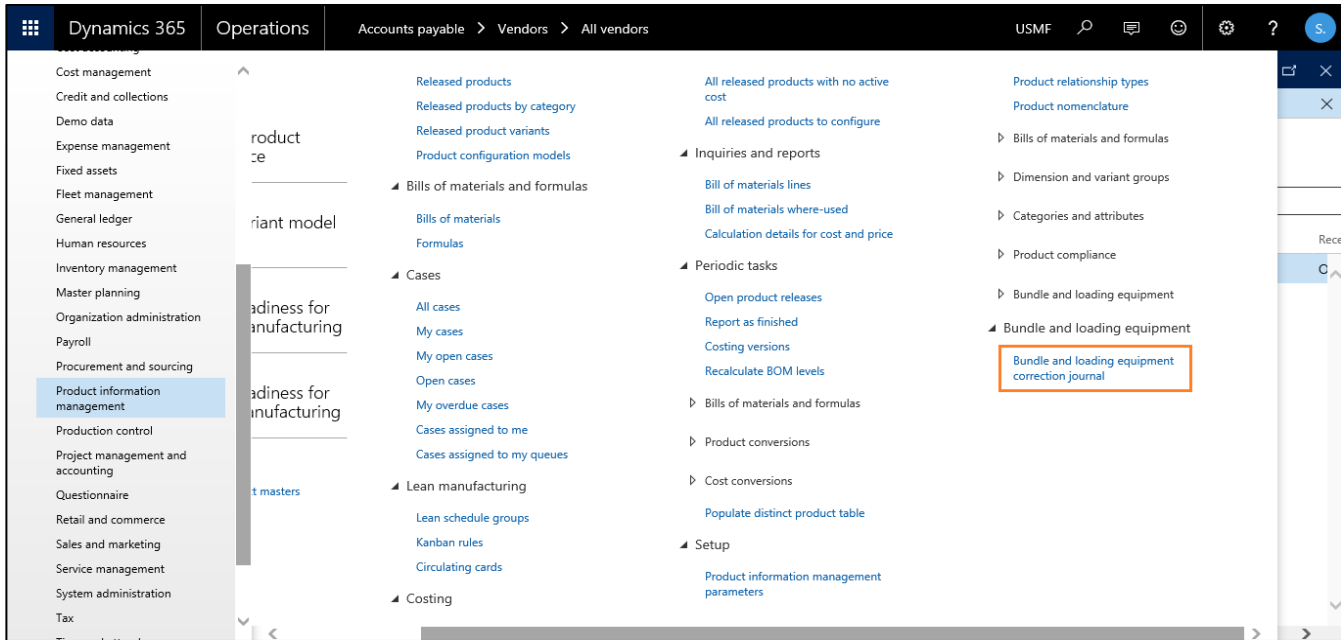
12) Perform Transfer receive by clicking 'Receive' button on the action pane under 'Receive' tab.

8. Correction journals

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

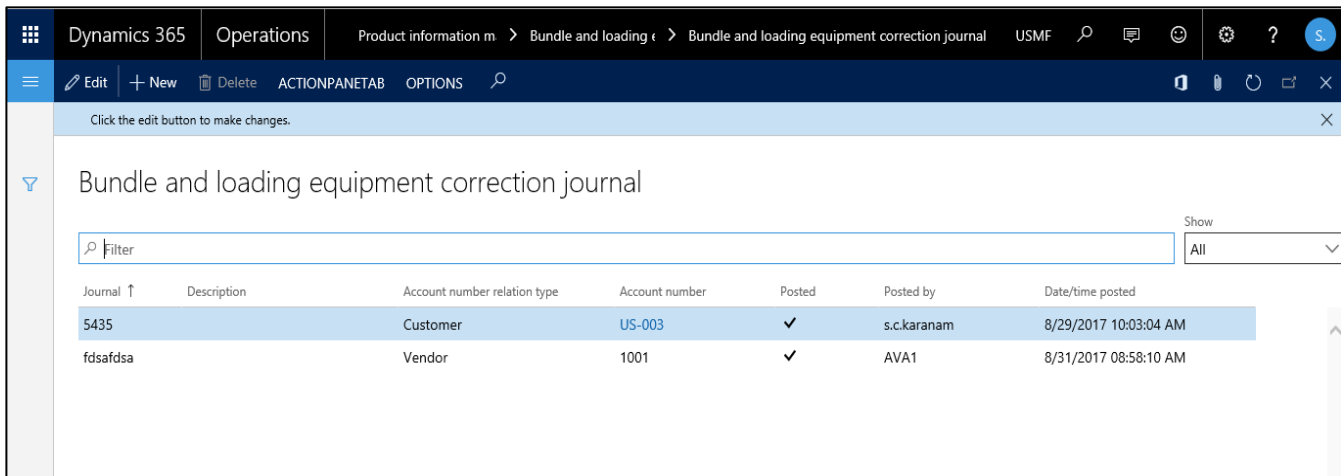
Thus, Carriers and Empties equipment transactions with a receipt or issue status 'Correction' are created.

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



8.1 Journal header

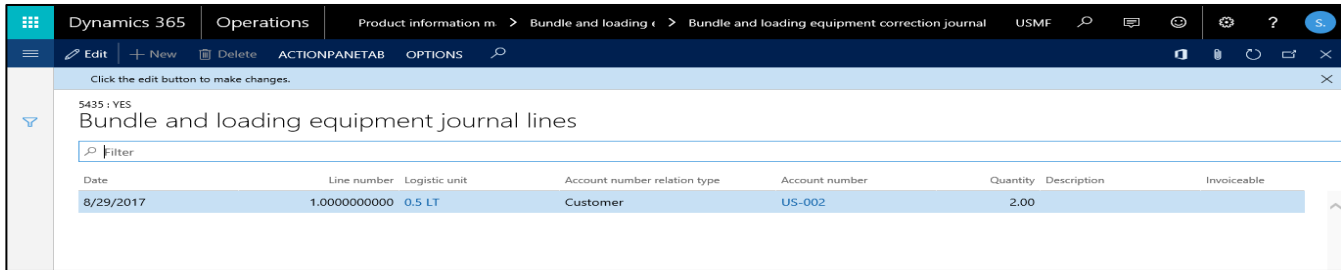
On the journal header, the 'Account relation type' and the corresponding 'Account number' can be defined. The journal lines inherit those settings.



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.



Date	Line number	Logistic unit	Account number relation type	Account number	Quantity	Description	Invoiceable
8/29/2017	1.0000000000	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

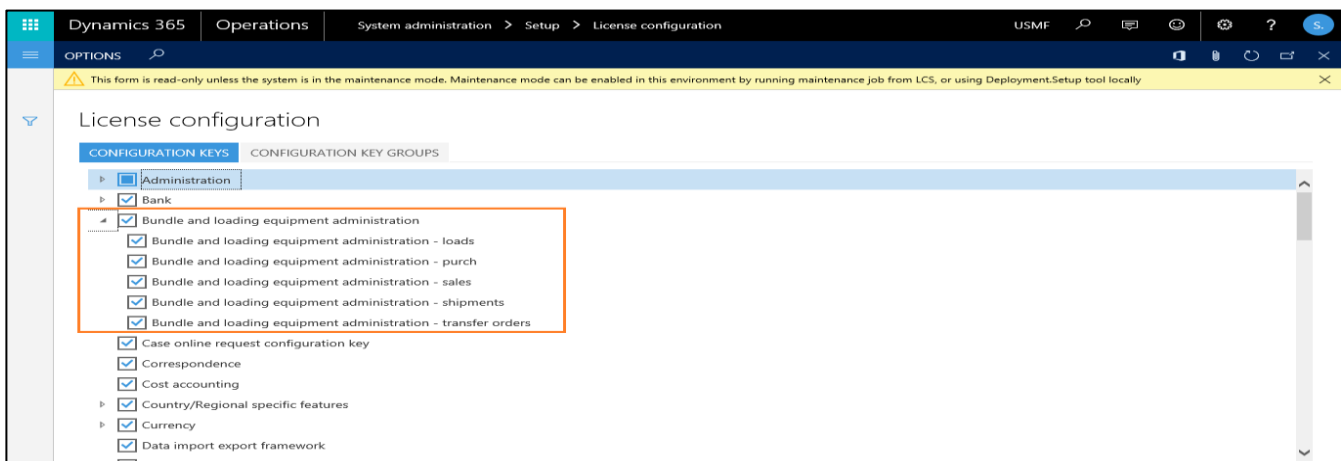
- Roles & process cycle
- Duties, Privileges and Entry points

10. Installation

- Licensing
- 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 → Setup → Licensing → License configuration



Configuration Key	Configuration Key Group
Administration	Administration
Bank	Bank
Bundle and loading equipment administration	Bundle and loading equipment administration
Bundle and loading equipment administration - loads	Bundle and loading equipment administration - loads
Bundle and loading equipment administration - purch	Bundle and loading equipment administration - purch
Bundle and loading equipment administration - sales	Bundle and loading equipment administration - sales
Bundle and loading equipment administration - shipments	Bundle and loading equipment administration - shipments
Bundle and loading equipment administration - transfer orders	Bundle and loading equipment administration - transfer orders
Case online request configuration key	Case online request configuration key
Correspondence	Correspondence
Cost accounting	Cost accounting
Country/Regional specific features	Country/Regional specific features
Currency	Currency
Data import export framework	Data import export framework
Database	Database

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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