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WORKFLOW DESCRIPTION

LOGTRADE CONNECT

PRINT PACKAGE LABELS

FROM INVENTORY PICK

LogTrade Connect for Microsoft Dynamics 365 Business Central





1 GENERAL

This document describes how you print package labels and waybills based on a *Sales Order* from *Inventory Pick* in Microsoft Dynamics 365 Business Central. It is possible to print labels for one order at the time or to deliver several orders in the same package/consignment.

2 PREREQUISITES

This document does not handle setup needed to be done before shipping. That is explained in the document describing the Assisted Setup Wizard.

3 RECOMMENDED SETUP

The following setup is recommended to have the fastest and most convenient process when shipping goods. Based on your specific demands it might be a good idea to change some of the settings in *Delivery Setup*.

Confirm Status – If set to *Release* the electronic information (often called EDI) will be sent automatically to the Shipping Agent when the documents are printed. If you often need to modify a shipment after printing or you want to combine several orders/shipments to the same recipient, it is recommended to set this to *Prepare* instead. The release process is then done from the *Consignment Worksheet* and explained in the end of this document.

Shipment Date – If the goods normally leave your warehouse the same day as you print the labels you should set this to *Workdate*. Otherwise the order *Shipment Date* will be used.

4 PROCESS EXPLANATION

Before posting shipment from the inventory pick the package labels and waybills should be printed. That will ensure that your posted sales shipment will have correct shipping data like *Shipping Agent*, *Shipping Agent Service*, *Package Tracking No.*, *No. of Packages* etc. The labels and waybills will be printed automatically or downloaded and opened automatically as pdf files (if *Integrated printing* is not in use).



5 SHIPPING DATA ON INVENTORY PICK

With LogTrade Connect you get several fields to handle the shipping of goods on the inventory pick, for example *Shipping Agent Code*, *Shipping Agent Service Code*, *Shipment Method Code*, *No. of Packages*, *Package Type*, *Weight*, *Volume*, *Load Meters*, *Freight Payer*, *Note of Goods* etc. Some fields can be considered mandatory, for example *No. of Packages*, *Package Type*, *Weight* and *Freight Payer* and most others are optional but can be mandatory for some services or for specific processes. The fields are explained after the pictures below.

5.1 MANDATORY FIELDS

These fields are always mandatory to fill in.

FIELD NAME	DESCRIPTION
SHIPPING AGENT CODE	This defines which Shipping Agent that you will use for the transport.
SHIPPING AGENT SERVICE	This defines which service that you will use for the transport. For example, if it will be sent as a parcel shipment, a part load shipment or a full load shipment.
NO. OF PACKAGES	Total count of parcels, pallets or other types.
PACKAGE TYPE CODE	A predefined code for the package; parcels, pallets etc.
WEIGHT	Total gross weight for the packages
GOODS TYPE	Type of goods in the package. Recommended to use general descriptions and can be set based on the initial settings.





5.2 NON-MANDATORY FIELDS

These fields can be mandatory for some Shipping Agent services

FIELD NAME	DESCRIPTION
VOLUME	Total volume for the packages
LOAD METERS	Total load meters for the packages
NO. OF PALLET SPACES	Total number of pallet spaces
NO. OF EUR PALLETS	Total number of EUR pallets, used when member of EUR pallet pool.
NOTE OF GOODS	Often used as a description for the customer. Default it will be the order number.

6 PRINTING SHIPPING DOCUMENTS

When you have filled in all the shipping data needed for your shipment you select *Actions/Delivery/Create & Print Consignment*. If you have installed and configured the Integrated Printing software from LogTrade the documents will be printed on the printers at once. Otherwise a pdf will be downloaded. If you use pdf it is recommended to check the setting to always allow the pdf to open automatically.

Based on the Shipping Agent Service different documents can be printed. That is predefined in LogTrade based on each Shipping Agent specifications. Normally package labels are needed for all shipments but waybills are not needed for parcel shipments.



Dynamics 365 Business Central

INVENTORY PICK

Inv. Pick · IPI000007

Process Print/Send Posting Actions Navigate Report Fewer options

Functions Posting Print... Delivery

- Create Consignment
- Create & Print Consignment

Communication

E-mail mrandy.teal@contoso.com Mobile Phone No.

Phone No. +46406307206

Delivery Show less

No. of Packages 1 No. of Pallet Places

Package Type Code BOX No. of EUR Pallets

Weight 10 Goods Type

Volume

Load Meters

Note of Goods

10000
88 824,93
16 004,40
1 391,39
6,63
0,00
49,13
0,00
21-01-17
5 276,48
0,00
153,50
368,40
0,00

6.1 PACKAGE LABEL EXAMPLE

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



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SIS - Transport

From:
LogTrade Technology AB
Marcus Wigren
Propellergatan 2
SE-21115 MALMÖ
Sweden Phone: 040-6307206

To:
The Cannon Group PLC
Mr. Andy Teal
192 Market Square
GB-B27 4KT Birmingham
United Kingdom Phone: +46406307206

Services
[Redacted]

Shipment id 660 940 852 8 1 / 1
Sender ref 1064
Rec. ref.
Date 2019-12-22
Pay cust. #

Weight 10 / 10 Kg

Contents Goods
Ship. mark



Shipment ID: 660 940 852 8



Package ID: (00) 3 73 40030 662899220 0

LogTrade, version 19.6c.3 - Copyright© 2007-2019, LogTrade Technology AB.





7 AFTER PRINT

When the shipping documents have been printed you will see some updated information in Microsoft Dynamics 365 Business Central. *Package Tracking No.* is filled in on the sales order for example. That is the tracking number that can be used to track the shipment on the way to the recipient. Below is a picture of the created consignment with all values.

The screenshot displays the 'CONSIGNMENT' record for 'LTC12330114 · The Cannon Group PLC'. The interface includes a navigation bar with 'Select Packages', 'Create Package', 'Print', 'Release', 'Add Service', 'Reopen', and 'Book' buttons. The 'General' tab is active, showing various fields for shipment details. A 'Totals' table and a 'Statistics' section are also visible.

Field	Value
Warehouse Shipment No.	
Warehouse Pick No.	
Inventory Pick No.	IPI000007
Source Document No.	Sales Order
Source Document No.	1064
Back Order	<input type="checkbox"/>
Source Type	Customer
Source No.	10000
Ship-to Address Code	
Delivery Name	The Cannon Group PLC
Delivery Address	192 Market Square
Delivery Address 2	
Delivery Address 3	
Delivery Post Code	B27 4KT
Delivery City	Birmingham
Delivery Country	GB
Delivery Contact	Mr. Andy Teal
Shipment Date	2019-12-22
Requested Delivery Date	
Promised Delivery Date	
Location Code	PICK
Shipping Agent Code	OWN LOG.
Shipping Agent Name	STANDARD
Shipment Method	DDP
Payer	Sender
Paying Customer	
Shipment Template	
Booking Method	
Confirm Status	Prepare
Tracking No.	6609408528

Totals		
Packages	10	0
Weight	0	0
Volume	0	0
Load Meters	0	0
Pallet Places	0	0
Item Lines	0	0
Services	0	0
Linked Source Documents	0	0
Consolidated Consignments	0	0
Error Messages	0	0

Statistics

TRACKING
Status: Prepared
Booking Status: Prepared
Tracking No.: 6609408528
Consolidated With No.:





8 CONSIGNMENT LIST

All the consignments made during the day can be found in the *Consignment List*. Search for *Consignments* and open the list. This is consignments that has not been released yet, see more information below about releasing consignments.

The screenshot shows the Dynamics 365 Business Central interface. At the top, the header reads "Dynamics 365 Business Central". The main content area is titled "LogTrade Technology AB" and "Sales". A search bar at the top right contains the text "Consignments". Below the search bar, a dropdown menu is open, showing the following options:

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

At the bottom of the search results, it says "Didn't find what you were looking for? Try exploring". The background of the interface shows various dashboard tiles, including "Good evening", "OUTBOUND - TODAY" (Released Sale Until Today: 9, Posted Sale Today: 0), "MY USER TASKS" (Pending User Tasks: 0), and "DELIVERY" (Consignments Today: 17).



Dynamics 365 Business Central

CONSIGNMENTS

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

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

Details Attachments (0)

Totals

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

Statistics

TRACKING
Status Booking Status Tracking No. Consolidated With No. Failed



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9 RELEASE CONSIGNMENTS

It is important to release consignments. This is the moment when shipping instructions (often just called EDI) are sent to the Shipping Agent and if you use LogTrade advice services this is also when e-mails and/or SMS are sent. Until the consignment is released it is possible to change it.

With settings it is possible to send consignments to the status *Release* already when creating the consignment. If that setting is done this task does not need to be done.

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

The screenshot shows the Dynamics 365 Business Central interface. At the top, the header reads "Dynamics 365 Business Central". Below the header, the user is logged in as "LogTrade Technology AB". A search bar is open, displaying "Consignment Worksheet". The search results are shown in a list format under the heading "On current page (Shipping and Receiving - Order-by-Order)". The results include:

- Consignment Worksheet**: Process multiple consignments at the same time for status change, printing and booking.
- Released Consignment Worksheet**: Archive

The background of the screenshot shows a dashboard with various metrics and tasks. The "OUTBOUND - TODAY" section includes:

- RELEASED SA... UNTIL TODAY: 9
- POSTED SALE... TODAY: 0
- EXPECTED PU... UNTIL TODAY: 0
- POSTED PURC... TODAY: 0
- INVENTORY PL... TODAY: 4
- INVENTORY P... UNTIL TODAY: 0
- OPEN PHYS. L... ORDERS: 0
- CONSIGNMEN... TODAY: 17

The "MY USER TASKS" section shows "PENDING USER TASKS: 0".

It is possible to filter the worksheet on different Shipping Agents etc. Normally you want to filter on only consignments with status *Prepared*. Click on *Change Status* and a dialog will open that is prepared for changing status to *Released*. The *Print Queue* is also set based on the settings for this user. The *Print Queue* is used to print a *Manifest List* of all consignments for this pickup by the Shipping Agent.



Dynamics 365 Business Central

CONSIGNMENT WORKSHEET

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

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

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

Dynamics 365 Business Central

CONSIGNMENT WORKSHEET

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

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

Totals: Packages: 0, Weight: 0, Volume: 2

Services: 0, Linked Source Documents: 0, Consolidated Consignments: 0

Error Messages: 0

Statistics

Action: Save, Prepare, Release, Archive





9.1 MANIFEST LIST EXAMPLE

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

Manifest list				Page: 1
Own Logistics Transport		Shipment date: 2019-06-17		
Consignor code:	CRONUS International Ltd.	Phone: 0666-666-6666		
Customer code: 345678		Postal code: W2 8HG		
		City: London		
Shipment number	Consignee name Address	Sender reference Recipient reference	Number of packages	
Phone	Postal address	Paying customer number	Weight	
Fax			Volume	
			Loading meters	
6565439756	The Cannon Group PLC 192 Market Square B27 4KT Birmingham GB	1002 345678	1 1000,0 kg	
373400306482803032				
6565440119	New Concepts Furniture 705 West Peachtree Street GA 31772 Atlanta US	101018 345678	1 10,0 kg	
373400306482805401				
6565440135	Selangorian Ltd. 153 Thomas Drive CV6 1GY Coventry GB	104007 345678	2 46,0 kg	
373400306482805609	373400306482805616			
TOTALS				
Number of packages	Gross weight	Volume	Number of shipments	
4	1056,0 kg	Loading meters	3	
Consignments cleared for shipping				
Date	Drivers signature	Car registration		
END OF LIST				
LogTrade, version 19.3a.10 - Copyright© 2007-2019, LogTrade Technology AB.				

