User Guide

Shipment Builder for Dynamics 365 Business Central

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1. ABOUT

The Shipment Builder for Dynamics 365 Business Central app is a tool for distributors to expedite their process. The application is designed for users with a high-volume of orders to process as it groups sales orders into shipments for mass posting and shipping. Users can mass print bill of lading documents as well as a Bill of Lading Per Sales Orders and Commercial Invoices.

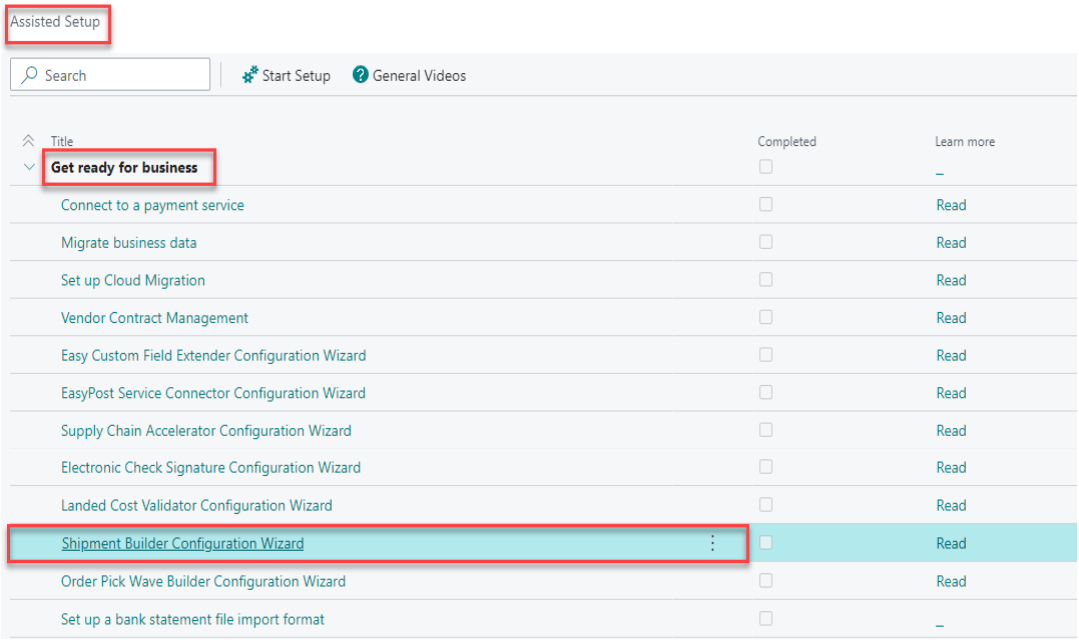
For more information, please visit: https://www.websan.com/shipment-builder

2. CONFIGURATION

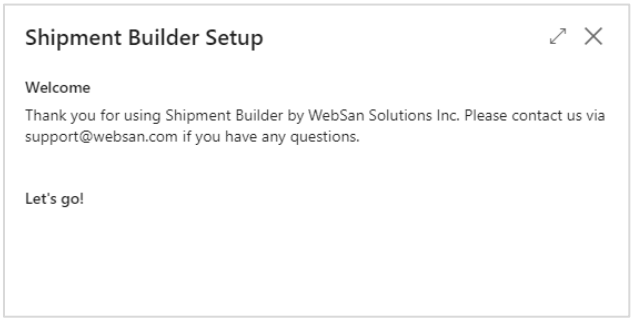
This section covers the configuration required to start using the Shipment Builder for Dynamics 365 Business Central. The steps outlined in this section should be completed before using the application.

To configure the application using a guided step-by-step wizard:

1. Use the magnifying glass tool to go to the Assisted Setup window.
2. In the Assisted Setup window, go to the section “Get ready for business”, and select the Shipment Builder Configuration Wizard.



3. Follow the instructions in the wizard. You will be ready to start using the application.



To manually configure the application, refer to the remaining topics of the Shipment Builder Setup section in this user guide.

Shipment Builder Setup

To manually setup the application, use the magnifying glass tool to search for the Builder Setup page.

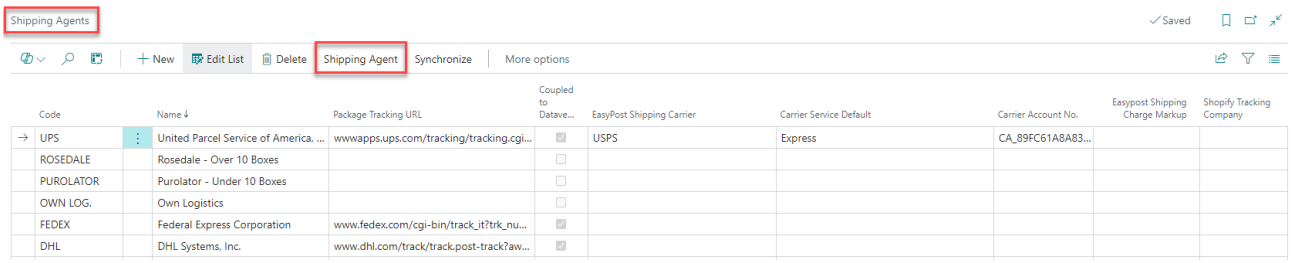
In the Shipment Builder Setup page, complete the setup of the application as needed. The configuration settings found in this window include:

- No. Series – Used for creating Shipment Records.
- UDF Text # Label – Display name for user definable field. Populating this value will enable the field.
- UDF Date # Label – Display name for user definable field. Populating this value will enable the field.

Shipping Agents

User can create a code for each shipping agent and input their details. When setting up shipping agents on sales orders, users can indicate the specific services offered by each agent. Each shipping agent can have multiple services defined, with a designated shipping time for each service. To set up a shipping agent:

1. Search for Shipping Agents
2. Complete the fields as required. Hover over any field for a brief description.
3. Select the Shipping Agent Services action.
4. In the Shipping Agent Services section, complete the necessary fields.

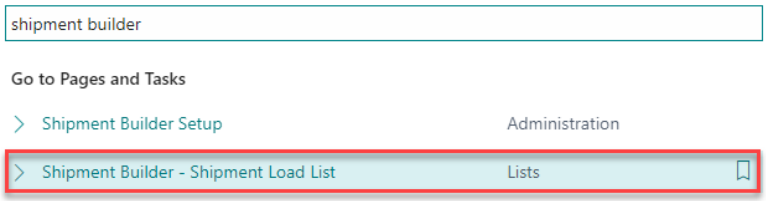


3. FUNCTIONALITY

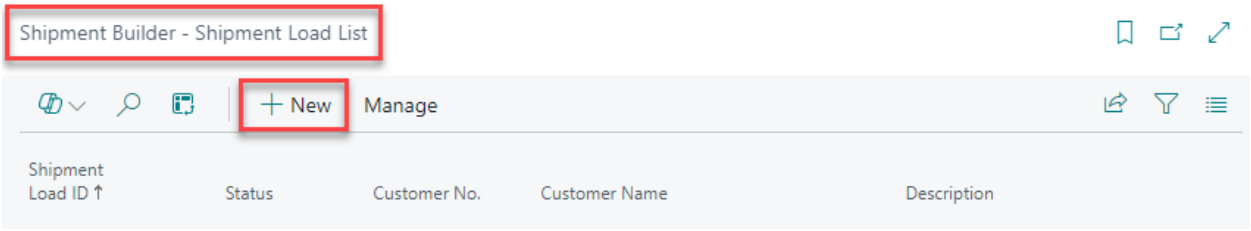
Creating a New Shipment

The Shipment Builder app allows users to mass update and post sales orders assigned to Shipments.

To create a New shipment, start by searching for shipment builder list.



In the Shipment Builder – Shipment Load List window, select New. A new Shipment Builder – Shipment window will open.

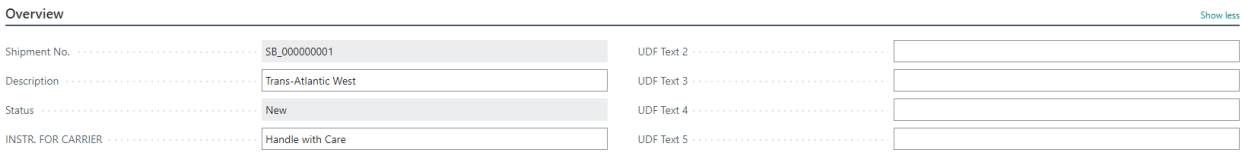


Entering a Shipment's Basic Information

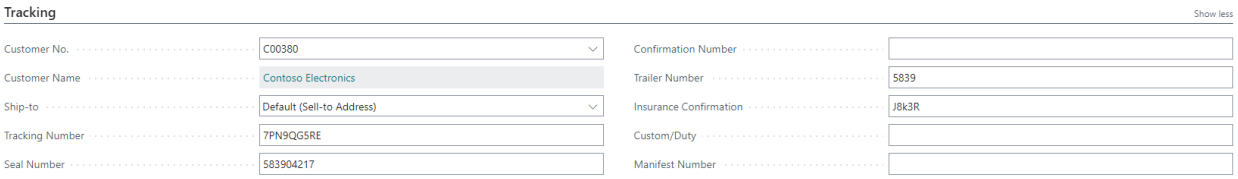
In the Shipment Builder Card, users can find all the fields required to properly set up a shipment. Here, users must enter important details, such as Shipment No., Customer No., and more.

To enter shipment basic details, users must:

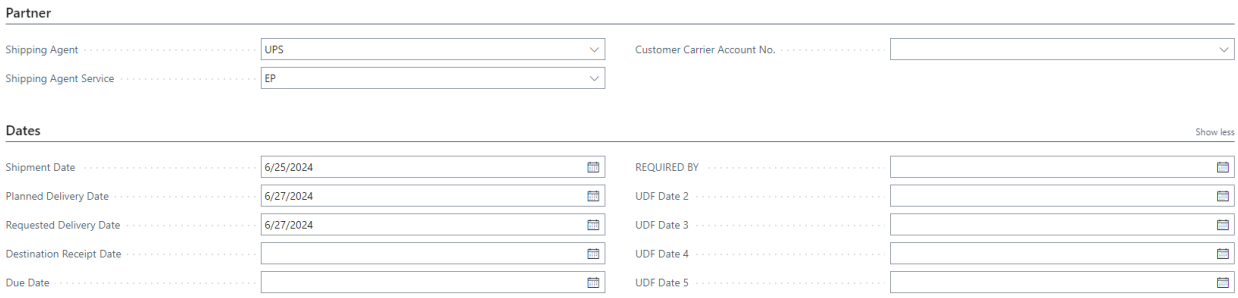
1. Complete the Overview section. Start by entering a Shipment No. and providing a useful description. The status of a newly created Shipment is defaulted to New; however, as transactions are entered, its status will update automatically. If enabled in the Shipment Builder Setup page, UDF Text Fields will appear in the Overview section.



2. In the Tracking section, select a Customer No. for the current Shipment. Set the Ship-To address to one of the following options: Default (Sell-To Address), Alternate Shipping Address, or Custom Address. Enter additional Tracking details as needed, including Tracking Number, Seal Number, Confirmation Number, and more.



3. In the Partner and Dates sections, enter a Shipping Agent, Shipping Agent Service, and Relevant Dates for the current shipment, such as Shipment Date, Planned Delivery Date, Due Date, among others. User Defined Dates appear in this section.

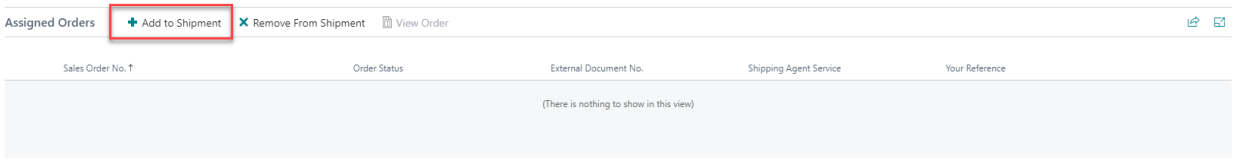


Adding Sales Order Lines

From the Container Card, users will add Sales Order Lines and manage their shipments.

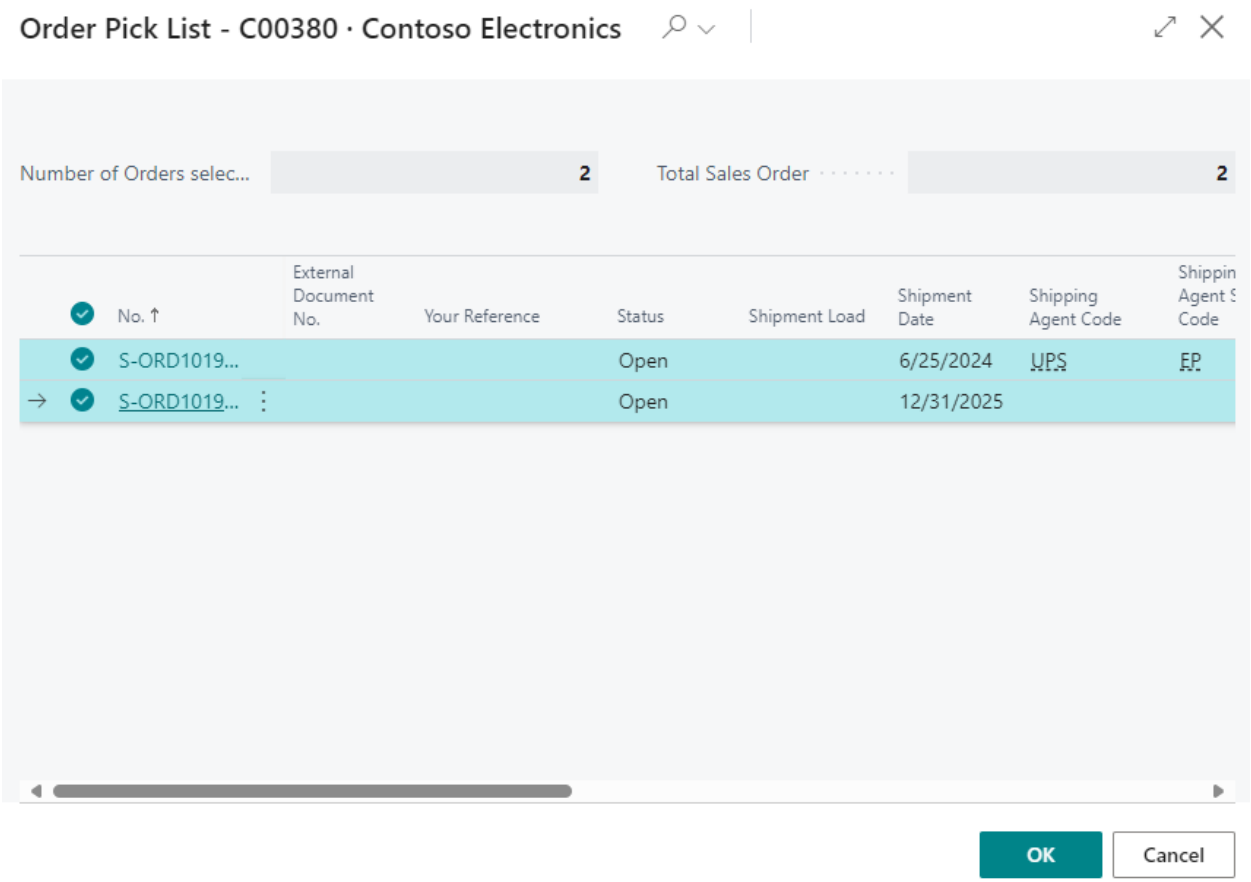
To add a new Sales Order Line, from the Shipment Builder page:

1. Scroll down to the Assigned Orders section, then click the Add to Shipment button.

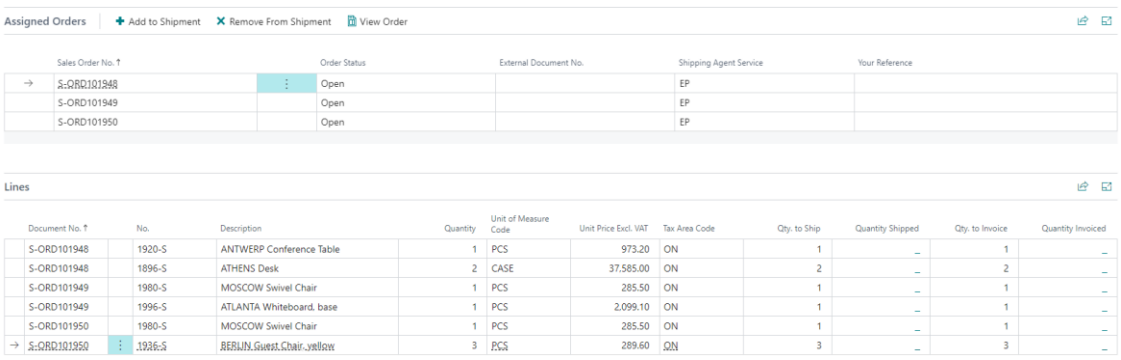


2. The Order Pick List window that appears will show a list of the Sales Orders for the current shipment's Vendor that have not been assigned to a shipment and that are Open. Here users may choose to:

a. Add a single Sales Order or simultaneously assign multiple Sales Orders to a shipment. To perform a mass assignment, press and hold the CONTROL key and select all the SOs that will be added to the shipment.
Note that all the SO lines found in the selected SOs will be added to the shipment.

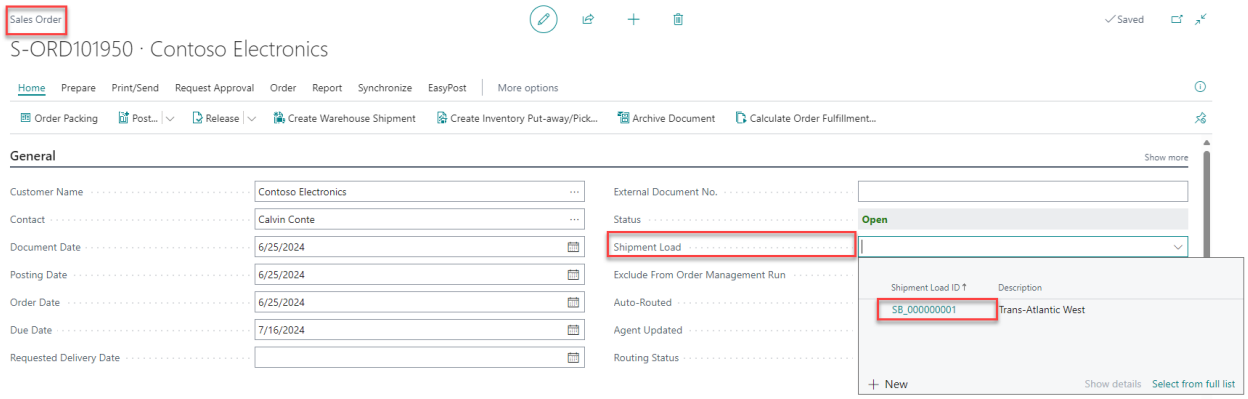


b. In the Shipment card you will notice that the sections Assigned Orders and Lines will be automatically populated based on the SO selection from the previous step.



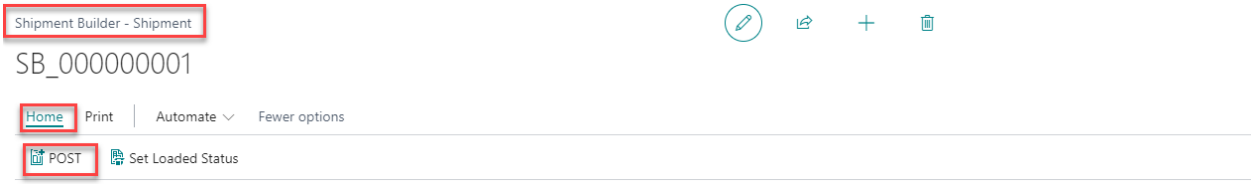
Sales Orders may also be assigned one by one from at the header or line level of each individual order. This is an alternative to the simultaneous assignment (explained in the previous point) that assigns all the lines on the SO to a shipment. To assign a single SO:

a. Go to the Sales Orders List; select a SO number from the list. Note that only SOs made for the customer specified in the shipment are eligible.
b. In the General section, expand the Shipment Load drop-down list and locate your shipment. With your shipment selected, go back to the Shipment Card. Here, you will notice that the SO lines have been added.

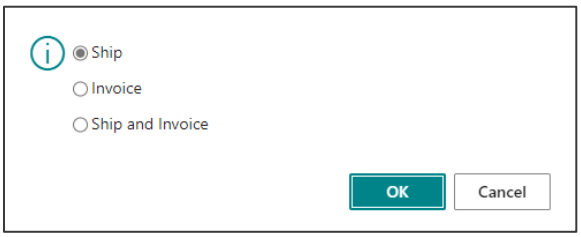


Posting Shipments

Sales documents can be posted on mass from the Shipment Card. To post the documents in a shipment, scroll to the top of the Shipment Card, click Home > Post.

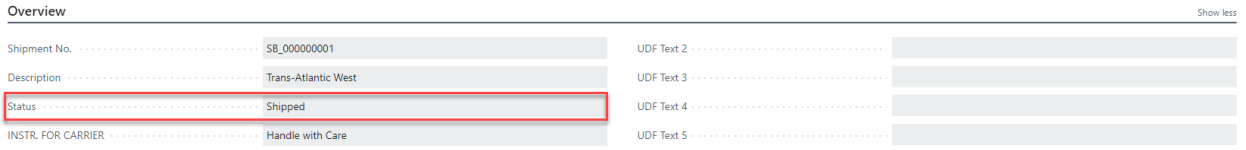


The native Business Central receiving window will appear. Select the option that best fits your business process and click Ok to continue.

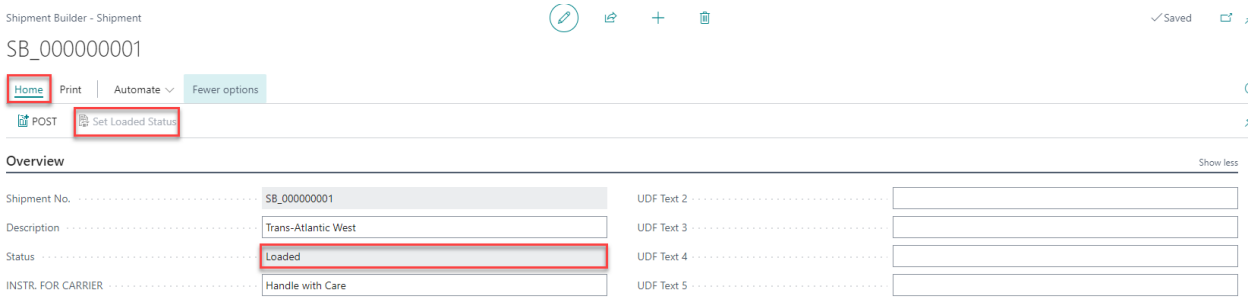


Confirming the receipt will populate the Posted Sales Shipments section and Posted Sales Invoices.

Posting the shipment will update the Shipment Card status to Shipped.



If required, before posting the shipment, users can update the Shipment Card status to Loaded by selecting Home > Set Loaded Status.

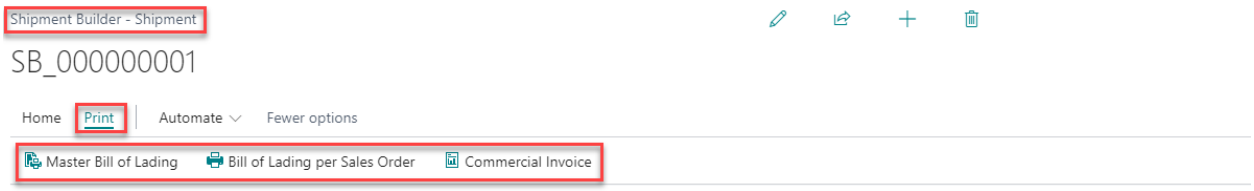


4. REPORTING

The Shipment Builder app allows users to print various reports, including Master Bill of Lading, Bill of Lading Per Sales Order, or Commercial Invoice. Documents may be attached to the Shipment Card to keep all information centralized and for a more convenient reporting.

Printing Shipment Card Reports

To generate a Container Card report, open the Shipment Builder page. At the top of the Shipment Card, select the Print menu. This will display the documents that are available for printing. Select any of the documents available for printing.

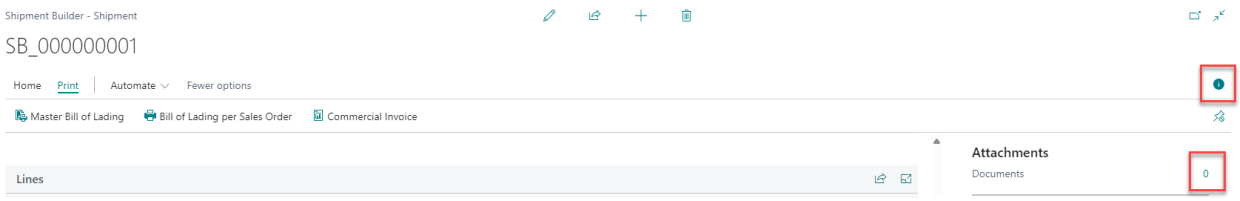


In the window that appears, select Preview and Close to generate a PDF report file.

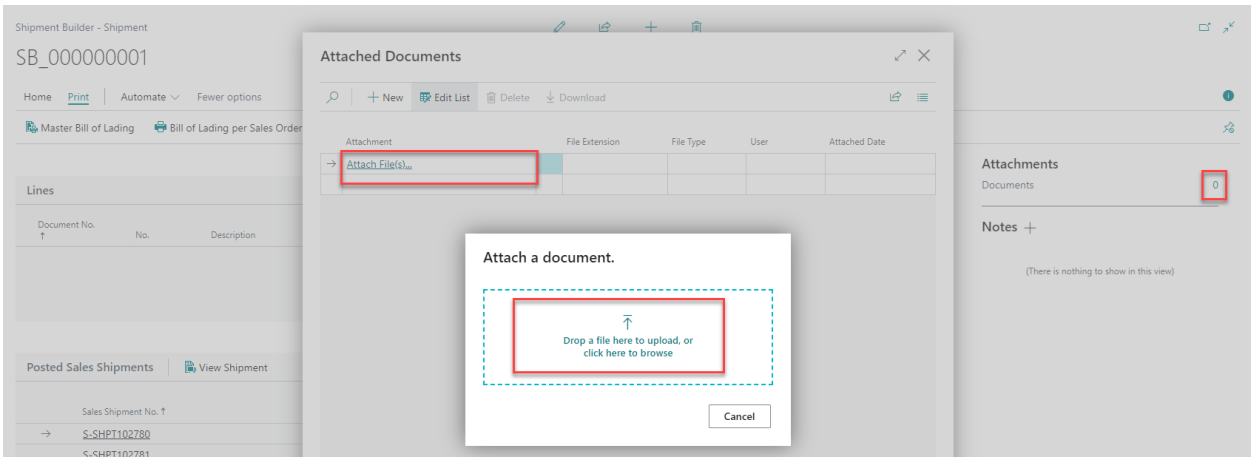
Attaching Files to a Shipment Builder Card

To attach files to a Shipment Card:

1. Select the “i" button that appears at the top of the window to expand the FactBox pane.



2. In the FactBox pane, click on the number that appears next to Documents.
3. Click on the text that reads “Attach File(s)…” and drag and drop files to the window that appears.

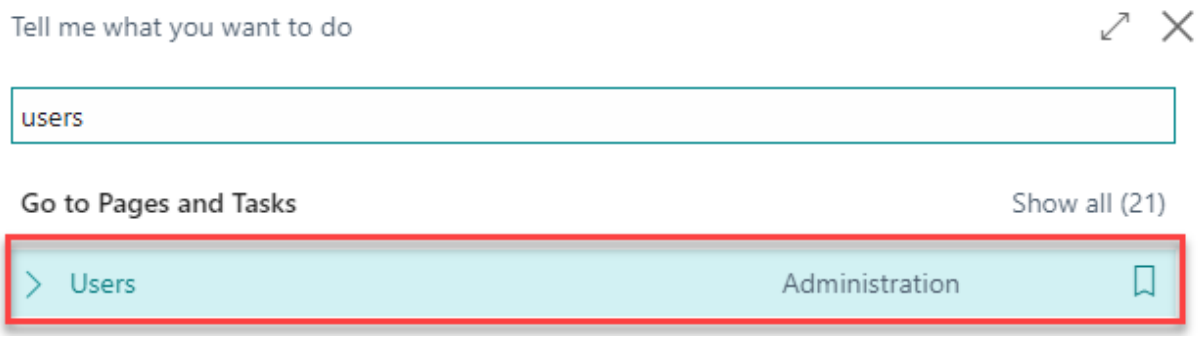

Shipment Builder - Shipment
SB_000000001
Home
Print
Automate
Fewer options
Master Bill of Lading
Bill of Lading per Sales Order
Lines
Document No.
No.
Description
Posted Sales Shipments
View Shipment
Sales Shipment No.
S-SHPT102780
Attached Documents
New
Edit List
Delete
Download
Attachment
File Extension
File Type
User
Attached Date
Attach File(s)...
Attachments
Documents
0
Notes
(There is nothing to show in this view)
Attach a document.
Drop a file here to upload, or click here to browse
Cancel

5. SECURITY

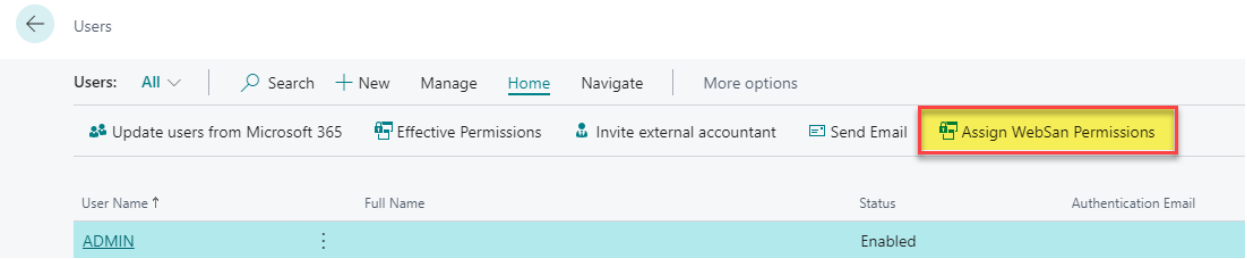
The Shipment Builder for Dynamics 365 App, along with the rest of WebSan Inc.'s Dynamics 365 apps, have a built-in Auto Permission security functionality. When a user with the proper credentials installs an App, the Auto Permission function automatically triggers and assigns or updates the user's permissions. No other action is needed from the user.

When a user without the proper credentials installs an App, the Auto Permission function allows the installation, but user permissions are not changed. In this case, a user with the proper security credentials can change the user's permissions later.

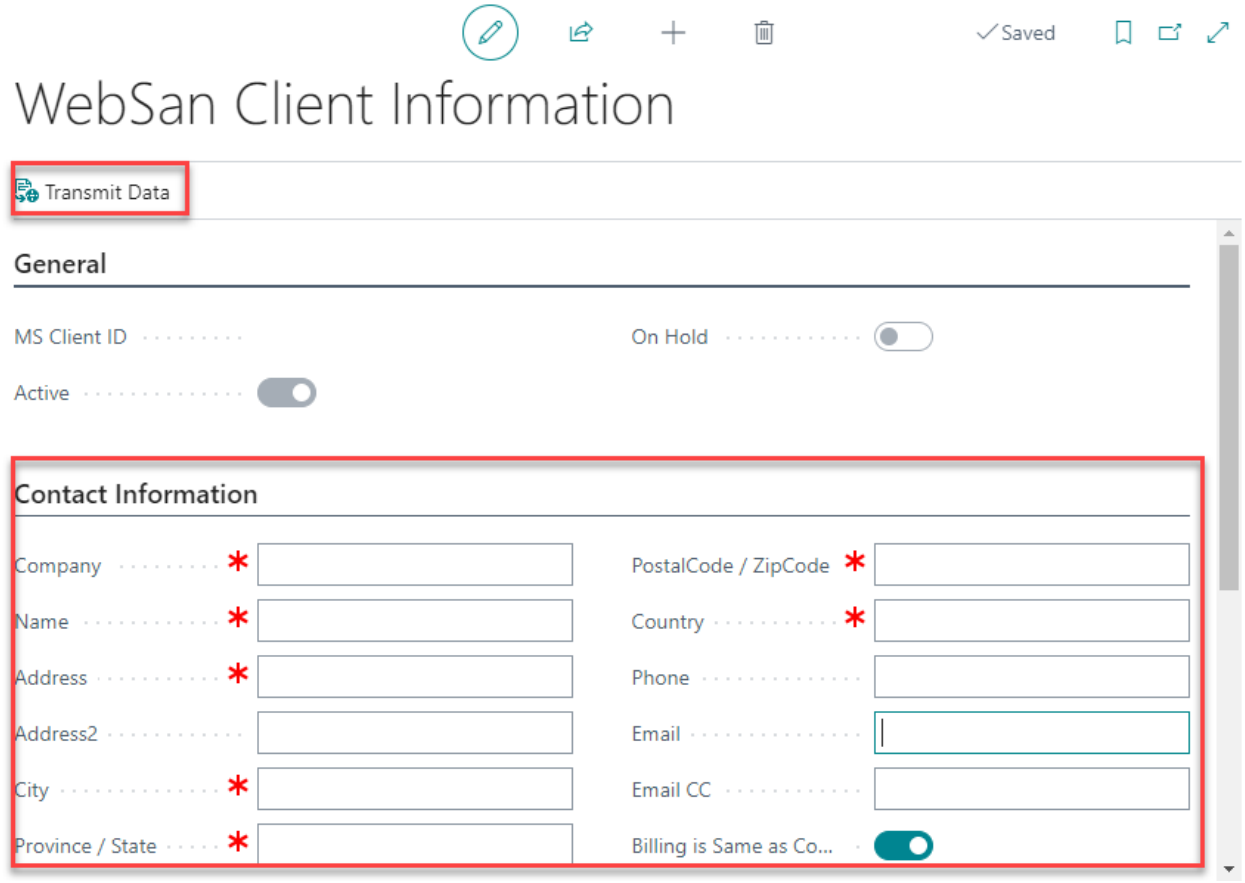
To change user permissions, search and go to the User list.



In the Users window, select Assign WebSan Permissions to assign all users the WebSan Permission Set.



6. REGISTRATION

To register a WebSan Inc.'s application, in Business Central, search WebSan Client Information and select WebSan Client Information – Administration.

In the WebSan Client Information window, enter your company's contact and billing information. After your information is complete, select Transmit Data.