



**Dynamics**  
Shop

# User Guide for Microsoft Dynamics 365 Business Central

**Product:** SD Stores Logistics

**Release:** D365 BC V21+

**Revision:** November 2023

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## 2 Getting Started

Using SD Stores Logistics, you can drop your sales, purchase and transfer orders to a dynamic embedded map using google maps providing a visual overview as you build your delivery routes.

You can also quickly build your delivery routes and create manifests from a queued documents list where you can also update your rates for the sales, purchase or transfer orders and enter pallet quantities. Manifests can be released and associated documents printed.

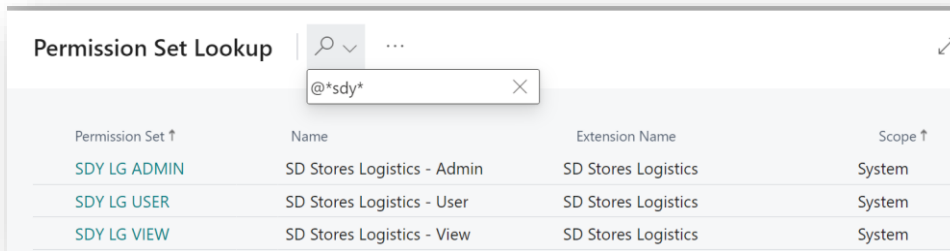
You can use SD Stores Logistics to calculate and issue Purchase Orders and Invoices for your Shipping Agents' delivery charges on release of your manifests. Rates can be manually updated and can include base rates, rates for drops, pallets, fuel surcharges or agreed rates.

You can enforce capacity planning and define capacity for your vehicles.

Control load weights, drops and, when ready, generate a full load manifest. All from your SD Stores Logistics planning screen.

### 3 Security Setup

We have provided the following permission sets for SD Stores Logistics: SDY LG ADMIN, SDY LG USER and SDY LG VIEW (*Figure 3-1*).



Permission Set ↑	Name	Extension Name	Scope ↑
SDY LG ADMIN	SD Stores Logistics - Admin	SD Stores Logistics	System
SDY LG USER	SD Stores Logistics - User	SD Stores Logistics	System
SDY LG VIEW	SD Stores Logistics - View	SD Stores Logistics	System

*Figure 3-1*

We have also created extensions on the following standard Microsoft Dynamics 365 Business Central Permissions:

- Exten. Mgt. - Admin includes SDY LG ADMIN permissions.
- D365 BUS FULL ACCESS includes SDY LG USER permissions.
- D365 BASIC includes SDY LG VIEW permissions.

## 4 Installing SD Stores Logistics

**SD Stores Logistics**, is available to download from AppSource or you can install the App from within Business Central using Extension Marketplace.

### 4.1 Allowing HttpClient Requests in SD Stores Logistics

Switching on the **Allow HttpClient Requests** option allows SD Stores Logistics to call an API that sends and returns licence key information to activate the product licence and to call GitHub to import sample data for the product. The **Allow HttpClient Requests** option is automatically enabled on install of SD Stores Logistics.

1. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management** (*Figure 4-1*).

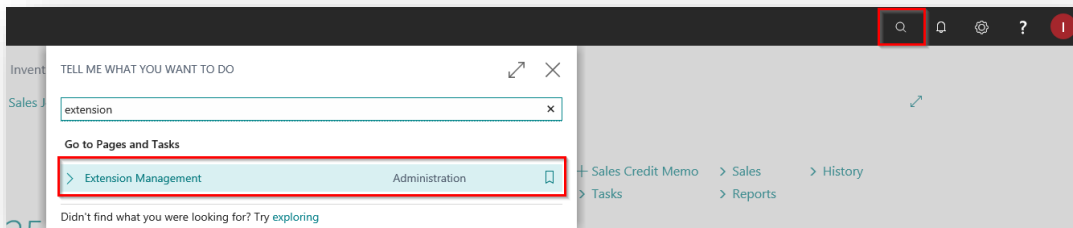
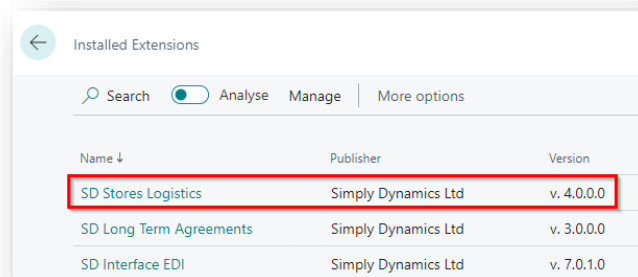


Figure 4-1

2. In the **Extension Management** list, you should see the **SD Stores Logistics** App installed (*Figure 4-2*).



Name ↓	Publisher	Version
SD Stores Logistics	Simply Dynamics Ltd	v. 4.0.0.0
SD Long Term Agreements	Simply Dynamics Ltd	v. 3.0.0.0
SD Interface EDI	Simply Dynamics Ltd	v. 7.0.1.0

Figure 4-2

3. Select the **SD Stores Logistics** App record and from the menu, select the **Manage** group, and choose **Configure** (Figure 4-3).

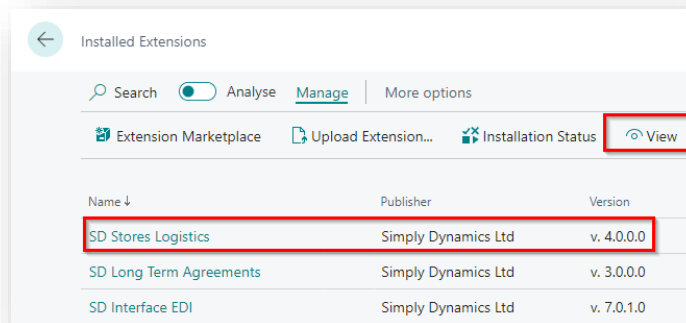


Figure 4-3

4. Choose to allow the **Allow HttpClient Requests** option (Figure 4-4).

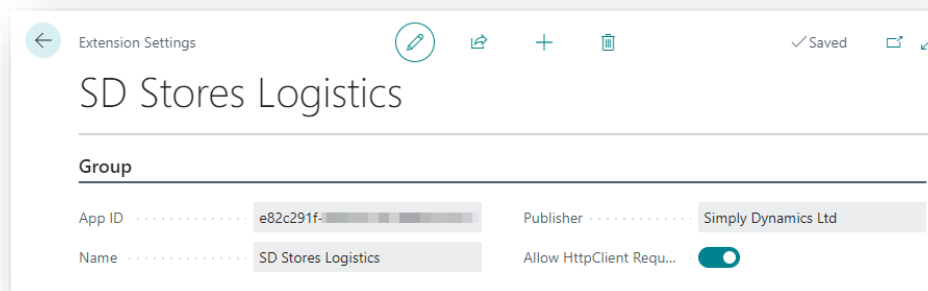


Figure 4-4

## 4.2 Choosing the SD Stores Logistics Role

SD Stores Logistics has two Role Centres. One Role Centre is designed for desktop use (*Figure 4-5*).

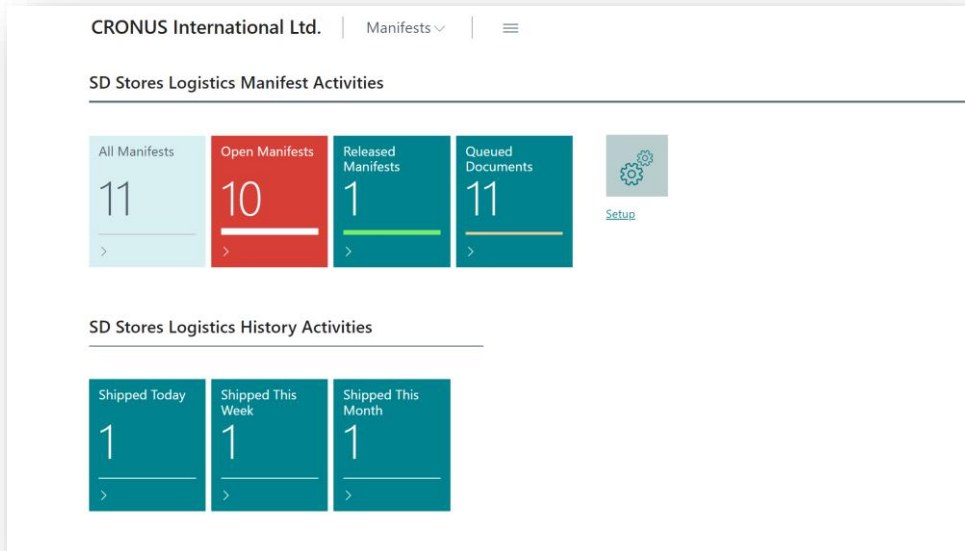


Figure 4-5

The second Role Centre, the SD Stores Logistics Mobile Role Centre, is designed for use on mobile phones by Drivers as they make their rounds (*Figure 4-6*).



Figure 4-6

1. From your Dynamics 365 Business Central environment, in the app bar, select the **Settings** icon and then select **My Settings** (Figure 4-7).

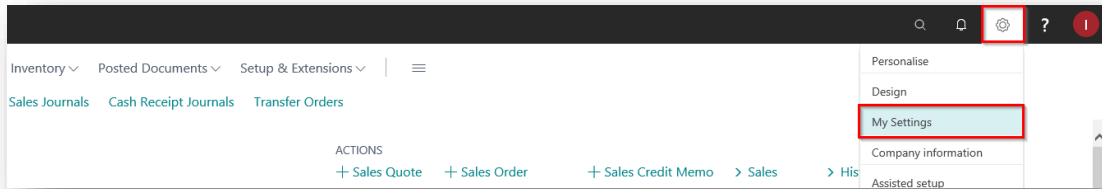


Figure 4-7

2. In the **My Settings** page, on the **Role** field, select the **AssistEdit** icon (Figure 4-8).

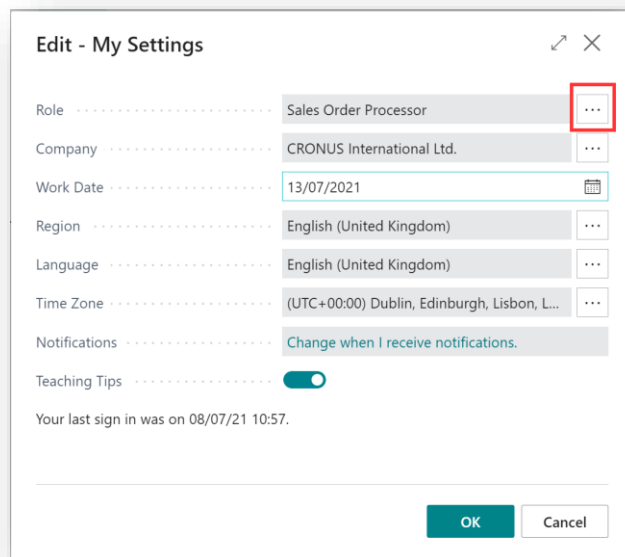


Figure 4-8

3. You should see **SD Stores Logistics** in the list of Roles (Figure 4-9).

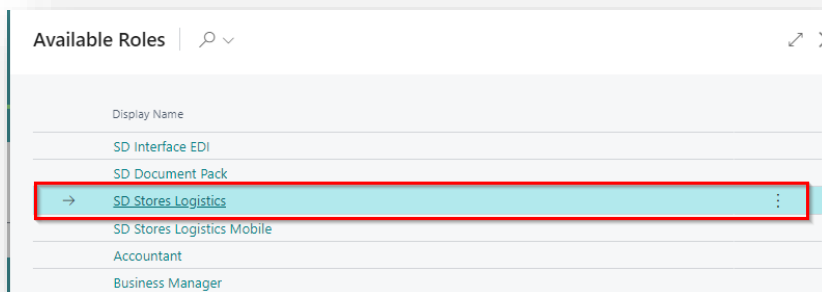


Figure 4-9



4. Choose **SD Stores Logistics** and click **OK**.
5. The **SD Stores Logistics** Role should now be displayed in the **Role** field (*Figure 4-10*).

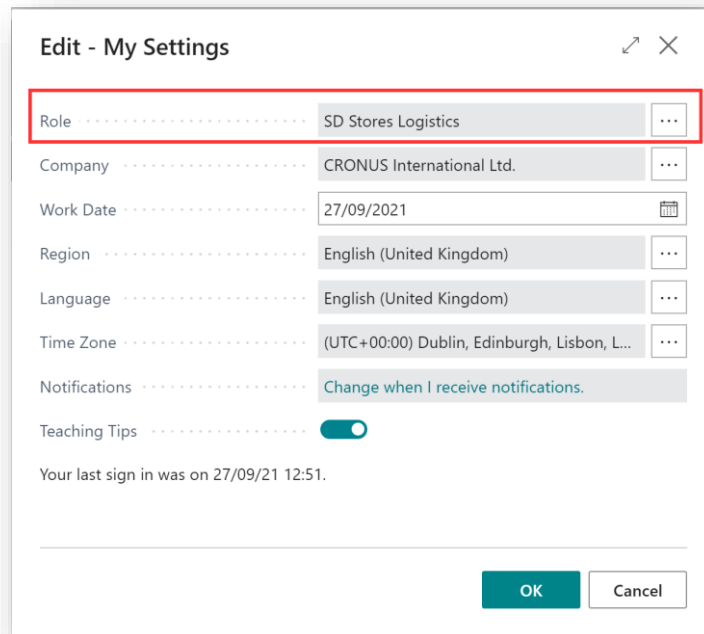


Figure 4-10 shows the 'Edit - My Settings' dialog box. The 'Role' field is highlighted with a red box and contains the text 'SD Stores Logistics'. Other fields include Company (CRONUS International Ltd.), Work Date (27/09/2021), Region (English (United Kingdom)), Language (English (United Kingdom)), Time Zone (UTC+00:00) Dublin, Edinburgh, Lisbon, L..., Notifications (Change when I receive notifications.), and Teaching Tips (toggle on). The dialog has OK and Cancel buttons at the bottom.

Figure 4-10

### 4.3 Accessing the SD Stores Logistics Pages

Use the **Tell Me** to search for SD Stores Logistics pages. Begin typing **SD** or **Logistics** to see a list of the SD Stores Logistics pages (*Figure 4-11*).

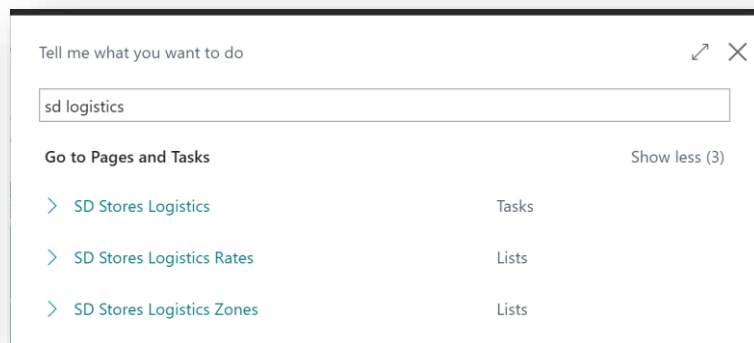


Figure 4-11

### 4.4 Activating the SD Stores Logistics Licence

To use SD Stores Logistics, you must activate the licence.

1. From the **Tell Me**, search for and select the **SD Stores Logistics Setup** card.
2. When the **SD Stores Logistics Setup** card opens, you will be prompted that “Your SD Stores Logistics license needs to be validated”. Choose **Yes** (*Figure 4-12*).

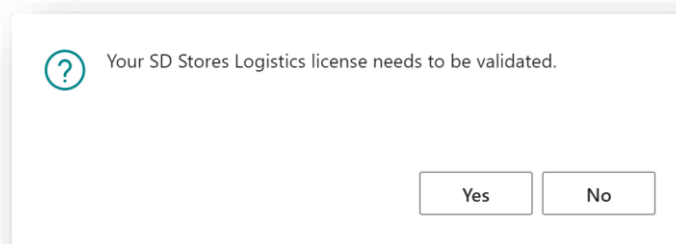
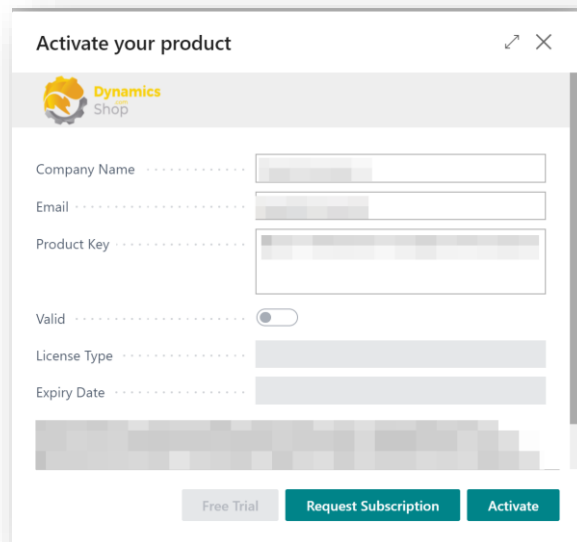


Figure 4-12

3. You will then see the **Activate your product** page.

#### 4.4.1 Activating the SD Stores Logistics Licence with a Product Key

If you have received a Product Key from Simply Dynamics Ltd., in the **Activate your product** page (*Figure 4-13*):



The screenshot shows a web form titled "Activate your product" with the Dynamics Shop logo. The form contains the following fields and controls:

- Company Name: Text input field
- Email: Text input field
- Product Key: Text input field
- Valid: Toggle switch (currently off)
- License Type: Text input field
- Expiry Date: Text input field

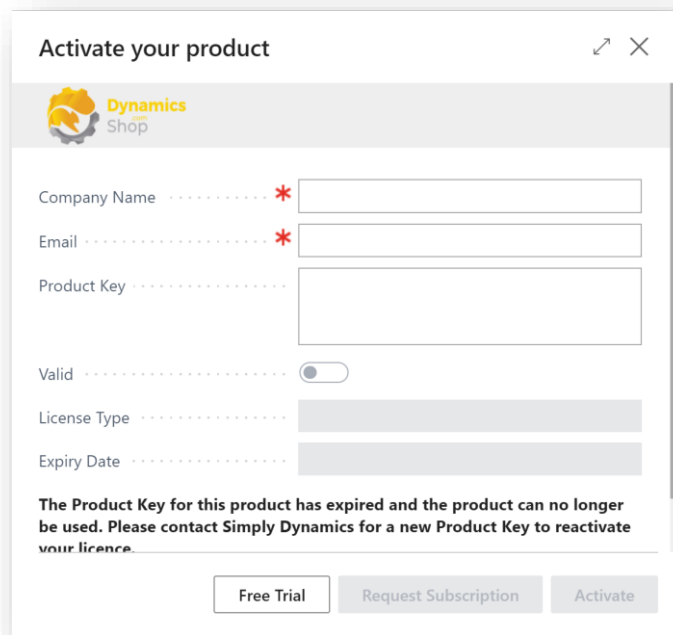
At the bottom of the form, there are three buttons: "Free Trial" (disabled), "Request Subscription" (disabled), and "Activate" (active).

Figure 4-13

1. Enter your company name in **Company Name**
2. Enter your company email in **Email**
3. Paste the supplied product key into the **Product Key** field. **Tab off the Product Key field to validate the contents of the field and to enable the Activate key.** Choose **Activate**.
4. The **Activate your product** page will update to display a message that the activation was successful. The expiry date will depend on the date that you activated your free trial.

#### 4.4.2 Activating the SD Stores Logistics Licence with a Free Trial

If you have not received a Product Key from Simply Dynamics Ltd. and want to avail of a free trial, in the **Activate your Product** page (Figure 4-14):



Activate your product

Dynamics Shop

Company Name ..... \*

Email ..... \*

Product Key .....

Valid .....

License Type .....

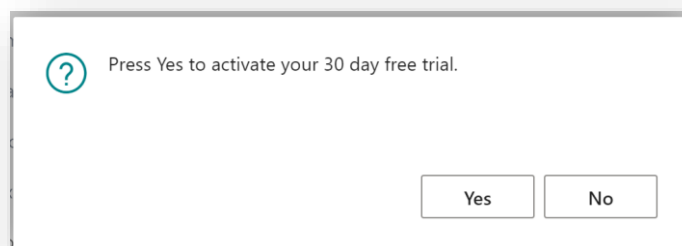
Expiry Date .....

The Product Key for this product has expired and the product can no longer be used. Please contact Simply Dynamics for a new Product Key to reactivate your licence.

Free Trial Request Subscription Activate

Figure 4-14

1. Enter your company name in **Company Name**
2. Enter your company email in **Email**
3. Choose **Free Trial**
4. You are then prompted to choose **Yes** to activate your free trial. Choose **Yes** (Figure 4-15).

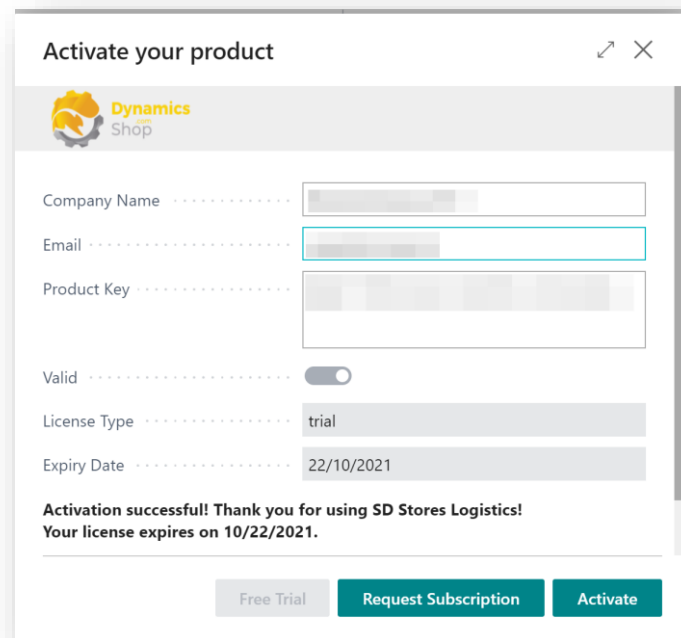


Press Yes to activate your 30 day free trial.

Yes No

Figure 4-15

5. The **Activate your product** page will update to display a message that the activation was successful. The expiry date will depend on the date that you activated your free trial (*Figure 4-16*).



The screenshot shows a web form titled "Activate your product" with the Dynamics Shop logo. The form contains the following fields and controls:

- Company Name: [Redacted]
- Email: [Redacted]
- Product Key: [Redacted]
- Valid:
- License Type: trial
- Expiry Date: 22/10/2021

Below the form, a message reads: "Activation successful! Thank you for using SD Stores Logistics! Your license expires on 10/22/2021." At the bottom, there are three buttons: "Free Trial", "Request Subscription", and "Activate".

Figure 4-16

6. Choose **Finish** to exit the page.
7. When your Free Trial has expired, choose **Request Subscription** to request a Product Key from Simply Dynamics.

## 5 Uninstalling SD Stores Logistics

You can uninstall **SD Stores Logistics** using the Web Client:

1. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management** (*Figure 5-1*).

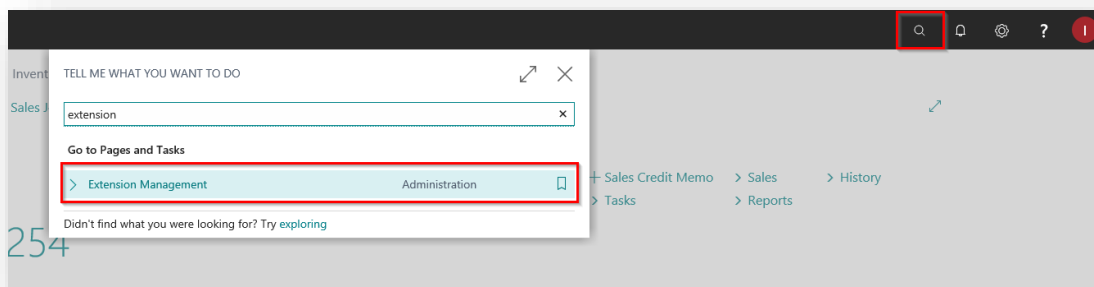


Figure 5-1

2. In **Extension Management**, you should see the **SD Stores Logistics** App installed.
3. Select the **SD Stores Logistics** App and choose the **Uninstall** Action (*Figure 5-2*).

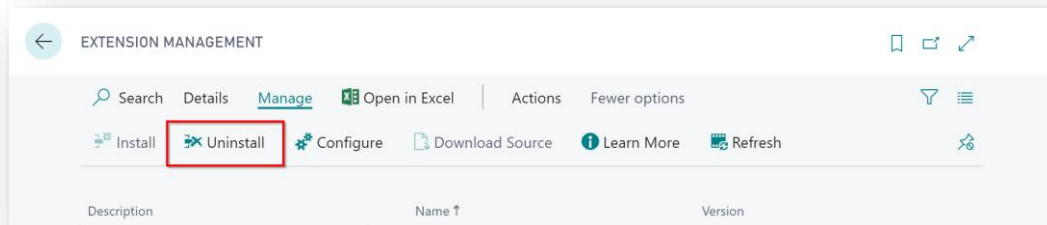


Figure 5-2

## 6 Setup and Configuration

### 6.1 SD Stores Logistics Assisted Setup Wizard

You can easily import default setup for SD Stores Logistics using the **Assisted Setup** Action on the **SD Stores Logistics Setup** card.

1. In the **SD Stores Logistics Setup**, from the menu choose the **Home** group, and then **Assisted Setup** (*Figure 6-1*).

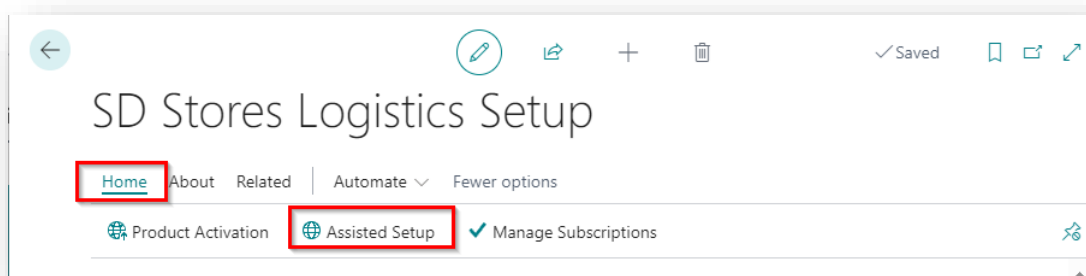


Figure 6-1

2. The **Assisted Setup Wizard** is displayed and guides you through set up. Choose **Next** (*Figure 6-2*).

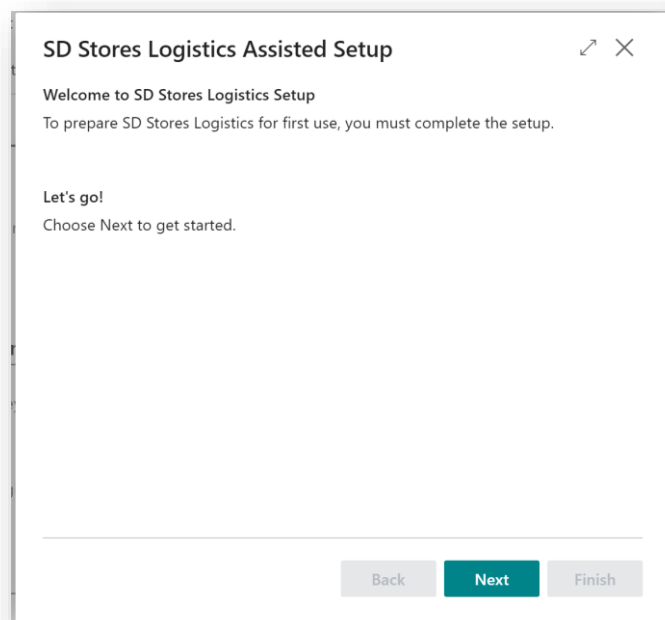
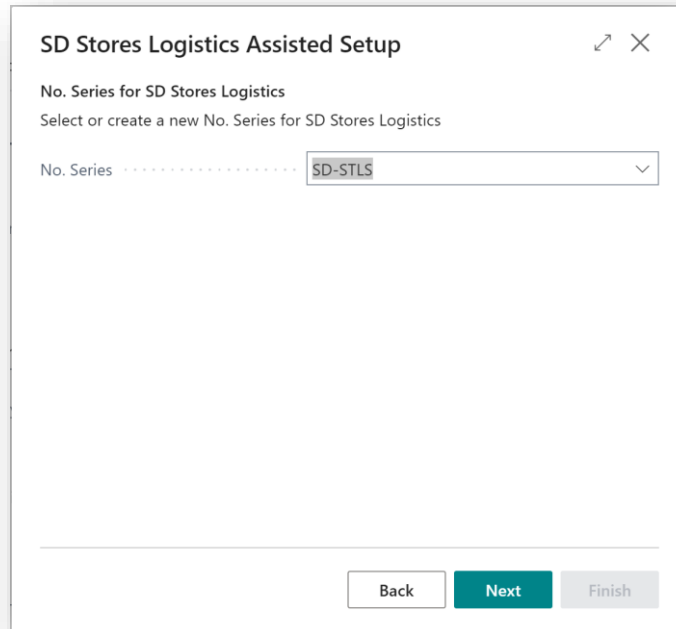


Figure 6-2

3. Choose an existing, or create a new, No. Series that will be used as the number series for the load manifests created in SD Stores Logistics (*Figure 6-3*).



SD Stores Logistics Assisted Setup

No. Series for SD Stores Logistics

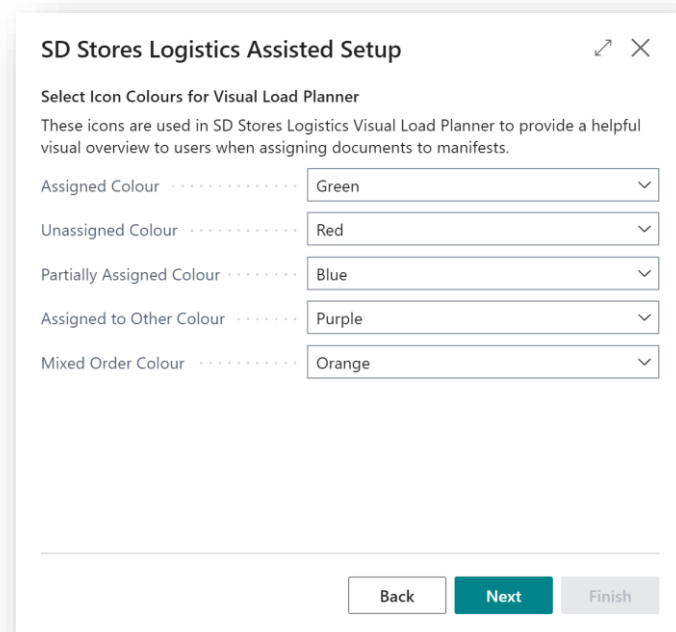
Select or create a new No. Series for SD Stores Logistics

No. Series ..... SD-STLS

Back Next Finish

Figure 6-3

4. Choose the colours for the pins that will display on the SD Stores Logistics Visual Load Planner (*Figure 6-4*).



SD Stores Logistics Assisted Setup

Select Icon Colours for Visual Load Planner

These icons are used in SD Stores Logistics Visual Load Planner to provide a helpful visual overview to users when assigning documents to manifests.

Assigned Colour ..... Green

Unassigned Colour ..... Red

Partially Assigned Colour ..... Blue

Assigned to Other Colour ..... Purple

Mixed Order Colour ..... Orange

Back Next Finish

Figure 6-4



5. Choose the **Suggest Zones** action to populate the Zones that will be used in SD Stores Logistics (Figure 6-5).

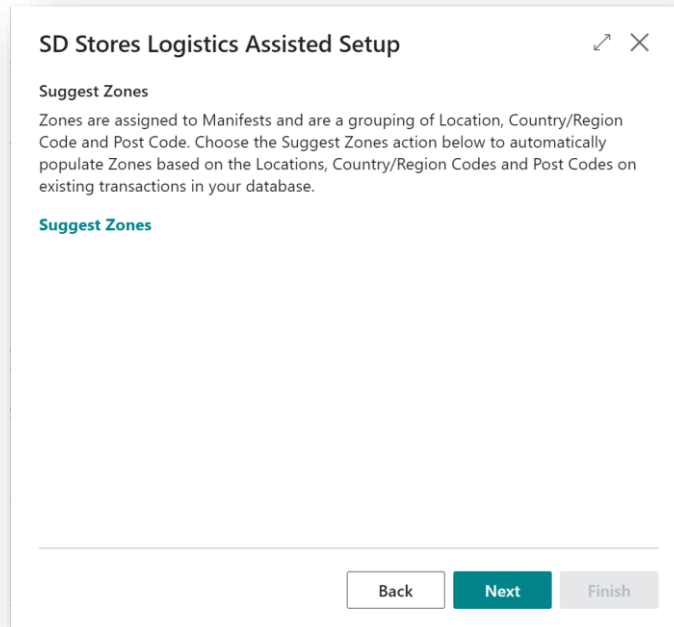


Figure 6-5

6. Choose the **Suggest Rates** action to populate the Rates that will be used for the Zones and Shipping Agent and Shipping Agent Service combinations (Figure 6-6).

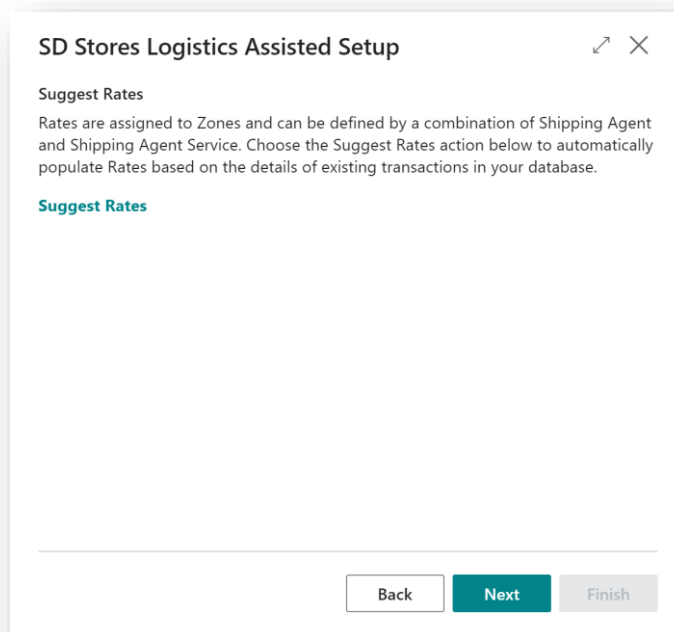
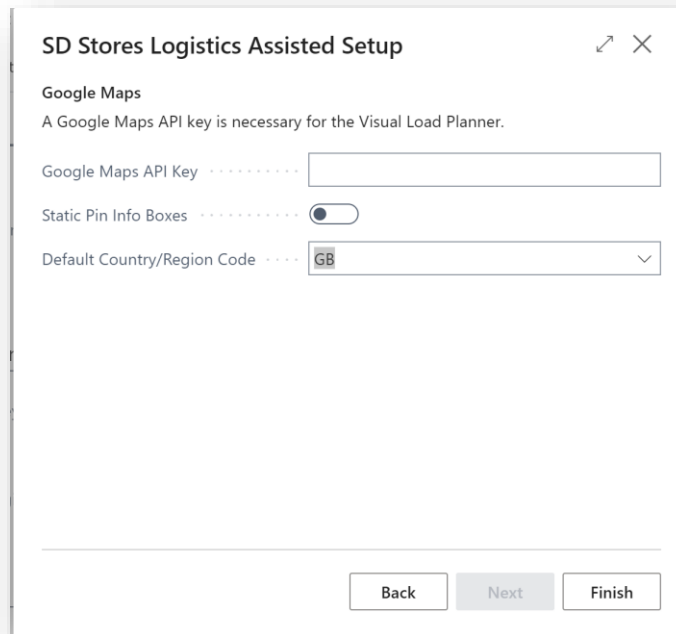


Figure 6-6

7. Enter your Google Maps API Key used to communicate with and to display your orders on Google Maps. Choose a Default Country/Region Code for the Google Map used in the Visual Load Planner. Choose **Finish** (Figure 6-7).



**SD Stores Logistics Assisted Setup**

**Google Maps**  
A Google Maps API key is necessary for the Visual Load Planner.

Google Maps API Key .....

Static Pin Info Boxes .....

Default Country/Region Code ..... GB

Back Next Finish

Figure 6-7

## 7 Using SD Stores Logistics

### 7.1 Setup Card

The **SD Stores Logistics Setup** card is accessed from the **SD Stores Logistics Role Centre**, by selecting the **Setup** action cue, or, by searching for **SD Stores Logistics Setup** in the **Tell Me**.

In the **SD Stores Logistics Setup** card, expand the **General** FastTab (*Figure 7-1*).

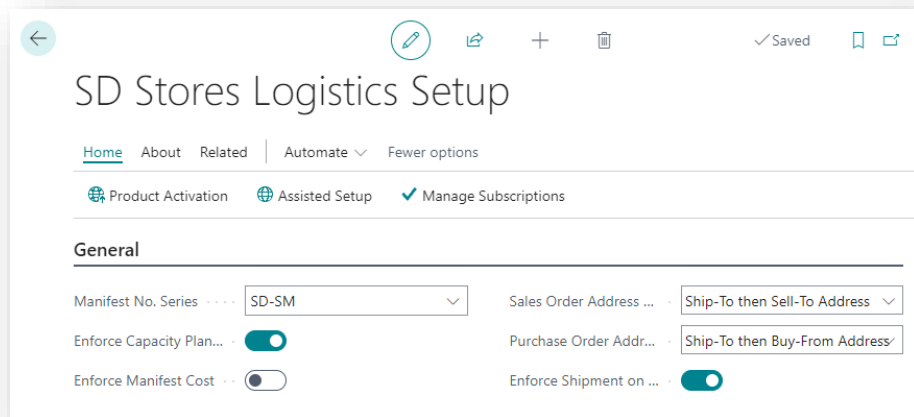


Figure 7-1

- **Manifest No. Series** - Select a No. Series Codes to use when a manifest is created in SD Stores Logistics.
- **Enforce Capacity Planning** – Select this option to check for capacity planning when creating a manifest. If this field is selected, when assigning a document to a manifest with Enforce Capacity Planning switched on, a **Vehicle Code** and a **Vehicle Type Code** must be set on the manifest. The enforce capacity planning runs through the compartments on the Vehicle Type, checking the weight KG and capacity of the items on the manifest and prompts the user on release of the manifest if capacity has been exceeded.
- **Enforce Manifest Cost** – If this option is chosen, SD Stores Logistics will not release a manifest if a zero rate amount exists on the manifest. This is applicable even for manifests whose Shipping Agent does not have a Shipping Agent to Vendor Code specified and where SD Logistics is not calculating and issuing Purchase Orders and Invoices for your Shipping Agents' delivery charges.
- **Sales Order Address Lookup** – Defines from where SD Stores Logistics will pick up the Sales Order Address when creating the manifest. Options are **Ship-To then Sell-To Address**, **Ship-To Address**, **Sell-To Address**.

**Ship-To then Sell-To Address** – SD Stores Logistics will look for the Ship-To Code on the Sales Header to populate the Address on the Manifest. If the Ship-To Code on the Sales Header is blank, then the Sell-To Address is used to populate the Address on the Manifest.

**Ship-To Address** – SD Stores Logistics will look for the Ship-To Address on the Sales Header to populate the Address on the Manifest.

**Sell-To Address** – SD Stores Logistics will look for the Sell-To Address on the Sales Header to populate the Address on the Manifest.

- **Purchase Order Address Lookup** – Defines from where SD Stores Logistics will pick up the Purchase Order Address when creating the manifest. Options are **Ship-To then Buy-From Address, Ship-To Address, Buy-From Address**

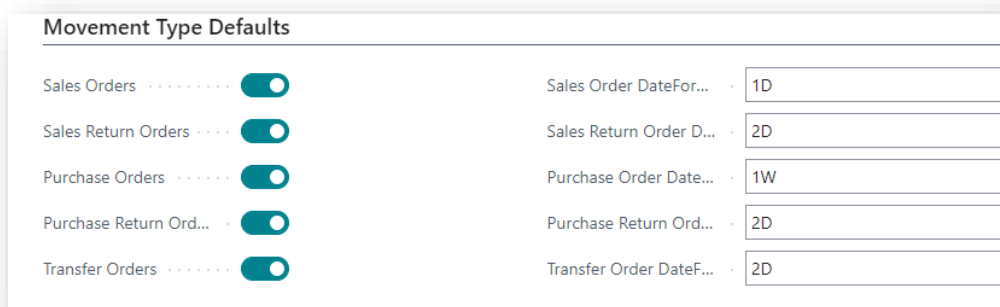
**Ship-To then Buy-From Address** – SD Stores Logistics will look for the Ship-To Code on the Purchase Header to populate the address on the manifest. If the Ship-To Code on the Purchase Header is blank, then the Buy-From Address is used to populate the address on the manifest.

**Ship-To Address** – SD Stores Logistics will look for the Ship-To Address on the Purchase Header to populate the address on the manifest.

**Buy-From Address** – SD Stores Logistics will look for the Buy-From Address on the Purchase Header to populate the address on the manifest.

- **Enforce Shipment on Close Manifest** - Select this option to check on close/ship of the manifest that a quantity to ship or a quantity to receive has been made against the document.

In the **Movement Type Defaults** FastTab (*Figure 7-2*) the following fields are shown:



Movement Type Defaults	
Sales Orders	<input checked="" type="checkbox"/>
Sales Return Orders	<input checked="" type="checkbox"/>
Purchase Orders	<input checked="" type="checkbox"/>
Purchase Return Ord...	<input checked="" type="checkbox"/>
Transfer Orders	<input checked="" type="checkbox"/>
Sales Order DateFor...	1D
Sales Return Order D...	2D
Purchase Order Date...	1W
Purchase Return Ord...	2D
Transfer Order DateF...	2D

Figure 7-2

- 
- **Sales Orders** – Enable this option to populate the Queued Documents list with released Sales Orders.
  - **Sales Order DateFormula** – Enter a DateFormula used to calculate the date filter to apply to the Shipment Date for Sales Orders when populating the Queued Documents List. The date filter will be calculated as  $..(\text{WorkDate} + \text{DateFormula})$ .
  - **Sales Return Orders** – Enable this option to populate the Queued Documents list with released Sales Return Orders.
  - **Sales Return Order DateFormula** – Enter a DateFormula used to calculate the date filter to apply to the Shipment Date for Sales Return Orders when populating the Queued Documents List. The date filter will be calculated as  $..(\text{WorkDate} + \text{DateFormula})$ .
  - **Purchase Orders** – Enable this option to populate the Queued Documents list with released Purchase Orders.
  - **Purchase Order DateFormula** – Enter a DateFormula used to calculate the date filter to apply to the Expected Receipt Date for Purchase Orders when populating the Queued Documents List. The date filter will be calculated as  $..(\text{WorkDate} + \text{DateFormula})$ .
  - **Purchase Return Orders** – Enable this option to populate the Queued Documents list with released Purchase Return Orders.
  - **Purchase Return Order DateFormula** – Enter a DateFormula used to calculate the date filter to apply to the Expected Receipt Date for Purchase Return Orders when populating the Queued Documents List. The date filter will be calculated as  $..(\text{WorkDate} + \text{DateFormula})$ .
  - **Transfer Orders** – Enable this option to populate the Queued Documents list with released Transfer Orders.
  - **Transfer Order DateFormula** – Enter a DateFormula used to calculate the date filter to apply to the Shipment Date for Transfer Orders when populating the Queued Documents List. The date filter will be calculated as  $..(\text{WorkDate} + \text{DateFormula})$ .

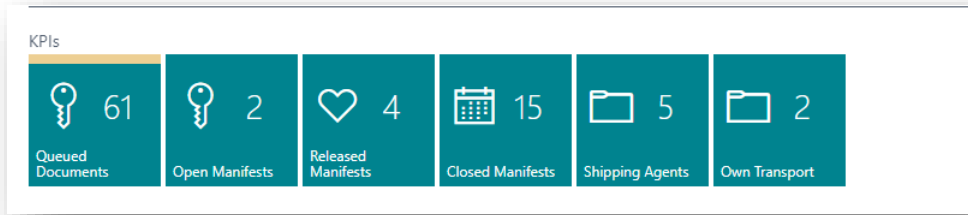
The following fields are contained in the **Reports** FastTab (*Figure 7-3*):

Reports			
Manifest Report ID	43018043	Manifest Report Name	Load Manifest
Docket Report ID	43018046	Docket Report Name	Delivery Docket
Manifest Pick List Rep...	43018044	Manifest Pick List Na...	Manifest Pick Instruction
Order Pick List Report...	43018045	Order Pick List Name	Order Pick Instruction

*Figure 7-3*

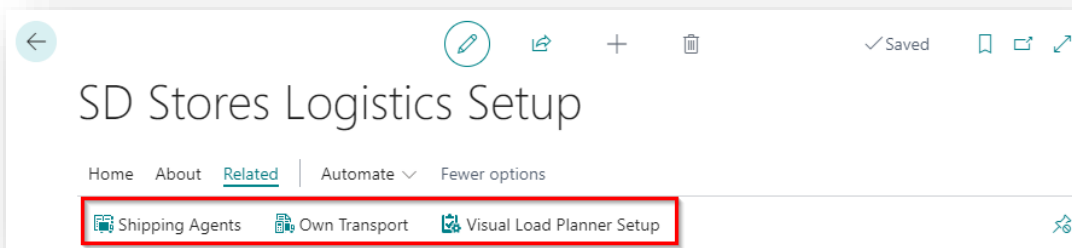
- **Manifest Report ID** – Select the Report ID of the Manifest Report that you want to print. SD Stores Logistics comes with its own Manifest Report, **Report ID 43018043, Load Manifest**.
- **Manifest Report Name** – The name of the report entered in Manifest Report ID.
- **Docket Report ID** – Select the Report ID of the Docket Report that you want to print. SD Stores Logistics comes with its own Delivery Docket, **Report ID 43018046, Delivery Docket**.
- **Docket Report Name** – The name of the report entered in Docket Report ID.
- **Manifest Pick List Report ID** - Select the Report ID of the Manifest Pick List Report that you want to print. SD Stores Logistics comes with its own Manifest Pick List, **Report ID 43018044, Manifest Pick Instruction**.
- **Manifest Pick List Name** - The name of the report entered in Manifest Pick List Report ID.
- **Order Pick List Report ID** - Select the Report ID of the Order Pick List Report that you want to print. SD Stores Logistics comes with its own Order Pick List, **Report ID 43018045, Order Pick Instruction**.
- **Order Pick List Name** - The name of the report entered in Order Pick List Report ID.

Drill through on the KPI cues to open the associated list pages (*Figure 7-4*).



*Figure 7-4*

The following actions can be chosen from the **Related** menu group in the **SD Stores Logistics Setup Card** (*Figure 7-5*).



*Figure 7-5*

## 7.2 Shipping Agents to Vendors

The **SD Stores Logistics Shipping Agents to Vendors** list, is accessed from an extended version of the standard Microsoft Dynamics 365 Business Central **Shipping Agents** page, by choosing the **Shipping Agent Vendor** action (*Figure 7-6*) or by searching the **Tell Me**.

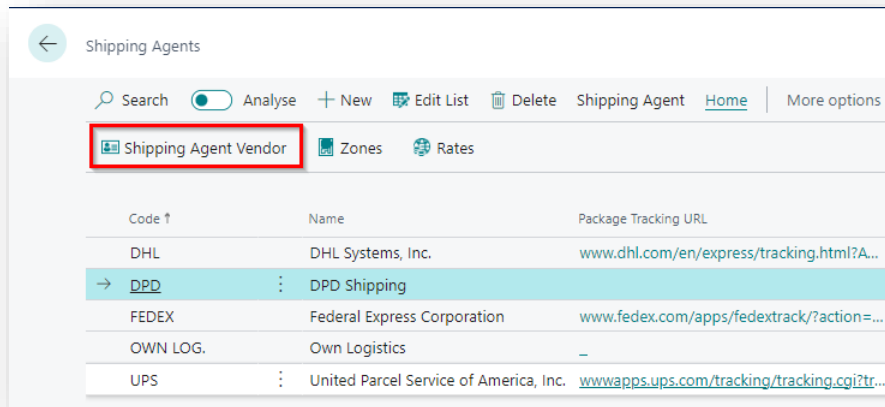


Figure 7-6

The Shipping Agents to Vendors list is used to define a Shipping Agent as a Vendor. The zones and rates you have defined in SD Stores Logistics are used to automatically create a Purchase Order or Purchase Invoice for your shipping costs on release of a manifest (*Figure 7-7*).

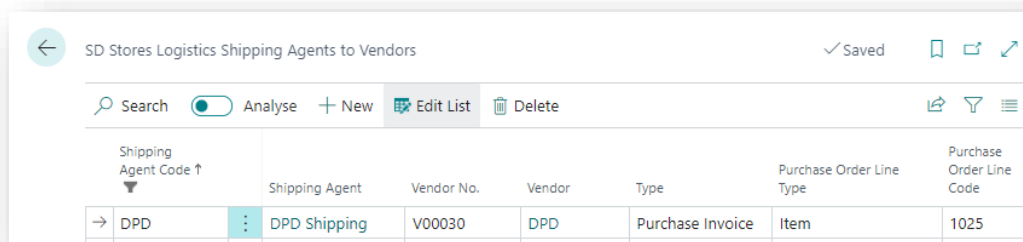


Figure 7-7

- **Shipping Agent Code** – The shipping agent that you want to link to the vendor.
- **Shipping Agent** – Displays the name of the shipping agent chosen in **Shipping Agent Code**.
- **Vendor No.** – Select your vendor number for the shipping agent.
- **Vendor** – Displays the name chosen in **Vendor No.**

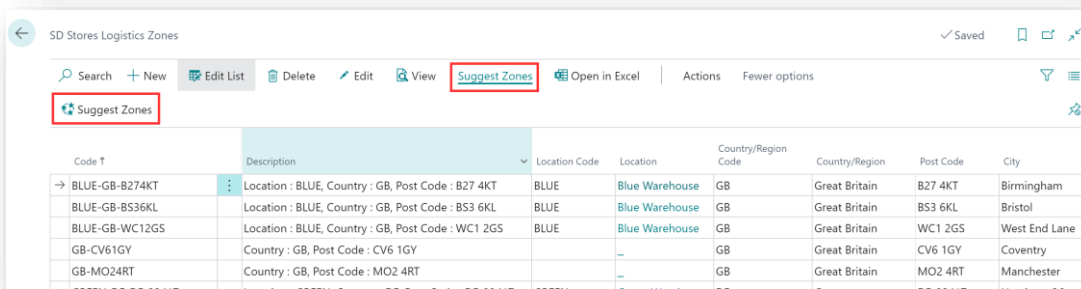


- **Type** – Choose the document type to be created **Purchase Invoice, Purchase Order** or **<None>**. Choosing <None> means that SD Stores Logistics will not automatically create a Purchase Order or Purchase Invoice for your shipping costs on release of a manifest.
- **Purchase Order Line Type** – Select the line type on the Purchase Invoice or Purchase Order. Options are **GL Account, Charge Item, or Item**.
- **Purchase Order Line Code** – Select the code for the line based on the option chosen in **Purchase Order Line Type**.
- **Purchase Order Line** – Displays the description of the code chosen in Purchase Order Line Code.
- **Create Purchase Order As** – Choose the Dynamics 365 user that will be stamped in the Assigned User ID field on the Purchase Order or Purchase Invoice.
- **Vendor Currency Code** – Displays the vendor’s currency code, if different from the base currency. If the vendor’s currency code is different from the base currency, then the rates for the Shipping Agent must be input in the vendor’s currency.
- **Fuel Surcharge %** - Enter a fuel surcharge percentage for the Shipping Agent. On release of the manifest the fuel surcharge is calculated as a percentage of the base, drop and pallet rates.

### 7.3 Zones

The **SD Stores Logistics Zones** list, is accessed from the **Shipping Agents** list or by searching the **Tell Me**.

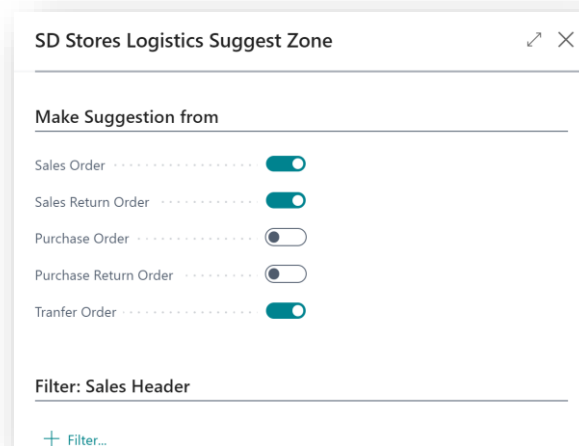
Zones are assigned to manifests and are a grouping of Location, Country/Region Code and Post Code. You can choose the **Suggest Zones** action to easily populate your Zones based on existing transactions in your database (*Figure 7-8*). The Suggest Zones action analyses past transactions and builds up the Zones by picking up the Locations, Country/Region Code and Post Code on the transactions. When creating Zones, the Post Code on the document must exist in the Post Code table for it to be added to the Zone.



Code	Description	Location Code	Location	Country/Region Code	Country/Region	Post Code	City
→ BLUE-GB-B274KT	Location : BLUE, Country : GB, Post Code : B27 4KT	BLUE	Blue Warehouse	GB	Great Britain	B27 4KT	Birmingham
BLUE-GB-BS36KL	Location : BLUE, Country : GB, Post Code : BS3 6KL	BLUE	Blue Warehouse	GB	Great Britain	BS3 6KL	Bristol
BLUE-GB-WC12GS	Location : BLUE, Country : GB, Post Code : WC1 2GS	BLUE	Blue Warehouse	GB	Great Britain	WC1 2GS	West End Lane
GB-CV61GY	Country : GB, Post Code : CV6 1GY	—	—	GB	Great Britain	CV6 1GY	Coventry
GB-MO24RT	Country : GB, Post Code : MO2 4RT	—	—	GB	Great Britain	MO2 4RT	Manchester

Figure 7-8

If you select the **Suggest Zones** action the page below is displayed (*Figure 7-9*).



**SD Stores Logistics Suggest Zone**

---

**Make Suggestion from**

Sales Order

Sales Return Order

Purchase Order

Purchase Return Order

Transfer Order

---

**Filter: Sales Header**

+ Filter...

Figure 7-9

If you selected the **Assisted Setup** action in the **SD Stores Logistics Setup** card, Zones were created in SD Stores Logistics.

The **SD Stores Logistics Zone Card** is accessed from the **SD Stores Logistics Zones** list by choosing **New**, **View** or **Edit** from the menu or by drilling through on an existing record (*Figure 7-10*).

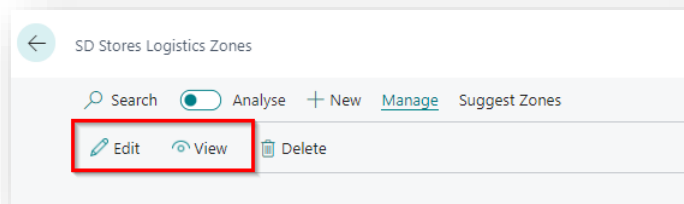
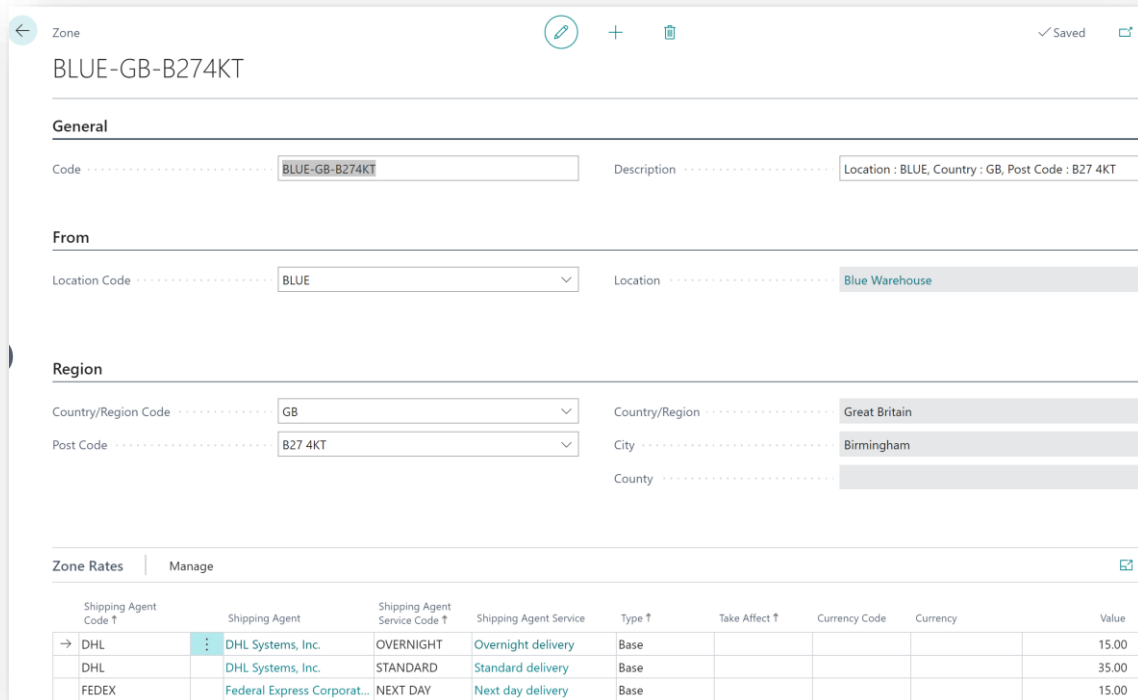


Figure 7-10

## 7.4 Zone Card

The **SD Stores Logistics Zone Card** contains the following fields (*Figure 7-11*).



Zone: BLUE-GB-B274KT

**General**

Code: BLUE-GB-B274KT      Description: Location : BLUE, Country : GB, Post Code : B27 4KT

**From**

Location Code: BLUE      Location: Blue Warehouse

**Region**

Country/Region Code: GB      Country/Region: Great Britain  
 Post Code: B27 4KT      City: Birmingham  
 County:

**Zone Rates** | Manage

Shipping Agent Code ↑	Shipping Agent	Shipping Agent Service Code ↑	Shipping Agent Service	Type ↑	Take Affect ↑	Currency Code	Currency	Value
→ DHL	DHL Systems, Inc.	OVERNIGHT	Overnight delivery	Base				15.00
DHL	DHL Systems, Inc.	STANDARD	Standard delivery	Base				35.00
FEDEX	Federal Express Corporat...	NEXT DAY	Next day delivery	Base				15.00

Figure 7-11

### General FastTab:

- **Code** – A unique code to identify the Zone. If you have chosen the **Suggest Zones** action in the **SD Stores Logistics Zones** page, then the Zone Codes have been automatically created using the Location Code, Country/Region Code, and Post Code from your existing transactions.
- **Description** – Enter a meaningful user defined description to describe the Zone. If you have chosen the **Suggest Zones** action in the **SD Stores Logistics Zones** page, then the Zone Code has been automatically generated using the Location Code, Country/Region Code, and Post Code from your existing transactions.

### From FastTab:

- **Location Code** – Select a Location Code from a list of existing Location Codes in Microsoft Dynamics 365 Business Central.

- **Location** – Displays the name of the Location.

#### Region FastTab:

- **Country/Region Code** – Select a Country/Region Code from a list of existing Country/Region Codes in Microsoft Dynamics 365 Business Central.
- **Country/Region** – Displays the name of the Country/Region Code.
- **Post Code** - Select a Post Code from a list of existing Post Codes in Microsoft Dynamics 365 Business Central for the Country/Region Code.
- **City** – Displays the City for the Post Code.
- **County** – Displays the County for the Post Code.

The Zone Rates (*Figure 7-12*) can be generated using the **Suggest Rates** action from the **SD Stores Logistics Rates** page or can be manually entered. The Zone Rates allow you to set the rates for your shipping costs.

Shipping Agent Code ↑	Shipping Agent	Shipping Agent Service Code ↑	Shipping Agent Service	Type ↑	Take Affect ↑	Currency Code	Currency	Value
→ DHL	DHL Systems, Inc.			Base				15.00
DHL	DHL Systems, Inc.	OVERNIGHT	Overnight delivery	Base				15.00
FEDEX	Federal Express Corporation	NEXT DAY	Next day delivery	Base				15.00
FEDEX	Federal Express Corporation	OVERNIGHT		Base				15.00
UPS	United Parcel Service of Amer...	OVERNIGHT		Base				15.00

Figure 7-12

- **Shipping Agent Code** – Select the Shipping Agent Code for the rate.
- **Shipping Agent** – Displays the name of the shipping agent chosen in Shipping Agent Code.
- **Shipping Agent Service Code** – Select the Shipping Agent Service Code.
- **Shipping Agent Service** – Displays the description of the service chosen in Shipping Agent Service Code.

- **Type** – Select the **Type** of the shipping rate. Options are **Base**, **Drop** or **Pallet Space**. Rates of **Type Fuel Surcharge** are calculated on release of the manifest by using the Fuel Surcharge % on the Shipping Agents to Vendor list and rates of **Type Agreed Rate** are manually entered on the Queued Documents list or on the load documents on the manifest.

**Base** – Set the rate to use as the base rate for the shipping cost associated with the manifest.

**Drop** – Set the rate to use as the drop rate for the shipping cost. The drop rate is used for each additional address (drop) added to the manifest.

**Pallet Spaces** – Set the rate to use as the pallet space rate for the shipping cost associated with the individual documents on the manifest.

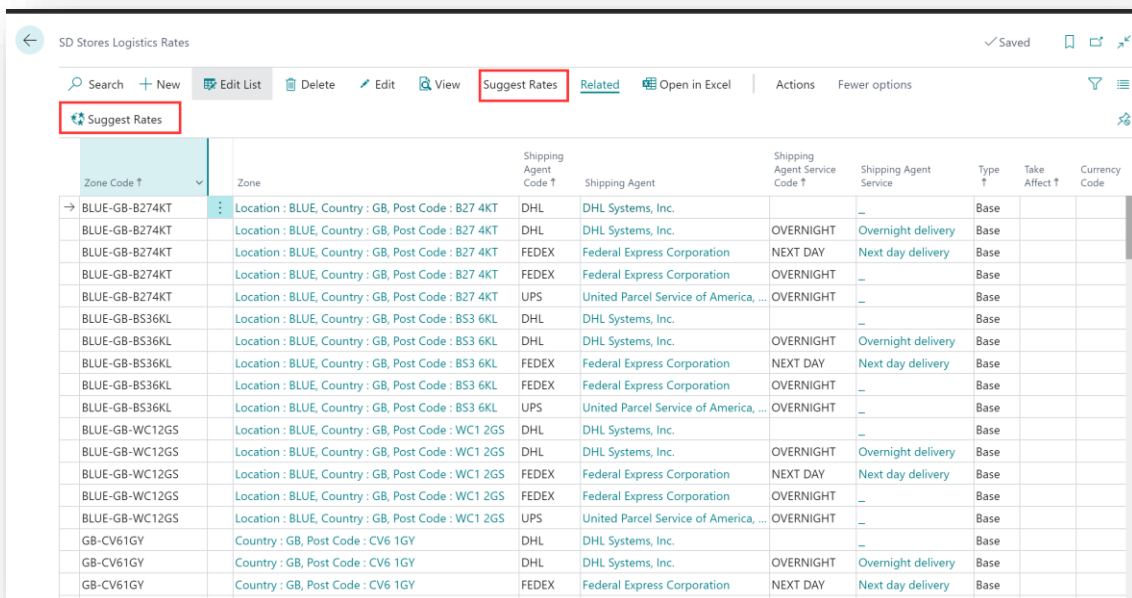
- **Take Affect** – Enter a date that the rate will take effect from.
- **Currency Code** – Enter the currency code for the rate.
- **Currency** – Displays the description of the currency.
- **Value** – Enter the rate's value.

## 7.5 Rates

The **SD Stores Logistics Rates** list, is accessed from is accessed from the **Shipping Agents** list or by searching the **Tell Me**.

Rates are assigned to Zones and are defined by a combination of Shipping Agent and Shipping Agent Service (*Figure 7-13*). Using SD Stores Logistics, you can easily set up these rates to automatically create a Purchase Order or Purchase Invoice for your shipping costs on release of a manifest.

If a total rate amount is not found for the manifest then an error is raised on release of a manifest if the **Enforce Manifest Cost** option on the **SD Stores Logistics Setup** is switched on.

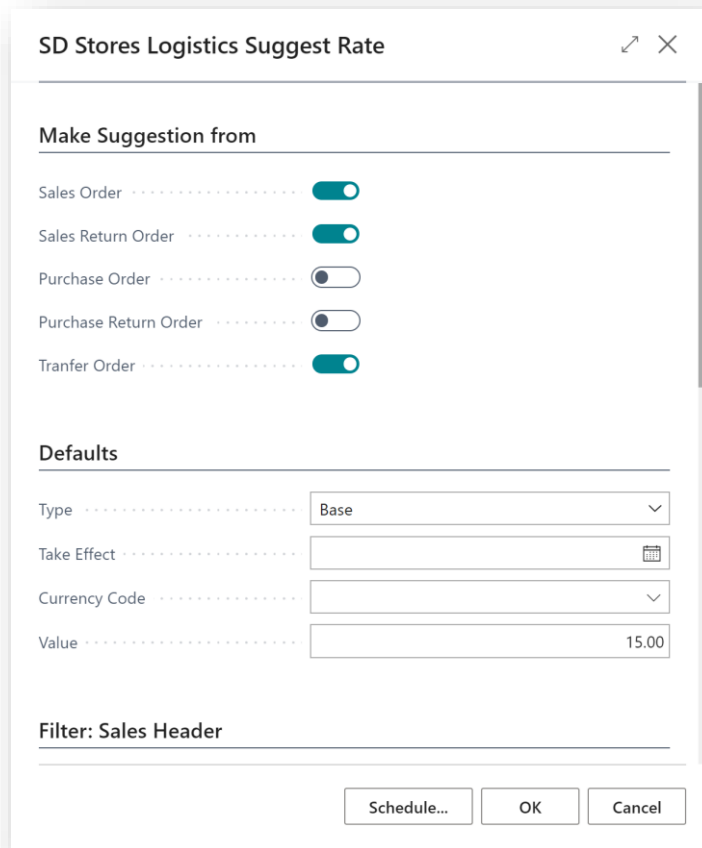


Zone Code ↑	Zone	Shipping Agent Code ↑	Shipping Agent	Shipping Agent Service Code ↑	Shipping Agent Service	Type ↑	Take Affect ↑	Currency Code
→ BLUE-GB-B274KT	Location : BLUE, Country : GB, Post Code : B27 4KT	DHL	DHL Systems, Inc.			Base		
BLUE-GB-B274KT	Location : BLUE, Country : GB, Post Code : B27 4KT	DHL	DHL Systems, Inc.	OVERNIGHT	Overnight delivery	Base		
BLUE-GB-B274KT	Location : BLUE, Country : GB, Post Code : B27 4KT	FEDEX	Federal Express Corporation	NEXT DAY	Next day delivery	Base		
BLUE-GB-B274KT	Location : BLUE, Country : GB, Post Code : B27 4KT	FEDEX	Federal Express Corporation	OVERNIGHT	—	Base		
BLUE-GB-B274KT	Location : BLUE, Country : GB, Post Code : B27 4KT	UPS	United Parcel Service of America, ...	OVERNIGHT	—	Base		
BLUE-GB-B536KL	Location : BLUE, Country : GB, Post Code : B53 6KL	DHL	DHL Systems, Inc.			Base		
BLUE-GB-B536KL	Location : BLUE, Country : GB, Post Code : B53 6KL	DHL	DHL Systems, Inc.	OVERNIGHT	Overnight delivery	Base		
BLUE-GB-B536KL	Location : BLUE, Country : GB, Post Code : B53 6KL	FEDEX	Federal Express Corporation	NEXT DAY	Next day delivery	Base		
BLUE-GB-B536KL	Location : BLUE, Country : GB, Post Code : B53 6KL	FEDEX	Federal Express Corporation	OVERNIGHT	—	Base		
BLUE-GB-B536KL	Location : BLUE, Country : GB, Post Code : B53 6KL	UPS	United Parcel Service of America, ...	OVERNIGHT	—	Base		
BLUE-GB-WC12GS	Location : BLUE, Country : GB, Post Code : WC1 2GS	DHL	DHL Systems, Inc.			Base		
BLUE-GB-WC12GS	Location : BLUE, Country : GB, Post Code : WC1 2GS	DHL	DHL Systems, Inc.	OVERNIGHT	Overnight delivery	Base		
BLUE-GB-WC12GS	Location : BLUE, Country : GB, Post Code : WC1 2GS	FEDEX	Federal Express Corporation	NEXT DAY	Next day delivery	Base		
BLUE-GB-WC12GS	Location : BLUE, Country : GB, Post Code : WC1 2GS	FEDEX	Federal Express Corporation	OVERNIGHT	—	Base		
BLUE-GB-WC12GS	Location : BLUE, Country : GB, Post Code : WC1 2GS	UPS	United Parcel Service of America, ...	OVERNIGHT	—	Base		
GB-CV61GY	Country : GB, Post Code : CV6 1GY	DHL	DHL Systems, Inc.			Base		
GB-CV61GY	Country : GB, Post Code : CV6 1GY	DHL	DHL Systems, Inc.	OVERNIGHT	Overnight delivery	Base		
GB-CV61GY	Country : GB, Post Code : CV6 1GY	FEDEX	Federal Express Corporation	NEXT DAY	Next day delivery	Base		
GB-CV61GY	Country : GB, Post Code : CV6 1GY	FEDEX	Federal Express Corporation	OVERNIGHT	—	Base		

Figure 7-13

You can choose the **Suggest Rates** action to easily populate your rates based on existing transactions in your database. The Suggest Rates action analyses past transactions and looks at the Zones, Shipping Agents and Shipping Agent Service Codes combinations on the transactions and populates the rates.

If you select the **Suggest Rates** action the below page is displayed (*Figure 7-14*).



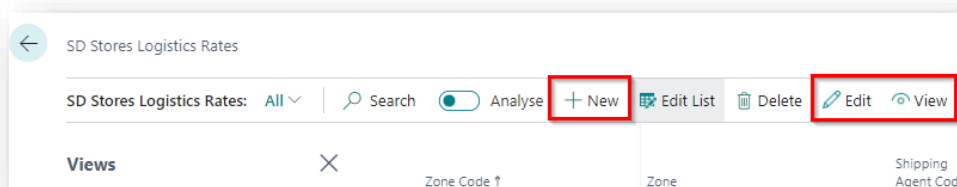
The dialog box is titled "SD Stores Logistics Suggest Rate". It contains the following sections:

- Make Suggestion from:** A list of order types with toggle switches: Sales Order (on), Sales Return Order (on), Purchase Order (off), Purchase Return Order (off), and Transfer Order (on).
- Defaults:** Fields for Type (Base), Take Effect (calendar icon), Currency Code, and Value (15.00).
- Filter:** Sales Header.
- Buttons:** Schedule..., OK, and Cancel.

Figure 7-14

If you selected the **Assisted Setup** action in the **SD Stores Logistics Setup** card, rates were created in SD Stores Logistics.

The **SD Stores Logistics Zone Card** is accessed from the **SD Stores Logistics Zones** list by choosing **New**, **View** or **Edit** from the menu (*Figure 7-15*).



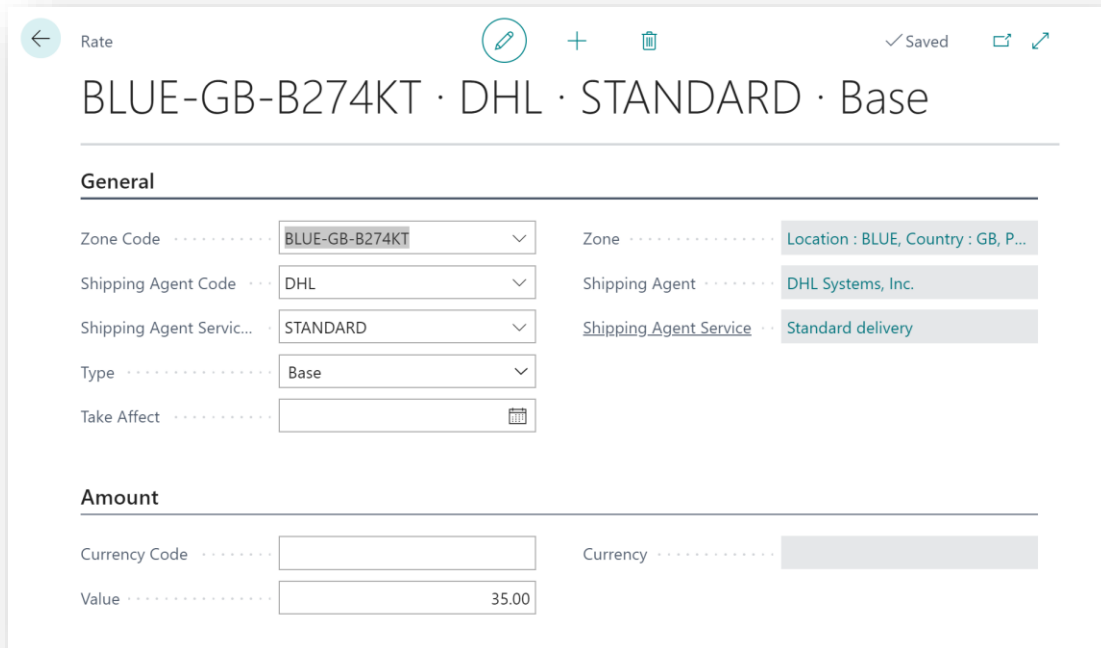
The screenshot shows the "SD Stores Logistics Rates" list view. The top navigation bar includes a back arrow, the title "SD Stores Logistics Rates", and a search bar. Below the search bar is a toolbar with the following actions: "All" (dropdown), "Analyse" (toggle), "+ New" (highlighted with a red box), "Edit List" (list icon), "Delete" (trash icon), "Edit" (pencil icon, highlighted with a red box), and "View" (eye icon, highlighted with a red box). Below the toolbar is a table with columns for "Zone Code", "Zone", and "Shipping Agent Cod".

Figure 7-15



## 7.6 Rate Card

The **SD Stores Logistics Rate Card** contains the following fields (*Figure 7-16*).



Rate

BLUE-GB-B274KT · DHL · STANDARD · Base

✓ Saved

### General

Zone Code	BLUE-GB-B274KT	Zone	Location : BLUE, Country : GB, P...
Shipping Agent Code	DHL	Shipping Agent	DHL Systems, Inc.
Shipping Agent Service	STANDARD	Shipping Agent Service	Standard delivery
Type	Base		
Take Affect			

### Amount

Currency Code		Currency	
Value	35.00		

Figure 7-16

### General FastTab:

- **Zone Code** – The Zone Code that the rate is for.
- **Zone** – Displays the zone description.
- **Shipping Agent Code** – The Shipping Agent Code that the rate is for.
- **Shipping Agent** – Displays the shipping agent description.
- **Shipping Agent Service Code** – The Shipping Agent Service Code that the rate is for.
- **Shipping Agent Service** – Displays the shipping agent service description.
- **Type** – Select the **Type** of the shipping rate. Options are **Base**, **Drop** or **Pallet Space**. Rates of **Type Fuel Surcharge** are calculated on release of the manifest by using the Fuel Surcharge % on the Shipping Agents to Vendor list and rates of **Type Agreed Rate**

---

are manually entered on the Queued Documents list or on the load documents on the manifest.

**Base** – Set the rate to use as the base rate for the shipping cost associated with the manifest.

**Drop** – Set the rate to use as the drop rate for the shipping cost. The drop rate is used for each additional address (drop) added to the manifest.

**Pallet Spaces** – Set the rate to use as the pallet space rate for the shipping cost associated with the individual documents on the manifest.

- **Take Affect** – Enter a date that the rate will take effect from.

**Amount** FastTab:

- **Currency Code** – Enter the rate's currency code.
- **Currency** – Displays the currency description.
- **Value** – Enter the value of the rate.

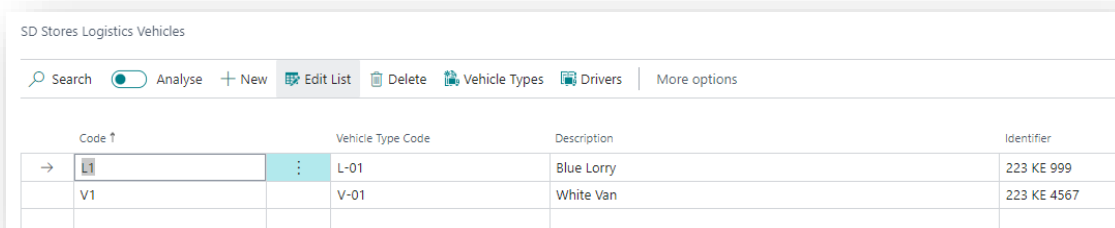
## 7.7 Own Transport

If you are not using a Shipping Agent Service such as DHL, DPD, or Fastway for example but are using your own fleet for shipping, you can set up details of your own transport in SD Stores Logistics. If you have switched on the **Enforce Capacity Planning** option on the Setup card, the weight and cubage capacity of your vehicles must be defined.

### 7.7.1 Vehicles

The **SD Stores Logistics Vehicles** list (*Figure 7-17*), is accessed from the **SD Stores Logistics Setup** card by choosing the **Own Transport** action or by searching the **Tell Me**.

Drivers and Vehicles are used if you are not using a Shipping Agent Service but are using your own fleet for shipping. These details are needed if you have chosen to enforce capacity planning on the **SD Stores Logistics Setup** card.



Code ↑	Vehicle Type Code	Description	Identifier
L1	L-01	Blue Lorry	223 KE 999
V1	V-01	White Van	223 KE 4567

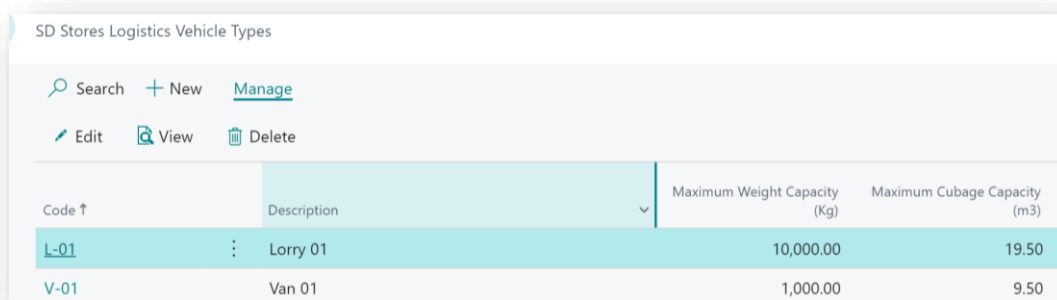
Figure 7-17

- **Code** – Enter a unique code for the vehicle.
- **Vehicle Type Code** – Select the vehicle type from a list of defined vehicle types.
- **Description** – Enter a user defined description for the vehicle.
- **Identifier** – Enter a text description to identify the vehicle.

## 7.7.2 Vehicle Types

The **SD Stores Logistics Vehicle Types** list, is accessed from the **SD Stores Logistics Vehicles** list by choosing the **Vehicle Types** action or by searching the **Tell Me**.

Enter the weight and cubage capacity for the different types of vehicles that you use. These details are used if you have chosen to enforce capacity planning in SD Stores Logistics Setup (Figure 7-18).



SD Stores Logistics Vehicle Types

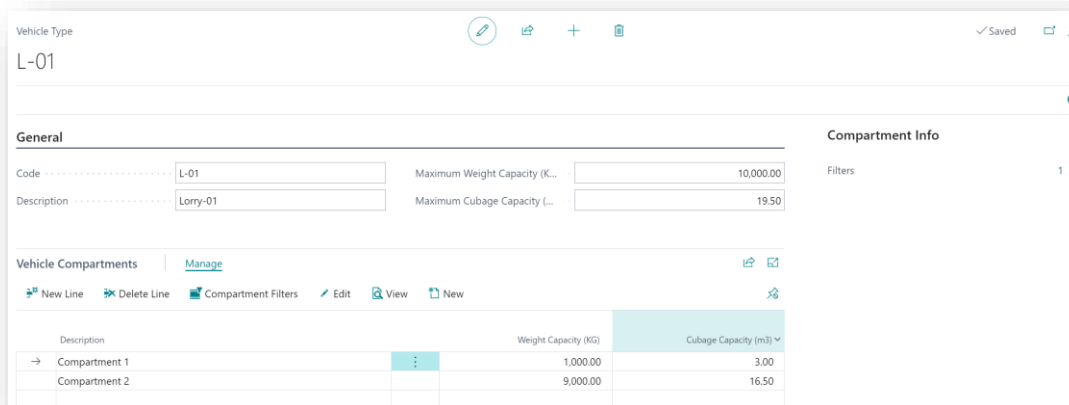
Search + New Manage

Edit View Delete

Code ↑	Description	Maximum Weight Capacity (Kg)	Maximum Cubage Capacity (m3)
L-01	Lorry 01	10,000.00	19.50
V-01	Van 01	1,000.00	9.50

Figure 7-18

Choose **New**, **Edit** or **View** to open the Vehicle Type Card (Figure 7-19).



Vehicle Type L-01

Code L-01 Maximum Weight Capacity (Kg) 10,000.00

Description Lorry-01 Maximum Cubage Capacity (m3) 19.50

Compartment Info Filters 1

Vehicle Compartments Manage

New Line Delete Line Compartment Filters Edit View New

Description	Weight Capacity (KG)	Cubage Capacity (m3)
→ Compartment 1	1,000.00	3.00
Compartment 2	9,000.00	16.50

Figure 7-19

In the **General** FastTab:

- **Code** – Enter a unique code to identify the vehicle type.
- **Description** – Enter a user defined description.

- **Maximum Weight Capacity (KG)** – Enter the maximum weight capacity (KG) that the vehicle type can hold.
- **Maximum Cubage Capacity (m3)** – Enter the maximum cubage capacity (m3) that the vehicle type can hold.

In the **Vehicle Compartments** FastTab:

- **Description** – Enter a user defined description for the compartment.
- **Weight Capacity (KG)** – Enter the weight capacity (KG) for the compartment.
- **Cubage Capacity (m3)** – Enter the cubage capacity (m3) for the compartment.

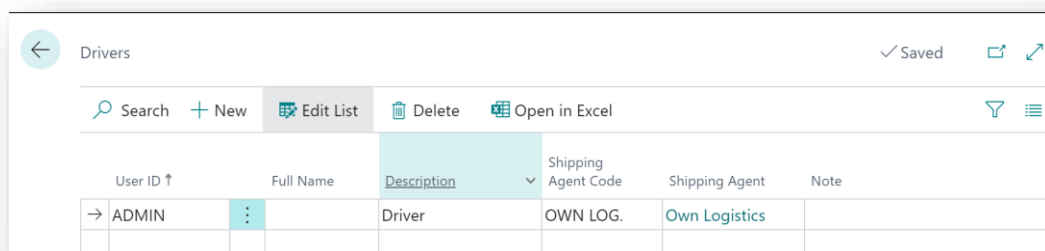
The following action can be chosen from the **Manage** menu group in Vehicle Compartments FastTab.

- **Compartment Filters** – Choose this action to include or exclude various items in a vehicle compartment.

### 7.7.3 Drivers

The **SD Stores Logistics Drivers** list, is accessed from the **SD Stores Logistics Vehicles** list by choosing the **Drivers** action or by searching the **Tell Me**.

Drivers are used if you are not using a Shipping Agent Service but are using your own vehicles for shipping. You can assign a Dynamics 365 Business Central User and a Shipping Agent Code to a driver (*Figure 7-20*).



User ID ↑	Full Name	Description	Shipping Agent Code	Shipping Agent	Note
→ ADMIN		Driver	OWN LOG.	Own Logistics	

*Figure 7-20*

- **User ID** – Select a User ID from existing users in you Microsoft Dynamics 365 Business Central Database.
- **Full Name** – Displays the name of the user chosen in **User ID**.
- **Description** – Enter a user defined description for the driver.
- **Shipping Agent Code** – Select a shipping agent to link the driver to.
- **Shipping Agent** – Displays the name of the shipping agent chosen in **Shipping Agent Code**.
- **Note** – Enter a comment to display on the SD Stores Logistics Manifest and Pick List Reports.

In the **Manifest Card**, you can assign a Driver to a Manifest (*Figure 7-21*).

Load Manifest

LD00004

Process Reports Actions Fewer options

**General**

No. LD00004 Zone Location : BLUE, Country : GB, Pos...

Zone Code BLUE-GB-B274KT Shipping Agent DHL Systems, Inc.

Shipping Agent Code DHL Shipping Agent Service Overnight delivery

Shipping Agent Service... OVERNIGHT

Shipment Date 20/10/2021

Status Released

**Vehicle and Driver**

Vehicle Code 2 Vehicle Van

Vehicle Type Code V-01

Driver ID ADMIN Driver

Figure 7-21

When the Manifest is Released, the driver will see the Drops and Manifests assigned to them for the day in the **SD Stores Logistics Mobile Role Centre** (Figure 7-22).

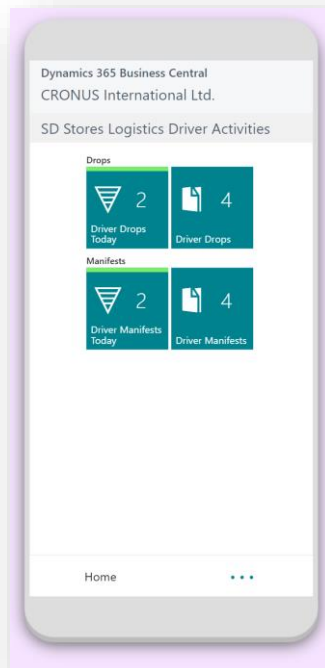


Figure 7-22

## 7.8 Visual Load Planner Setup Card

The **Visual Load Planner Setup** card is accessed from the **SD Stores Logistics Setup** card, or, by searching for **Visual Load Planner Setup** in the **Tell Me**.

Expand the **Visual Load Planner** FastTab (*Figure 7-23*):

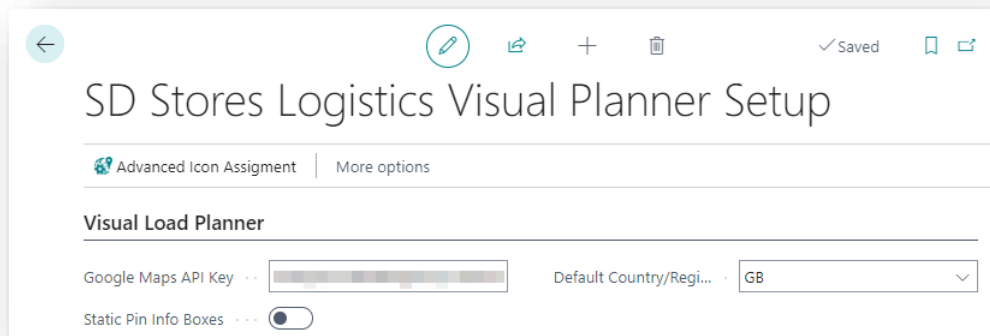


Figure 7-23

- **Google Maps API Key** – Enter the Google Maps API Key needed to use Google Maps. You will need to generate and use your own Google Maps API Key to use and view the Visual Load Planner in SD Stores Logistics.
- **Static Pin Info Boxes** – Select this checkbox to always show the details of the transactions in the Info Box next to the pin displayed on the Visual Load Planner.
- **Default Country/Region Code** – Select the default Country/Region Code to use. This sets the default location on the map area. If there are documents in several different Country/Region Codes, the Visual Load Planner will show all the Country/Region Codes on the map.

The **Icon Colours** FastTab allows you to define the colours on the pins on the Visual Load Map Planner. This enables users to differentiate, at a glance, the status of the different documents assigned on a manifest (*Figure 7-24*):

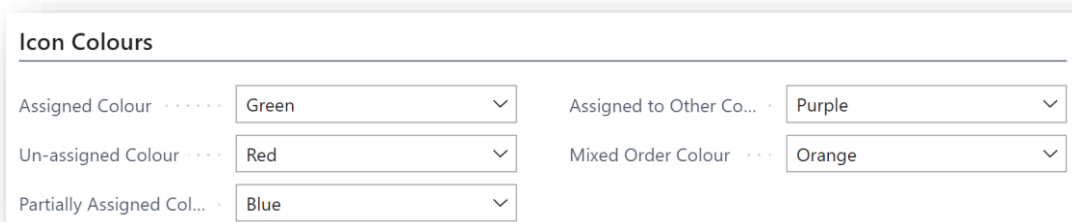


Figure 7-24



- **Assigned Colour** – Choose from a list of colour options to identify the document(s) as assigned to a manifest. Options are <no colour>, **Blue, Red, Green, Pink, Purple, White, Light Blue, Yellow, Orange.**
- **Unassigned Colour** – Choose from a list of colour options to identify the document(s) as not yet assigned to a manifest. Options are <no colour>, **Blue, Red, Green, Pink, Purple, White, Light Blue, Yellow, Orange.**
- **Partially Assigned Colour** – Choose from a list of colour options to identify when several documents (but not all documents) from the one address are assigned to a manifest. Options are <no colour>, **Blue, Red, Green, Pink, Purple, White, Light Blue, Yellow, Orange.**
- **Assigned to Other Colour** – Choose from a list of colour options to identify the document(s) at an address that are assigned to another manifest and not the manifest that the user has currently selected on the Visual Load Planner. Options are <no colour>, **Blue, Red, Green, Pink, Purple, White, Light Blue, Yellow, Orange.**
- **Mixed Order Colour** – Choose from a list of colour options to identify the document as a mixed order. Options are <no colour>, **Blue, Red, Green, Pink, Purple, White, Light Blue, Yellow, Orange.** A mixed order is where documents at the one address consist of different document types e.g., Sales Orders and Purchase Orders.

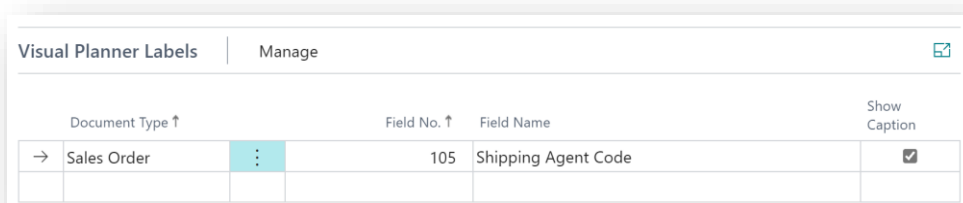
SD Stores Logistics uses the Visual Planner and the Google Map Engine to find the position of the document on the map based on the document(s) address. The **Coordinate Alternatives** FastTab allows you define fields to use on the documents as latitude and longitude fields, optimising the loading time of the Visual Planner. Once the Visual Planner is generated, these latitude and longitude fields on the document are populated and are used the next time the Visual Planner is loaded reducing API calls to the Google Map Engine. If these fields aren't defined, then SD Stores Logistics uses the Visual Planner and the Google Map Engine find the position of the document on the map, based on the document address, each time the Visual Planner is opened. We recommend users use these Coordinate Alternatives fields. The following fields are contained in the **Coordinate Alternatives** FastTab (*Figure 7-25*):

Coordinate Alternatives		Manage				
Document Type ↑	Table	Latitude Field No.	Latitude Field	Longitude Field No.	Longitude Field	
Sales Orders and Return Orders	Sales Header	43018040	Latitude	43018041	Longitude	
Purchase Orders and Return Orders	Purchase Header	43018040	Latitude	43018041	Longitude	
→ Outbound Transfer Orders	Transfer Header	43018040	Latitude	43018041	Longitude	

Figure 7-25

- **Document Type** - Select a Document Type. Options are **Sales Orders and Sales Return Orders, Purchase Orders and Purchase Return Orders and Transfer Orders**.
- **Table No.** – Displays the table associated with the **Document Type**. If a **Document Type** of **Sales Orders and Sales Return Orders** is selected, the **Table** is **Sales Header**. If a **Document Type** of **Purchase Orders and Purchase Return Orders** is selected, the **Table** is **Purchase Header**. If a **Document Type** of **Transfer Order** is selected, the **Table** is **Transfer Header**.
- **Latitude Field No.** – Select the field No. from the table in **Table No.** to be used as the **Latitude Field No.** SD Stores Logistics has a field extension on the Sales Header, Purchase Header, and Transfer Header tables - Field No. **43018040, SDYLGLatitude**.
- **Latitude Field** – Displays the Name of the field chosen in **Latitude Field No.**
- **Longitude Field No.** – Select the field No. from the table in **Table No.** to be used as the **Longitude Field No.** SD Stores Logistics has a field extension on the Sales Header, Purchase Header, and Transfer Header tables - Field No. **43018041, SDYLGLongitude**.
- **Longitude Field** – Displays the Name of the field chosen in **Longitude Field No.**

By default, in the Visual Load Planner, when you select the Info Box to assign or unassign documents to the manifest, the Document Type and Document No. are displayed on the labels. The **Visual Planner Labels** FastTab allows you to display information other than the Document Type and Document No. in the labels. Expand the **Visual Planner Labels** FastTab (*Figure 7-26*):



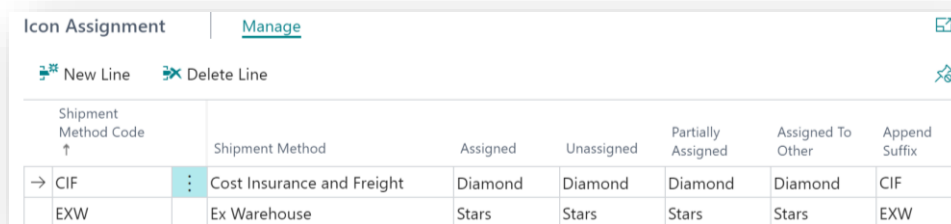
Visual Planner Labels		Manage		
Document Type ↑		Field No. ↑	Field Name	Show Caption
→ Sales Order	⋮	105	Shipping Agent Code	<input checked="" type="checkbox"/>

*Figure 7-26*

- **Document Type** - Select a Document Type. Options are **Sales Order, Sales Return Order, Purchase Order, Purchase Return Order, or Outbound Transfer**.
- **Field No.** – Select the field No. from the table in **Table No.** to be used on the label in the Visual Load Planner.

- **Field Name** – Displays the Name of the field chosen in **Field No.**
- **Show Caption** – Select this checkbox to show the field caption on the Visual Load Planner labels.

In the **Icon Assignment** FastTab you can define icons that appear in the pins on the Visual Load Planner to differentiate and identify the Shipment Method Code used on the document(s) (*Figure 7-27*):



Shipment Method Code ↑	Shipment Method	Assigned	Unassigned	Partially Assigned	Assigned To Other	Append Suffix
→ CIF	Cost Insurance and Freight	Diamond	Diamond	Diamond	Diamond	CIF
EXW	Ex Warehouse	Stars	Stars	Stars	Stars	EXW

*Figure 7-27*

- **Shipment Method Code** – Select the **Shipment Method Code** to assign the icons to.
- **Shipment Method** – Displays the description of the **Shipment Method Code**.
- **Assigned** - Choose from a list of icons to visually identify the Shipment Method Code on the document when assigned to a manifest. Options are **Blank, Circle, Diamond, Square, or Stars**.
- **Unassigned** - Choose from a list of icons to visually identify the Shipment Method Code on the document when unassigned to a manifest. Options are **Blank, Circle, Diamond, Square, or Stars**.
- **Partially Assigned** - Choose from a list of icons to identify the Shipment Method Code on a document when partially assigned to a manifest. Options are **Blank, Circle, Diamond, Square, or Stars**.
- **Assigned To Other** - Choose from a list of icons to identify the Shipment Method Code on a document when assigned to another manifest. Options are **Blank, Circle, Diamond, Square, or Stars**.
- **Append Suffix** – Enter 3 characters for the suffix that will display on the Visual Load Planner label.

## 7.9 Advanced Icon Assignment

The **SD Stores Logistics Advanced Icon Assignment** list, is accessed from the **Visual Load Planner Setup** card or by searching the **Tell Me**.

The **SD Stores Logistics Advanced Icon Assignment** allows users to visually define an order on the Visual Load Planner based on a certain field on the transaction header table (*Figure 7-28*).

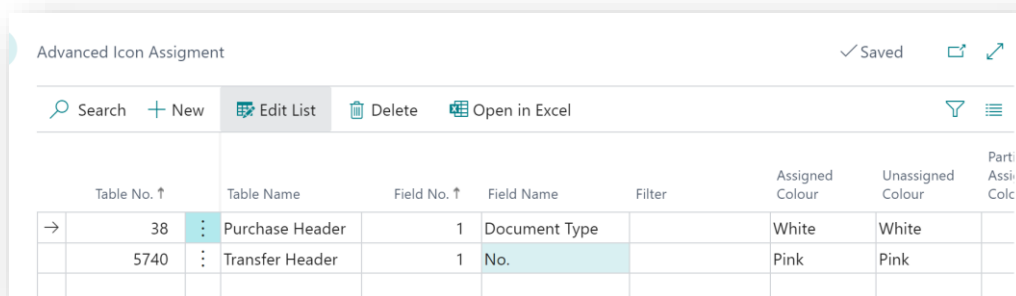


Table No. ↑	Table Name	Field No. ↑	Field Name	Filter	Assigned Colour	Unassigned Colour	Part Assi Colc
→ 38	Purchase Header	1	Document Type		White	White	
5740	Transfer Header	1	No.		Pink	Pink	

Figure 7-28

- **Table No.** – Select from **36 Sales Header, 38 Purchase Header, 5740 Transfer Header**.
- **Table Name** – Displays the name of the table chosen in **Table No.**
- **Field No.** – Select a field from the table chosen in **Table No.**
- **Field Name** - Displays the name of the field chosen in **Field No.**
- **Filter** – Enter a filter to filter down on specific values in the field chosen in **Field No.**
- **Assigned Colour** – Choose from a list of colour options to identify the order as assigned to a manifest. Options are **<no colour>, Blue, Red, Green, Pink, Purple, White, Light Blue, Yellow, Orange**.
- **Un-assigned Colour** – Choose from a list of colour options to identify the order as not assigned to a manifest. Options are **<no colour>, Blue, Red, Green, Pink, Purple, White, Light Blue, Yellow, Orange**.

- 
- **Partially Assigned Colour** – Choose from a list of colour options to identify the order as partially assigned to a manifest. Options are **<no colour>, Blue, Red, Green, Pink, Purple, White, Light Blue, Yellow, Orange**.
  - **Assigned to Other Colour** – Choose from a list of colour options to identify the order as assigned to another manifest and not the manifest that the user has currently selected on the Visual Load Planner. Options are **<no colour>, Blue, Red, Green, Pink, Purple, White, Light Blue, Yellow, Orange**. Other
  - **Mixed Order Colour** – Choose from a list of colour options to identify the document as a mixed order. Options are **<no colour>, Blue, Red, Green, Pink, Purple, White, Light Blue, Yellow, Orange**. A mixed order is where documents at the one address consist of different document types e.g., Sales Orders and Purchase Orders.
  - **Assigned Icon** - Choose from a list of icons to identify the Shipment Method Code on the document as assigned to a manifest. Options are **Blank, Circle, Diamond, Square, or Stars**.
  - **Unassigned Icon** - Choose from a list of icons to identify the Shipment Method Code on the document as not assigned to a manifest. Options are **Blank, Circle, Diamond, Square, or Stars**.
  - **Partially Assigned Icon** - Choose from a list of icons to identify the Shipment Method Code on the document as partially assigned to a manifest. Options are **Blank, Circle, Diamond, Square, or Stars**.
  - **Assigned To Other Icon** - Choose from a list of icons to identify the Shipment Method Code on the document as assigned to another manifest. Options are **Blank, Circle, Diamond, Square, or Stars**
  - **Append Suffix** – Enter 3 characters for the suffix that will display on the Visual Load Planner label.

## 8 Working with SD Stores Logistics

### 8.1 Queued Documents

The **Queued Documents** list, is accessed from the **SD Stores Logistics Role Centre** by drilling through on the **Queued Documents** cue or by searching the **Tell Me**.

The **Queued Documents** list is automatically populated on page open. The **Movement Type Defaults** from the **SD Stores Logistics Setup** card are used to determine which document types to include in the list and what date filters to apply to the shipment dates or to the expected receipt dates depending on the document type. To refresh the Queued Documents, from the menu choose the **New** menu group and then **Refresh** (*Figure 8-1*).

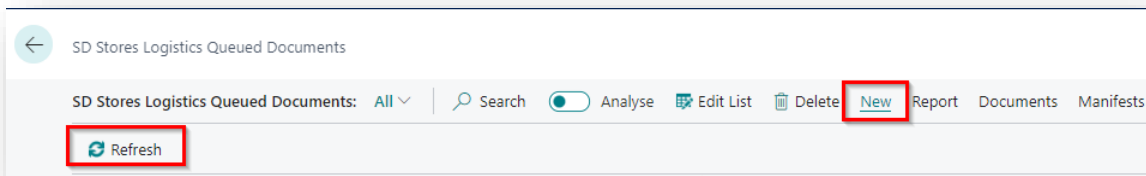


Figure 8-1

The **SD Stores Logistics Document Selector** report page opens (*Figure 8-2*), and the **Queued Documents** list is updated with released documents based on the selections entered.

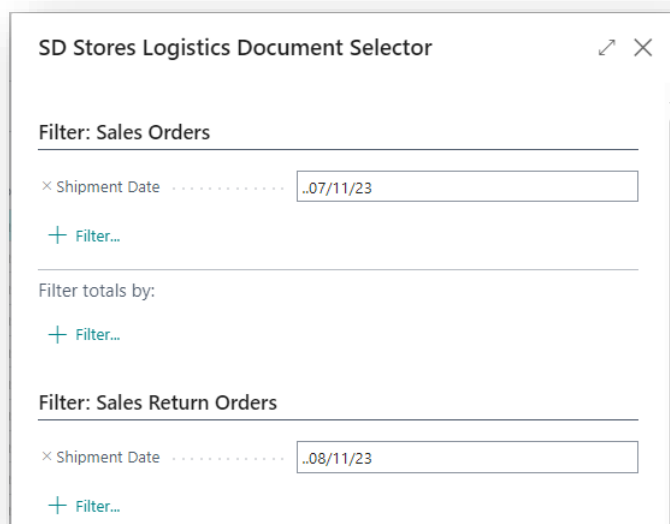
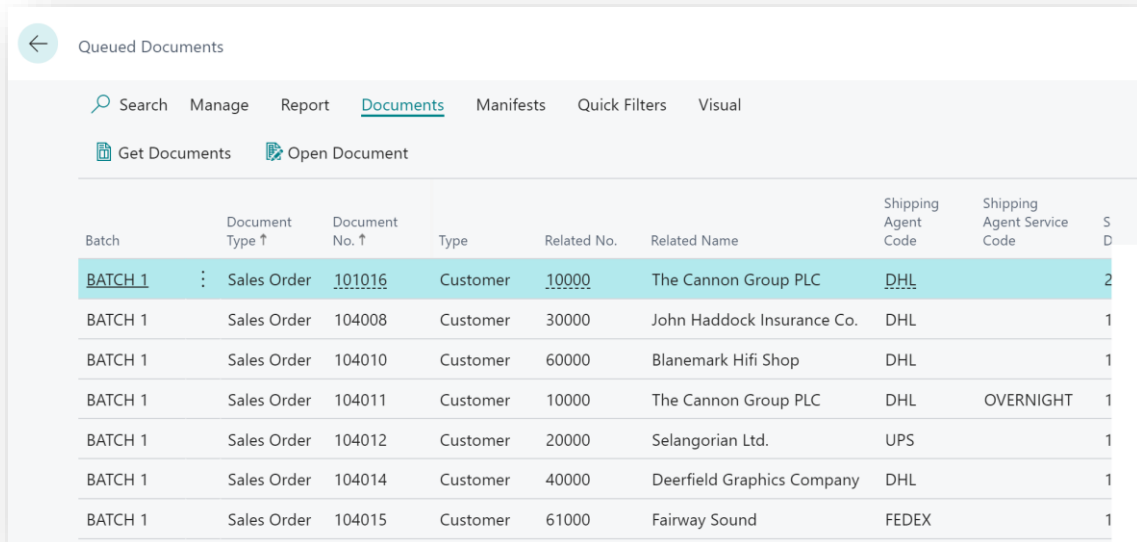


Figure 8-2

The following fields are available in the **Queued Documents** list (Figure 8-3). Choosing the **Edit List** action allows you to update and enter some of the fields in the list.

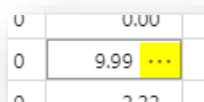


Batch	Document Type ↑	Document No. ↑	Type	Related No.	Related Name	Shipping Agent Code	Shipping Agent Service Code	S D
BATCH 1	Sales Order	101016	Customer	10000	The Cannon Group PLC	DHL		2
BATCH 1	Sales Order	104008	Customer	30000	John Haddock Insurance Co.	DHL		1
BATCH 1	Sales Order	104010	Customer	60000	Blanemark Hifi Shop	DHL		1
BATCH 1	Sales Order	104011	Customer	10000	The Cannon Group PLC	DHL	OVERNIGHT	1
BATCH 1	Sales Order	104012	Customer	20000	Selangorian Ltd.	UPS		1
BATCH 1	Sales Order	104014	Customer	40000	Deerfield Graphics Company	DHL		1
BATCH 1	Sales Order	104015	Customer	61000	Fairway Sound	FEDEX		1

Figure 8-3

- **Document Type** – Can be **Sales Order**, **Sales Return Order**, **Purchase Order**, **Purchase Return Order**, or **Outbound Transfer Order**.
- **Document No.** – The document number of the associated **Sales Order**, **Sales Return Order**, **Purchase Order**, **Purchase Return Order**, or **Outbound Transfer Order**.
- **Type** – Displays **Customer** if the **Document Type** is **Sales Order**, **Sales Return Order**. Displays **Vendor** if the **Document Type** is **Purchase Order**, **Purchase Return Order**. Displays **Location** if the **Document Type** is **Outbound Transfer Order**.
- **Related No.** – Displays the number of the customer or vendor. Displays the location code if the **Type** is **Location**.
- **Related Name** – Displays the name of the customer, vendor, or location.
- **Shipping Agent Code** - Displays the shipping agent on the document. Choosing the **Edit List** action allows you to update the Shipping Agent Code on the list. The Shipping Agent Code is not updated on the originating document. You can only update the Shipping Agent Code if the document is not already assigned to a manifest. If a rate is entered on the line and the Shipping Agent Code or Shipping Agent Service is updated, the rates are revalidated.

- **Shipping Agent Service Code** – Displays the shipping agent service on the document. Choosing the **Edit List** action allows you to update the Shipping Agent Service Code on the list. The Shipping Agent Service Code is not updated on the originating document. If a rate is entered on the line and the Shipping Agent Code or Shipping Agent Service is updated, the rates are revalidated.
- **Zone Code** – Displays the zone code for the based on the details on the document. Choosing the **Edit List** action allows you to update the zone code on the list. This does not update the Location, Country nor the Post Code on the originating document.
- **Shipment Date** – Displays the shipment date on the document.
- **City** – Displays the city on the document.
- **County**– Displays the county on the document.
- **Country/Region Code**– Displays the country/region code on the order.
- **Rate Currency Code** – Displays the currency code for the Vendor linked to the Shipping Agent Code.
- **No. of Pallets** – Defaults to 0. Enter the number of pallets used.
- **No. of Pallet Spaces** – Defaults to the No. of Pallets. Enter the amount of pallet spaces used.
- **Pallet Space Rate** – Displays the Pallet Space Rate from the Rates list based on the Shipping Agent/Shipping Agent Service/Zone Combination on the Queued Documents list. This field can be updated. If the rate does not exist for the Shipping Agent/Shipping Agent Service/Zone Combination you will be prompted to create a new rate. If a rate exists for the Shipping Agent/Shipping Agent Service/Zone Combination and you enter a different rate you will be prompted to update the rate. Choose the assist edit (...) on the Pallet Space Rate to check if a more up to date rate has been entered since you initially entered/modified the No. of Pallets and No. of Pallet Spaces.



0	0.00	
0	9.99	...
0	2.22	

Figure 8-4



- **Total Rate** – Displays the No. of Pallet Spaces multiplied by the Pallet Space Rate.
- **Agreed Rate** – Defaults to 0. If you enter an agreed rate this rate will be used on the manifest and not the **Total Rate**.
- **Weight (KG)** – Displays the weight (KG) on the document.
- **Cubage (m3)** – Displays the cubage (m3) on the document.
- **No. of Parcels** – The number of parcels on the document.
- **Booking Reference** – Enter a booking reference.
- **Load Manifest No.** – The number of the manifest that the document is assigned to.

From the **Queued Documents** list you can easily create a manifest and assign documents to the manifest by choosing the following actions (*Figure 8-5*).

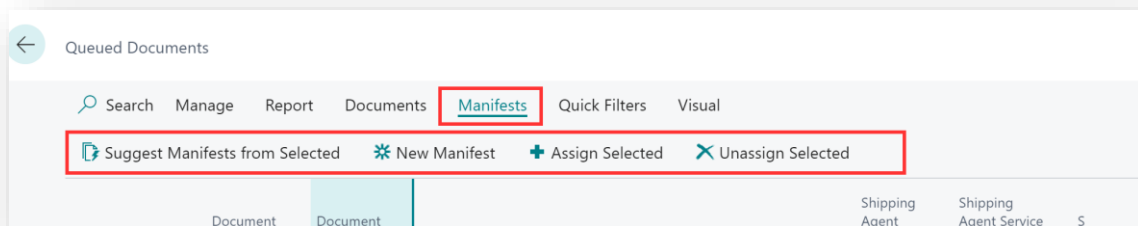


Figure 8-5

- **Suggest Manifests from Selected** - Choose this action to automatically create manifests for the selected documents. When creating a manifest SD Stores Logistics assigns the Zone to the manifest by attempting to find an exact match with the Location, Country/Region Code, Postcode on the document to that on the Zone. If an exact match is not found, SD Stores Logistics tries to match on the Location and Country/Region Code on the document to Location and Country/Region Code and a blank Post Code on the Zone, and if that match is not found, SD Stores Logistics tries to match on the Location on the document to Location and a blank Country/Region Code and a blank Post Code on the Zone.
- **New Manifest** – Choose this action to manually create a new manifest.
- **Assign Selected** – Choose this action to assign the selected document to an existing manifest. You can assign documents to a manifest that have the same Shipping Agent

Code as the manifest but that have different Shipping Agent Service Codes to that specified on the manifest header.

- **Unassign Selected** – Choose this action to unassign the selected document from an existing manifest.

You can quickly and easily filter down on the orders in the **Queued Documents** list by choosing the following actions from the **Quick Filters** menu group (*Figure 8-6*).

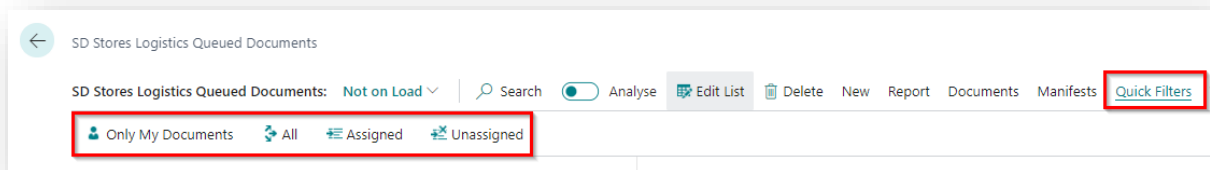


Figure 8-6

- **Only My Documents** – Choose this action to filter the list of documents in the Queued Documents list to those that were added by you.
- **All** – Choose this action to filter the list of documents in the Queued Documents list to all documents.
- **Assigned** – Choose this action to filter the list of documents in the Queued Documents list to documents that are assigned to a manifest.
- **Unassigned** – Choose this action to filter the list of documents in the Queued Documents list to documents that are not assigned to a manifest.

The following action can be chosen from the **Visual** menu group in the **SD Stores Logistics Queued Documents** list (*Figure 8-7*).

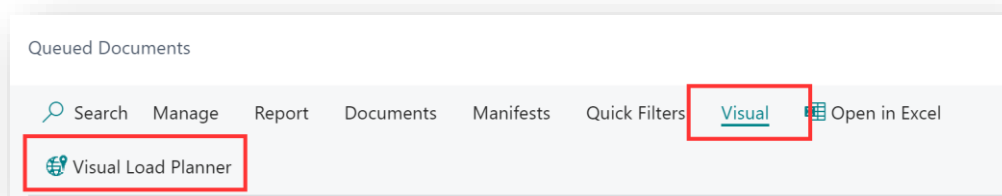


Figure 8-7

- **Visual Load Planner** – Opens the **SD Stores Logistics Load Planner Card** filtered down to the filters you have specified in the **Queued Documents** list to work on.

## 8.2 Manifests

You can access the Open, Released and Closed Manifests lists, by drilling through on the cues in the **SD Stores Logistics Role Centre** (*Figure 8-8*) or by searching the **Tell Me**.

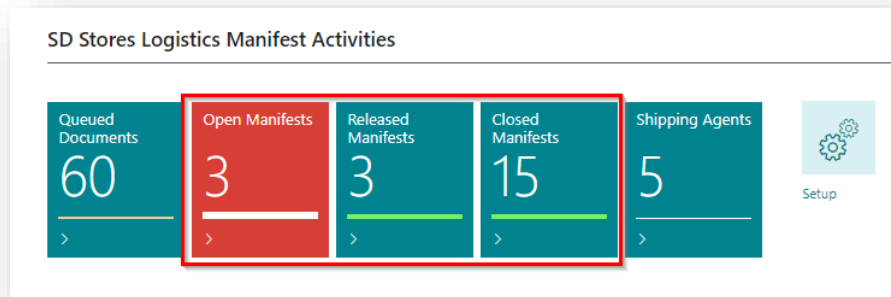
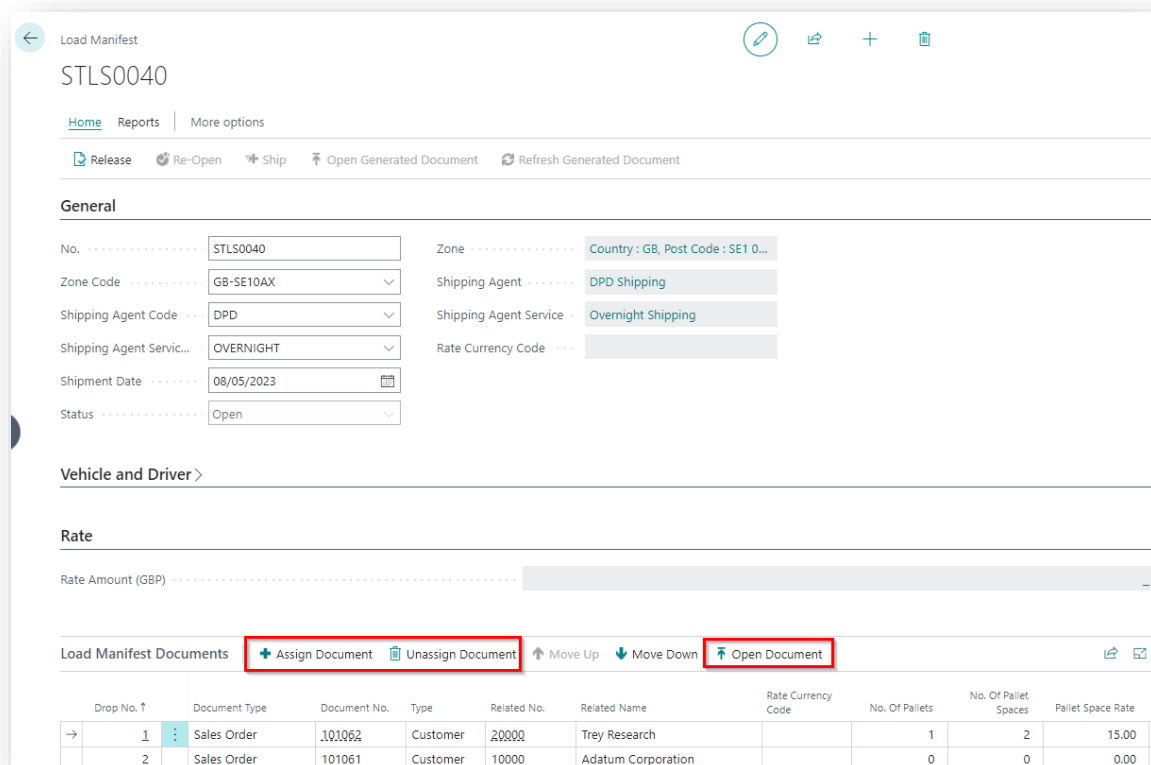


Figure 8-8

From the manifest lists, open the individual Manifest card where you can assign and unassign documents to the manifest (*Figure 8-9*).



Drop No. ↑	Document Type	Document No.	Type	Related No.	Related Name	Rate Currency Code	No. Of Pallets	No. Of Pallet Spaces	Pallet Space Rate
→ 1	Sales Order	101062	Customer	20000	Trey Research		1	2	15.00
2	Sales Order	101061	Customer	10000	Adatum Corporation		0	0	0.00

Figure 8-9

Once you release the manifest (Figure 8-10) the rates for the shipping charges are calculated and the purchase order or invoice is generated.

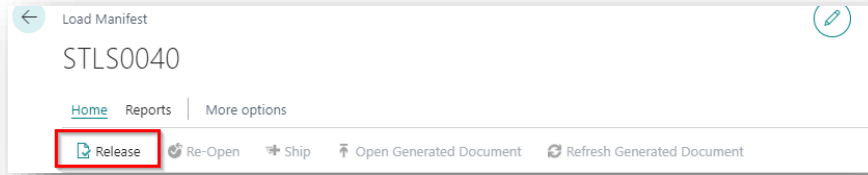


Figure 8-10

From the released manifest you can view the calculated rates by drilling through on the Rate Amount and you can view the generated purchase document for shipping costs (Figure 8-11).

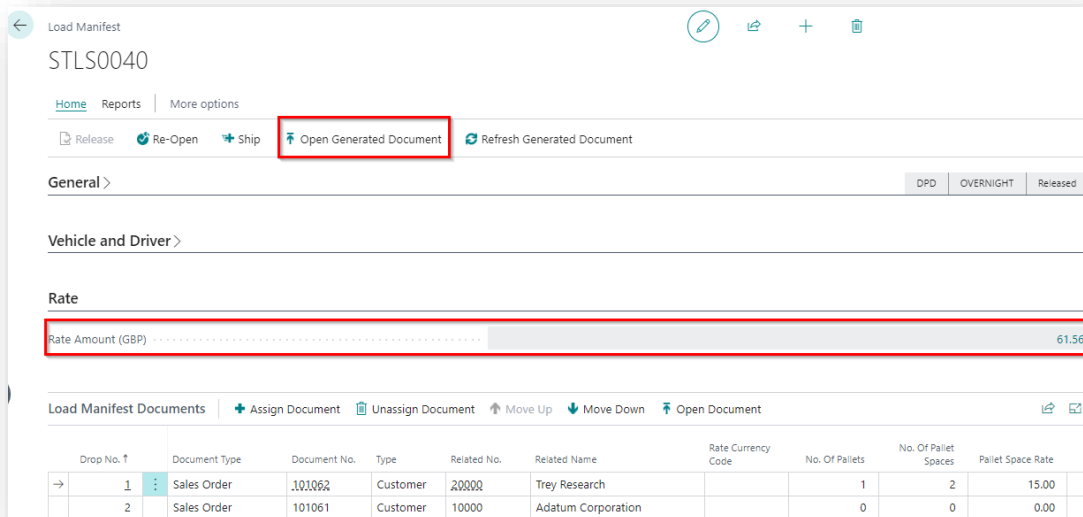


Figure 8-11

Drilling through on the Rate Amount shows you the breakdown of the rates (Figure 8-12).

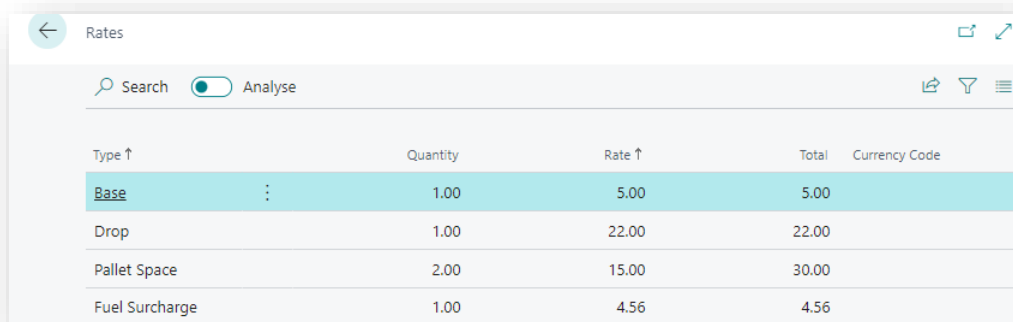
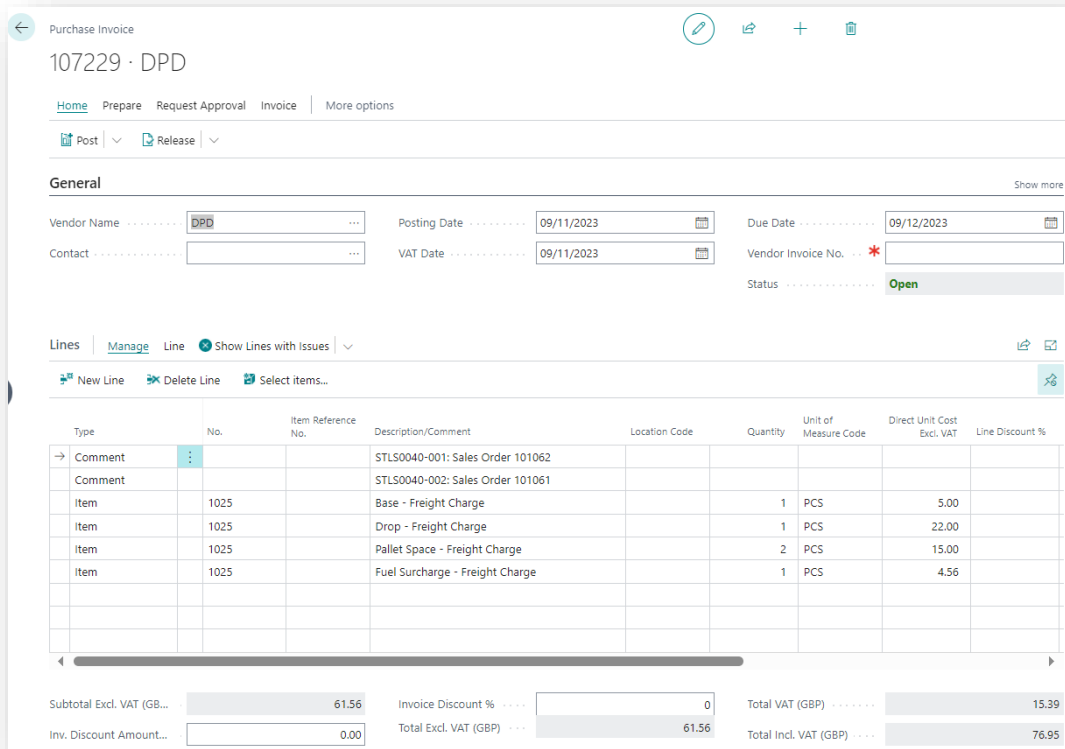


Figure 8-12

The generated purchase document for the Shipping Agent also shows the breakdown of rates and the documents on the manifest (*Figure 8-13*).



**Purchase Invoice**  
107229 · DPD

Home Prepare Request Approval Invoice More options

Post Release

**General** Show more

Vendor Name: DPD Posting Date: 09/11/2023 Due Date: 09/12/2023  
 Contact: Vendor Invoice No.: \* Status: Open

VAT Date: 09/11/2023

**Lines** Manage Line Show Lines with Issues

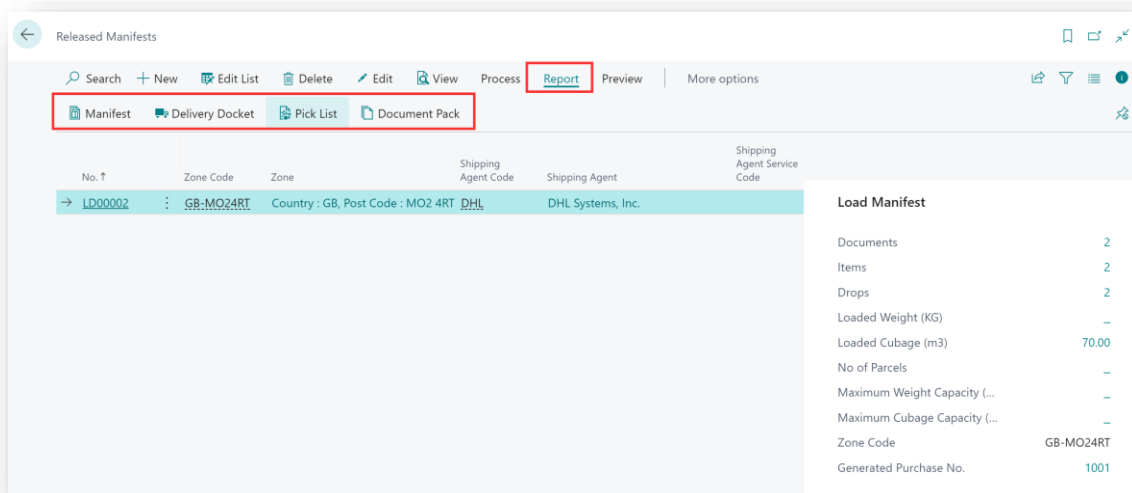
New Line Delete Line Select Items...

Type	No.	Item Reference No.	Description/Comment	Location Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. VAT	Line Discount %
Comment			STLS0040-001: Sales Order 101062					
Comment			STLS0040-002: Sales Order 101061					
Item	1025		Base - Freight Charge		1	PCS	5.00	
Item	1025		Drop - Freight Charge		1	PCS	22.00	
Item	1025		Pallet Space - Freight Charge		2	PCS	15.00	
Item	1025		Fuel Surcharge - Freight Charge		1	PCS	4.56	

Subtotal Excl. VAT (GBP) 61.56 Invoice Discount % 0 Total VAT (GBP) 15.39  
 Inv. Discount Amount 0.00 Total Excl. VAT (GBP) 61.56 Total Incl. VAT (GBP) 76.95

Figure 8-13

Once the manifest is released, you can print your documents for the manifest (*Figure 8-14*).



Released Manifests

Search + New Edit List Delete Edit View Process Report Preview More options

Manifest Delivery Docket Pick List Document Pack

No. ↑	Zone Code	Zone	Shipping Agent Code	Shipping Agent	Shipping Agent Service Code
→ LD00002	GB-MO24RT	Country : GB, Post Code : MO2 4RT	DHL	DHL Systems, Inc.	

**Load Manifest**

- Documents: 2
- Items: 2
- Drops: 2
- Loaded Weight (KG): -
- Loaded Cubage (m3): 70.00
- No of Parcels: -
- Maximum Weight Capacity (...): -
- Maximum Cubage Capacity (...): -
- Zone Code: GB-MO24RT
- Generated Purchase No.: 1001

Figure 8-14

If the **Enforce Shipment on Close Manifest** on the **SD Stores Logistics Setup** card is switched on, then you must first ship or receive the individual documents on the manifest and then ship/close the manifest itself. If the **Enforce Shipment on Close Manifest** on the **SD Stores Logistics Setup** card is switched off, you can ship/close the manifest and ship the individual documents on the manifest at a later stage (*Figure 8-15*).

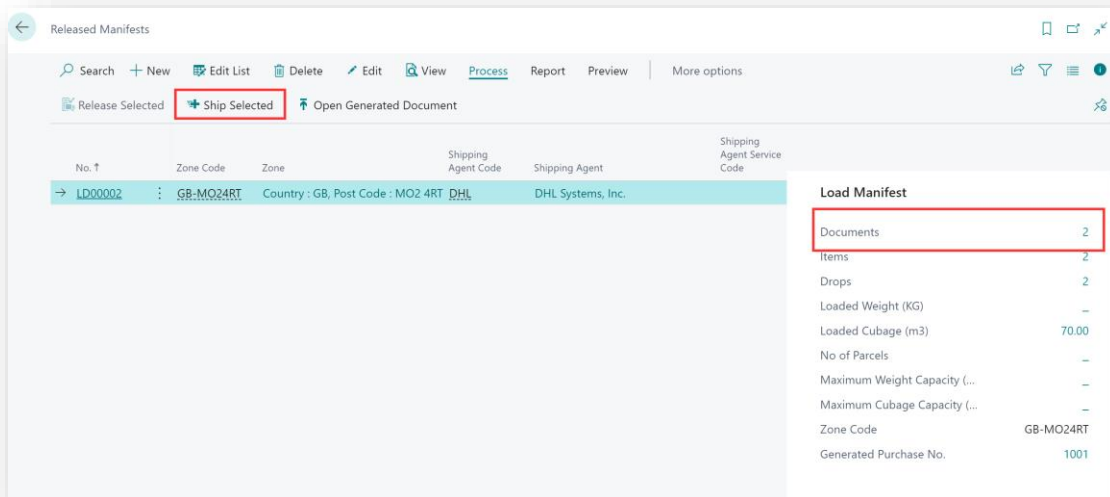


Figure 8-15

### 8.3 Visual Load Planner

**Visual Load Planner** is accessed from the **Queued Documents** list (Figure 8-16).

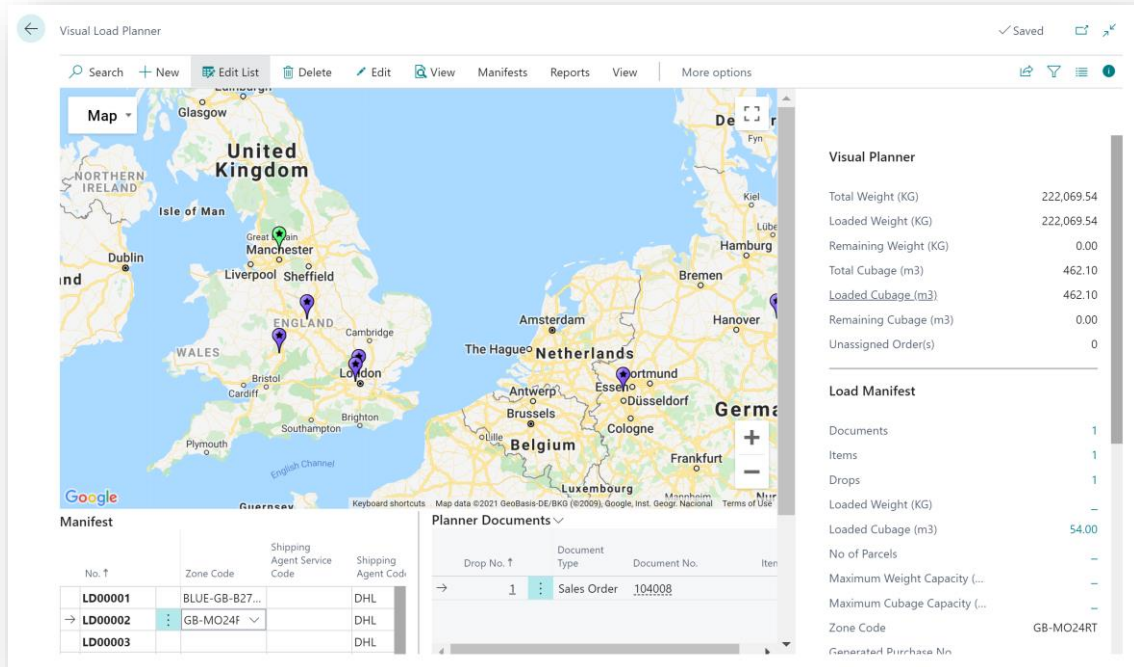


Figure 8-16

You can use the **Visual Load Planner** to build up the delivery route for the shipping agent. SD Stores Logistics allows you to easily create the load for the manifest made up of several orders. In the **Queued Documents** list, users can pick a group of orders to plan, and the **Visual Load Planner** gives users a visual aid to plan the loads. Clicking on the orders in the map, you can easily assign and unassign the orders to the currently selected load.

From here, you can view the manifests, the orders associated with the manifest, assign or unassign documents to your existing manifest, create new manifests, release manifests, and print the documents associated with the manifest.

The orders appear in the google map and the pins are set to reflect the setup you have defined in the **SD Stores Logistics Setup**. SD Stores Logistics looks at the Advanced Icon Assignment first and assigns this setup, when found, to the pins, it then looks at the Icon Assignment and Icon Colours from the **SD Stores Logistics Setup Card**.

If this setup is not found, the icons are left blank and SD Stores Logistics uses the following defaults Assigned - Green, Unassigned – Red, Partial – Yellow, Assigned to Other – Purple, Mixed – Orange.



In the **Manifest** area of the **Visual Load Planner**, select the manifest that you want to assign the order to, navigate to the order on the map and select **Assign**. The Package Tracking No. on the document is updated with the Load Number (*Figure 8-17*).

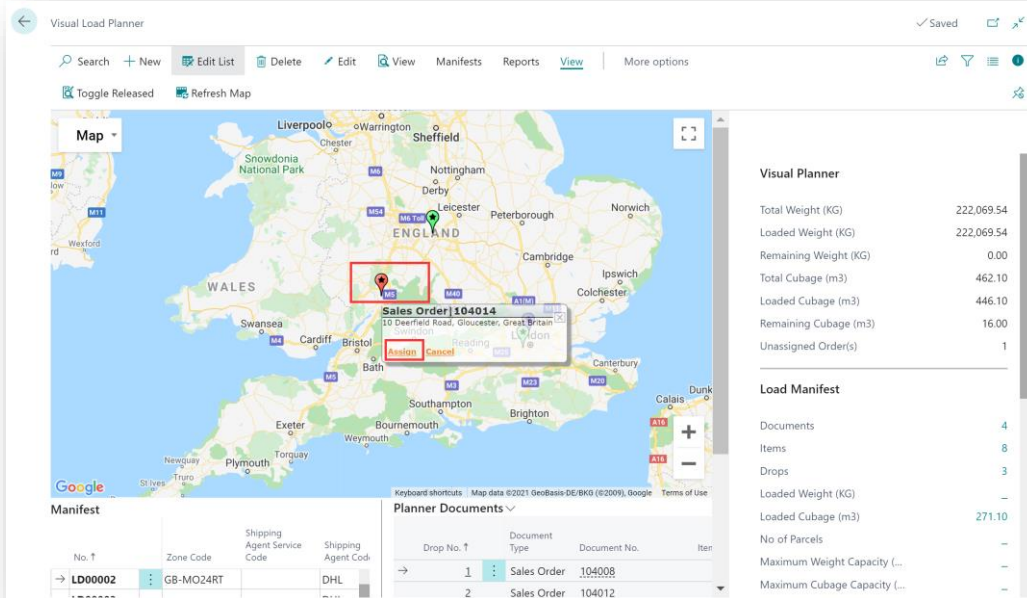


Figure 8-17

When the orders at the address are fully assigned to a manifest, the colour of the pin changes to reflect the colours that you specified in the **SD Stores Logistics Setup** (*Figure 8-18*).

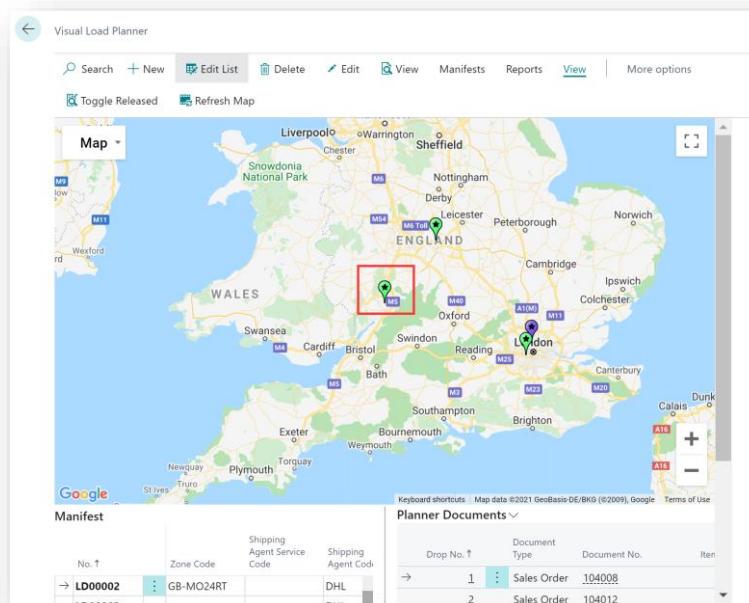


Figure 8-18

If an order at the same address has been assigned to another manifest, the order is greyed out (*Figure 8-19*).

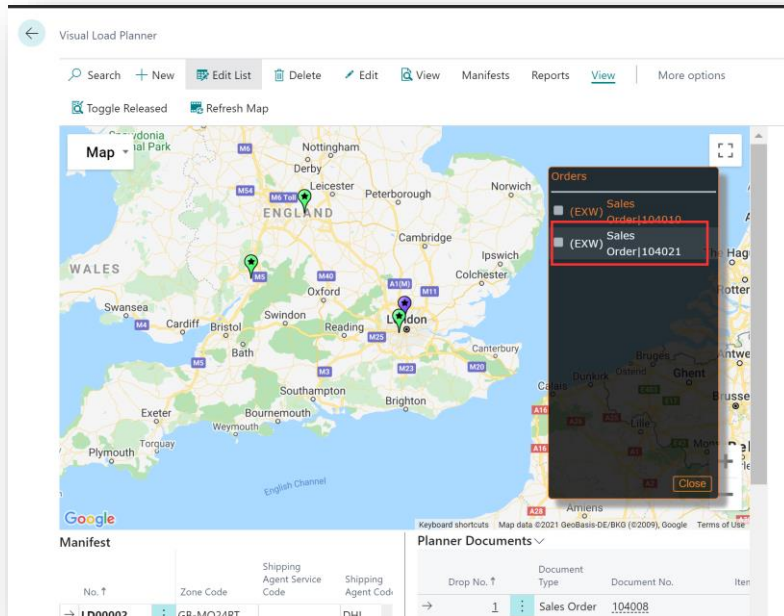


Figure 8-19

When the manifest is ready to be released you can select the manifest and choose **Release Selected**. A Purchase Order or Invoice is created for the shipping agent and the manifest is marked as released (*Figure 8-20*).

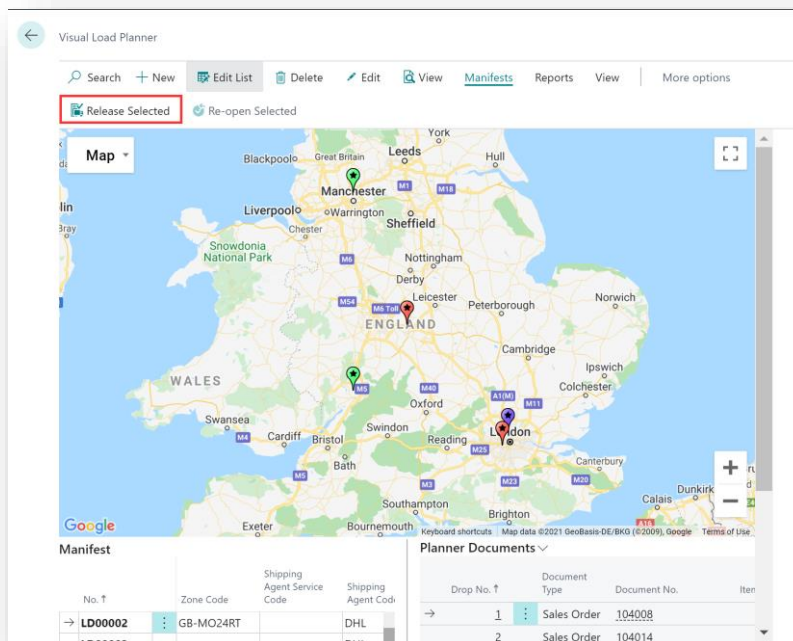
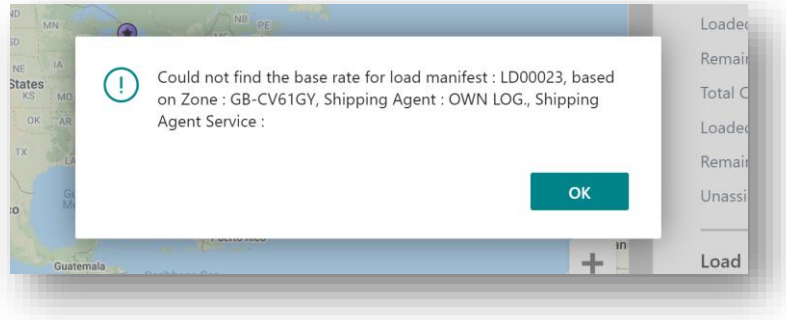


Figure 8-20

If a rate cannot be found for the Purchase Order or Invoice and the **Enforce Manifest Cost** option on the **SD Stores Logistics Setup** is switched on, the following error is raised (*Figure 8-21*).



*Figure 8-21*

## 9 Creating a Google Maps API Key

You must create a Google Maps API Key to display your orders on the embedded Google Maps in the Visual Load Planner in SD Stores Logistics.

1. Go to <https://console.cloud.google.com/home/dashboard>
2. Set up a new project.
3. Select the Project and in the **Project Dashboard** choose **Go to API's Overview**
4. Select + **ENABLE APIS AND SERVICES** and enable following APIs (both found under the maps category)
  - a. Maps JavaScript API
  - b. Geocoding API
5. Open **Credentials** and + **CREATE CREDENTIALS** and create a new API key.
6. Return to the project dashboard and select **Billing** from the menu.
7. Select the Billing Account for the Project.



# Dynamics Shop

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