Process:	**Manage Transport**

Document information:

Document number	P-7.1
Process Cluster	Manage Transport
Date of creation	5/08/2021
Date of revision	Click or tap to enter a date.

Process Ownership	Name	Function	Date
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Document history:

Version	Reason for change	Date effective
01	NEW	2/01/2022

Definitions & Abbreviations

TrO: Transport Order.
SO: Sales Order.
PO: Purchase Order.
IC: Intercompany.

Scope

This procedure describes the different steps the transport planner must execute after a transport requirement has been created by customer service, by a supply chain planner or a sales representative. This document will refer to them as the requestor.

The transport planner must create TrO's for a list of transport requirements.

The result of this business process is an arranged transport between:

- A shipping warehouse and a client (in case of an SO).
- The supplier and a receiving warehouse (in case of a PO).
- A shipping warehouse and a receiving warehouse (in case of a (IC) transfer order).

A TrO must be created for only 1 truck or container. If a transport requirement is created for more than 1 truck/container, the transport planner must split the transport requirements in different transport requirements.

If the price of a transport is not known in advance, the transport planner must send a price request to the transport partner. If a price agreement exists, no price request is needed.

After the transport confirmation is sent to the transport partner, the TrO is ready for transport and can be executed.
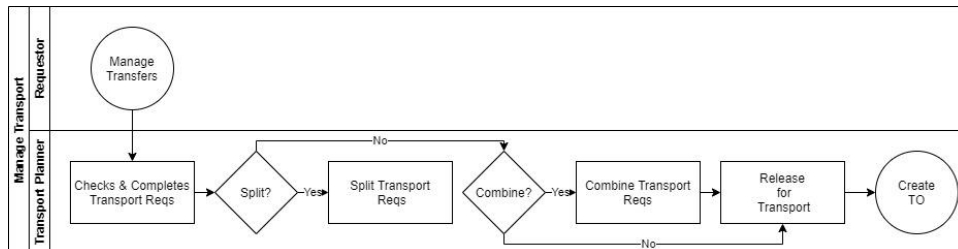
Process Visualization

This process is divided into three parts:

- Compl_Trport_Reqs,
- Create_TrO,
- Price_Request.

Process Steps

Compl_Trport_Reqs

Step 1: Complete Transport Requirements

The requestor triggers a transport requirement. The transport planner checks and completes the transport requirements.

Step 2: Split/Combine Transport Requirements

The next step is to prepare the transport requirements in a TrO maximum 1 TrO per transport requirement depending on the capacity of a truck or container. A TrO can never exceed the maximum capacity of 1 truck or container.

The transport requirements can be split into different TrO's by using the Splitting Transport Requirement Rules. The requirements will be released for transport.
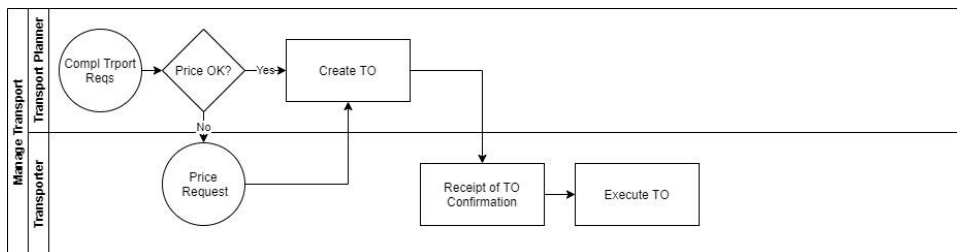
Create_TRO

Step 3: Create TrO

There are 2 possibilities to create a TrO:

- You can create one TrO for one transport requirement,
- You can combine transport requirements and/or split requirements.

The transport planner will check if the price is ok and create the TrO. If the price is not ok, he will issue a price request to the transporter. This will trigger the price request subprocess.

If the price request sub process was conclusive for the transporter, then the transport planner will use his quote to create a TrO. He will also confirm the transport order to the transporter. D365 will automatically issue a transport PO.

The transporter will execute the TrO.
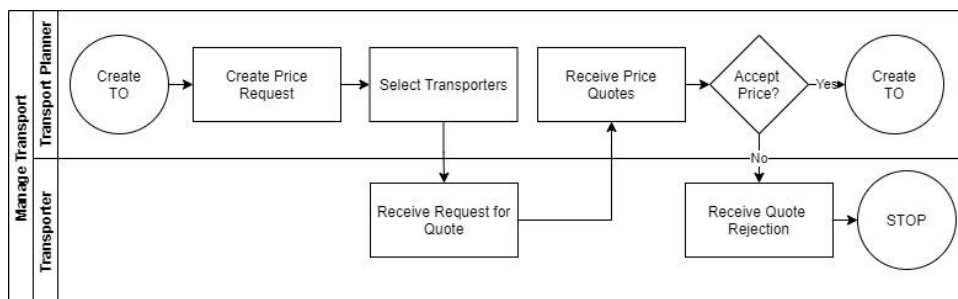
Price_Request

Step 4: Create Price Request

If a price is not known or agreed in advance, a price request must be sent to the transport partner(s).

A price request can be sent to one or more transporters. When a price quote is received from a transporter, you can choose to accept or reject this price quote. In case you accept the price, automatically a transport purchase order is created with that price.

Link to work instruction of 'manage transport': WI Manage Transport

Process Responsibilities: Manage Transport

	Supply Chain Planner	Customer Service Worker	Transport Planner	Transport Partner	Supply Chain Manager
1. **Complete transport requirement**	C	C	R		A
2. **Split/combine transport requirements**			R		A
3. **Create transport requirement**			R		A
4. **Create price request**			R	C	A
5. **Generate transport confirmation**	I	I	R	I	A

Exceptions

N/A

Control points

All transport requirements need to be completed and need to have a corresponding TrO.
The column 'TrO' in the list of Transport Requirements need to be filled in.

In the column 'Status' the status of the transport can be checked:

- Created: transport requirement is created.
- Released: transport requirement is released.
- Quoted: a price request has been sent to the transport.
- Confirmed: the transport is.
- Ready for transport: the transport is ready to be transported. (??? Check with RD)

Associated Tools & documents

N/A