

Work instruction: ***Manage transport***

Document information:

Process Cluster	Supply Chain
Date of creation	7/04/2021
Date of revision	Click or tap to enter a date.

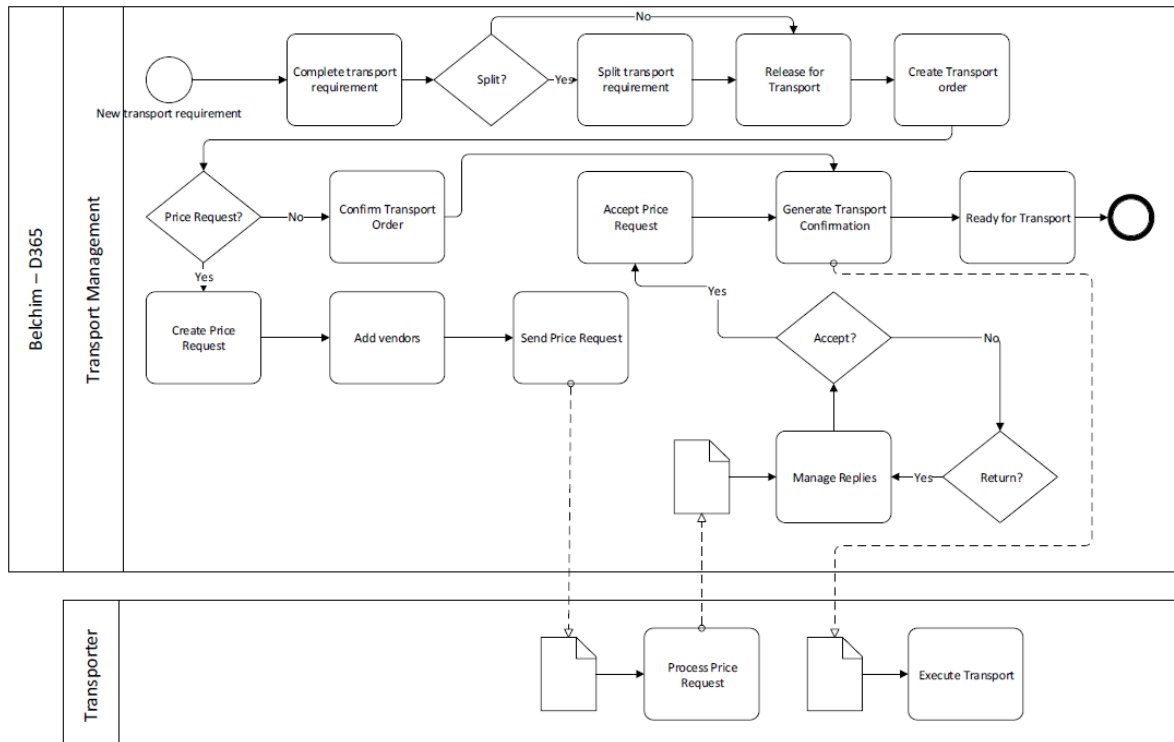
Process Ownership	Name	Function	Date
Author	Jolien Sleenckx	D365 Key User	Click or tap to enter a date.
Reviewer (s)	Jurgen Trogh	D365 Key User	Click or tap to enter a date.
Approver (s)	Jonas Borm Marc Vandenhove	Transport Planner Supply Chain Manager	Click or tap to enter a date.

Document history:

Version	Reason for change	Date effective
01	NEW	Click or tap to enter a date.

Manage Transport – Version 01

Process Visualization

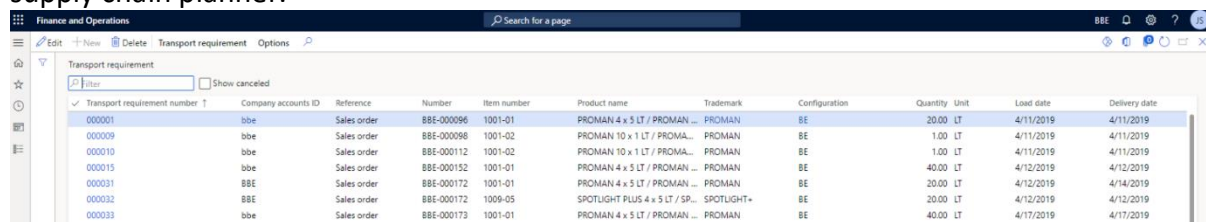


Process Steps

Step 1: Complete transport requirements

1. Go to: [Transport Planning > Transport > Common > Transport Requirements](#)

Here you find a list of transport requirements that are created by the customer service or supply chain planner.



Transport requirement number	Company accounts ID	Reference	Number	Item number	Product name	Trademark	Configuration	Quantity	Unit	Load date	Delivery date
000001	bbe	Sales order	BBE-000096	1001-01	PROMAN 4 x 5 LT / PROMAN ...	PROMAN	BE	20.00	LT	4/11/2019	4/11/2019
000009	bbe	Sales order	BBE-000098	1001-02	PROMAN 10 x 1 LT / PROMAN ...	PROMAN	BE	1.00	LT	4/11/2019	4/11/2019
000010	bbe	Sales order	BBE-000112	1001-02	PROMAN 10 x 1 LT / PROMAN ...	PROMAN	BE	1.00	LT	4/11/2019	4/11/2019
000015	bbe	Sales order	BBE-000152	1001-01	PROMAN 4 x 5 LT / PROMAN ...	PROMAN	BE	40.00	LT	4/12/2019	4/12/2019
000031	BBE	Sales order	BBE-000172	1001-01	PROMAN 4 x 5 LT / PROMAN ...	PROMAN	BE	20.00	LT	4/12/2019	4/12/2019
000032	BBE	Sales order	BBE-000172	1009-05	SPOTLIGHT PLUS 4 x 5 LT / SP...	SPOTLIGHT+	BE	20.00	LT	4/12/2019	4/12/2019
000033	bbe	Sales order	BBE-000173	1001-01	PROMAN 4 x 5 LT / PROMAN ...	PROMAN	BE	40.00	LT	4/17/2019	4/17/2019

‘Number’ refers to the referring sales/purchase/transfer order.

Status of the transport requirement is ‘Created’ if the transport requirement was not checked/completed by the transport planner.

The purpose is to create transport orders for all transport requirements.

2. Open a transport requirement by clicking on the transport requirement number
3. Check the relevant information on the transport requirement:
 - Mode of delivery
 - Load date
 - Delivery date
 - Transport pool
 - Item number (service item of transport)
 - Details of shipment (volume, weight, pallets, quantity, ...)
 - ADR details

If relevant information is missing on the transport requirement, the transport planner need to consult the customer service or supply chain planner.

(TBD: how to modify? Who is responsible?)

Step 2: Split transport requirements

If the transport requirement is created for a volume that is bigger than a full truck or container volume, the transport requirement need to be splitted.

If no splitting is needed, go to point 7 in this step.

1. Click on Transport requirement details > Split
2. An extra window opens 'split transport requirement'

Split transport requirement



Splitting requirement options

Split per

Truck

Refrigerated transport

No

Simulate

Transport requirement details

✓	Pallets	Pallet type unit	Boxes	Box type unit	Total	Inventory unit	Gross weight
	30	PAL	120	BOX	120	LT	0.00

3. Choose correct information for simulating the splitting:
 1. Split per:
 2. Refrigerated transport
4. Click 'Simulate'
5. If the simulation shows a desired result, click 'OK'

Manage Transport – Version 01

Split transport requirement

Splitting requirement options

Split per Refrigerated transport

Transport requirement details

✓	Pallets	Pallet type unit	Boxes	Box type unit	Total	Inventory unit	Gross weight
✓	26	PAL	1	BOX	26	LT	0.00
	4	PAL	1	BOX	4	LT	0.00

The simulation can be modified to a different distribution per truck if desired.

The transport requirements will be split by the 'Splitting transport requirement rules'. These can be found and modified by: [Transport Planning > Setup > Splitting transport requirement rules](#)

- By splitting a transport requirement, the initial transport requirement is deleted and the number of splitted transport requirements are created (with new transport requirement numbers).

7. When the information is completed and the transport is splitted correctly, click on transport requirement > Actions > 'Release for transport'

[Edit](#)
[+ New](#)
[Delete](#)
[Transport requirement](#)
[Options](#)

Actions

Release for transport

Cancel

Setup

Controls

Transport order

Create transport order

Add to transport order

Order

Order

REFERENCE	Lot ID	Trademark	Mode of delivery
Transport requirement number	BBE-003028	CALLISTO	Truck
000800	Transport order	Configuration	Load date
Reference		FR	7/11/2019
Sales order		Quantity	Delivery date
Number	ORDER LINE	4.00	7/11/2019
BBE-000674	Item number	Unit	Transport pool
	1600-2	LT	INT
	Product name		
	CAPSULE 1 x 15 LT / CALLISTO...		

Transport requirement details

Step 3: Create transport order

A transport order must be created.

There are 2 options:

- You can create one transport order for one transport requirement
- You can combine transport requirements and create one transport order for multiple transport requirements. In this case different sales/purchase/transfer orders can be transported in one truck.

OPTION 1:

To create a transport order for one transport requirement:

1. Click on tab 'transport requirement' on 'Create transport order'.
2. Transport order is created

OPTION 2:

To create a transport order for multiple transport requirements:

1. Go to the overview of transport requirements
2. Click on the Boolean in the first column of the transport requirements you want to combine in 1 transport order
3. Click on tab 'transport requirement' on 'Create transport order'.

Edit + New Delete Transport requirement Options 			
Actions		Setup	Transport order
Release for transport Cancel		Controls	Create transport order Add to transport order ▼
			Order
			Order
✓	000800	bbe	Sales order
✓	000799	bbe	Sales order

Manage Transport – Version 01

The referring transport order can be found on the transport requirement.

[Transport requirement](#)

000800 : BBE-000674

General

REFERENCE

Transport requirement number

000800

Reference

Sales order

Number

BBE-000674

Lot ID

BBE-003028

Transport order

000270

ORDER LINE

Item number

1600-2

Product name

CAPSULE 1 x 15 LT / CALLIST...

Trademark

CALLISTO

Configuration

FR

Quantity

4.00

Unit

LT

Transport requirement details

Step 4: Complete transport order

In the transport order, the needed information need to be completed.

- a) Select the 'Invoice to company'
2. Select 'Transporter'

Transport order | 000270 : BBE

000270 : BBE

Transport order

Transport Id
000270

Transporter
BBE-V0768

Currency
EUR

Company accounts ID
BBE

Status
Quoted

Purchase order

Invoice to company
BBE

Item number
9950-04

Transport requirement

Add lines Remove Transport requirement Relink Document notes

✓	Company accounts ID	Reference	Number	Item number	Trademark
	bbe	Sales order	BBE-000674	1600-2	CALLISTO

Step 5: Create price request (if needed)

- a) a price is not known or agreed beforehand, a price request has to be send to the transport partner.

1. Click on tab 'Transport Order' > Actions > Request price
2. A price request is created

(next steps: ???)

- b) If the price is known or agreed beforehand, there is no need to send a price request to the transport partner.

1. Complete field 'Transport cost' with the correct price

Transport order | 000270 : BBE

000270 : BBE

Transport order

Transport Id 000270	Transporter BBE-V0768	Currency EUR	Free text <div></div>	Mode of delivery Truck
Company accounts ID BBE	Status Quoted	Purchase order <div></div>		Transport cost 500.00
Invoice to company BBE	Item number 9950-04	Transport pool INT		

Step 6: Generate transport confirmation

When the transport order is created and is completed, a transport confirmation can be generated and send to the transport partner.

1. Click on tab 'Transport order' > Actions > Confirm
2. A transport confirmation is send to:
 - a. The transport partner
 - b. The shipping warehouse (if applicable)
 - c. The receiving warehouse (if applicable)
3. A purchase order is created for the transport.

Manage Transport – Version 01

Save + New Delete Transport order Options

Purchase order BBE-001700 has been created

Transport order | 000271 : BBE

000271 : BBE

Transport order

Transport Id 000271	Transporter BBE-V0768	Currency EUR	Free text	Mode of delivery Truck
Company accounts ID BBE	Status Confirmed	Purchase order BBE-001700		Transport cost 500.00
Invoice to company BBE	Item number 9950-04			Transport pool INT

Transport requirement

+ Add lines Remove Transport requirement Relink Document notes

✓	Company accounts ID	Reference	Number	Item number	Trademark	Configuration	Quantity	Unit	Delivery
	bbe	Sales order	BBE-000674	1600-2	CALLISTO	FR	26.00	LT	7/11/201

Manage Transport – Version 01

Exceptions

N/A

Control points

Check if all transport requirements are handled.

Go to: [Transport Planning > Transport > Common > Transport Requirements](#)

The column 'Transport order' shows if a transport order is created for a transport requirement.

Transport requirement											
Product name	Trademark	Configuration	Quantity	Unit	Load date	Delivery date	From city	From country	To city	To country	Status
CAPSULE 1 x 15 LT / CALLISTO...	CALLISTO	FR	4.00	LT	7/11/2019	7/11/2019	Londerzeel	BEL	Asse	BEL	Released
CAPSULE 1 x 15 LT / CALLISTO...	CALLISTO	FR	26.00	LT	7/11/2019	7/11/2019	Londerzeel	BEL	Asse	BEL	Confirmed
RANMAN TOP 4 x 5 LT / RAN...	RANMAN TOP	BE	800.00	LT	4/8/2021	4/8/2021	Sint-Truiden	BEL	TOURNAI-OUEST	BEL	Created
RANMAN TOP 4 x 5 LT / RAN...	RANMAN TOP	BE	800.00	LT	4/8/2021	4/8/2021	Sint-Truiden	BEL	TOURNAI-OUEST	BEL	Created
RANMAN TOP 2 x 10 LT / RA...	RANMAN TOP	DE	1.440.00	LT	4/8/2021	4/8/2021	Londerzeel	BEL	Burgdorf	DEU	Created

The status shows the status of the transport confirmation and/or transport order.

Definitions & Abbreviations

N/A

Associated Tools & documents

N/A