



**Dynamics 365 – Purchase Order
Receiving and Shipment Tracking**
Revision 1



Revision History

Date	Revision	Description	Signature / Date	
25/03/2022	1	Initial draft of user manual: Purchase Order Receiving and Shipment Tracking	Prepared	Salman Tahir
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			Approved	
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			Verified	
			Approved	
			Prepared	





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1 About User Manual

This document describes the procedure regarding the creation of product receipt and other options like to correct, cancel and check the history of created product receipts.

2 Product Receipt Creation

In order to create a product receipt, following steps are involved.

2.1 Purchase Order Confirmation

The first step involved around the creation and confirmation of purchase order. After the PO creation, confirm the Purchase order in order to create the product receipt.

Navigation: Modules > Procurement and Sourcing > Purchase orders > All Purchase Orders > Purchase > Action > Confirm

Figure 1. Confirmation of Purchase Order

2.2 Generate Product Receipt

To generate product receipt, go to the 'Receive' option available on the top. Select the 'Product receipt' option available under 'Generate' category.

Navigation: Modules > Procurement and Sourcing > Purchase orders > All Purchase Orders > Recieve > Generate > Product receipt

Figure 2. Product Receipt Generation



Enter the name in the ‘Product Receipt’ field. Also add information in the fields of ‘Product receipt date’, ‘Document Date’ and ‘terms of payment’.

In the line items, enter the quantity that you have received. If you have received the complete PO items then keep the quantity field unchanged. In the **Figure** below, sample process for receiving the items.

Figure 3. Add require information to Post the Product Receipt

3 Product Receipt Update

3.1 Product Receipt Journal

To view the generated product receipt, select the ‘Product Receipt’ available under the Journals.

Navigation: Modules > Procurement and Sourcing > Purchase orders > All Purchase Orders > Receive > Journals > Product receipt

Figure 4. Accessing Product Receipt Journal page

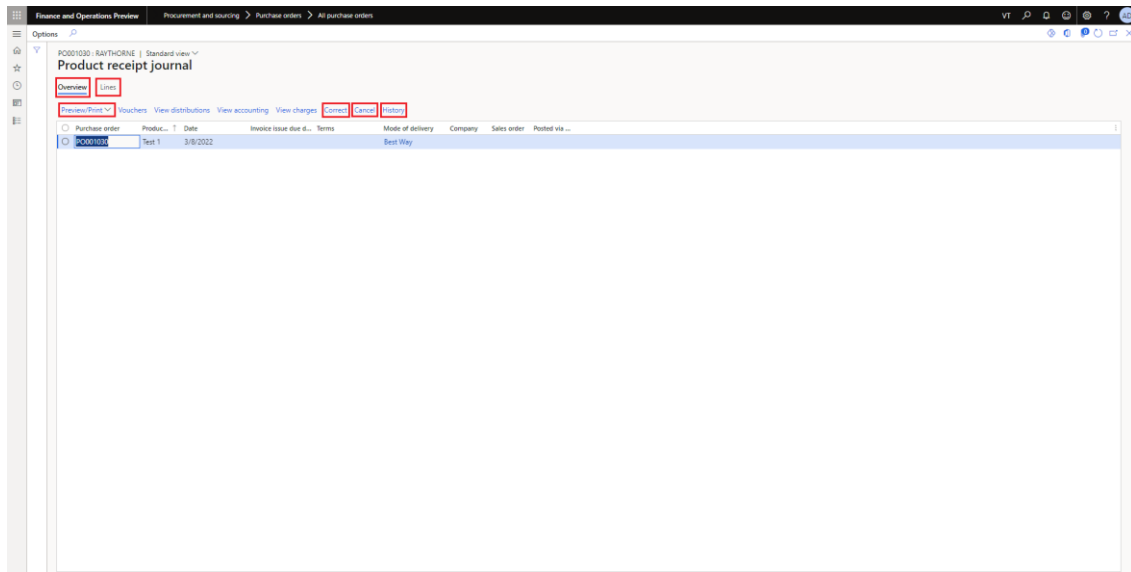


Figure 5. Product Receipt Journal Page

The Journal page will give the overview information and lines details of items that are received. Also, there is an option to Preview/print the product receipt for reference. There are also available options like to correct the product receipt, cancel and check the history of changes in product receipt.

3.2 Product Receipt Correction

Sometimes actual received items are not matched or less in number compared to generated product receipts. To rectify this issue, select the 'Correct' option available in the product journal page and enter the actual received items. You only can reduce the received quantity for any product receipt.

Update the 'Quantity' field according to the actual item received.

Navigation: Modules >Procurement and Sourcing > Purchase orders > All Purchase Orders > Receive > Journals > Product receipt > Correct

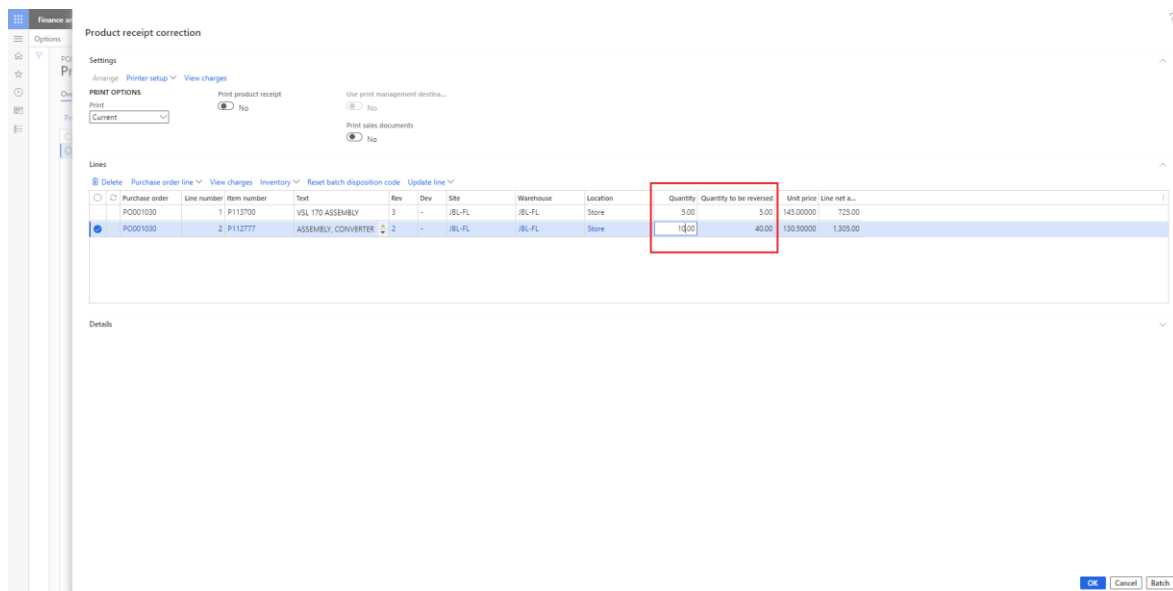


Figure 6. Product Receipt Correction



3.3 Product Receipt Cancellation

In order to cancel the product receipt, select the **'Cancel'** option available in the Product Receipt Journal.

Navigation: Modules > Procurement and Sourcing > Purchase orders > All Purchase Orders > Receive > Journals > Product receipt > Cancel

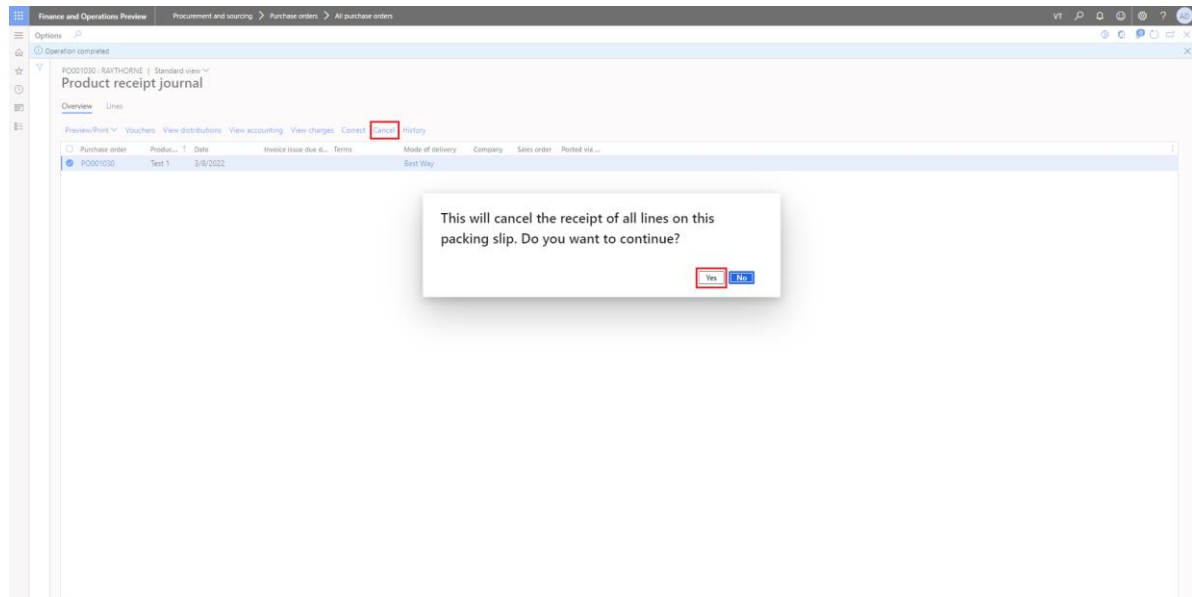


Figure 7. Product Receipt Cancellation

4 Product Receipt History

Product Receipt history will show the history of changes that you have made in the product receipt. It will depend on the number of corrections you have made in product history. You can also compare the versions of products receipts.

Navigation: Modules > Procurement and Sourcing > Purchase orders > All Purchase Orders > Receive > Journals > Product receipt > History

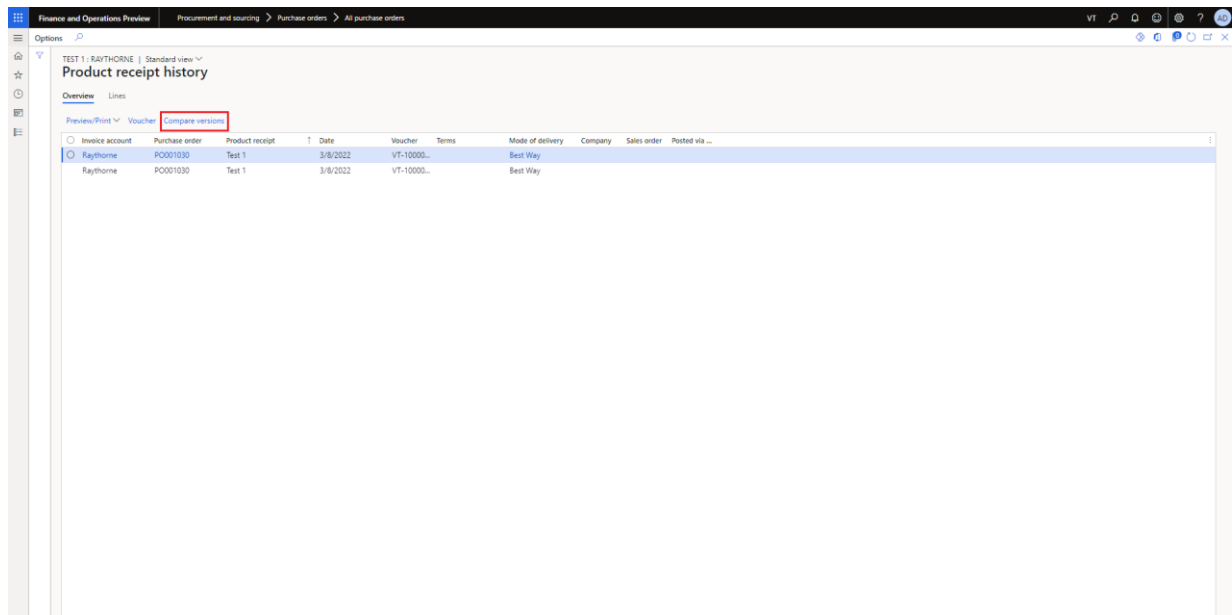


Figure 8. Product Receipt History



Field label	Old value	New value
Received quantity	10.00	5.00
Amount	1,450.00	725.00
Received	10.00	5.00
Remaining quantity	38.00	43.00
Value	9.23	4.61

Figure 9. Compare Product Receipt Versions

5 Shipment Tracking Details

5.1 Get Shipment Information

Get shipment detail will refresh the data of the purchase orders.

Navigation: Modules >Procurement and Sourcing > Purchase orders > Get Shipment

Finance and Operations

Expand all Collapse all

Workspaces

Purchase order preparation

Purchase order receipt and follow-up

Purchase orders

All Purchase Orders Extended

Purchase order entry

Not submitted purchase orders

Pending purchase orders

Purchase orders not sent

Purchase order follow-up

Backorder purchase lines

Delayed receipts

Backorder purchase lines details

Purchase orders without confirmed delivery date

Purchase orders sent for vendor collaboration, awaiting response

Purchase orders sent for vendor collaboration, response requires action

Purchase order vendor confirmation history

Open purchase order lines with unconfirmed delivery date report

Batch jobs for delivery date data notification workflow

Open purchase order lines

Open purchase order lines by delivery date report

Open purchase order lines by item report

Open purchase order lines by vendor report

Open purchase orders report

Planned purchase orders

Planned purchase orders with order date today or overdue

Intercompany

Check intercompany order price discrepancies

Purchase journal

Purchase orders of type journal

Post purchase journal

Purchase order confirmation

Confirm purchase orders

Purchase order confirmations

Purchase order vendor confirmation history

Receiving products

Post product receipt

Product receipt

Post receipts list

Receipts list

Packing material transactions

Products received from consignment inventory

Direct delivery processing

Direct delivery

Create direct delivery orders

Shipment Tracking Details

Shipment Details

Purchase Order Details Form

Procurement Details Form

Purchase requisitions

All purchase requisitions

Purchase requisitions prepared by me

Purchase requisitions require my action

Purchase requisitions assigned to me

Purchase requisitions not assigned to my queries

Purchase requisitions not recorded

Purchase requisitions review

Purchase requisitions requested for me

Purchase requisitions for my direct reports

Purchase requisitions for all my reports

Purchase requisition statistics

Approved purchase requisition processing

Consolidation opportunities

Release approved purchase requisitions

Generate purchase orders in batch

Requests for quotations

All requests for quotations

Open requests for quotations

Request for quotations follow-up

Sent requests for quotations

Request for quotation

Request for quotation follow-up

Request for quotation journals

Vendors

All vendors

Vendors on hold

Vendors past due

Vendors who are diverse

Vendor search

Vendor inactivation

Vendor/item relations

Approved vendor list by item

Approved vendor list expiration

Vendor collaboration requests

Vendor requests

Prospective vendor registration requests

Vendor collaboration user requests

Vendor Details Form

Catalogs

Procurement catalogs

Vendor catalogs

External catalogs

Prices and discounts

Price/discount groups

Vendor price/discount groups

Item discount groups

Trade agreement journals

Purchase agreements

Purchase agreements

Purchase agreement fulfillment report

Vendor rebates

Rebate agreements

Rebate claims

Rebate update

Cumulative rebates

Process rebates

Calculate rebates

Purge rebates

Rebate program types

Rebate groups

Item rebate groups

Vendor rebate groups

Consignment

Consignment replenishment orders

Inventory ownership change

Procurement categories

Inquiries and reports

Order posting

Confirmation

Product receipt

Receipts list

Transaction reports

Purchase receiving log

Ledger posting for purchase orders

Vendor reports

Vendors

Vendor base data

Vendor phone list

Procurement category reports

Categories

Vendors by category

Commodity codes by category

Status

Open purchase order lines by delivery date report

Open purchase order lines by item report

Open purchase order lines by vendor report

Open purchase orders report

Purchase agreement fulfillment report

Open purchase order lines with unconfirmed delivery date report

Vendor statistics

Vendor/item statistics

Item/Vendor statistics

Top 100 vendors

Request for quotation statistics

Request for quotation item/vendor

Request for quotation vendor/item

Vendor performance

Purchase requisition statistics

Purchase requisition statistics

Figure 10 Module Purchase Order Flow



The user needs to click on **Get Shipment Information** to refresh the data or fetch the latest shipment detail. As the user press the Get Shipment Information then Destination will update. Its briefly describe in [Shipment Tracking Details 5.4](#).

The screenshot shows the Dynamics 365 interface for Purchase Orders. The 'Get Shipment Information' button is highlighted with a red box. The interface includes a top navigation bar with tabs like Finance and Operations, Purchase order, Purchase, Manage, Receive, Invoice, Retail, Warehouse, Transportation, General, and Options. Below the navigation bar, there are various action buttons such as Create, Charges, Tax, Calculate, Prepay, Generate, Actions, Accounting, Journals, and Vendor collaboration. The main area displays a list of purchase orders with columns for mail to vendor, confirmed by, is mail sent to, is reminder ma..., last email vendor for expiry DD, is expiry rem..., last email to finance for prepayment, is prepayment..., final destination, and intermediate destination. A red box highlights the 'Get Shipment Information' button in the 'Generate' section.

Figure 11 Get Shipment Details

5.2 Shipment Tracking

The user can access the tracking of the of purchase order (PO) by opening the any specific purchase order. In the shipment tracking user can add new, remove and refresh it. The user can't add any duplicate tracking number nor its courier. Any tracking number have 2 carrier (DHL and FedEx) services. The user can also remove any tracking number from the list as well refresh the list of tracking number.

The screenshot shows the Dynamics 365 interface for a specific purchase order (PO001103 : Mouser Electron - Mouser Electronics). The 'Shipment Tracking' section is highlighted. It includes a table with columns for Tracking Number, Shipment Carrier, From, To, Shipment Status, Status Description, Expected Time of Arrival, and Shipment Destination. The table shows two tracking entries: one for DHL (4670853051) and one for FedEx (578256059825). The 'Add line', 'Remove', and 'Refresh' buttons are highlighted with a red box.

Tracking Number	Shipment Carrier	From	To	Shipment Status	Status Description	Expected Time of Arrival	Shipment Destination
4670853051	DHL	MORRISVILLE, NC - USA	LAHORE - PAKISTAN	delivered	Delivered		Final
578256059825	FedEx	MANFIELD, United States	DURHAM, United States	Delivered	Record not found in Sandbox	2022-04-26T10:19:00-04:00	Intermediate

Figure 12 Shipment Tracking of Purchase Order



The user can also find the specific tracking number by using the filter option.

The screenshot shows the Dynamics 365 interface for a Purchase Order (PO001103) for Mouser Electronics. The 'Lines' tab is selected, and the 'Tracking Number' filter is applied. The 'Apply' button is highlighted with a red box.

Tracking Number	Shipment Carrier	From	To	Shipment Status	Status Description	Expected Time of Arrival	Shipment Destin
4670853051	DHL	MORRISVILLE, NC - USA	LAHORE - PAKISTAN	delivered	Delivered		Final
578256059825	FedEx	MANSFIELD, United States	DURHAM, United States	Delivered	Record not found in Sandbox	2022-04-26T10:19:00-04:00	Intermediate

Figure 13 Apply Filter to find Tracking Number of Purchase Order

When the user is new then user must have to add the tracking number and shipment carrier.

The screenshot shows the Dynamics 365 interface for a Purchase Order (PO001103) for Mouser Electronics. The 'Lines' tab is selected, and the 'Shipment Tracking Details' section is expanded. The 'Add line' button is highlighted with a red box.

Tracking Number	Shipment Carrier	From	To	Shipment Status	Status Description	Expected Time of Arrival	Shipment Destin
4670853051	DHL	MORRISVILLE, NC - USA	LAHORE - PAKISTAN	delivered	Delivered		Final
578256059825	FedEx	MANSFIELD, United States	DURHAM, United States	Delivered	Record not found in Sandbox	2022-04-26T10:19:00-04:00	Intermediate

Figure 14 Add New Line of Shipment Tracking



The user adds the tracking number is already in the list.

Tracking Number 4670853051 is also found in Purchase Order PO001103

PO001103 : Mouser Electron - Mouser Electronics

Line details

Shipment Tracking Details

Shipment Tracking

Tracking Number	Shipment Carrier	From	To	Shipment Status	Status Description	Expected Time of Arrival	Shipment Destin
4670853051	DHL	MORRISVILLE, NC - USA	LAHORE - PAKISTAN	delivered	Delivered		Final
4670853051							Final
578256059625	FedEx	MANSFIELD, United States	DURHAM, United States	Delivered	Record not found in Sandbox	2022-04-26T10:19:00-04:00	Intermediate

Figure 15 Alert if Tracking Number Already in the List

The user can't add the shipment carrier if it's associated tracking number already in the list.

Tracking id is already in use against DHL

PO001103 : Mouser Electron - Mouser Electronics

Line details

Shipment Tracking Details

Shipment Tracking

Tracking Number	Shipment Carrier	From	To	Shipment Status	Status Description	Expected Time of Arrival	Shipment Destin
4670853051	DHL	MORRISVILLE, NC - USA	LAHORE - PAKISTAN	delivered	Record not found in Sandbox		Final
4670853051	DHL						Final
578256059625	FedEx	MANSFIELD, United States	DURHAM, United States	Delivered	Record not found in Sandbox	2022-04-26T10:19:00-04:00	Intermediate

Figure 16 Alert If Shipment Carrier Already Associated



When the user adds, correct the tracking number and its associated shipment services only then it will be added and get all the detail related to it.

Figure 17 shows the Dynamics 365 interface for Purchase Order PO001103: Mouser Electron - Mouser Electronics. The 'Shipment Tracking' section is expanded, displaying a table of tracking details. The row for tracking number 'abcd1234' is highlighted in red, indicating it has been successfully added.

Tracking Number	Shipment Carrier	From	To	Shipment Status	Status Description	Expected Time of Arrival	Shipment Destin
4670853051	DHL	MORRISVILLE, NC - USA	LAHORE - PAKISTAN	delivered	Record not found in Sandbox		Final
578256059825	FedEx	MANSFIELD, United States	DURHAM, United States	Delivered	Record not found in Sandbox	2022-04-26T10:19:00-04:00	Intermediate
abcd1234	DHL	Busan	AUCKLAND	delivered	Document Handover (if no POD)	MUMBAI	Final

Figure 17 Correct Tracking number is Added Successfully

Then user need to select the specific tracking number then click on remove button to delete. It will be deleted after confirming the 'Yes' from the popup.

Figure 18 shows the Dynamics 365 interface for Purchase Order PO001146: Arrow Electronics. The 'Shipment Tracking' section is expanded, displaying a table of tracking details. The row for tracking number 'abcd1234' is highlighted in red, and the 'Remove' button is also highlighted in red, indicating it is ready to be deleted.

Tracking Number	Shipment Carrier	From	To	Shipment Status	Status Description	Expected Time of Arrival	Shipment Destin
abcd1234	DHL	Busan	AUCKLAND	delivered	Document Handover (if no POD)	MUMBAI	Final
3865315510	DHL	MORRISVILLE, NC - USA	LAHORE - PAKISTAN	delivered	Delivered		Final
582195825859	FedEx	RENO, United States	Durham, United States	Delivered	Delivered	2022-05-16T14:35:41-04:00	Intermediate

Figure 18 Remove Tracking Number from the List



The screenshot shows the Dynamics 365 interface for Purchase Order PO001146. A confirmation popup is displayed in the center, asking "Are you sure you want to delete all marked records?". The popup has two buttons: "Yes" and "No". The "No" button is highlighted with a red rectangle. The background shows the "Shipment Tracking" section with a table of tracking details.

Tracking Number	Shipment Carrier	From	To	Shipment Status	Status Description	Expected Time of Arrival	Shipment Destination
3865315510	DHL	MORRISVILLE, NC - USA	LAHORE - PAKISTAN	delivered	Delivered		Final
582195825859	FedEx	RENO, United States	Durham, United States	Delivered	Delivered	2022-05-16T14:35:41-04:00	Intermediate
abcd1234	DHL	Busan	AUCKLAND	delivered	Document Handover (if no POD)	MUMBAI	Final

Figure 19 Confirmation Popup to Remove the Tracking Number

The screenshot shows the Dynamics 365 interface for Purchase Order PO001146. The "Shipment Tracking" section is expanded, and the "Refresh" button is highlighted with a red rectangle. The background shows the "Shipment Tracking" section with a table of tracking details.

Tracking Number	Shipment Carrier	From	To	Shipment Status	Status Description	Expected Time of Arrival	Shipment Destin
abcd1234	DHL	Busan	AUCKLAND	delivered	Document Handover (if no POD)	MUMBAI	Final
3865315510	DHL	MORRISVILLE, NC - USA	LAHORE - PAKISTAN	delivered	Delivered		Final
582195825859	FedEx	RENO, United States	Durham, United States	Delivered	Delivered	2022-05-16T14:35:41-04:00	Intermediate

Figure 20 Refresh the Tracking List



5.3 Shipment Detail

The user needs to follow the below flow to open the shipment details.

Navigation: Modules > Procurement and Sourcing > Shipment Tracking Details > Shipments

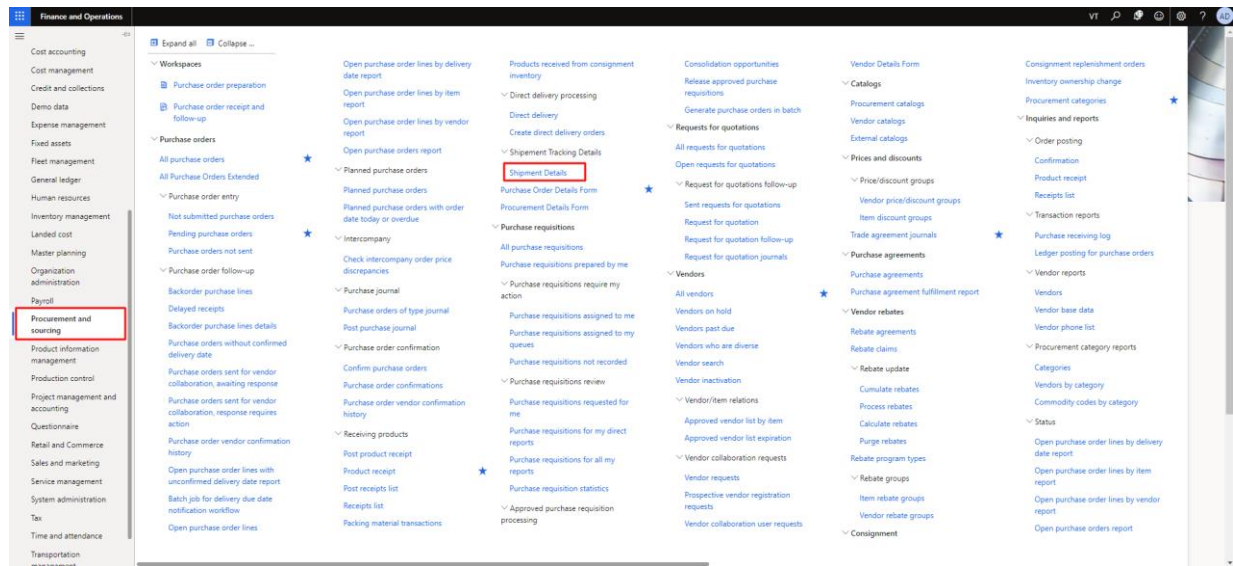


Figure 21 Shipment Details

The user needs to click on show all shipment detail to view all shipments.

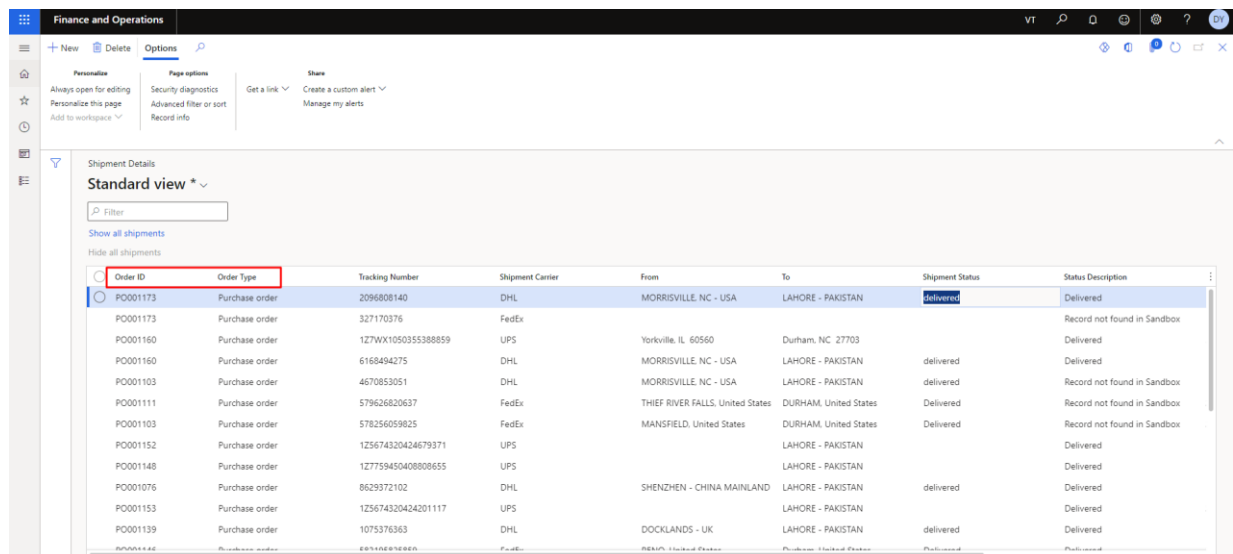


Figure 22 All Shipment Details



5.4 Shipment Tracking Details

The user can access the shipment tracking detail of the of purchase order (PO) by opening the any specific purchase order. In the shipment tracking user can add new, remove and refresh it. The user sees the selected Part number from shipment tracking. Tracking number and shipment carrier in the top fields of shipment tracking details. In the shipment tracking detail user can't add shipment tracking more than quantity of purchase order. The user can also remove any tracking number from the list as well refresh the list of tracking number.

The screenshot shows the 'Shipment Tracking Details' section of a purchase order (PO001146: Arrow Electronics - Arrow Electronics). The 'Shipment Tracking' tab is active. At the top, there are fields for 'Shipment Carrier' (DHL) and 'Tracking Number' (3865315510). Below these are buttons: 'Add Remaining Shipments' (highlighted with a red box), 'Remove', and 'Refresh'. A table lists shipment details:

Part Number	Rev	Dev	Shipment Qty...	Line number
P106910	A	-	20.00	3
P116303	A	-	20.00	4

Figure 23 Add Remaining Shipment in the List

The screenshot shows the 'Shipment Tracking Details' section of a purchase order (PO001146: Arrow Electronics - Arrow Electronics). The 'Shipment Tracking' tab is active. At the top, there are fields for 'Shipment Carrier' (DHL) and 'Tracking Number' (3865315510). Below these are buttons: 'Add Remaining Shipments', 'Remove', and 'Refresh'. A table lists shipment details:

Part Number	Rev	Dev	Shipment Qty...	Line number
P106910	A	-	20.00	3
P116303	A	-	20.00	4

Figure 24 Comparison of Quantity of Purchase Order and Shipment Quantity



In the shipment tracking detail user can't add shipment tracking more than quantity of purchase order.

The screenshot shows the Dynamics 365 interface for Purchase Order Receiving. A red warning message at the top states: "quantity must be less the ordered quantity". Below this, the "Shipment Tracking Details" section is visible. It includes a table with columns: Part Number, Rev, Dev, Shipment Qty., and Line number. The table contains two rows: P106910 (Rev A, Dev -, Shipment Qty. 50.00, Line number 3) and P116303 (Rev A, Dev -, Shipment Qty. 20.00, Line number 4). The "Shipment Qty." for P106910 is highlighted with a red box.

Part Number	Rev	Dev	Shipment Qty.	Line number
P106910	A	-	50.00	3
P116303	A	-	20.00	4

Figure 25 Shipment Quantity Must Les Then Order Quantity

The screenshot shows the Dynamics 365 interface for Purchase Order Receiving. The "Shipment Tracking Details" section is visible. It includes a table with columns: Part Number, Rev, Dev, Shipment Qty., and Line number. The table contains two rows: P106910 (Rev A, Dev -, Shipment Qty. 20.00, Line number 3) and P116303 (Rev A, Dev -, Shipment Qty. 20.00, Line number 4). The "Remove" button in the "Add Remaining Shipments" section is highlighted with a red box.

Part Number	Rev	Dev	Shipment Qty.	Line number
P106910	A	-	20.00	3
P116303	A	-	20.00	4

Figure 26 Remove any Part Number from the List



Then user need to select the specific tracking number then click on remove button to delete. It will be deleted after confirming the 'Yes' from the popup.

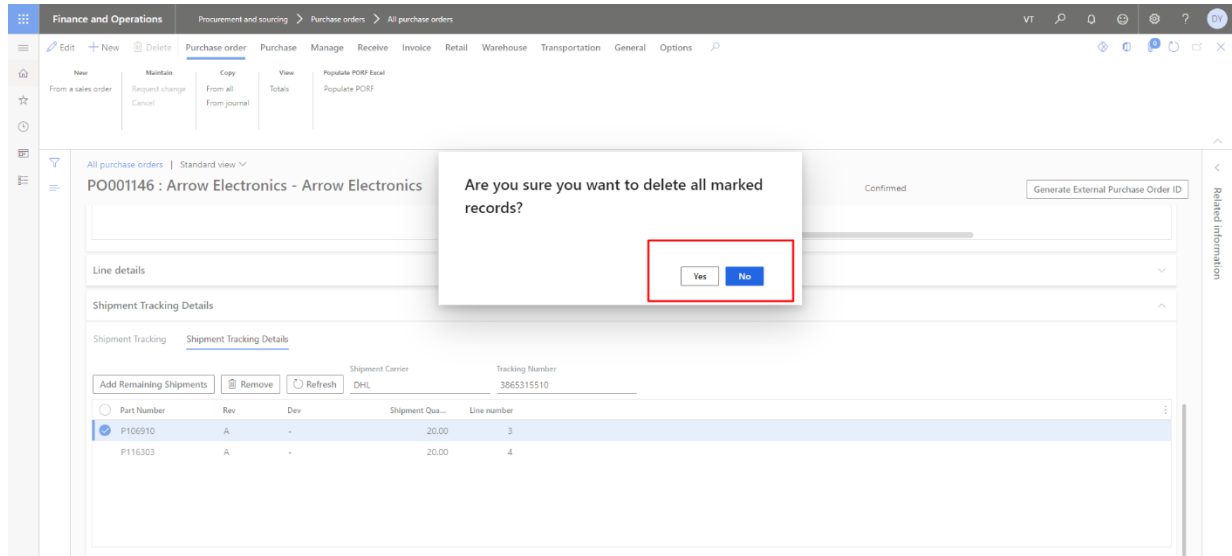


Figure 27 Confirmation Popup to Remove the Part Number from the List

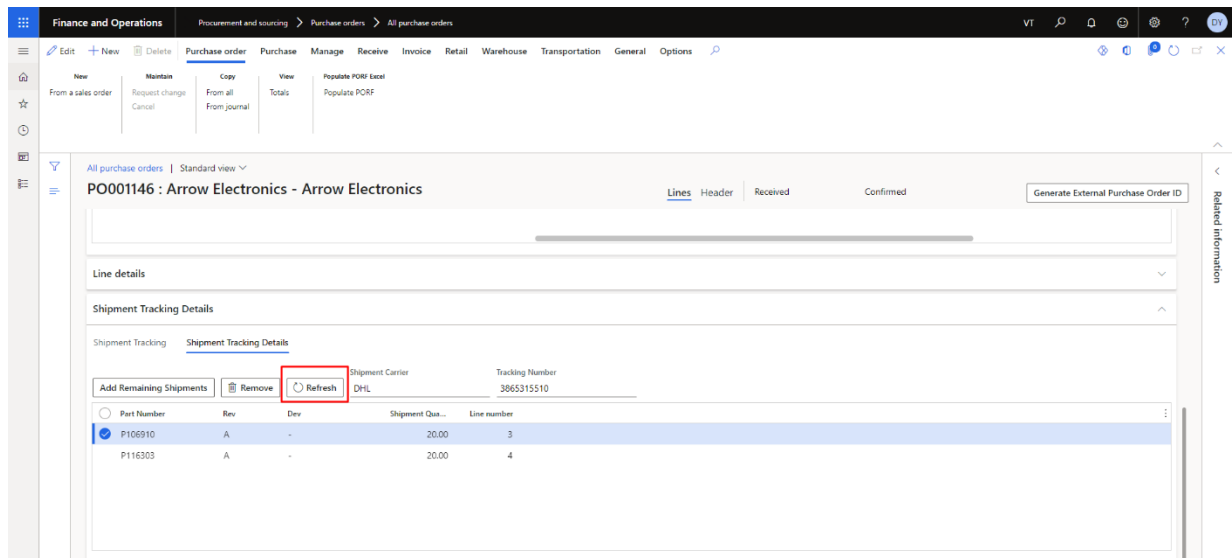


Figure 28 Refresh the List of Part Number