

# Packing list mgmt Steel Structures

DYNAMICS 365

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2	Create Packing list
3	Release Packing list
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# Introduction & supply specification

**Maire Tecnimont Group is leading the Supply Chain transformation on the EPC industry integrating process with collaboration as main driver.**

... *THROUGH*



On materials delivery management, we leverage on **Microsoft Dynamics 365** to automate material delivery processes.

Supplier is in charge of both:

- MBL preparation & timely sharing with MET engineering
- Packing list & certificates on collaboration solution



**MBL timely preparation & send to MET engineering**



- **First time?: onboard!**
  - **Packing List, documents & bundles preparation & release**



# 1<sup>st</sup> time: on boarding

ACCESS THE DEDICATED HANDBOOK FOR DETAILS

1<sup>st</sup> time: register to MSD365



## Invitation by Expediter

Granting free-of-charge invitation to register:  
you'll receive an email from MET expediter

Upon email receipt, you are requested to perform simple steps on MSD365 Vendor Portal:

1

Onboard providing requested information

2

Complete the Vendor Registration and check your email inbox for the welcome email

3

Access Handbooks for detailed "step by step" guidance



*All the functionalities of MSD365 are compatible with Google Chrome & Microsoft Edge.  
Not compatible with Internet Explorer, Mozilla Firefox and Opera.*

*Registration account must be a business account in order to comply with MET compliance requirements.*



*Facing issues? Contact MET expediter for any support you may require.*

02

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# Create packing list

# Process details

Process Phase	Activity		
#	Macro Task	Description	
<b>PL MANAGEMENT</b>	01	PL creation	<ul style="list-style-type: none"><li>• First creation of PL</li><li>• Bulk Upload from Excel</li><li>• Add lines manually &amp; manage Packages</li></ul>
	02	PL data update & review	<ul style="list-style-type: none"><li>• Update Preliminary &amp; Final PL</li><li>• Input Expected EXW Delivery date</li></ul>
	03	PL issuing management	<ul style="list-style-type: none"><li>• First issuing of Preliminary/Final PL</li><li>• Issuing upon Rework requested</li></ul>

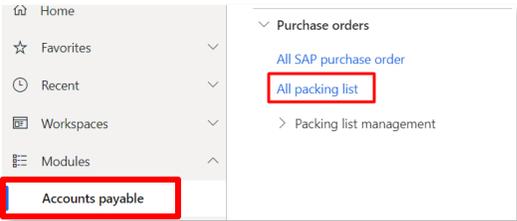
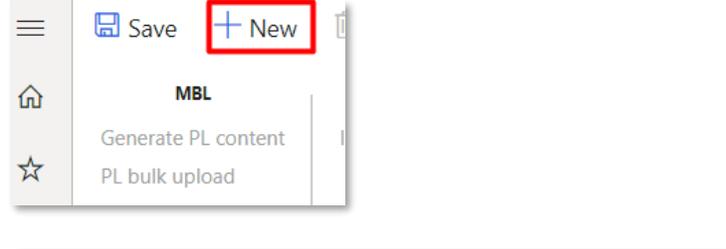
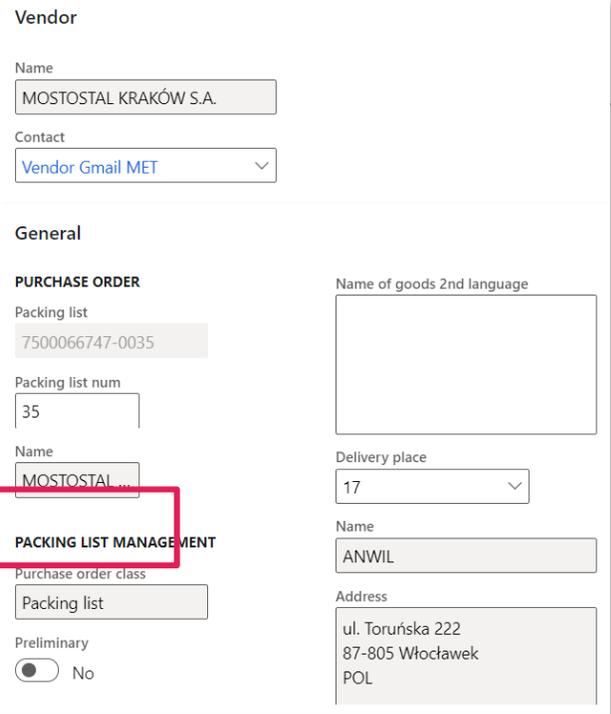
# MANAGE PL: CREATION of PL

PRELIMINARY

FINAL

## Process Phase

## Activity

	#	Macro Task	Description
<p>PL MANAGEMENT</p>	01	PL creation	<ul style="list-style-type: none"> <li>Fist creation of PL: new PL</li> </ul>
<p>1. ACCESS ALL PACKING LIST AREA</p> <p>a) From the menu on the left click on ACCOUNTS PAYABLE b) Select ALL PACKING LIST</p>			
<p>2. CREATE NEW PACKING LIST</p> <p>a) Click on NEW and if necessary, change the PL number b) Select the Package from sustainable sources % (the default value is &lt;10%) c) Select the Purchase Order (PO) d) Fill in all the mandatory fields (check the asterisk) d) Click on OK</p>			
<p>Switch "Preliminary" flag from No to Yes to create Preliminary PL</p>			
<p>Switch "OSD/NC" flag from No to Yes to create OSD/NC PL.</p>			

# MANAGE PL: BULK UPLOAD

PRELIMINARY

FINAL

## Process Phase

## Activity

	#	Macro Task	Description
PL MANAGEMENT	01	PL creation	• Bulk Upload from Excel

### 3.ADD PL LINES AUTOMATICALLY:

#### PREPARE YOUR FILE BEFOREHAND! - see next slide

- Click on PL BULK UPLOAD
- To download the template directly from the website select one of the header column and make right click, then select Export all rows.

- Click on UPLOAD EXCEL FILE. Here below you can find the template.

**CAUTION! Each upload cancels & overwrites the previous one.**

**NOTE:** it's also possible to add PL lines by filling in the field in the table manually.

- SAVE

- After the Upload we check by clicking on VALDATE DATA:

- If the validation is successful we click on IMPORT DATA IN PL
- If the check is not successful then we need to check the alert messages.

#### CHECK TEMPLATE & ERRORS HANDLINGS

The system will check the template and in case of errors detected an alert will show the issues.

The screenshot displays the 'Packing list management' interface. The top navigation bar includes 'Save', 'New', 'Delete', 'Packing list management', and 'Options'. Below this, there are tabs for 'MBL', 'Integrity checks', 'Update', and 'Print management'. The 'MBL' tab is active, showing 'Generate PL content' and 'PL bulk upload' (highlighted with a red box). The 'Update' tab shows 'PL Status update' and 'Reset to 00.DRAFT'. The 'Print management' tab shows 'Print Packing List & Marking List'. Below the navigation bar, there is a table with columns for 'HEAT No.', 'Mark', and a dropdown menu. The 'Mark' column has a red asterisk and a dropdown arrow. A context menu is open over the 'Mark' column, showing options: 'Form information', 'Export all rows' (highlighted with a red box), 'Group by this column', and 'Freeze column'. At the bottom right, there is a 'Save' button (highlighted with a red box) and a '+ New' button. Below the table, there is a 'Validate data' button (highlighted with a red box) and an 'Import data in PL' button (highlighted with a red box). The bottom navigation bar includes 'Save', 'New', 'Delete', 'Upload Excel file', 'Validate data', 'Import data in PL', 'Load bulk data', and 'Options'. The page title is '9900067749-0005 : TEST IMPERIAL FURNITURE | Standard view'.

# PREPARING YOUR EXCEL FILE FOR MARKS BULK UPLOAD 1/2

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB
Mark No.	Stock/Mill	Country of origin	HS code	Manufacturer	MTC ID	HEAT No.	NC ID	OSD	Punch list	Punch ID	Duty Exemption/CR ID	Duty Exemption/CR Description	Progressive	Vendor package ID	Gross weight	Length	Width	Height	Min temperature	Max temperature	Kind of package	On deck shipped permitted	Stackable	Storage symbol	Vacuum sealed	Package quantity	
1371PR001	Stock	SAU	NA						No					1		1,060.75	80.00	90.00	100.00			LOOSE	Yes	No	A	No	1.00

### Values that need to match the MBL:

**MARK\*:** the code must be equal to the code in MBL

**No.:** quantity of marks, there must be availability on the PL

### Values that must fit the naming Convention:

**Stock/Mill\*:** Mill/Stock

**Country of Origin\*:** ISO 3 char  
Check this link:  
[https://www.nationsonline.org/oneworld/country\\_code\\_list.htm](https://www.nationsonline.org/oneworld/country_code_list.htm)

**Storage symbol\*:**  
A: outdoors  
B: outdoors sheltered  
C: indoors  
D: indoors heated area  
E: indoors air conditioned area

**Kind of Package\*:**

BOX	LOOSE
BUNDLE	PALLET
CASE	REEL
CRATE	SADDLE
DRUM	SKID

### Further compulsory fields values:

**HS Code\*:** use NA if not available

**Progressive\***

**Gross, Length, Width, Height\*** greater than 0

**On deck shipped permitted\*:** Yes/No

**Stackable\*:** Yes/No

**Vacuum Sealed\*:** Yes/No

**No.\*** Must be equal or greater than Package quantity

### Further compulsory fields values:

**Punch list\*:** Yes/No

**Punch list id:** mandatory if Punch list is valued.

**Package quantity\*:** must be greater than 0

**NC ID, OSD:** for all rows, at least one field of these is mandatory for Packing list where OSD/NC is Yes in Header section

**MTC ID:** mandatory only for the Packing list with "Fasteners PL" field is marked as Yes in Header section

# PREPARING YOUR EXCEL FILE FOR MARKS BULK UPLOAD 2/2

**CASE OF PACKING LIST WITH PACKAGE "LOOSE":** have a Single page for each Mark when the Mark quantity is bigger than 1

1. Each single page (progressive) of the packing list shall contain only "1" quantity of the Mark with its correct weights and dimensions;
2. All the "Package quantity" - column "AB" shall be 1. While the columns "B" ("No.") shall indicate the total quantity of the Mark included inside the packing list;
3. Marks/Items with quantities bigger than one, shall be split into more lines so that they will be considered as if they are in different packages;

Mark	No.	Stock/ Mill	Country of origin	HS code	Manufacturer	MTC ID	HEAT No.	NC ID	OSD list	Punch list ID	Duty Exemption/ CR ID	Duty Exemption/ CR Description	Progressive	Vendor package ID	Gross weight	Length	Width	Height	Min temperature	Max temperature	Kind of package	On deck shipped permitted	Stackable	Storage symbol	Vacuum sealed	Package quantity
1371PR003I04AB0015	1	Stock	SAU	NA					No				1		#####	12,000.00	2,500.00	2,000.00			LOOSE	Yes	Yes	A	No	1.00
1371PR003I04AB0016	1	Stock	SAU	NA					No				2		#####	12,000.00	2,500.00	2,000.00			LOOSE	Yes	Yes	A	No	1.00
1371PR003I04AB0018	2	Stock	SAU	NA					No				3		#####	12,000.00	2,500.00	2,000.00			LOOSE	Yes	Yes	A	No	1.00
1371PR003I04AB0018	2	Stock	SAU	NA					No				4		#####	12,000.00	2,500.00	2,000.00			LOOSE	Yes	Yes	A	No	1.00
1371PR003I04AB0039	1	Stock	SAU	NA					No				5		#####	12,000.00	2,500.00	2,000.00			LOOSE	Yes	Yes	A	No	1.00

Mark "1371PR003I04AB0018" with No.2 is splitted into 2 rows, each with Package quantity valued with 1.

## CASE OF PACKING LIST WITH PACKAGE "BUNDLE"

### ALL THE MARKS IN THE SAME PROGRESSIVE

1. No. is the total quantity of mark included in the PL;
2. Package quantity: same as No.

Mark	No.	Progressive	Gross weight	Length	Width	Height	Kind of package	On deck shipped	Stackable	Storage symbol	Vacuum sealed	Package quantity
410PR001IAB0002	2	2	500.00	12	34	50	Bundle	No	No	A	No	2

### SAME MARK (>1) IN DIFFERENT PROGRESSIVE

1. Each mark shall be split into more lines, one for different progressive;
2. For each mark row: No. is the total quantity of the mark included inside the packing list;
3. For each mark row: in Package quantity insert the quantity of mark included in the package;

Mark	No.	Progressive	Gross weight	Length	Width	Height	Kind of package	On deck shipped	Stackable	Storage symbol	Vacuum sealed	Package quantity
410PR001IAB0002	2	2	500.00	12	34	50	Bundle	No	No	A	No	1
410PR001IAB0002	2	3	1,500.00	15	33	60	Bundle	No	No	A	No	1

# MANAGE PL: BULK UPLOAD

PRELIMINARY

FINAL

## Process Phase

## Activity

PL MANAGEMENT

#

Macro Task

Description

01

PL creation

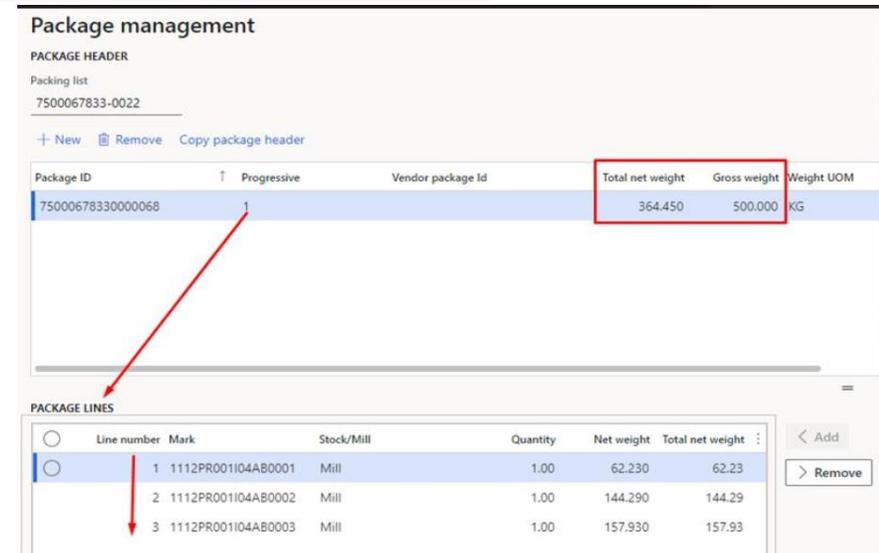
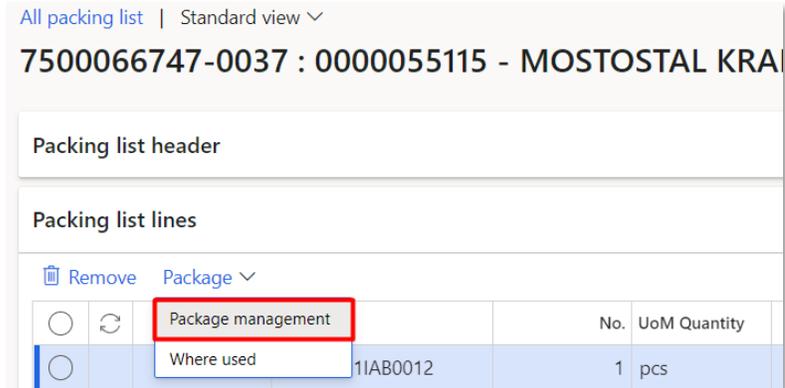
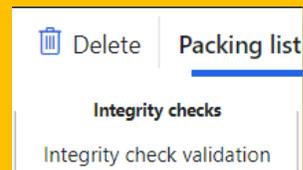
- Bulk Upload from Excel

### 4. CHECK THE PACKAGE MANAGEMENT

- Click on Package Management
- Check the lines added to each package accordingly to the progressive(s) indicated into the Bulk upload file
- Check Total net weight and Gross weight because are under system control: Gross Weight must be greater than Net Weight or equal: click on EDIT if Gross weight must be changed.
- For a quick edit:
  - export all the rows of the package;
  - copy all the Net weights of all the rows involved
  - Delete the value of the Gross weight on the screen into the first row
  - Paste all the values already copied by the excel
- SAVE

### CHECK THE DATA THROUGH THE INTEGRITY CHECK VALIDATION

In order to check any possible error on the data inserted, Integrity check validation will help to highlight the errors.



# MANAGE PL: ADD LINES MANUALLY

PRELIMINARY

FINAL

## Process Phase

## Activity

### PL MANAGEMENT

1. GENERATE PL CONTENT
  - a) Click on GENERATE PL CONTENT

7500066747-0037 : MOSTOSTAL KRAKÓW S.A. | PL Mark Selection

**Generate PL content**

2. MANAGE THE PACKAGE if necessary
  - a) Select PACKAGE MANAGEMENT
  - b) Click on NEW to create the n. Packages necessary

All packing list | Standard view

7500066747-0037 : 0000055115 - MOSTOSTAL KRA

Packing list header

Packing list lines

Remove	Package	Where used	Mark	No.	UoM	Quantity
<input type="checkbox"/>	<input type="checkbox"/>	Package management	11AB0012	1	pcs	

**+ New** **Remove**

#

Macro Task

Description

01

PL creation

- Add lines manually & manage Packages

- b) Select the desired rows and insert the number in the No. column

7500067833-0022 : 0000055663 - Zamil Structural Steel Co

Packing list header

PO SAP: 7500067833 | DELIVERY: 3/22/2022 | VENDOR: Elena gmail Test Vendor d365

Packing list lines

Remove	Package	Line number	Mark	No.	UoM	Quantity	Stock/Mill
<input type="checkbox"/>	<input type="checkbox"/>	1	1112PR001104AB0001	1	pcs	62.23	62.23
<input type="checkbox"/>	<input type="checkbox"/>	2	1112PR001104AB0002	1	pcs	144.29	144.29

- c) Click on GENERATE PL CONTENT
- d) Select all the lines
- e) Click on Integrity check validation in order to check the data and apply any correction required
- f) save

Packing list management

**Generate PL content** | Integrity check validation | Update | Print management

Packing list lines

Integrity check

Validation error: HS Code | Description: HS code for Mark 1112PR001104AB0001 (Mill) is not populated.

- c) Fill in the mandatory package header field

Package management | Standard view

PACKAGE HEADER

Packing list: 7500066747-0037

**+ New** **Remove** Copy package header

Package ID	Progressive
75000667470000062	1

- d) Select the packing list lines and click on ADD
- e) SAVE

**Save** **+ New**

PACKAGE LINES

Line number	Mark	Stock/Mill	Quantity	Net weight	Total net weight
<input type="checkbox"/>					

**< Add** **> Remove**

PACKING LIST LINES

Package line re...	Line number	Mark	Stock/Mill
<input checked="" type="checkbox"/>	1.00	1 410PR0011AB0008	Mill

# MANAGE PL: update CONTENT

PRELIMINARY

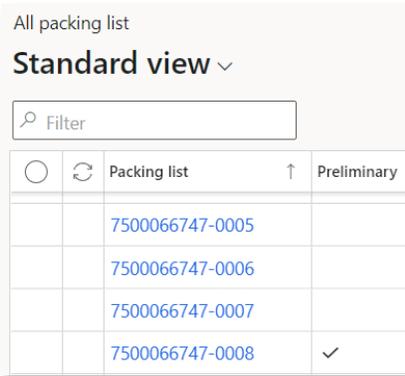
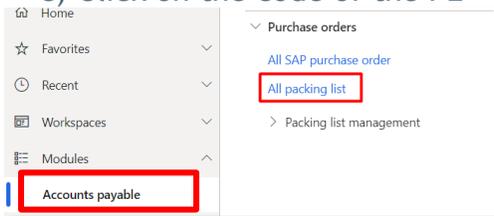
FINAL

## Process Phase

## Activity

### PL MANAGEMENT

1. ACCESS ALL PACKING LIST AREA
  - a) From the menu on the left click on ACCOUNTS PAYABLE
  - b) Select ALL PACKING LIST
  - c) Click on the code of the PL



#

Macro Task

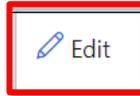
Description

02

PL data update & review

- Update Preliminary & Final PL
- Input Expected EXW Delivery date

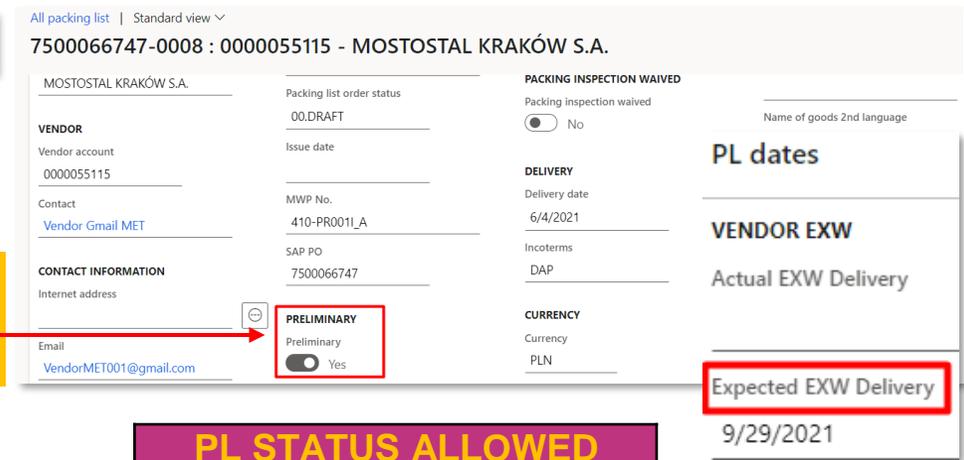
### 2A. UPDATE PACKING LIST HEADER



### Header

- a) Select the PL & EDIT
- b) Choose Header
- c) Click on SAVE when done

TURN PRELIMINARY INTO FINAL: Switch Preliminary to NO



PL STATUS ALLOWED  
00.DRAFT

Expected EXW Delivery  
9/29/2021

### 2B. UPDATE PACKING LIST LINES

- a) Select the Lines section & EDIT
- b) To edit the Packages please select "Package management" and apply the modifications
- c) Click on SAVE when done



TO UPDATE PACKING LIST LINES or TO ADD NEW MARKS USE THE BULK UPLOAD FUNCTION

MBL  
Generate PL content  
PL bulk upload

# Focus: Packing list creation FOR AKI30AY90

#	Validation	Packing list	Scenario
1.1	Successfully	1.Packing list Fasteners = NO	Lines referred to marks having TAG/Commodity Code for Mark ALL different from AKI30AY90
1.2	Failed: PL lines fails with error: PL cannot be created: non Fastener PL has mixed lines Fastener and not fastener		Lines referred to marks having "mix" TAG/Commodity Code for Mark, some equal to AKI30AY90 and some different
1.3	Failed: PL cannot be created: please set the flag "Fasteners/Precast" and retry		Lines referred to marks having TAG/Commodity Code for Mark ALL equal to from AKI30AY90
2.1	Successfully	2.Packing list Fasteners = YES	Lines referred to marks having TAG/Commodity Code for Mark ALL different from AKI30AY90
2.2	Failed: Validation PL lines fails with error: PL cannot be created: Fastner PL has some commodity codes different from AKI30AY90		Lines referred to marks having "mix" TAG/Commodity Code for Mark, some equal to AKI30AY90 and some different
2.3	Successfully		Lines referred to marks having TAG/Commodity Code for Mark ALL equal to from AKI30AY90

# Release packing list

# Process – details

Process Phase	Activity	
	#	Macro Task Description
<b>PL ISSUING</b>	03	PL issuing management <ul style="list-style-type: none"><li>• First issuing</li><li>• Review an issued PL</li><li>• Issuing upon Rework requested</li></ul>
<b>LOAD DOCUMENTS</b>	04	Add documents to PL <ul style="list-style-type: none"><li>• Uploads documents to PL</li></ul>
<b>PRINT MARKING LIST &amp; PL</b>	05	Make Prints of Marking and PL content <ul style="list-style-type: none"><li>• Prints Marking and PL</li></ul>
<b>ADD SITE DATES</b>	06	Manage dates for DAP/DDP <ul style="list-style-type: none"><li>• Adds Vendor Estimated Arrival to site date</li></ul>

# Manage pl: Issue

PRELIMINARY

FINAL

## Process Phase

## Activity

PL ISSUING

#

Macro Task

Description

03

PL issuing management

- First issuing
- Review an issued PL
- Issuing upon Rework requested

### 1. PACKING LIST ISSUE

- Access Packing List
- Select the PL in status «00.DRAFT»
- Choose the command on top «PL status update»
- The new status is already present: write a note if necessary and click on OK.

An integrity check job will verify the data and alert in case of error: Provide the prompt correction and repeat the action.

Certificates attachments are not mandatory to issue the PL

	Packing list	Preliminary	Vendor account	Invoice account	Vendor name	Purchase order class	Packing list order status
	7500066747-0005		0000055115	0000055115	MOSTOSTAL KRAKÓW S.A.	Packing list	00.DRAFT
	7500066747-0008	✓	0000055115	0000055115	MOSTOSTAL KRAKÓW S.A.	Packing list	00.DRAFT
	7500066747-0010		0000055115	0000055115	MOSTOSTAL KRAKÓW S.A.	Packing list	00.DRAFT

**Need to issue the Final PL from a Preliminary?**  
 i. Go in HEADER  
 ii. Switch the icon “Preliminary from Yes to NO”

Validation error	Description	PO SAP	Tag
Integrity check	Mark weight for Mark 724PR0011A80006 (Mill) on Packing List 7500067724-0004 (Packing List Line 1) is different from related MBL Mark Weight.	7500067724	7500067724-0004
MBL dimensions differences	Single Mark Quantity as per PO UoM for Mark 724PR0011A80006 (Mill) on Packing List 7500067724-0004 (Packing List Line 1) is different from related MBL Single Mark Quantity as per PO UoM.	7500067724	7500067724-0004
MBL dimensions differences	Mark weight for Mark 724PR0011A80007 (Mill) on Packing List 7500067724-0004 (Packing List Line 2) is different from related MBL Mark Weight.	7500067724	7500067724-0004
MBL dimensions differences	Single Mark Quantity as per PO UoM for Mark 724PR0011A80007 (Mill) on Packing List 7500067724-0004 (Packing List Line 2) is different from related MBL Single Mark Quantity as per PO UoM.	7500067724	7500067724-0004

PLEASE VIEW THE ERROR HANDLING SECTION FOR DETAILS

# Review a pl & issue

PRELIMINARY

Process Phase	#	Macro Task	Activity
PL ISSUING	03	PL issuing management	<ul style="list-style-type: none"><li>First issuing</li><li>Review an issued PL</li><li>Issuing upon Rework requested</li></ul>

**PL STATUS ALLOWED**  
**10.ISSUED**

## 1. REVIEW PACKING LIST

- Access Packing List (see previous slide)
- Select the PL in status «10.ISSUED»
- Click on “Reset to 00.DRAFT”
- To edit the content, select EDIT on top page and click on the PL
- Save

Packing list	Preliminary	Vendor account	Invoice account	Vendor name	Purchase order class	Packing list order status
7500066747-0040	✓	0000055115	0000055115	MOSTOSTAL KRAKÓW S.A.	Packing list	10.ISSUED

Integrity checks | Update

Integrity check validation | PL Status update

**Reset to 00.DRAFT**

Save

## 2. ISSUE THE REVIEWED PRELIMINARY PACKING LIST

- Access Packing List & select the PL in status «00.DRAFT»
- Click on PL Status update
- The new status 10.ISSUED is already present, add a note if necessary & click on OK

Integrity checks | Update

Integrity check validation | PL Status update

Packing list status update

Parameters

Next packing list status: 10.ISSUED

Note

An integrity check job will verify the data and alert in case of error.  
Provide the prompt correction and repeat the action

Integrity check	Description	0-40 SAP	Tag
MBL dimensions differences	Mark weight for Mark 724PR0011A80006 (MIL) on Packing List 7500067724-0004 (Packing List Line 1) is different from related MBL Mark Weight.	7500067724	7500067724-0004
MBL dimensions differences	Single Mark Quantity as per PO UoM for Mark 724PR0011A80006 (MIL) on Packing List 7500067724-0004 (Packing List Line 1) is different from related MBL Single Mark Quantity as per PO UoM.	7500067724	7500067724-0004
MBL dimensions differences	Mark weight for Mark 724PR0011A80007 (MIL) on Packing List 7500067724-0004 (Packing List Line 2) is different from related MBL Mark Weight.	7500067724	7500067724-0004
MBL dimensions differences	Single Mark Quantity as per PO UoM for Mark 724PR0011A80007 (MIL) on Packing List 7500067724-0004 (Packing List Line 2) is different from related MBL Single Mark Quantity as per PO UoM.	7500067724	7500067724-0004

# Manage pl: Review a pl & issue

FINAL

Process Phase	#	Macro Task	Activity
PL ISSUING	03	PL issuing management	<ul style="list-style-type: none"> <li>First issuing</li> <li>Review an issued PL</li> <li>Issuing upon Rework requested</li> </ul>

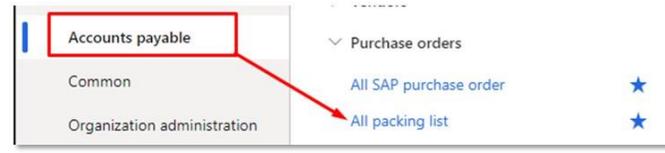
MET Inspex requires a review.

A notification will be sent by email and through the bell icon on the platform with rework motivation and instructions

**PL STATUS ALLOWED**  
**05.REWORK**

## 1. REVIEW PACKING LIST

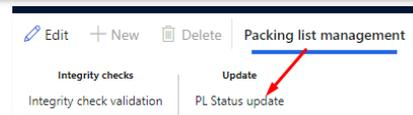
- Access Packing List
- Select the PL in status «05.REWORK»
- Click on Edit on the top page to edit the content
- Follow steps in slide: “Manage PL: update content”
- Click on Save



Packing list	Preliminary	Vendor account	Invoice account	Vendor name	Purchase order class	Packing list order status
7500066747-0001		0000055115	0000055115	MOSTOSTAL KRAKÓW S.A.	Packing list	05.REWORK
7500066747-0006		0000055115	0000055115	MOSTOSTAL KRAKÓW S.A.	Packing list	05.REWORK

## 2. ISSUE THE REVIEW:

- Click on PL Status update
- The new status 10.ISSUED is already present.
- Write a note if necessary.
- Click on OK
- An integrity check job will verify the data and alert in case of error.
- Provide the prompt correction and repeat the action from point 2.a



Packing list status update

Parameters

Next packing list status: 10.ISSUED

Note: [Text area]

Integrity check

Validation error:

Integrity check	Description	PO SAP	Tag
MBL dimensions differences	Mark weight for Mark 724PR0011A80006 (MILL) on Packing List 7500067724-0004 (Packing List Line 1) is different from related MBL Mark Weight.	7500067724	7500067724-0004
MBL dimensions differences	Single Mark Quantity as per PO UoM for Mark 724PR0011A80006 (MILL) on Packing List 7500067724-0004 (Packing List Line 1) is different from related MBL Single Mark Quantity as per PO UoM.	7500067724	7500067724-0004
MBL dimensions differences	Mark weight for Mark 724PR0011A80007 (MILL) on Packing List 7500067724-0004 (Packing List Line 2) is different from related MBL Mark Weight.	7500067724	7500067724-0004
MBL dimensions differences	Single Mark Quantity as per PO UoM for Mark 724PR0011A80007 (MILL) on Packing List 7500067724-0004 (Packing List Line 2) is different from related MBL Single Mark Quantity as per PO UoM.	7500067724	7500067724-0004

## 3. REVIEW ACCEPTED & REFUSED

You will be notified by email and by alert bell icon on the platform about the changed status in «20.ACCEPTANCE» If REVIEW REFUSED You will be notified by email and by alert bell icon on the platform about the changed status in «05.REWORK»

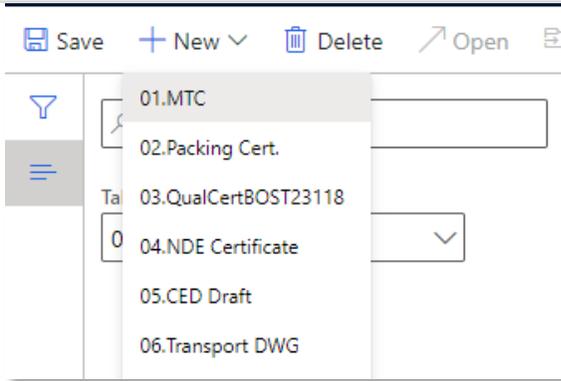
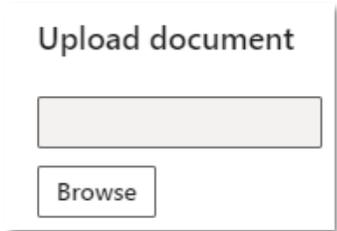
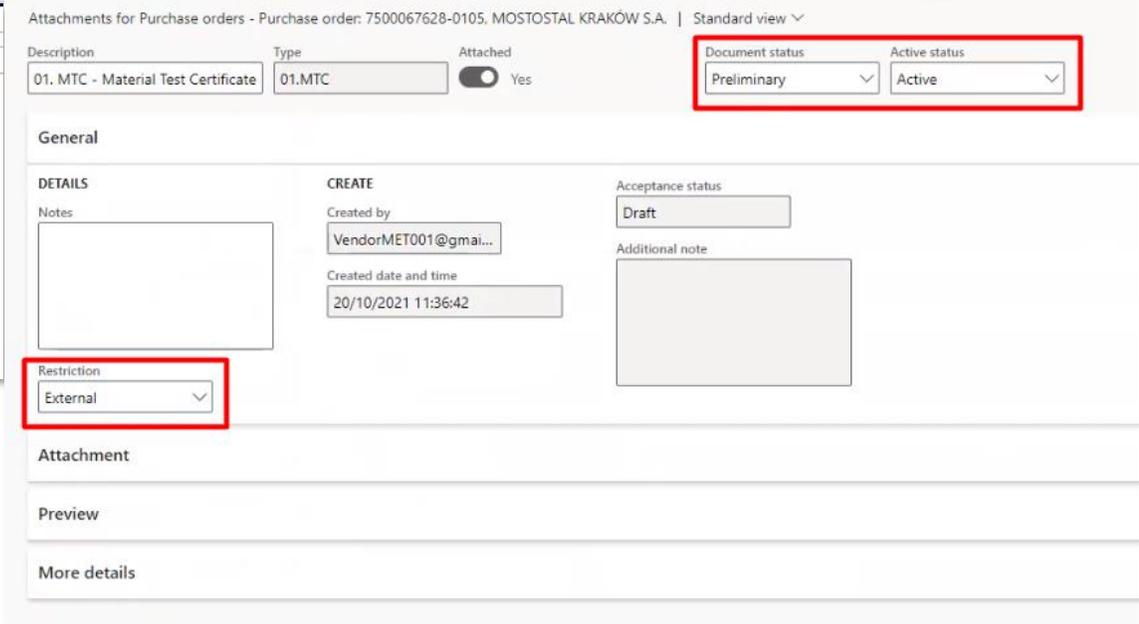
# Uploads documents to PL

PRELIMINARY

FINAL

## Process Phase

## Activity

LOAD DOCUMENTS	#	Macro Task	Description
<p><b>1.ACCESS ATTACHMENTS AREA</b></p> <ol style="list-style-type: none"> <li>1. After selected the PL:</li> <li>2. Move to Header section</li> <li>3. From the top page select the attachments icon that displays the number of current attachments available</li> </ol>	04	<p>Add documents to PL</p> 	<p>Uploads documents to PL – Manage attachments</p> 
<p><b>2. ADD ATTACHMENTS</b></p> <ol style="list-style-type: none"> <li>Click on New</li> <li>Select from the List the type of document</li> <li>Upload the document</li> <li>Complete the additional fields                     <ul style="list-style-type: none"> <li>Document status</li> <li>Active status</li> <li>Restriction:                             <ol style="list-style-type: none"> <li>External: makes the attachment visible to the Vendor itself &amp; MET</li> <li>Internal: makes the attachment visible only to MET</li> </ol> </li> <li>Notes if required</li> </ul> </li> <li>SAVE</li> </ol> 		 	

# Prints Marking LIST and PL content

## Process Phase

## Activity

#

Macro Task

Description

### PRINT MARKING LIST & PL

05

Make Prints of Marking and PL content

- Prints Marking and PL

#### PRINT MARKING & PROJECT PACKING LIST FORMAT

- Access Packing List
- Select the desired PL
- Click on Print PL & Marking List
- A message informs you that the printout documents will be generate soon
- When the number of attachments increases, access to Attachments Area after selecting the Header section of the PL.
- Select the last PL or ML and click OPEN.

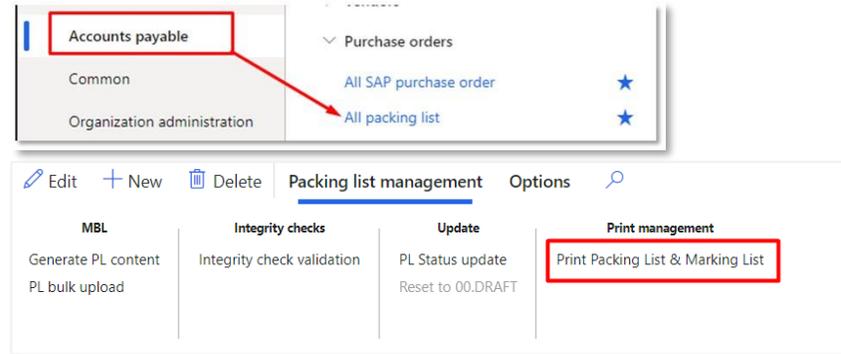
The document in PDF format can be seen inside a window preview and downloaded by the "\*\*\*" in the upper corner.

**PL STATUS ALLOWED**

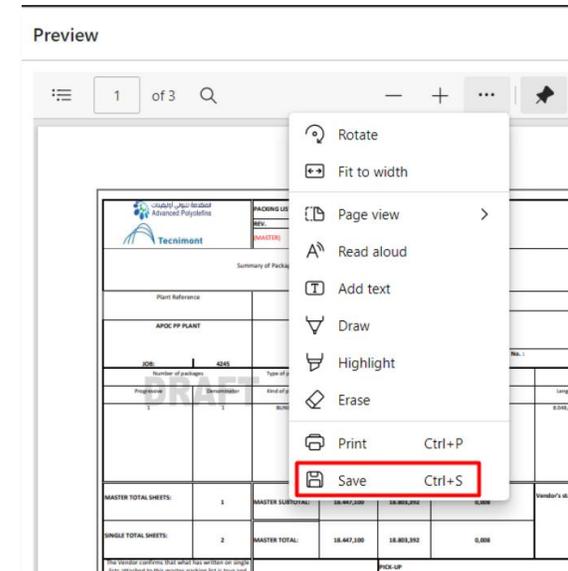
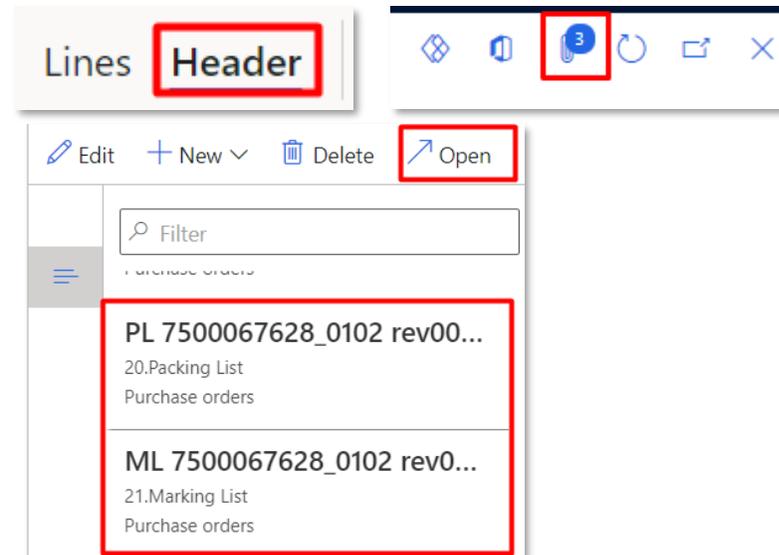
00.DRAFT

05.REWORK

10.ISSUED



Packing list printout documents will be generate soon. You will be notified when they are available as attachment of the packing list 7500066747-0005.

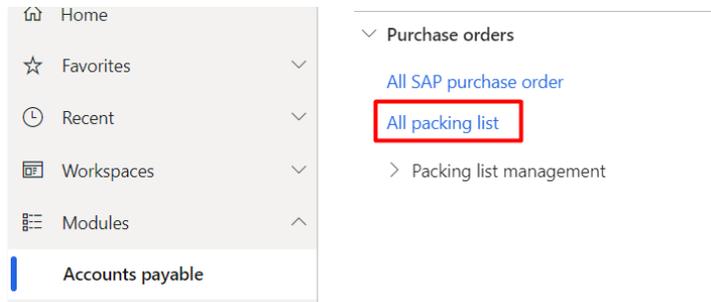


# On DAP/DDP: add Vendor Estimated Arrival date to site

Process Phase	#	Macro Task	Activity
<b>ADD SITE DATES</b>	06	Manage dates for DAP/DDP	• Adds Vendor Estimated Arrival to site date

## 1. ACCESS ALL PACKING LIST AREA

a) Select ACCOUNTS PAYABLE from the Menu



b) Select ALL PACKING LIST to see the PL list

Standard view ▾

Filter

	Packing list	Preliminary	Vendor account	Invoice account	Vendor name
	7500066747-0005		0000055115	0000055115	MOSTOSTAL KRAKÓW S.A.
	7500066747-0006		0000055115	0000055115	MOSTOSTAL KRAKÓW S.A.

## 2. ADD THE VENDOR ESTIMATED ARRIVAL DATE TO SITE

a) Click on the PL code to access details, choose Header and Edit



b) Add the Vendor Estimated Arrival in the PL Dates section

c) SAVE



All packing list | Standard view ▾

7500066747-0005 : 0000055115 - MOSTOSTAL KRAKÓW S.A. Lines Header Open order

Routing Method

Delivery places and pick-up locations

PL dates

<b>VENDOR EXW</b>	<b>INSPEX DATE</b>	<b>LOGIS &amp; ICA DATES</b>	<b>SITE DATES</b>	Forwarder Estimated Arrival
Actual EXW Delivery	Accepted date	Actual Departure	ETA Site (calculated)	
Expected EXW Delivery	Last rework	Custom clearance	Site Arrival	<b>Vendor Estimated Arrival</b>
9/1/2021				
		ICA		

# ERRORS HANDLING 1/2

ID	Field	Mandatory	Rules applied
1	Mark	Yes	Mark must be present in current MBL before PL creation. The Mark must be valid for the related PO&MWP of the PL
2	No.	Yes	Accepted format: numeric; No. must be equal to or greater than Package quantity; Identify the # of the Mark inside the Packing list
3	Stock/Mill	Yes	Accepted format: Stock/Mill
4	Country of Origin	Yes	Use ISO Code 3 chars
5	HS Code	Yes	Must be applied on all the lines
6	Punch list	Yes	Accepted format: Yes/No
7	Punch list id		If punch list is set to yes field Punch list id must be filled in
8	Progressive	Yes	Accepted format: numeric
9	Gross, Length, Width, Height	Yes	GrossWeight must be greater than 0 Length must be greater than 0 Width must be greater than 0 Height must be greater than 0
10	Kind of Package	Yes	Accepted format: BOX BUNDLE CASE CRATE DRUM LOOSE PALLET REEL SADDLE SKID
11	On deck shipped permitted	Yes	Accepted format: Yes/No
12	Stackable	Yes	Accepted format: Yes/No
13	Storage Symbol	Yes	Accepted format: A: outdoors B: outdoors sheltered C: indoors D: indoors heated area E: indoors air conditioned area
14	Vacuum Sealed	Yes	Accepted format: Yes/No
15	Package quantity	Yes	Package quantity must be greater than 0

# ERRORS HANDLING 2/2

ID	Content	Rules applied
1	Total Package quantity sum	Sum of the value inserted on the "Package quantity" column, specified for each Mark must be equal to Packing list line No inserted into the column "No."
2	PL lines values	For each lines that contains the same combination of Mark and Stock/Mill attribute, the fields No., Country of origin, HS code, Manufacturer, MTC ID, HEAT No., NC ID, OSD, Punch list, Punch list id, Duty Exemption/CR ID and Duty Exemption/CR Description must be the same
3	Package header values " <b>@inconsistent package header data" Alert can appear in "Validation data" phase</b>	For each lines that contains the same Progressive ID the fields Vendor package Id, Gross weight, Length, Width, Height, Min temperature, Max temperature, Kind of package, On deck shipment permitted, Stackable, Storage symbol must be the same
4	Package management: Gross Weight & Net Weight	<ul style="list-style-type: none"> <li>Gross Weight must be greater than Net Weight or equal</li> <li>In case of "LOOSE" Package the Gross Weight must be only equal</li> </ul>
5	Document/certificates are missing	In case of DRAFT Packing list this error is no blocking
6	Volume value missing	Please check all the values related to the 3 dimensions filled in, to be sure that the total cubic meter is at least 0.01 accordingly to the UoM accepted.
7	Same Marks with different Stock/Mill attribute	All other attributes can be different for each Marks – see point 2

04

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# REPORTING

# 01.ACCESS to REPORTS

## 1.ACCESS INQUIRIES AND REPORTS

Click on the Main Menu on “Account payable” and then click on Inquiries and reports - Reports - Vendor Reports



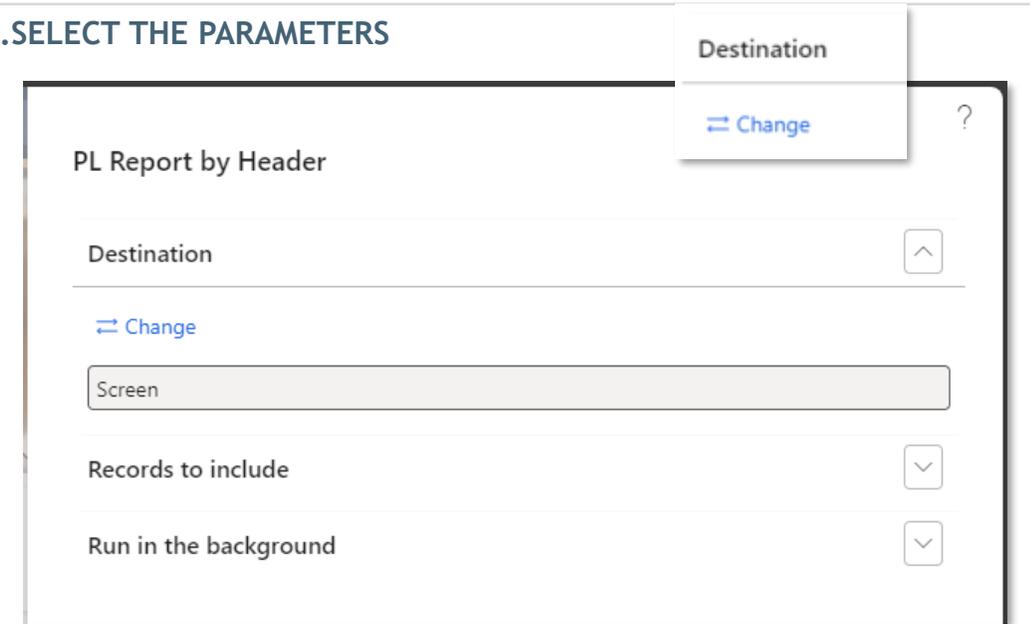
The screenshot shows the SAP navigation menu. The 'Accounts payable' module is selected. Under 'Inquiries and reports', the 'Vendor Report' sub-menu is expanded, showing the following options: MBL Report Mark, PL Report Extended, and Drum List report - Drums. A callout box highlights these three options.

## 2.SELECT THE REPORT OF INTEREST

Select from the list the reports of interest. Below the reports available in D365:

- MBL Report Mark
- PL Report Extended

## 3.SELECT THE PARAMETERS



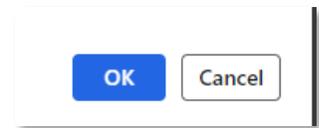
The screenshot shows the 'PL Report by Header' dialog box. The 'Destination' dropdown menu is open, showing 'Screen' as the selected option. The 'Records to include' dropdown is set to a downward arrow, and the 'Run in the background' dropdown is also set to a downward arrow. A 'Change' button is visible next to the 'Destination' dropdown.

**Destination:** choose the format using the command “change”

**Records to include:** apply the filters

**Run in background:** to run the report in the meantime that another page is open

After the selection click “ok” in order to run the processing of the report



The screenshot shows two buttons: 'OK' (blue) and 'Cancel' (white with blue border).

## 02.Set query & download - destination

Destination

• ALL

Change

1. Click on “Change” in order to choose the final format of the download.  
If selected “Screen” the file will be displayed with a button to Download it.

The image shows two panels. The left panel, titled 'Destination', has a 'Change' button. The right panel, titled 'Print destination settings', has a 'Standard view' dropdown and a list of options: 'Print archive', 'Screen', 'Printer', 'File', and 'Email'. The 'Screen' option is currently selected. To the right of the list is a 'Save in print archive?' toggle switch, which is currently turned off.

If selected «file» it’s possible to choose the final format, for example «Excel»  
In this case it’s mandatory to apply a name to the file

2. Click on «ok» to start the processing

The image shows two buttons: a blue 'OK' button and a white 'Cancel' button with a grey border.

Standard view ▾

### Print destination settings

The image shows the 'Print destination settings' panel. The 'File' option is selected and highlighted with a red box. A red arrow points from the 'File' option to the 'File format' dropdown menu. The dropdown menu is open, showing options: 'HTML4.0', 'CSV', 'Microsoft Excel', 'HTML4.0', 'Image', 'MHTML', 'PDF', 'XML', and 'Word'. The 'HTML4.0' option is currently selected in the dropdown. To the right of the dropdown is a 'Name' input field. Above the dropdown is a 'Save in print archive?' toggle switch, which is currently turned off.

# 02.Set query & download - Records to include

Records to include

## APPLY PARAMETERS

1. Click on “Filter” to open the list of parameters to be value

2.Select “Query used”

3. Insert the criteria: type or click on the “+” icon to view the available options

**NB: If you type in the criteria, be sure to enter the exact one: the system will look for that exact value**

4. Flag “Replace the criteria value on lookup” to replace the value inserted in the criteria column with the one in the drop down list

## 2. ADD NEW FIELDS

1. In order to add new field, click on “Add”

2. Select the table and the field of interest

3. Insert the related criteria

**+ Add** **Remove**

Table	Derived table	Field	Criteria
Purchase orders	Purchase orders		
AVAPoReportLatestVer...	AVAPoReportLatestVersion		
Purchase order versions	Purchase order versions	Accounting date	
Purchase order confir...	Purchase order confirmations	Accounting date	
Purchase orders	Purchase orders	Activate change man...	
Purchase orders	Purchase orders	Agreement header re...	
Purchase orders	Purchase orders	Approval status	
Purchase orders	Purchase orders	Attention information	

## Records to include

**Filter**

Select query  
Query used **Modify...**

Range   Sorting   Joins

**+ Add** **Remove**

Table	Derived table	Field	Criteria
AVAPoReportLatestVer...	AVAPoReportLatestVersion	Record-ID	
Purchase order versions	Purchase order versions	Purchase order	
Purchase order confir...	Purchase order confirmations	Vendor account	
Purchase orders	Purchase orders	Project ID	
Purchase orders	Purchase orders	Related project	
Purchase orders	Purchase orders	Cluster Id	
Purchase orders	Purchase orders	Incoterms	<b>+</b>
Purchase orders	Purchase orders	Accounting date	Delivery te... ↑ Description
Purchase order lines	Purchase order lines	Purchase order	CFR   Costs and freight
			CIF   Cost, insurance & freight
			CIP   Carriage and insurance paid to
			CPT   Carriage paid to
			DAF   Delivered at frontier
			DAP   Delivered At Place

Replace the criteria value on lookup

# 03.Modify Or DELETE A QUERY

## 1. MODIFY A QUERY

- 1.Select the query to modify
2. Insert the criteria or “Add” and select the table and the field of interest
3. Select “Save”
4. Click on OK

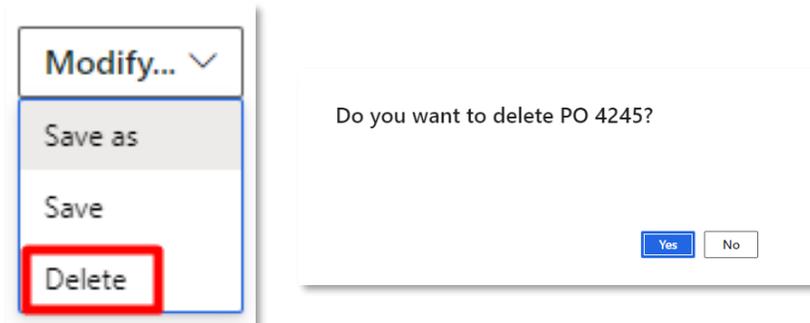


+ Add Remove

<input type="radio"/>		Table	Derived table	Field	Criteria
<input type="radio"/>		MBL	MBL	MWP No	
		Purchase orders	Purchase orders	Project ID	
		Purchase orders	Purchase orders	Related project	
		Purchase orders	Purchase orders	Vendor account	
		Purchase orders	Purchase orders	Purchase order	

## 2. DELETE A QUERY

- 1.Select the query to delete
2. Select “Delete”
3. Confirm by clicking on “Yes”



## EXAMPLE OF MAIN FILTERS OF INTEREST

Input the value into the field “Criteria”.  
i.e: MBL

<input type="radio"/>		Table	Derived table	Field	Criteria
<input checked="" type="radio"/>		MBL	MBL	MWP No	
		Purchase orders	Purchase orders	Project ID	MWP No
		Purchase orders	Purchase orders	Related project	1199.B.11.0

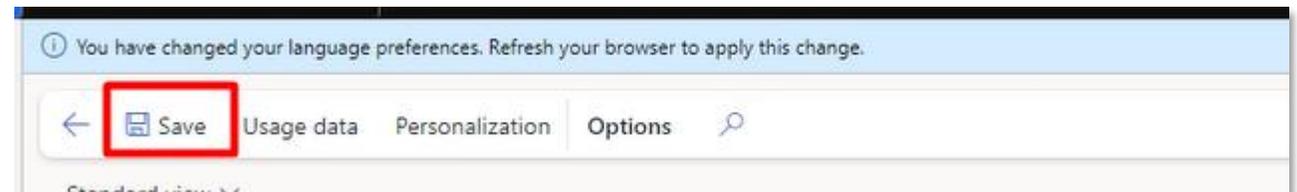
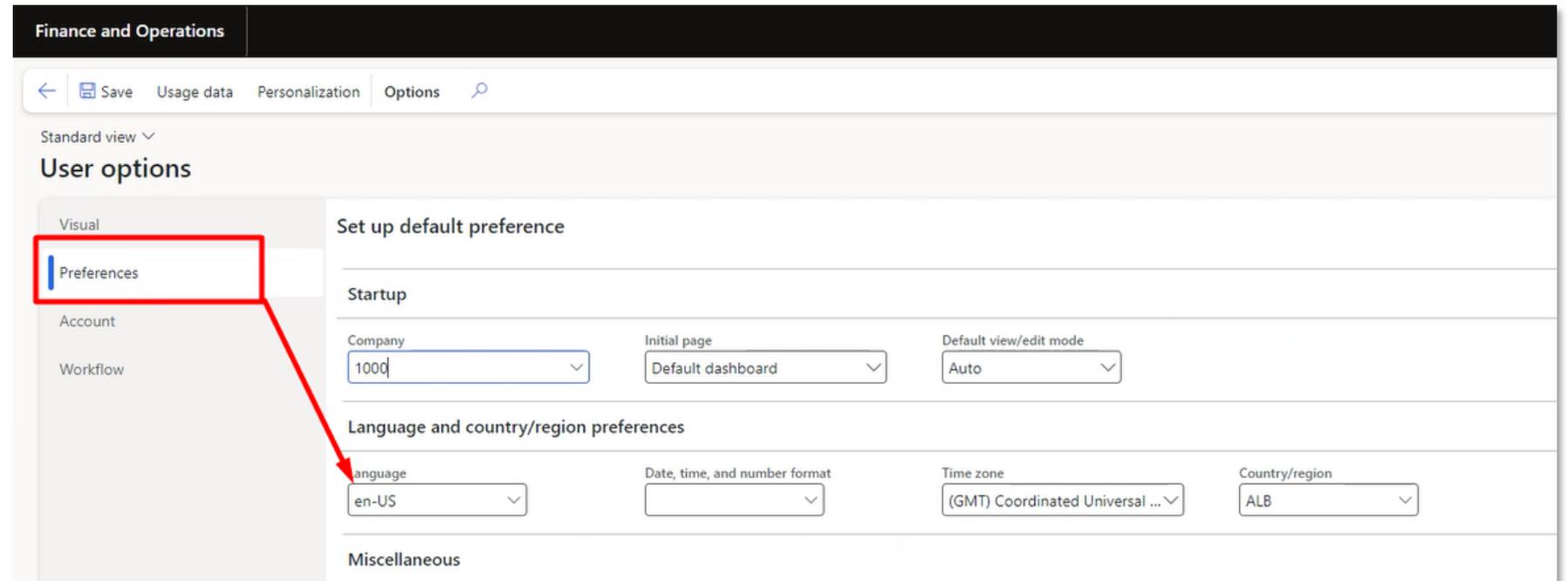
05

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# APPENDIX 1

# Change language – PLEASE NOTE TO USE «EN-US»

1. From the Dashboard after the access click on the Setting icon
2. Click on “User options”
3. Go on Preferences
4. Edit the Language field apply: en-US
5. Save

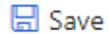
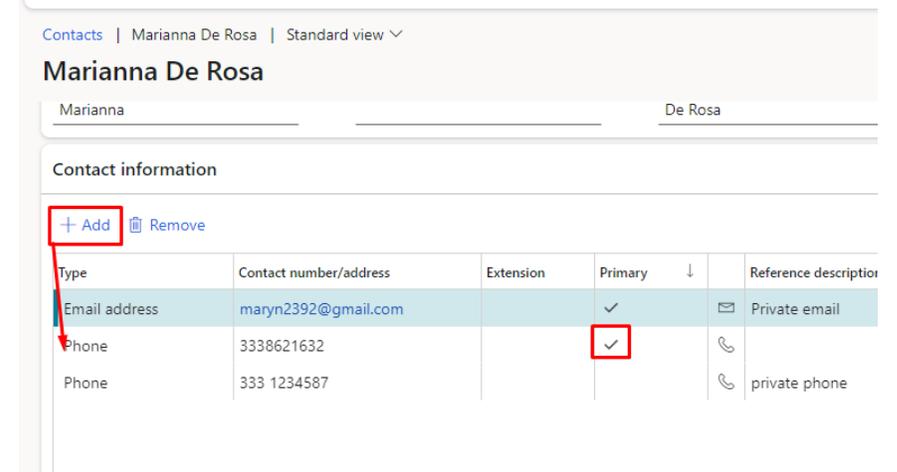


# CONTACT DETAILS MANAGEMENT: CHANGE THE PHONE NUMBER 1/4

## CHANGE THE PHONE NUMBER TO BE UPDATED ON THE PL PRINTOUT

If a phone number is already inserted but it's wrong, it's necessary to add a new row, input the new phone number and marked as "primary"

1. Go in "Vendor information"
2. Choose by the SAP Code your Vendor
3. Access "All Users"
4. Select the User you need to modify
5. Go in the contact information section
6. Add a row related to a phone number
7. Flag as primary
8. Save

A button with a floppy disk icon and the text "Save".A screenshot of a software interface showing contact information for "Marianna De Rosa". The interface includes a header with the name and a "Standard view" dropdown. Below the header is a "Contact information" section with a table. The table has columns for "Type", "Contact number/address", "Extension", "Primary", and "Reference description". There are two rows: "Email address" with value "maryn2392@gmail.com" and "Phone" with value "333 1234587". A red box highlights the "+ Add" button and the "Primary" checkbox for the phone row. A red arrow points from the "+ Add" button to the "Phone" row.

Type	Contact number/address	Extension	Primary	Reference description
Email address	maryn2392@gmail.com		✓	Private email
Phone	3338621632		✓	
Phone	333 1234587			private phone

## CHANGE THE PHONE NUMBER USEFUL TO MAKE THE AUTHENTICATION IN THE ACCESS PHASE

This change must be managed from the Microsoft account page. Please check the case, before start your activities.

### 2 CASES:

#### 1. NO ACCESS TO PERSONAL MICROSOFT ACCOUNT

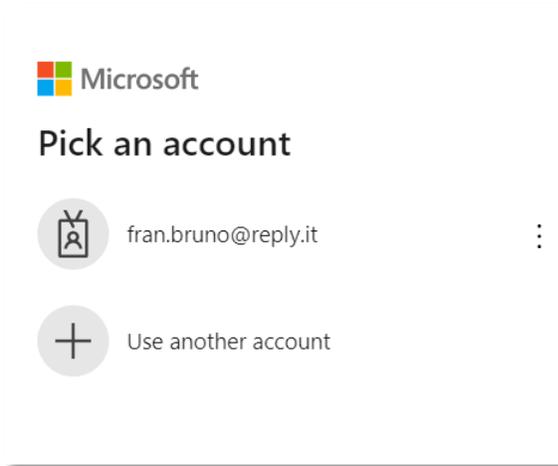
In this case the Maire User have to open a ticket in SN! Asking for this modification.

*Need Help – Applications – DYNAMICS: Category: D365 E2E Material Management + Subcategory: 60.01 Vendor support*

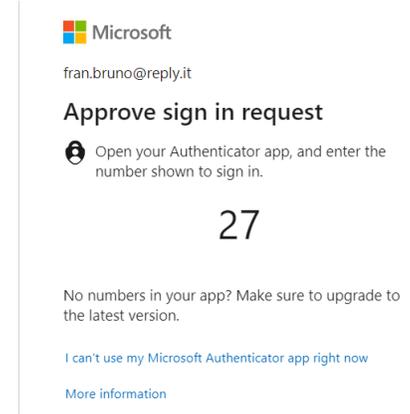
# CONTACT DETAILS MANAGEMENT: CHANGE THE PHONE NUMBER 2/4

## 2. ACCESS TO PERSONAL MICROSOFT ACCOUNT AND APPLY THE CHANGE FROM THE AUTHENTICATION SETTINGS

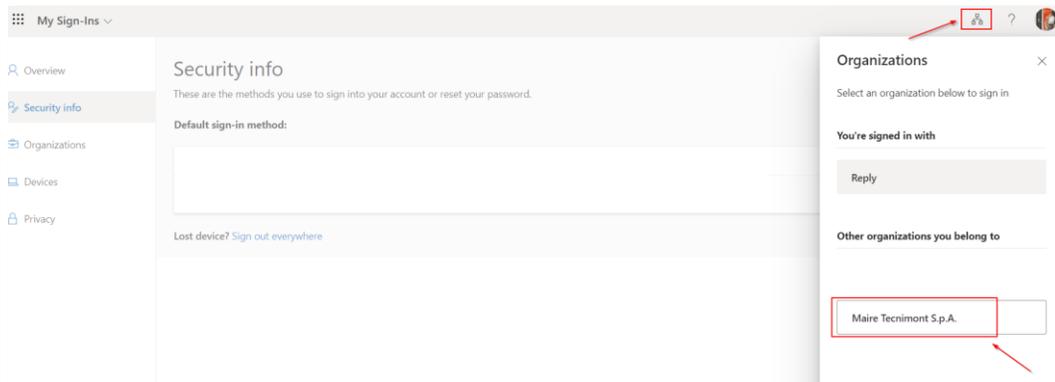
- 1.Go to: <https://mysignins.microsoft.com/security-info>
- 2.Log-in with credentials of own organization



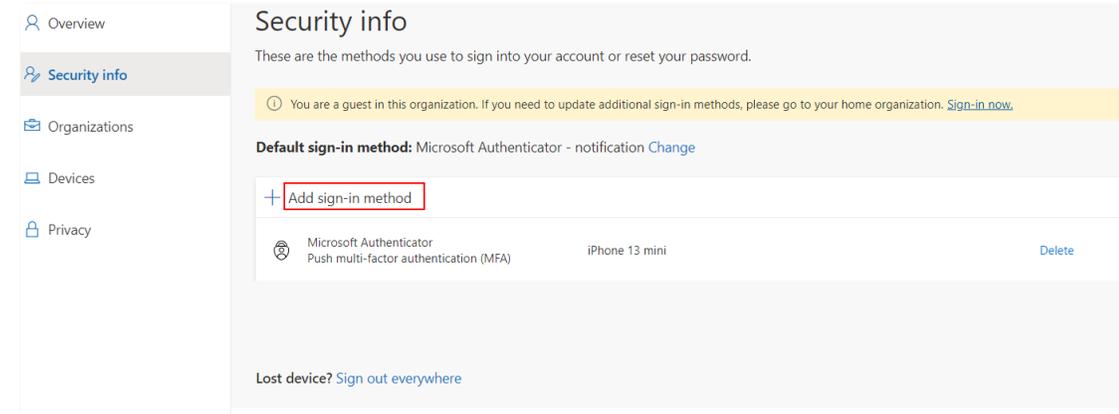
## 4. Confirm authentication method in order to switch to Maire Tecnimont



## 3. Change organization switching to Maire Tecnimont S.p.A., top on the right

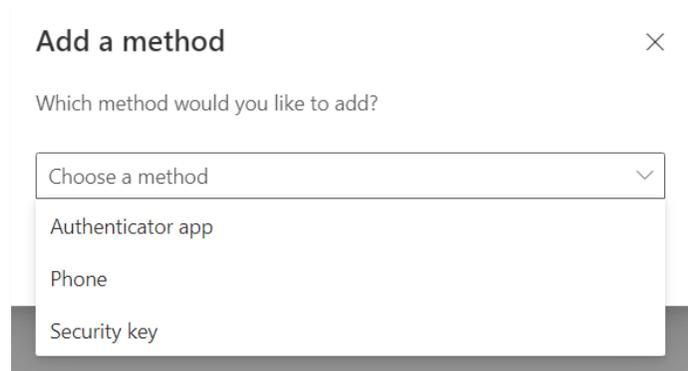


## 5. If it's required to add a new method, click on Add sign-in method



# CONTACT DETAILS MANAGEMENT: CHANGE THE PHONE NUMBER 3/4

6. Choose the new wanted method (e.g. phone number).



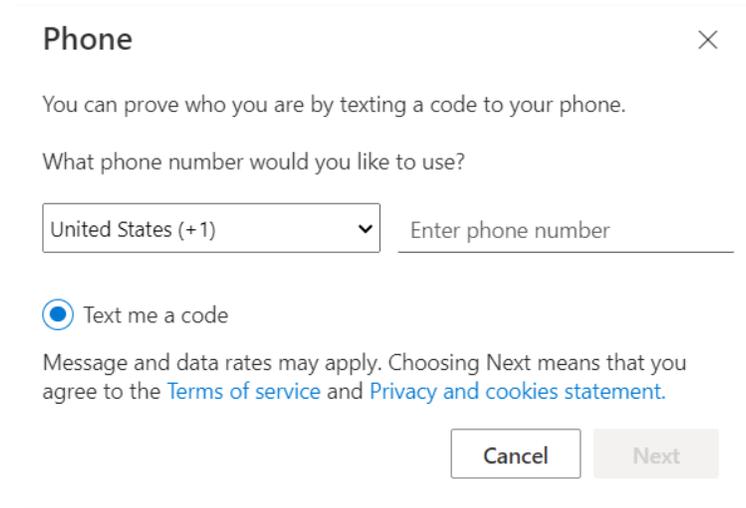
**Add a method** ×

Which method would you like to add?

Choose a method ▾

- Authenticator app
- Phone**
- Security key

7. Insert the phone number



**Phone** ×

You can prove who you are by texting a code to your phone.

What phone number would you like to use?

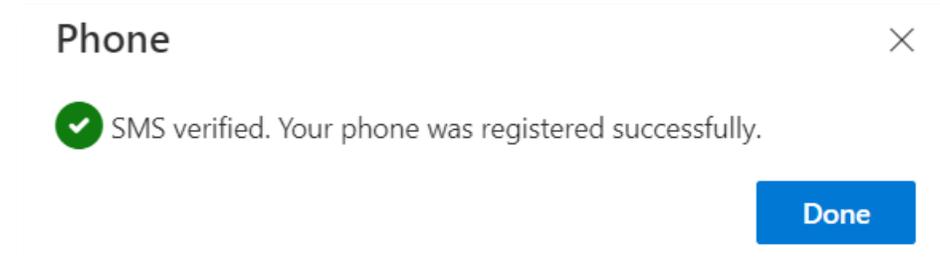
United States (+1) ▾ Enter phone number

Text me a code

Message and data rates may apply. Choosing Next means that you agree to the [Terms of service](#) and [Privacy and cookies statement](#).

Cancel Next

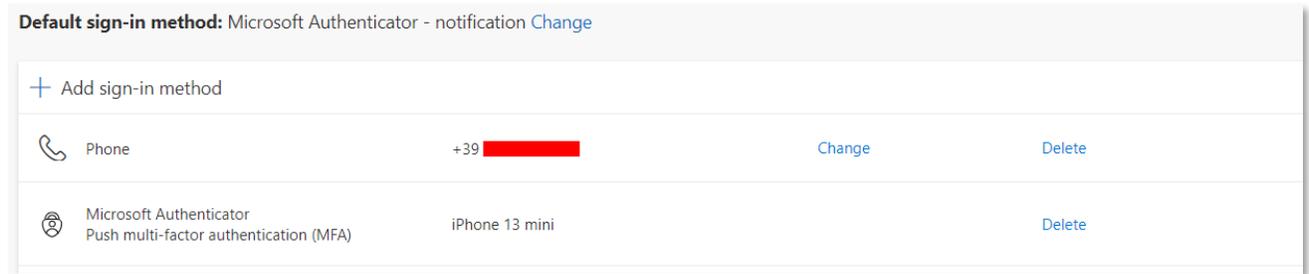
8. It will be sent a confirmation code to the number set up before. Insert code in the system. A new method has been added.



**Phone** ×

✓ SMS verified. Your phone was registered successfully.

Done

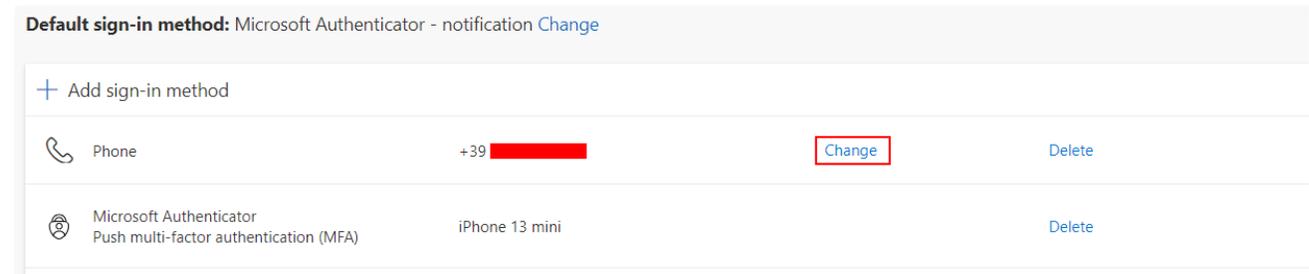


**Default sign-in method:** Microsoft Authenticator - notification [Change](#)

+ Add sign-in method

Phone	+39 [REDACTED]	<a href="#">Change</a>	<a href="#">Delete</a>
Microsoft Authenticator Push multi-factor authentication (MFA)	iPhone 13 mini		<a href="#">Delete</a>

9. If it's necessary to change the phone number, it's required to click on Change. Then insert new number and repeat the number confirmation process, as done at point 8.



**Default sign-in method:** Microsoft Authenticator - notification [Change](#)

+ Add sign-in method

Phone	+39 [REDACTED]	<a href="#">Change</a>	<a href="#">Delete</a>
Microsoft Authenticator Push multi-factor authentication (MFA)	iPhone 13 mini		<a href="#">Delete</a>

# CONTACT DETAILS MANAGEMENT: CHANGE THE PHONE NUMBER 4/4

10. If it's required to set up as default one of the possible authentication method, it's necessary to click on Default sign-in method: Change  
Then choose the wanted authentication method.

Default sign-in method: Microsoft Authenticator - notification [Change](#)

+ Add sign-in method

Phone	+39 [REDACTED]	<a href="#">Change</a>	<a href="#">Delete</a>
Microsoft Authenticator Push multi-factor authentication (MFA)	iPhone 13 mini		<a href="#">Delete</a>

## Change default method



Which method would you like to use to sign in?

App based authentication - notification

Phone - text +39 [REDACTED]

App based authentication - notification

App based authentication or hardware token - code

Z

---

# Task recorder

# Task Recorder

You will have available the in tool record of the process, that will provide an online step by step instructional guide



User access to Microsoft Dynamics



User plays record to be guided during the process



The system guides the user helping him/her following the pre-defined process



Help user familiarizing with the system

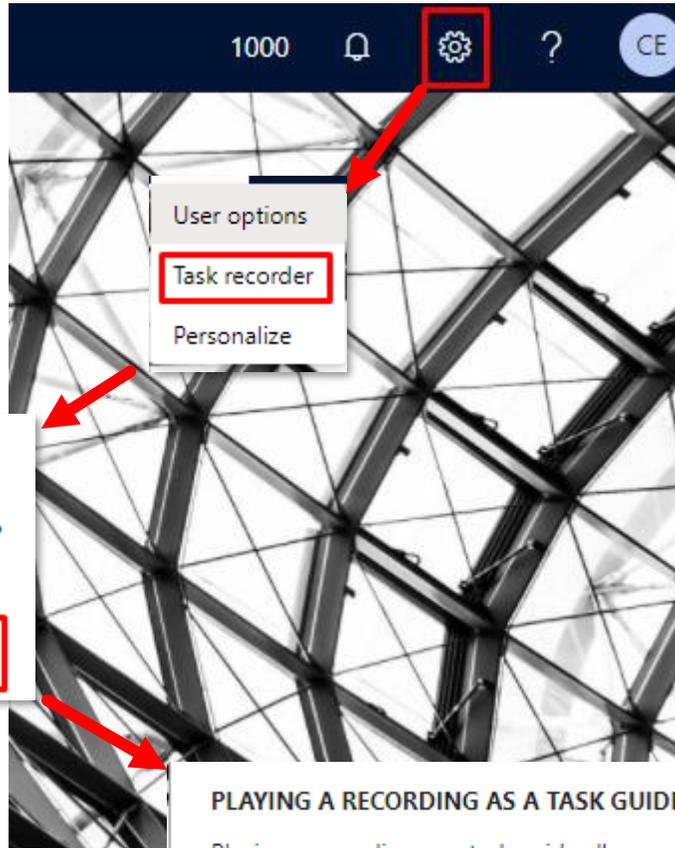


Reduce risk of adoption issues

# START THE RECORDER

In the dashboard select the settings icon on the right corner

## ACCESS



### Task recorder

WHAT WOULD YOU LIKE TO DO?

+ Create recording

▶ Play recording as guide

### PLAYING A RECORDING AS A TASK GUIDE

Playing a recording as a task guide allows you to validate that a recording plays as expected in Task guide mode.

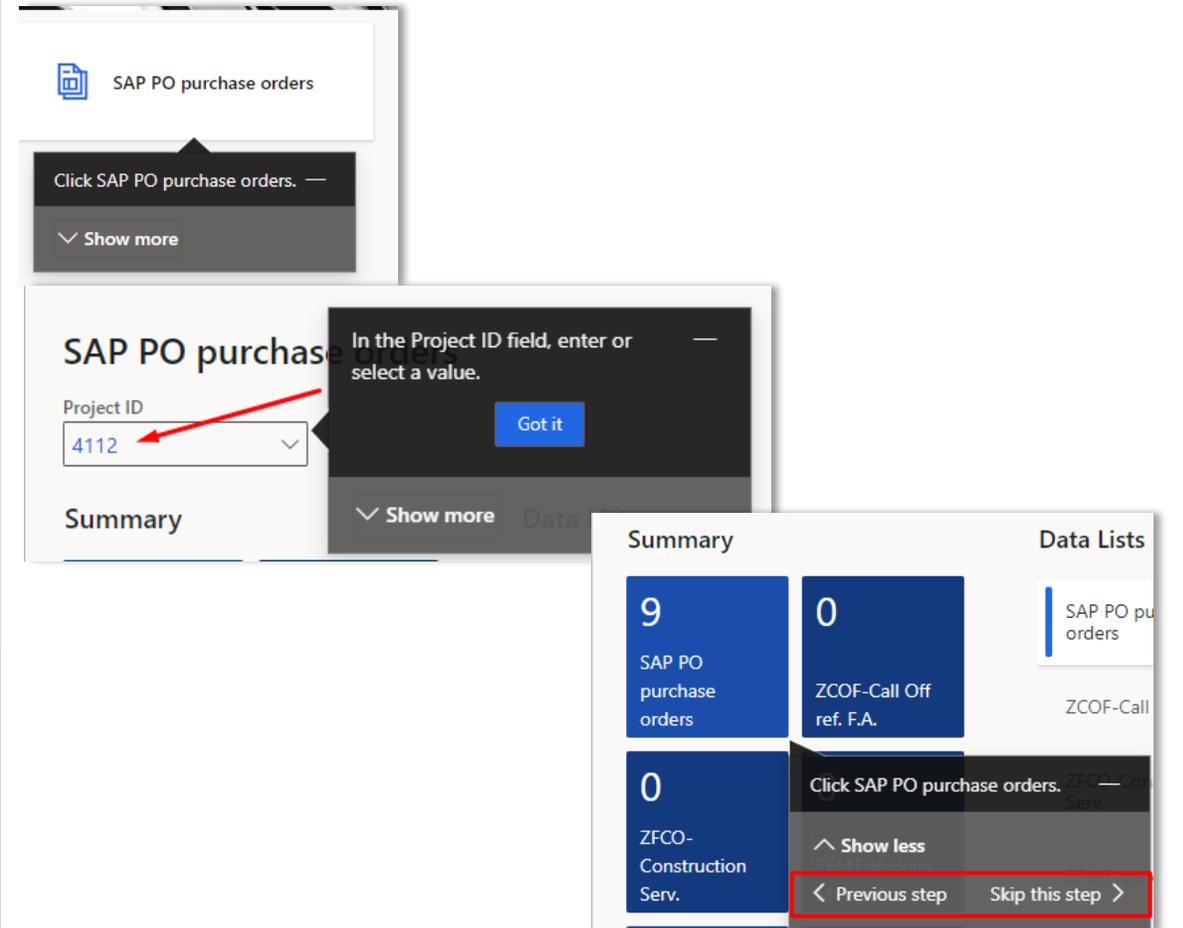
↑ Open from this PC

☁ Open from Lifecycle Services

## STEP BY STEP LIVE INSTRUCTIONS

Pop up into the screen will show the step to made. Any step can be skipped or be replied if necessary.

Until the step has not been done correctly, the next won't be shown.





**MAIRE**

# Appendix

## STATUS CHANGED in 05.REWORK

Sample for Action center notification on the platform  
Sample of email notification

Da: **D365\_MET\_SVC\_QUA** <[D365.met.svc.qua@mairetecnimont.it](mailto:D365.met.svc.qua@mairetecnimont.it)>  
Date: mer 10 nov 2021, 16:27  
Subject: Automatic message TEST - Packing list status change in Dynamics 365 SCM  
To: Marianna De Rosa <[maryn2392@gmail.com](mailto:maryn2392@gmail.com)>

Hello,

The Packing list status for 7500067719-0008 has been changed to 05.REWORK.

Additional note: Please add the MARK 4120ABC0043 |D.

Kind regards.

### Action center

1 total

[See all](#)

#### ⓘ Order status changed ×

15 hours ago

The packing list 7500067719-0008 has been changed from order status 10.ISSUED to order status 05.REWORK

#### STATUS

Active

[Go to the Packing list](#)



## PACKING LIST REWORK MOTIVATION LIST

Cccccldchtjklrthhfrelfjvgggdlnkdldtfdengntr

### Packing list status update

#### Parameters

Next packing list status

05.REWORK

Note

Rework motivation

Rework motivation	Description
1. Missing Material	Material / brand expected in ins...
2. Wrong Material	Material / brand inserted in PL i...
3. Wrong Quantity	Quantity in PL different from th...
4. Wrong Size	One of the 3 dimensions or all a...
5. Wrong Weights	Wrong weights, it should happe...
6. Wrong Description	It happens above all in the trans...
7. Wrong HS Code	Import HS code entered by the ...
8. Add Documents	Add additional non-mandatory ...
9. Other	Various and possible

# End to end vendor engagement workflow

PRELIMINARY

