



BEYOND

COLLECTIVESHIPMENTS

User Guide



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About BEYOND CollectiveShipments

About this Extension

BEYOND CollectiveShipments is an extension for Microsoft Dynamics 365 Business Central.

It was developed by:

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Beyond CollectiveShipments is an extension of our template-based report designer (Beyond Reports) with live preview and HTML text capabilities that allows you to create and print collective shipments. You can use the created documents to organize your shipments from sales and service, group them and prepare them for your shipping agents.

The latest version of this documentation can be found under the following link: [BEYOND CollectiveShipments Documentation](#).

NOTE

Dependencies from or to other apps

Additional, basic applications are required to use BEYOND CollectiveShipments. The following applications are required to use BEYOND CollectiveShipments:

- [BEYOND Reports](#): A solution with a template-based designer that can be used to create company-specific report templates.

Version	Date	Author	Comments
1.0	09.01.2023	Jannic Weidel	Initial Version of the Documentation

File Access

public

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Setup Beyond CollectiveShipments

This chapter describes how to set up Beyond CollectiveShipments.

Note that you are assigned the appropriate permission set to set up Beyond CollectiveShipments. For more information on how the permission set is assigned, please refer to the chapter [Assign Permission Set](#).

To set up Beyond CollectiveShipments, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Collective Shipment Setup** and click on the corresponding search result.
3. The **Collective Shipment Setup** page is displayed.

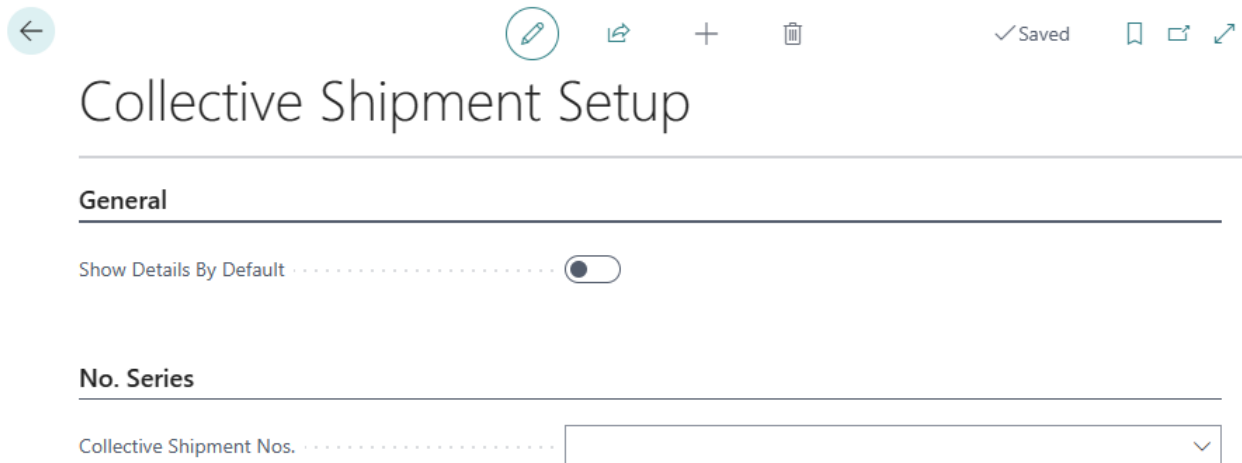


Figure: Setup Beyond CollectiveShipments

4. Activate the **Show Details By Default** slider if you want to display additional details such as the type of shipment line, the quantity and the sales price. You can also show or hide this information later using a button.
5. Click in the **Collective Shipment Nos.** field and open the drop-down menu.
6. Click on **New** in the drop-down menu for the **Collection Shipment Nos.** field to create a new number series.
7. Define a number series for collective shipments. For more information on number series, see the chapter [Create Number Series](#).

You have set up Beyond CollectiveShipments.

[Continue with the next chapter](#)

Setup Collective Shipment Report

This chapter describes how to set up the report for Collective Shipments. As **Beyond CollectiveShipments** is based on **Beyond Reports**, the setup is carried out via the **Beyond Reports Setup** page. Please note that you must have the appropriate permissions to be able to make changes on the **Beyond Reports Setup** page. Further information on the permission sets of **Beyond Reports** can be found in the chapter [Set Up Users](#).

Proceed as follows to import the report for Collective Shipments:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Beyond Reports Setup** and click on the corresponding search result.
3. The **Beyond Reports Setup** page is displayed.

The screenshot shows the 'Beyond Report Setup' page. At the top, there is a navigation bar with a back arrow, the title 'Beyond Report Setup', a 'Saved' status, and icons for bookmark, share, and refresh. Below this is a toolbar with buttons for 'Search', 'Analyze', 'Edit List', 'Edit', 'View', 'Run Report', 'Report Placeholders', and a dropdown menu. The main area contains a table with columns for 'Report Area', 'Caption', and 'Active as Default'. A context menu is open over the first row, showing options: 'Copy Report Setup to...', 'Reports Setup Wizard', 'Setup Report Selections', and 'More options'.

Report Area ↑	Caption	Active as Default
→ Purchase	Purchase - Quote	<input checked="" type="checkbox"/>
Purchase	Purchase - Order	<input checked="" type="checkbox"/>
Purchase	Purchase - Blanket Order	<input checked="" type="checkbox"/>
Purchase	Purchase - Return Order	<input checked="" type="checkbox"/>
Purchase	Purchase - Receipt	<input checked="" type="checkbox"/>
Purchase	Purchase - Invoice	<input checked="" type="checkbox"/>
Purchase	Purchase - Credit Memo	<input checked="" type="checkbox"/>
Purchase	Purchase - Return Shipment	<input checked="" type="checkbox"/>
Sales	Sales - Quote	<input checked="" type="checkbox"/>
Sales	Sales - Order	<input checked="" type="checkbox"/>
Sales	Sales - Shipment	<input checked="" type="checkbox"/>
Sales	Sales - Invoice	<input checked="" type="checkbox"/>
Sales	Sales - Credit Memo	<input checked="" type="checkbox"/>
Sales	Sales - Blanket Order	<input checked="" type="checkbox"/>
Sales	Sales - Return Order	<input checked="" type="checkbox"/>
Sales	Sales - Return Receipt	<input checked="" type="checkbox"/>
Sales	Sales - Pro Forma Invoice	<input checked="" type="checkbox"/>
Service	Service - Quote	<input checked="" type="checkbox"/>
Service	Service - Order	<input checked="" type="checkbox"/>
Service	Service - Item Worksheet	<input checked="" type="checkbox"/>
Service	Service - Shipment	<input checked="" type="checkbox"/>
Service	Service - Invoice	<input checked="" type="checkbox"/>
Service	Service - Credit Memo	<input checked="" type="checkbox"/>
Service	Service - Warranty Claim	<input checked="" type="checkbox"/>
Reminder	Issued Reminder	<input checked="" type="checkbox"/>
Reminder	Reminder	<input checked="" type="checkbox"/>
Collective Shipment	Collective Shipment	<input type="checkbox"/>

Figure: Beyond Reports Setup

4. Select one of the report templates already set up.
5. Select the option **Copy Report Setup to...** from the menu bar.
6. The **Beyond Reports Setup** window is displayed.
7. Select the **Collective Shipment** line in the window.

Report Area ↑	Caption	Active as Default
Purchase	Purchase - Blanket Order	<input type="checkbox"/>
Purchase	Purchase - Return Order	<input checked="" type="checkbox"/>
Purchase	Purchase - Receipt	<input checked="" type="checkbox"/>
Purchase	Purchase - Invoice	<input checked="" type="checkbox"/>
Purchase	Purchase - Credit Memo	<input checked="" type="checkbox"/>
Purchase	Purchase - Return Shipment	<input checked="" type="checkbox"/>
Sales	Sales - Quote	<input checked="" type="checkbox"/>
Sales	Sales - Order	<input checked="" type="checkbox"/>
Sales	Sales - Shipment	<input checked="" type="checkbox"/>
Sales	Sales - Invoice	<input checked="" type="checkbox"/>
Sales	Sales - Credit Memo	<input checked="" type="checkbox"/>
Sales	Sales - Blanket Order	<input checked="" type="checkbox"/>
Sales	Sales - Return Order	<input checked="" type="checkbox"/>
Sales	Sales - Return Receipt	<input checked="" type="checkbox"/>
Sales	Sales - Pro Forma Invoice	<input checked="" type="checkbox"/>
Service	Service - Quote	<input checked="" type="checkbox"/>
Service	Service - Order	<input checked="" type="checkbox"/>
Service	Service - Item Worksheet	<input checked="" type="checkbox"/>
Service	Service - Shipment	<input checked="" type="checkbox"/>
Service	Service - Invoice	<input checked="" type="checkbox"/>
Service	Service - Credit Memo	<input checked="" type="checkbox"/>
Service	Service - Warranty Claim	<input checked="" type="checkbox"/>
Reminder	Issued Reminder	<input checked="" type="checkbox"/>
Reminder	Reminder	<input checked="" type="checkbox"/>
→ Collective Shipment	Collective Shipment	<input type="checkbox"/>

OK Cancel

Figure: Copy Report Setup for Collective Shipments

- To copy the setup (logos and fields to be printed) into the collective shipment report template, click **OK**.
- The setup is adopted from the selected template and the **Active as Default** checkbox is activated. The checkbox indicates that this report setup is actively used as a template for collective shipments.

If you want to make further or individual changes to the report template for collective shipments, you can open the corresponding report template card. To open the report template card for collective shipments, select the **Collective Shipment** line from the list and click **Edit** in the menu bar. Further information on configuring the report template can be found in the **Beyond Reports** documentation under the chapter [Configure Reports](#).

Assign Permission Set

The following description shows how to assign user permissions for the **BEYOND CollectiveShipments** extension. The permission sets provided are:

Permission Set	Description
BYD CS Reader	This permission set enables the reading of data from the extension BeyondCollectiveShipments .
BYD CS User	This permission set enables the use of the BeyondCollectiveShipments extension at user level. In this permission set, the setup is excluded, i.e. the user has access to the functions, but not to the setup of the app.
BYD CS Admin	This permission set gives the assigned user administrative access to the BeyondCollectiveShipments extension and the associated setup.

To assign the permission set for **BEYOND CollectiveShipments** to a user, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Permission Sets** and click on the appropriate search result.
3. The **Permission Sets** page is displayed.
4. Select one of the above permission sets from the list.
5. Click **Related > Permissions > Permission Set by User** in the menu bar.

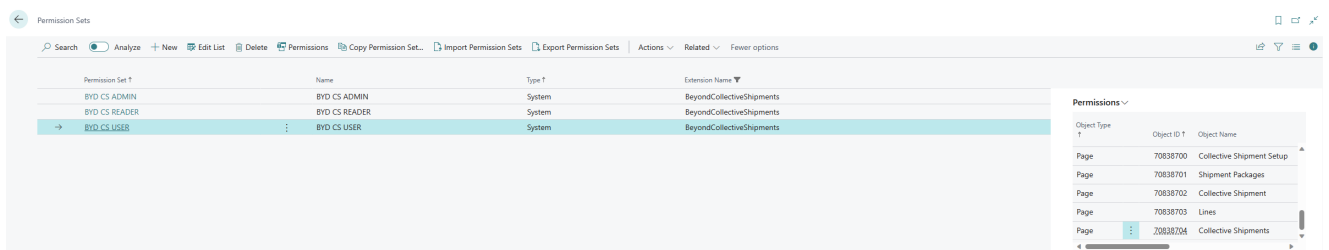


Figure: Permission Sets for BEYOND CollectiveShipments

6. The **Permission Set by User** page is displayed.
7. Show the filter area (**SHIFT+F3**) and pick **Extension Name** and the value **BeyondCollectiveShipments** as filter criteria.
8. The list is filtered to the permission sets of **BeyondCollectiveShipments**.
9. Select the check box on the right side of the page for the user or users to whom you want to assign the permission set.

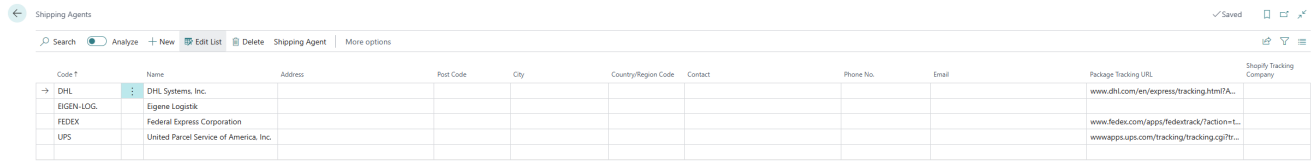
You have assigned a permission set for **BEYOND CollectiveShipments** to a user. Note that users with the **SUPER** permission set have all rights, i.e. you do not need to give this user any additional rights.

Create Shipping Agent

This section describes how to create a Shipping Agent that you can use for **Beyond CollectiveShipments**.

To create a shipping agent, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Shipping Agents** and click on the corresponding search result.
3. The **Shipping Agents** page is displayed.



Code T	Name	Address	Post Code	City	Country/Region Code	Contact	Phone No.	Email	Package Tracking URL	Shopify Tracking Company
DHL	DHL Systems, Inc.								www.dhl.com/en/express/tracking.html?A...	
EGEN-LOG	Egense Logistik									
FEDEX	Federal Express Corporation								www.fedex.com/apps/fedextrack/?action=L...	
LPS	United Parcel Service of America, Inc.								wwwapps.ups.com/tracking/tracking.cgi?r...	

Figure: Create Shipping Agent

4. To create a new shipping agent, click on **New** in the menu bar.
5. Enter a code for the shipping agent in the new line under the **Code** column.
6. Enter the name of the shipping agent under the **Name** column.
7. Enter the address of the deliverer under the **Address** column.
8. Enter the zip code of the deliverer under the **Post Code** column.
9. Under the **City** column, enter the shipping agent's city.
10. Under the **Country/Region Code** column, enter the country or region of the shipping agent.
11. Under the **Contact** column, enter the name of the contact person at the shipping company.
12. Enter the telephone number for the shipping agent under the **Phone no.** column.
13. Enter the deliverer's email address in the **Email** column.
14. Enter the URL for package tracking under the **Package Tracking URL** column. To allow users to track specific parcels, add %1 to the URL. When users track a package, %1 is replaced by the tracking number.
15. Under the **Shopify Tracking Company** column, enter the company in Shopify where you can track your items. For more information about Shopify, see [Get Started with the Shopify Connector](#).

You have created a shipping agent.

[Continue with the next chapter](#)

Create Collective Shipment

This section describes how to create a collective shipment.

To create a collective shipment, sales shipments or service shipments must already be booked in your system.

Proceed as follows to create a collective shipment:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Collective Shipments** and click on the corresponding search result.
3. The **Collective Shipments** page is displayed.

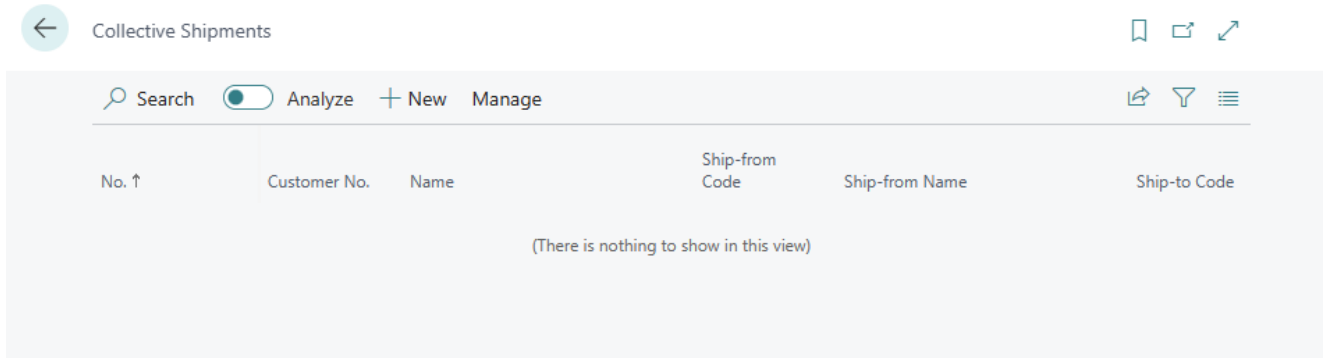



Figure: Create Collective Shipment

4. To create a collective shipment, click on **New** in the menu bar.
5. A new collective shipment card is displayed.
6. Click in the **Customer No.** field and select the customer for whom you want to create a collective shipment from the drop-down list. The **No.** field is automatically assigned by the system based on the number series set up. Further information on setting up **Beyond CollectiveShipments** can be found in the chapter [Setup Beyond CollectiveShipments](#).
7. Under the **Shipping Agent** tab in the **Shipping Agent Code** field, select a shipping agent who will transport the collective shipment to the customer. If the relevant shipping agent is not included in the drop-down list, you must create the carrier. You can find further information on this in the chapter [Create delivery agent](#).
8. Your company data is entered under the **Transport** tab in the **Ship-from** tab. You can adjust or complete these if necessary.
9. Click in the **Ship-To Code** field and select the location of the customer from the dropdown list. Other fields in this area are automatically filled in by the system. If necessary, you can adjust or complete them.
10. Under the **Shipment Details** tab, enter the collection date of the deliveries in the **Collection at Date** field.
11. Enter the earliest possible time for the collection day in the **Collection from Time** field.
12. Enter the last possible time for the collection day in the **Collection to Time** field.
13. Enter the delivery day in the **Delivery at Date** field.
14. Enter the earliest possible time for the delivery day in the **Delivery from Time** field.
15. Enter the last possible time for the delivery day in the **Delivery to Time** field.
16. In the **Goods** area, you can enter a text for the collective shipment in the **Goods Description** field.
17. Activate the **Dangerous Goods** slider if the collective shipment includes dangerous goods.
18. To fill the **Lines** area with shipments, click on the **Get Shipments** option in the menu bar.
19. Select whether you want to include deliveries from sales documents or service documents in the collective shipment.







 Please select the type of shipments to get:

Sales

Service

Figure: Get Shipments

20. Click on **OK** to go to the posted Shipments.

Posted Sales Shipments |      

No.	Sell-to Customer No.	Sell-to Customer Name	Currency Code	Location Code	No. Printed
102215	10000	Adatum Corporation			0
102191	10000	Adatum Corporation			0
102186	10000	Adatum Corporation			0
102178	10000	Adatum Corporation			0
102174	10000	Adatum Corporation			0
102204	10000	Adatum Corporation			0
102203	10000	Adatum Corporation			0
102202	10000	Adatum Corporation			0
102165	10000	Adatum Corporation			0
102201	10000	Adatum Corporation			0
102200	10000	Adatum Corporation			0
102199	10000	Adatum Corporation			0
102160	10000	Adatum Corporation			0
102157	10000	Adatum Corporation			0
102148	10000	Adatum Corporation			0
102146	10000	Adatum Corporation			0
102136	10000	Adatum Corporation			0
102125	10000	Adatum Corporation			0
102120	10000	Adatum Corporation			0
102110	10000	Adatum Corporation			0
102099	10000	Adatum Corporation			0
102094	10000	Adatum Corporation			0
102085	10000	Adatum Corporation			0
102080	10000	Adatum Corporation			0
102070	10000	Adatum Corporation			0

Figure: Transfer posted Shipments to collective Shipment

21. Select one or more lines from the posted shipments and click on **OK**.
22. The shipments are transferred to the **Lines** area in the collective shipment card. If you have set up the system so that no details are displayed by default, you can use the **Show Details** option in the menu bar of the **Lines** tab to display additional information on the individual shipments in the lines.

Shipment Type	Shipment No.	Type	No.	Description	Description 2	Quantity	Unit of Measure Code	Unit Price
→ Sales Shipment	S-SHPT102094			Shipment - S-SHPT102094				
Sales Shipment	S-SHPT102094	Item	1960-S	ROME Guest Chair, green		4.00	PCS	192.80
Sales Shipment	S-SHPT102085			Shipment - S-SHPT102085				
Sales Shipment	S-SHPT102085	Item	1896-S	ATHENS Desk		6.00	PCS	1,000.80
Sales Shipment	S-SHPT102085	Item	1972-S	MUNICH Swivel Chair, yellow		2.00	PCS	190.10
Sales Shipment	S-SHPT102085	Item	1996-S	ATLANTA Whiteboard, base		4.00	PCS	1,397.30
Sales Shipment	S-SHPT102080			Shipment - S-SHPT102080				
Sales Shipment	S-SHPT102080	Item	1960-S	ROME Guest Chair, green		4.00	PCS	192.80
Sales Shipment	S-SHPT102070			Shipment - S-SHPT102070				
Sales Shipment	S-SHPT102070	Item	1896-S	ATHENS Desk		8.00	PCS	1,000.80
Sales Shipment	S-SHPT102070	Item	1960-S	ROME Guest Chair, green		4.00	PCS	192.80
Sales Shipment	S-SHPT102070	Item	1972-S	MUNICH Swivel Chair, yellow		3.00	PCS	190.10
Sales Shipment	S-SHPT102070	Item	1996-S	ATLANTA Whiteboard, base		5.00	PCS	1,397.30

Figure: Collective Shipment Lines

23. If you want to add a text to the collective shipment, click on the **HTML Editor** option in the menu bar. You can enter the text in the window that appears. For more information on where the text is displayed and what options you have for formatting and designing the text, please refer to the sections [Create Document Pre-Text](#) and [Create Document Post-Text](#).
24. After entering the text, you can print the collective shipment using the **Print** button.

Please note that **Beyond CollectiveShipments** is based on **Beyond Reports**, i.e. the corresponding design of the area (i.e. the collective shipment) must be set up in **Beyond Reports**.