



Getting started with 365 for Transportation. The basics of the environnement.

Role Center

After you have successfully logged into 365 for Transportation, you will see the screen below. This is your Role Center. Here, you can see the most important information for your role specifically. A quick overview will provide you with all the information you need to start your workday correctly. Also, from this screen you can directly to creating orders and invoices, or any other tasks connected to your function.

Of course, you can customize your Role Center to your personal desires. You can find out how by consulting our Help-document concerning customization.

The screenshot shows the Dynamics 365 Business Central Role Center for 'Logistics Inc.'. The interface includes a navigation bar with 'Dynamics 365' and 'Business Central', and a user profile 'Environment Sandbox'. The main content area is divided into several sections:

- Logistics Inc. | Master Data | Documents | Posted Documents**
- Orders | Trips | Customers**
- ACTIONS**
 - > New Order
- Insights**
- Activities**
 - CREATE
 - Order (+)
 - Sales Invoice (+)
 - Replay Getting Started (play button)
 - GET STARTED
- Power BI Reports**
 - An error occurred while trying to get reports from the Power BI service. Please try again or contact your syste...
- My Plan Departments**

PLAN DEPARTMENT NO.	PLAN DEPARTMENT LINE NO.	DESCRIPTION
[There is nothing to show in this view]		
- Business Assistance**
 - Top Five Customers by Sales Value**
 - Donut chart showing: All Other Customers, Adatum Corporation, School of Fine Art, Relecloud, Alpine Ski House.
- My Customers**

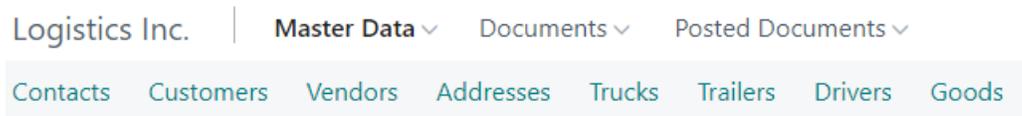
CUSTOMER NO.	NAME	PHONE NO.	BALANCE (LCY)
20000	Trey Research		2,345.63
- Report Inbox**

CREATED DATE-TIME	DESCRIPTION	OUTPUTTYPE
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Master Data

From your Role center, you can go to Master Data. By clicking on Master Data in your menu bar, you will see the following appear.



As you can see, there are several subjects when it comes to Master Data: Contacts, Customers, Vendors, Addresses, Trucks, Trailers, Drivers and Goods. By clicking on each of these subjects, you can easily add, edit, manage or consult data concerning these subjects.

For example, if you open the Master Data related to Trucks, you will see a screen similar to the following. In this overview, you can see the most important details of your trucks, including the current status.

NO.	DESCRIPTION	REGISTRATION NO.	STATUS
93-TR-UCK	DAF XF 365	DEMO0001	20-RELEASED
94-TR-UCK	MAN D365	DEMO0024	10-NEW
98-TRU-CK	VOLVO 365BC	DEMO00014	20-RELEASED

By clicking on the name of the Truck, you can find the details of the Master Data, as in the next screen. Here, you can easily edit the details or change the Truck's status. Also, you can add or consult notes regarding this Truck.

EDIT - TRUCK

93-TR-UCK · Truck · DEMO0001

General

Description	DAF XF 365	Brand	DAF
Resource Group	TRAILER CONDITIONED	Model	XF 365
Registration No.	DEMO0001	Status	20-RELEASED
Chassis No.	DEMO0002		

Communication

Carrier	<input checked="" type="checkbox"/>	Phone No.	
Carrier No.	10000	E-Mail	

Picture

Links

(There is nothing to show in this view)

Notes

Last maintenance: 2/10/... ...



Documents

Besides Master Data, 365 for Transportation gives you a clear overview of important Documents. Again, by using the menu bar you will get here. For your transportation company, Orders and Trips are the documents you can create, manage or consult.

Logistics Inc. | Master Data ▾ Documents ▾ Posted Documents ▾

Orders Trips

By clicking on Orders, you will get to a screen similar to the following. In this overview, you can see the most important details of your current documents, including the current status.

Logistics Inc. | Master Data ▾ Documents ▾ Posted Documents ▾

Orders: [All](#) | Search | + New | Manage ▾ | Status ▾ | Page ▾ | Show all

NO.	CUSTOMER NO.	NAME	POSTING DATE	STATUS	FROM ADDRESS DESCRIPTION	TO ADDRESS DESCRIPTION	LOAD REFERENCE	UNLOAD REFERENCE	
DEMO00002	C00040	Demo Customer	4/9/2018	40-INPROG...	Fresh Logistics Rotterdam	Amsterdams Shipyard	12345		Contract
DEMO00001	C00030	Demo Company	4/9/2018	60-INVOICED	Fresh Logistics Rotterdam	Amsterdams Shipyard			Customer No. C00040
ORD12345	C00040	Demo Customer	4/9/2018	20-RELEASED	Fresh Logistics Rotterdam	Amsterdams Shipyard			Contract -

Realisation 0.00

Steps ▾

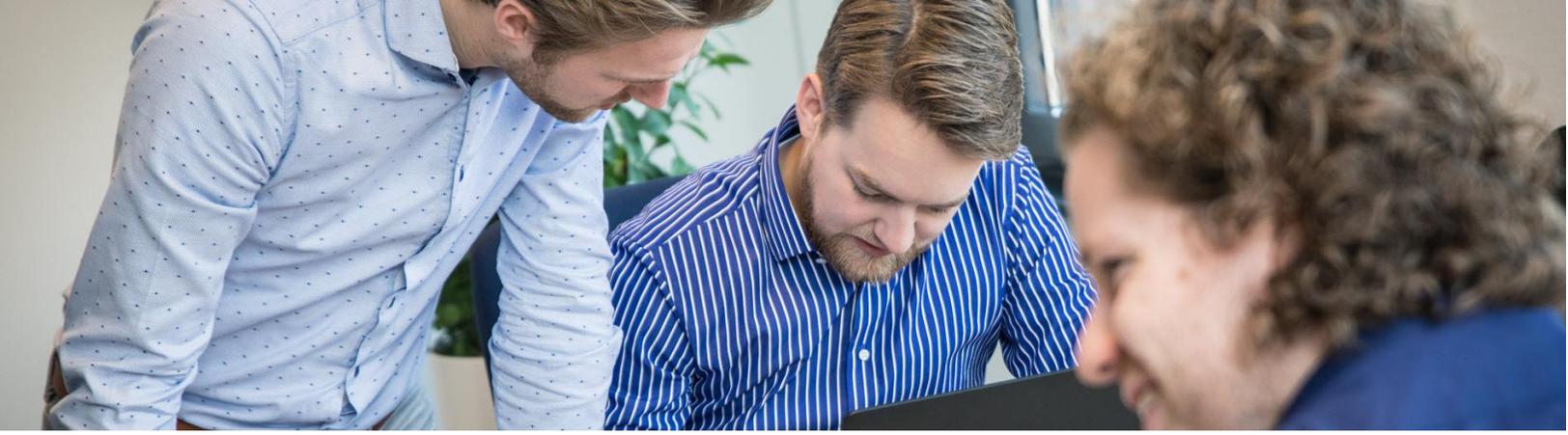
DESCRIPTION
(There is nothing to show in this view)

Relations ▾

LINKED DOCUMENTS
(There is nothing to show in this view)

Links +
(There is nothing to show in this view)

Clicking on the second Order with Status 60-INVOICED will bring us to the following screen. Over here, you can see all the necessary details of this Order.



Posted Documents

Finally, 365 for Transportation offers you a complete overview of Posted Documents. Again, by using the menu bar you will get here. For your transportation company, Posted Orders, Posted Sections and Posted Trips are the Posted Documents you can manage and consult.

Logistics Inc. | Master Data ▾ Documents ▾ **Posted Documents ▾**

Posted Orders Posted Sections Posted Trips
