



MET E2E MATERIAL MANAGEMENT PACKING LIST - STEEL

Handbook - Steel Structures

As of November 2021

Updated: June 2022



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02. Create Packing List



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Z. Support: Task Recorder

A. 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



1ST TIME: ON BOARDING



Invitation by Expediter

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



1st time: register to MSD365

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.*



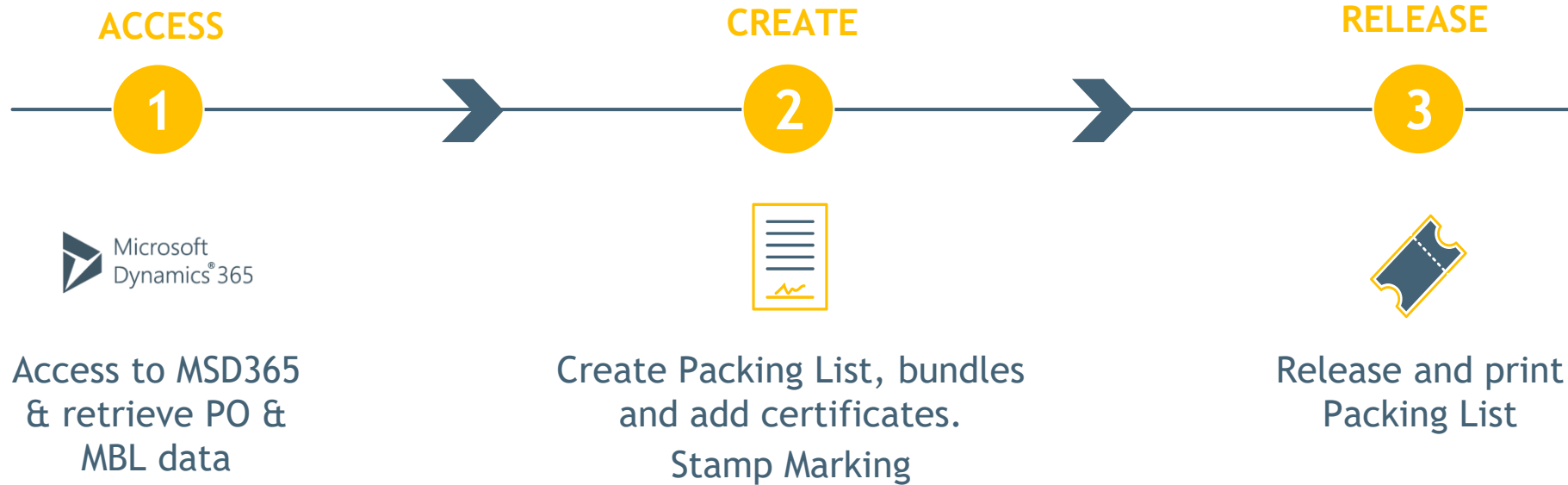
Registration account must be a business account in order to comply with MET compliance requirements.



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



PACKING LIST & BUNDLES PREPARATION & RELEASE

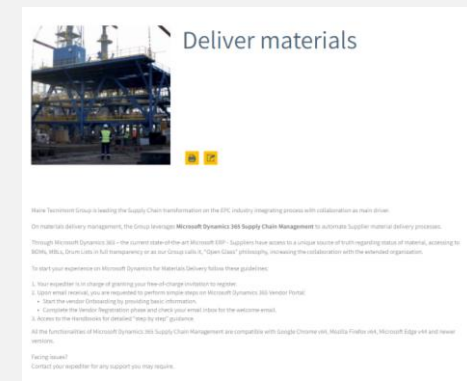
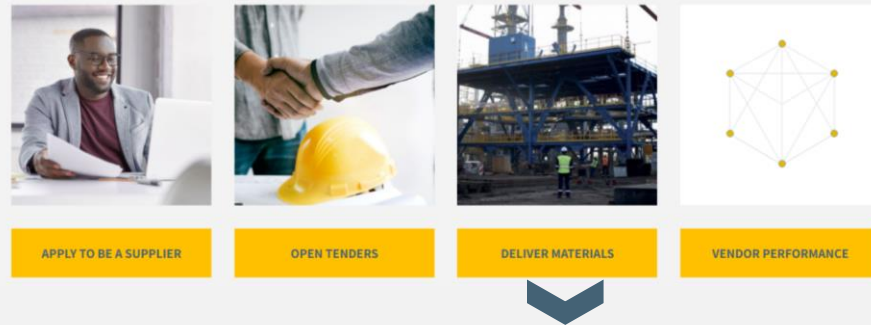
Creating a Packing List





00.ACCESS & UNDERSTANDING THIS HANDBOOK

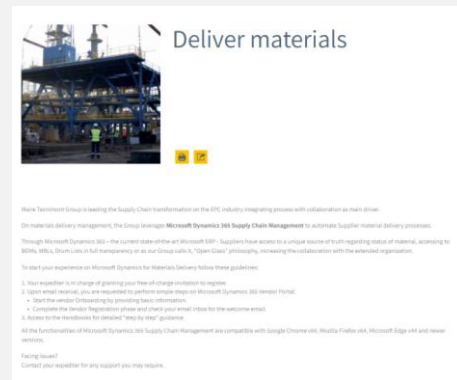
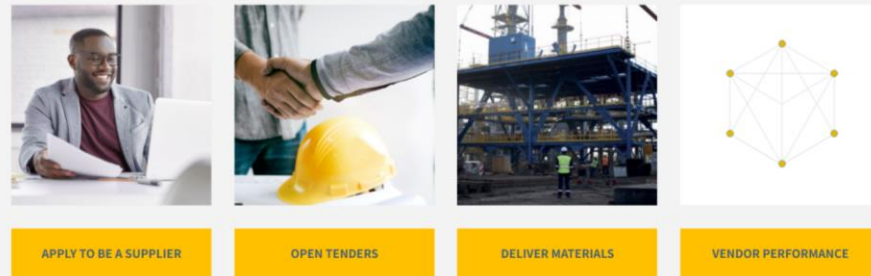
HOW TO ACCESS THE PLATFORM:

- 1  First time? Request invitation to MET expediter: You'll receive an onboarding email with a link to register.
- 2  Access to Dynamics 365 Platform & related documentation: [Global Procurement Website - Deliver Materials](#)



HOW TO ACCESS THE PLATFORM:

- 1  First time? Request invitation to MET expediter: You'll receive an onboarding email with a link to register.
- 2  Access to Dynamics 365 Platform & related documentation: [Global Procurement Website - Deliver Materials](#)



UNDERSTANDING THIS HANDBOOK:



1. HIGH LEVEL PROCESS

You will be guided step by step in the different sections:

1. Access
2. Create
3. Release

At the beginning of each section: find a process workflow highlighting phase to be explained - in red “Focus Next”.

PROCESS - DETAILS

Process Phase	#	Macro Task	Activity	Description
START & ENGAGEMENT	01	Manage Vendor Informations	• Check & create contacts • Check & create Pick up locations	
PO & PL CHECK	02	Overview of PO & PL content	• Check own POs & PL list	

2. PROCESS DETAILS

Each section has a recap slide in which the different process phases are listed.

For each process phase you will find the activities & the related description

VENDOR INFORMATION: VIEW CONTACTS

Process Phase	#	Macro Task	Activity	Description
START & ENGAGEMENT	01	Manage Vendor Informations	• Check & create contacts • Check & create Pick up locations	

ACCESS VENDOR INFORMATION
Click on the Workspace tile on the dashboard

ALL CONTACTS
View details of each contacts already created and related activation status:

USERS
All active contacts

USER REQUESTS
All users required for provisioning

PICK UP LOCATION
List of Pick up locations already inserted

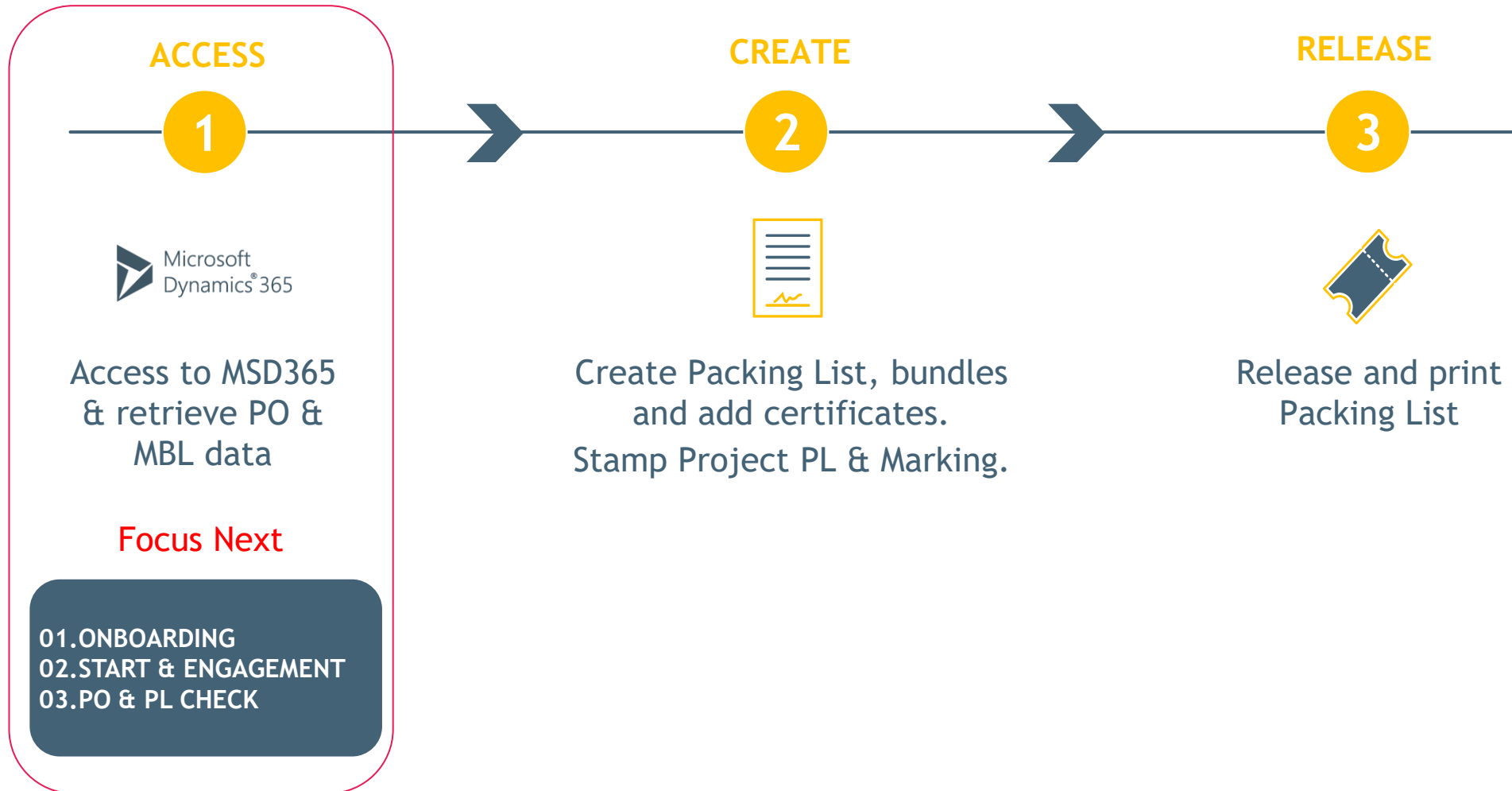
3. SINGLE ACTIVITY DESCRIPTION

Each Activity has a specific slide in which the detailed tasks are explained step by step including printscreens for easy understanding.

01.ACCESS TO MICROSOFT DYNAMICS

PACKING LIST & BUNDLES PREPARATION & RELEASE

Creating a Packing List





PROCESS - DETAILS

Process Phase	#	Macro Task	Activity
ONBOARDING	01	D365 Engagement	<ul style="list-style-type: none">• 2 invitation emails• How to Sign into Microsoft• Authenticate the account

ONBOARDING 1/3

Process Phase	#	Macro Task	Activity
ONBOARDING	01	D365 Engagement	<ul style="list-style-type: none"> Look&Feel: 2 invitation emails How to Sign into Microsoft Authenticate the account

1

INVITATION TO ACCESS from invites@microsoft.com

This acceptance is mandatory to authenticate the external email in b2b with Tecnimont Azure farm.

Maire Tecnimont S.p.A. invited you to access applications within their organization

Microsoft Invitations on behalf of Maire Tecnimont S.p.A. <invites@microsoft.com>

Please only act on this email if you trust the organization represented below. In rare cases, individuals may receive fraudulent invitations from bad actors posing as legitimate companies. If you were not expecting this invitation, proceed with caution.

Organization: Maire Tecnimont S.p.A.
Domain: tecnimont.onmicrosoft.com

If you accept this invitation, you'll be sent to <https://met-uat.sandbox.operations.dynamics.com>.

[Accept invitation](#)

2

COMPLETE YOUR DATA REQUEST from D365.met.svc@mairitecnimont.it

Once your email is authenticated you can proceed with Dynamics on boarding

User created: complete your data request - Maire Tecnimont Group on Microsoft Dynamics 365

D365_MET_SVC_QUA <D365.met.svc.qua@mairitecnimont.it>

Dear User,

You've been registered on Maire Tecnimont Group solution for Material Packing List management running on Microsoft Dynamics 365.

Please follow below steps:

- Accept Invitation of the previous e-mail from Microsoft Invitations on behalf of Maire Tecnimont S.p.A. (invites@microsoft.com)
- Click here <https://met-uat.sandbox.operations.dynamics.com> to access the platform.
- Upon first access, complete your account details;
- For further accesses log in with your credentials.

Need help? Check out the online documentation here. [\[hyperlink\]](#)

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

You are receiving this email because Maire Tecnimont Group has identified you as the appropriate contact for this correspondence.

For further queries contact your Expediter on Maire Tecnimont Group

**DO NOT PROCEED:
SEE NEXT SLIDES
FOR STEP BY STEP
GUIDANCE**

Hint: you might have been already b2b authenticated on Tecnimont Azure farm by means of Digital Documents / FTA usage.

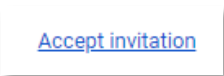
In this case you won't receive this email.



Process Phase	#	Macro Task	Activity	Description
ONBOARDING	01	D365 Engagement	<ul style="list-style-type: none"> Look&Feel: 2 Invitation emails How to Sign into Microsoft Authenticate the account 	

1 INVITATION TO ACCESS from invites@microsoft.com

1. Click **Accept invitation** link to access D365.



Maire Tecnimont S.p.A. invited you to access applications within their organization Inbox x

Microsoft Invitations on behalf of Maire Tecnimont S.p.A. <invites@microsoft.com> to me

Please only act on this email if you trust the organization represented below. In rare cases, individuals may receive fraudulent invitations from bad actors posing as legitimate companies. If you were not expecting this invitation, proceed with caution.

Organization: Maire Tecnimont S.p.A.
Domain: technimont.onmicrosoft.com

If you accept this invitation, you'll be sent to <https://met-uat.sandbox.operations.dynamics.com>.

Accept invitation

[Block future invitations](#) from this organization.

This invitation email is from Maire Tecnimont S.p.A. (technimont.onmicrosoft.com) and may include advertising content. Maire Tecnimont S.p.A. has not provided a link to their privacy statement for you to review. Microsoft Corporation facilitated sending this email but did not validate the sender or the message.

Microsoft respects your privacy. To learn more, please read the [Microsoft Privacy Statement](#).
Microsoft Corporation, One Microsoft Way, Redmond, WA 98052

2.
2.A. If you don't have a b2b account, click on NEXT to proceed with the creation.



Create account

Looks like you don't have an account with us. We'll create one for you using **d365plvendor@gmail.com**.



2.B. If Microsoft detect that your account is already created, Sign in



viarovalentina@gmail.com

You may already have an account

viarovalentina@gmail.com is already being used with another Microsoft account. You should sign in with that account.

If you do not remember your username, [recover it now](#).

[Create the account anyway](#)





Process Phase	#	Macro Task	Activity	Description
ONBOARDING	01	D365 Engagement	<ul style="list-style-type: none"> Look&Feel: 2 Invitation emails How to Sign into Microsoft Authenticate the account 	

3. Create the password and click on NEXT

Microsoft
← d365plvendor@gmail.com

Create a password

Enter the password you would like to use with your account.

Create password

Show password

Next

4. Complete the account and click on NEXT

Microsoft
← d365plvendor@gmail.com

Create account

We need just a little more info to set up your account. Your date of birth helps us to provide you with age-appropriate settings.

Country/region
Italy

Birthdate
January 3 Year

Next

5. Enter the code received by email

Verify your email address Inbox x

Microsoft account team <account-security-noreply@accountprotection.microsoft.com> to me

Microsoft account

Verify your email address

To finish setting up your Microsoft account, we just need to make sure this email address is yours.

To verify your email address use this security code: 4231

If you didn't request this code, you can safely ignore this email.

Thanks,
The Microsoft account team

Microsoft
← d365plvendor@gmail.com

Verify email

Enter the code we sent to d365plvendor@gmail.com. If you didn't get the email, check your junk folder or [try again](#).

4231

I would like information, tips, and offers about Microsoft products and services.

Choosing **Next** means that you agree to the [Microsoft Services Agreement](#) and [privacy and cookies statement](#).

Next

6. Sign in

Microsoft
d365plvendor@gmail.com

Stay signed in?

Stay signed in so you don't have to sign in again next time.

Don't show this again

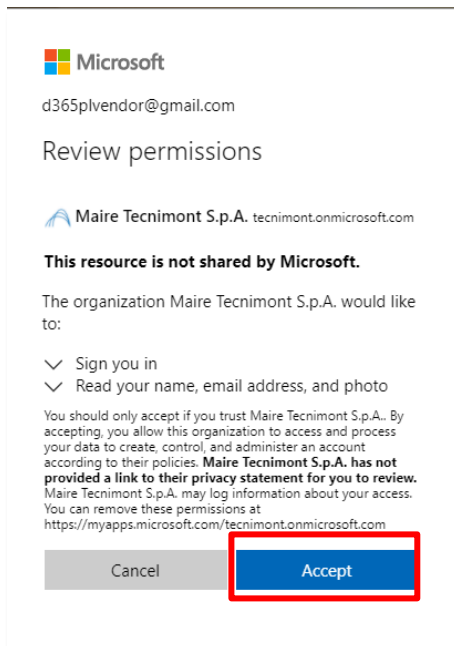
No **Yes**



Process Phase	Activity		
	#	Macro Task	Description
ONBOARDING	01	D365 Engagement	<ul style="list-style-type: none"> Look&Feel: 2 Invitation emails How to Sign into Microsoft Authenticate the account

AUTHENTICATE YOUR MICROSOFT ACCOUNT

1. Click on ACCEPT:



Microsoft
d365plvendor@gmail.com

Review permissions

Maire Tecnimont S.p.A. tecnimont.onmicrosoft.com

This resource is not shared by Microsoft.

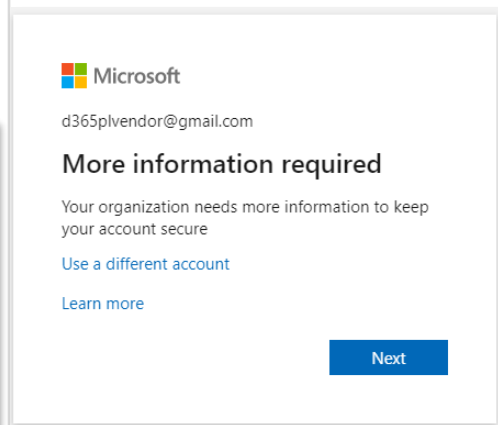
The organization Maire Tecnimont S.p.A. would like to:

- Sign you in
- Read your name, email address, and photo

You should only accept if you trust Maire Tecnimont S.p.A.. By accepting, you allow this organization to access and process your data to create, control, and administer an account according to their policies. **Maire Tecnimont S.p.A. has not provided a link to their privacy statement for you to review.** Maire Tecnimont S.p.A. may log information about your access. You can remove these permissions at <https://myapps.microsoft.com/tecnimont.onmicrosoft.com>

Cancel **Accept**

2. click on NEXT:



Microsoft
d365plvendor@gmail.com

More information required

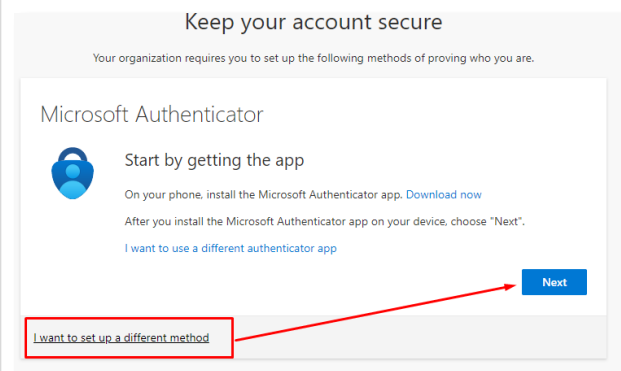
Your organization needs more information to keep your account secure

[Use a different account](#)

[Learn more](#)

Next

3. Choose how to authenticate safely and click confirm:
If Authenticator app is not available we suggest to use “a different method option” to use the SMS by phone.



Keep your account secure

Your organization requires you to set up the following methods of proving who you are.

Microsoft Authenticator

Start by getting the app

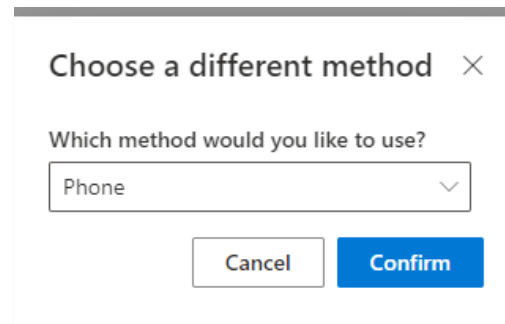
On your phone, install the Microsoft Authenticator app. [Download now](#)

After you install the Microsoft Authenticator app on your device, choose “Next”.

[I want to use a different authenticator app](#)

Next

[I want to set up a different method](#)



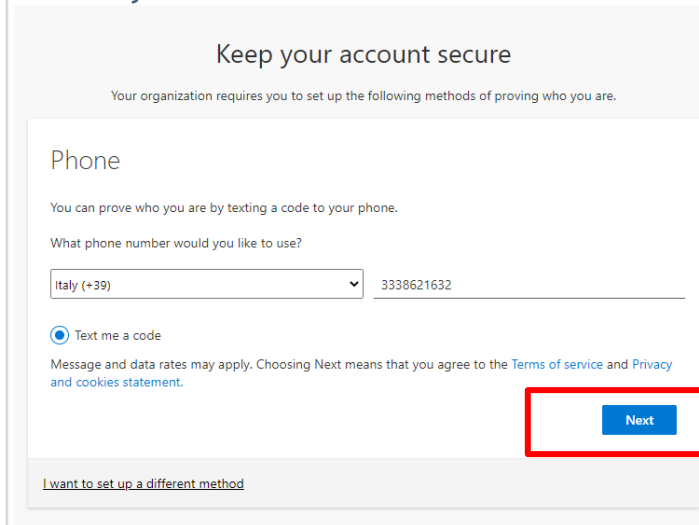
Choose a different method ✕

Which method would you like to use?

Phone

Cancel **Confirm**

4. Complete with your phone number and click NEXT: you’ll receive a verification code.



Keep your account secure

Your organization requires you to set up the following methods of proving who you are.

Phone

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

What phone number would you like to use?

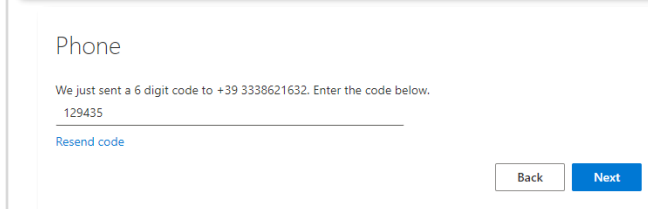
Italy (+39) 3338621632

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](#).

Next

[I want to set up a different method](#)



Phone

We just sent a 6 digit code to +39 3338621632. Enter the code below.

129435

[Resend code](#)

Back **Next**

5. Follow the automatic steps until you log in into D365

D365 HOMEPAGE - NAVIGATION TIPS

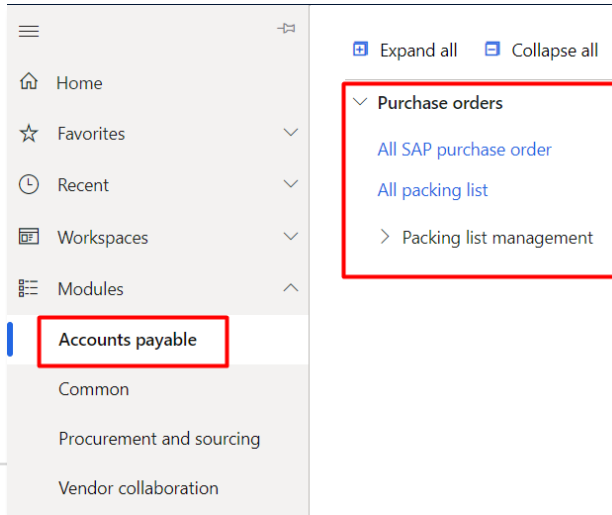


ACCESS - RECOMMENDED BROWSER: GOOGLE CHROME & EDGE - Secured access guaranteed by SSO

Main Menu - Section of interest:

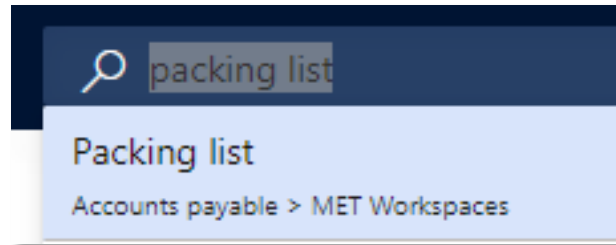
MODULES > “Account Payable” to access Purchase Orders & Packing lists

Mark the star for your “Favorites”

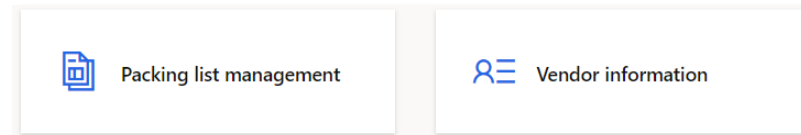


Quick search bar & tile

Quick search of content by free text typing:



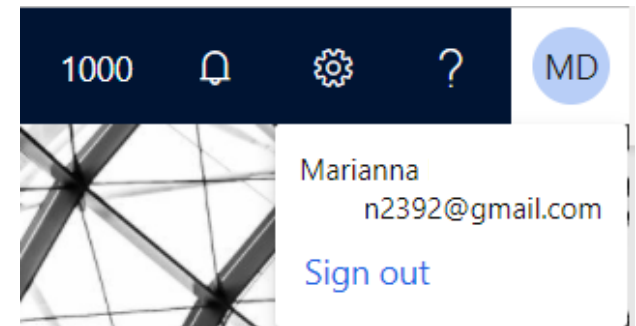
Quick access WORKSPACE TILE



User's account features

Bell icons: shows the activities done and documents ready to be downloaded.

Settings icon: allows to custom the view





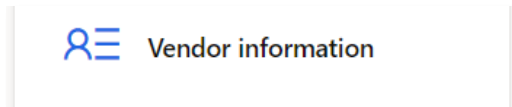
PROCESS - DETAILS

Process Phase	Activity		
	#	Macro Task	Description
START & ENGAGEMENT	02	Manage Vendor information	<ul style="list-style-type: none">• Check & create contacts• Check & create Pick up locations
PO & PL CHECK	03	Overview of PO & PL content	<ul style="list-style-type: none">• Check own POs & PL list

VENDOR INFORMATION: OVERVIEW CONTACTS

Process Phase	#	Macro Task	Activity
START & ENGAGEMENT	02	Manage Vendor information	<ul style="list-style-type: none"> Check & create contacts Check & create Pick up locations

ACCESS VENDOR INFORMATION: Click on the Workspace tile on the dashboard



MOSTOSTAL KRAKÓW S.A.

Address

Email address

Telephone

0 User requests

5 Pick up location

18 All contacts

5 Users

MENU OVERVIEW:

ALL CONTACTS
View details of each contacts already created and related activation status

USERS
All active contacts

USER REQUESTS
All users required for provisioning

PICK UP LOCATION
List of Pick up locations already inserted

All contacts

	Name	Personal title	Primary email	Email (user alias)	User account a...
Users	Carlo Giuseppe I Secci		carlo.giuseppe.secci@avar		
User requests	Carlo Secci		CarloSecci@robertopontiggia.o...		
User requests	Carlo Secci				
User requests	Davide Persico		davide.persico@robertopontigg...	davide.persico@robertopontigg...	

	Name	Email	Vendor account	Name
Users	<input type="radio"/> Elena Chiarati	el.chiarati@	0000055115	MOSTOSTAL KRAKÓW S.A.
User requests	<input type="radio"/> Slawomir Radecki	Slawomir.Radecki@VendorMET...	0000055115	MOSTOSTAL KRAKÓW S.A.
User requests	<input type="radio"/> Vendor Gmail MET	VendorMET001@gmail.com	0000055115	MOSTOSTAL KRAKÓW S.A.
User requests	<input type="radio"/> Vendor Outlook MET	VendorMET001@outlook.com	0000055115	MOSTOSTAL KRAKÓW S.A.
User requests	<input type="radio"/> Marianna De Rosa	maryn2392@	0000055115	MOSTOSTAL KRAKÓW S.A.

	Request ID	Request action	Email	Name	Status	Business justification
Users						
User requests						

We didn't find anything to show here.

Pick up location | Standard view

Filter

Pick-up location id	Name
PUL000000008	MOSTOSTAL KRAKÓW S.A.
PUL000000013	MOSTOSTAL KRAKÓW S.A.
PUL000000014	MOSTOSTAL KRAKÓW S.A. 3
PUL000000017	polonia
PUL000000018	tes

Setup

Sub vendor: No Yes (Vendor account: 0000055115)

Addresses

Name or description	Address	Purpose	Primary
MOSTOSTAL KRAKÓW S.A.	ul. Miłanina 5 97-410 Zdobnica, Kleszczow POL	Pick-up location	Yes

After 2 months without activity, Vendor Users are deactivated.

User account activated

No

Process Phase

Activity

START & ENGAGEMENT

#

Macro Task

Description

02

Manage Vendor informations

- Check & create contacts
- Check & create Pick up locations

1. ACCESS VENDOR COLLABORATION: choose All contacts

The screenshot shows a navigation menu with 'Modules' selected. Under 'Modules', 'Vendor collaboration' is highlighted with a red arrow. In the 'Contacts' section, 'All contacts' is highlighted with a red box. Other options include 'Accounts payable', 'Common', 'Organization administration', 'Procurement and sourcing', 'Project management and accounting', 'Workspaces', 'Vendor information', and 'Contacts'.

Name	Personal title	Primary email	Email (user alias)	User account a...	Vendor	Vendor name	Vendor admin
Carlo Giuseppe I Secci		carlo.giuseppe.secci@...		0000055115	MOSTOSTAL KRAKÓW S.A.		
Carlo Secci		CarloSecci@robertopontiggia...		0000055115	MOSTOSTAL KRAKÓW S.A.		
Carlo Secci				0000055115	MOSTOSTAL KRAKÓW S.A.		
Davide Persico		davide.persico@robertopontigg...	davide.persico@robertopontigg...	0000055115	MOSTOSTAL KRAKÓW S.A.		✓
Davide Persico		dav.persico90@...		0000055115	MOSTOSTAL KRAKÓW S.A.		✓
Elena Chiarati		elena.chiarati@robertopontigg...	elena.chiarati@robertopontigg...	0000055115	MOSTOSTAL KRAKÓW S.A.		✓
Elena Chiarati 2		el.chiarat...		0000055115	MOSTOSTAL KRAKÓW S.A.		
Mario Rossi	Dr.			0000055115	MOSTOSTAL KRAKÓW S.A.		

2. CREATE NEW CONTACT

- Select NEW on the top page
- Complete the form
- Select your company
- Click on CREATE to finalize

The screenshot shows the 'Create contact persons' form. At the top, there are buttons for 'Edit', '+ New' (highlighted with a red box), and 'Delete'. Below are input fields for 'First name', 'Middle name', 'Last name', and 'Personal title'. A 'Setup contact for' section shows a list of vendor accounts, with '0000055115 MOSTOSTAL KRAKÓW S.A. Maire Technimont Group' selected. At the bottom, there are 'Create' and 'Cancel' buttons.

3. COMPLETE THE REQUIRED ATTRIBUTES

- Select ADD
- Choose field type "phone", "email"
- Set primary flag (for main contact)
- SAVE

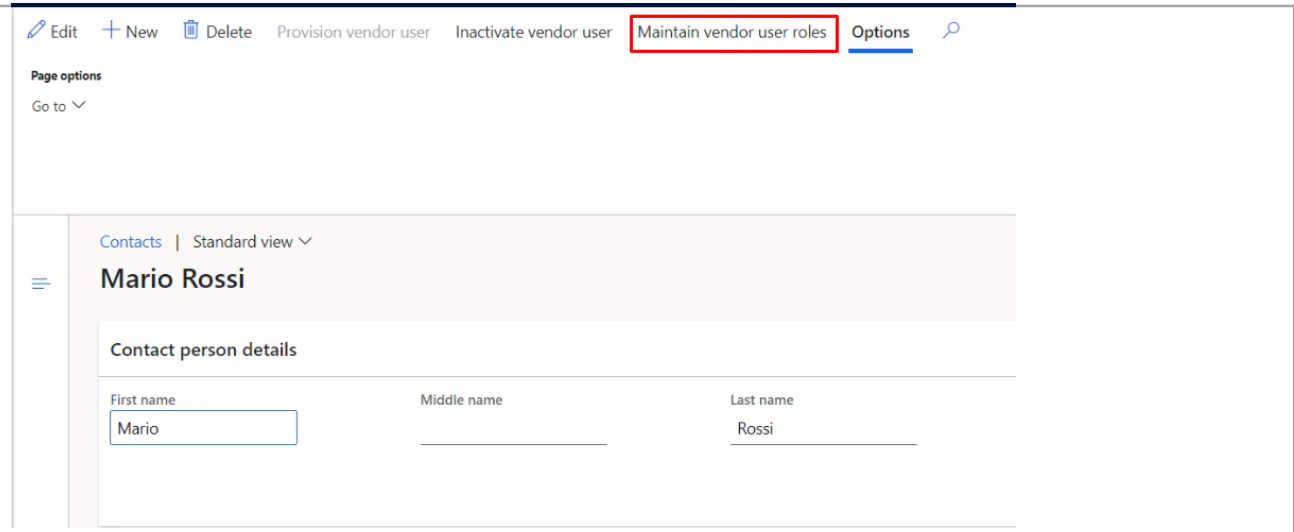
4. EDIT THE CONTACT

- Select the user
- Click on EDIT
- Update the details
- SAVE

The screenshot shows the 'Edit contact' form for 'Elena Chiarati 2'. At the top, there are buttons for 'Edit' (highlighted with a red box), 'Add', and 'Remove'. Below are input fields for 'First name', 'Middle name', 'Last name', and 'Personal title'. A 'Contact information' section shows a table with columns for 'Description', 'Type', 'Contact number/address', 'Extension', and 'Primary'. The 'Type' is set to 'Phone' and the 'Primary' flag is checked. At the bottom, there is a 'Save' button.

Process Phase	#	Macro Task	Activity
START & ENGAGEMENT	02	Manage Vendor informations	<ul style="list-style-type: none"> Check & create contacts Check & create Pick up locations

5.
CHANGE VENDOR CONTACT ROLE: to assign ADMINISTRATOR
 a) On menu USERS: select the user & EDIT
 b) Select “Maintain vendor user roles”



c) Update the current role and provide mandatory justification field

Maintain vendor user roles

Contact person details

IDENTIFICATION
 First name: Mario
 Middle name:
 Last name: Rossi

USER SETUP
 Email (user alias): mario.rossi@prova.ik
 Language: en-US

Business justification (highlighted with a red box and arrow pointing to the Submit button in the next screenshot)

d) Submit

Maintain user roles

Role description	Assign
MET-Material vendor user admi...	<input checked="" type="checkbox"/>
MET-Material vendor user (Exter...	<input type="checkbox"/>

Submit Cancel

VENDOR INFORMATION: MANAGE CONTACTS 3/3

Process Phase	#	Macro Task	Activity	Description
START & ENGAGEMENT	02	Manage Vendor informations	<ul style="list-style-type: none"> Check & create contacts Check & create Pick up locations 	

6. DELETE CONTACT CREATED:

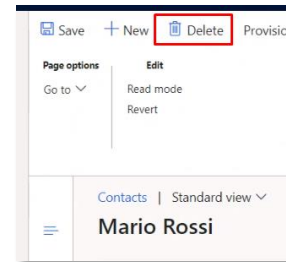
a) Select a CREATED CONTACT

Standard view

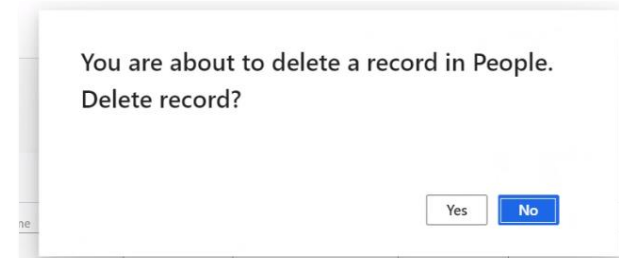
Filter

Name	Personal title	Primary email	Email (user alias)	User account a...
g g g	Mr.	a		
Marianna De Rosa	Miss	maryn2392@	maryn2392@_	✓
Mario Rossi	Dr.			
Mario Rossi				
Mario Rossi				

b) Click on the Delete icon on the top



c) An alert message asks confirmation

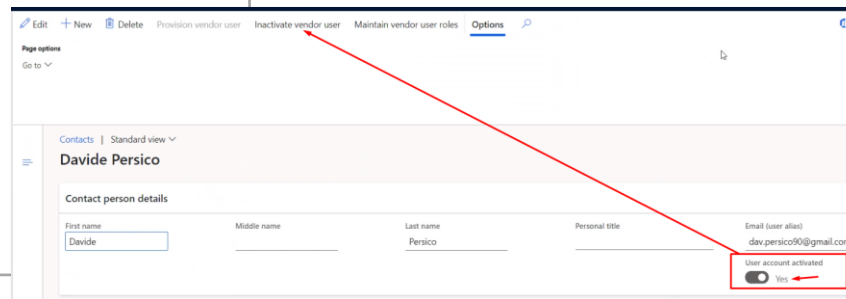


7. INACTIVATE USER PROVISIONED

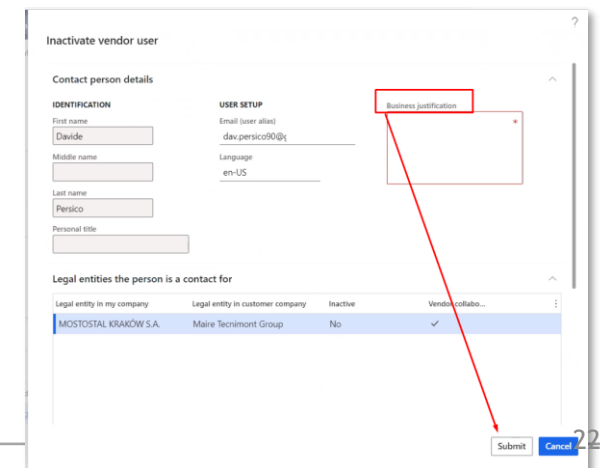
a) Select a PROVISIONED USER (Activated)

Name	Personal title	Primary email	Email (user alias)	User account a...
g g g	Mr.	a		
Marianna De Rosa	Miss	maryn2392@t	maryn2392t	✓

b) Click on "Inactivate vendor user on the top



c) Apply a business justification and submit



TO REACTIVATE A USER:
Follow the steps of section:
"VENDOR INFORMATION: PROVISION A USER"

VENDOR INFORMATION: PROVISION USER

Process Phase	#	Macro Task	Activity
START & ENGAGEMENT	02	Manage Vendor informations	<ul style="list-style-type: none"> Check & create contacts Check & create Pick up locations

1. PROVISION A NEW USER

a) Select the user from the list

b) Click on Provision vendor user

c) Complete the mandatory field: Business justification

d) Legal entities: Flag the Vendor collaboration

Legal entities the person is a contact for

Legal entity in my company	Legal entity in customer company	Inactive	Vendor collabo...
MOSTOSTAL KRAKÓW S.A.	Maire Tecnimont Group	No	<input checked="" type="checkbox"/>

e) Assign user roles: Flag one option: "admin" user will be able to create further users on its organization.

Assign user roles

Role description	Assign
MET-Material vendor user admin (External)	<input checked="" type="checkbox"/>
MET-Material vendor user (External)	<input type="checkbox"/>

f) Submit

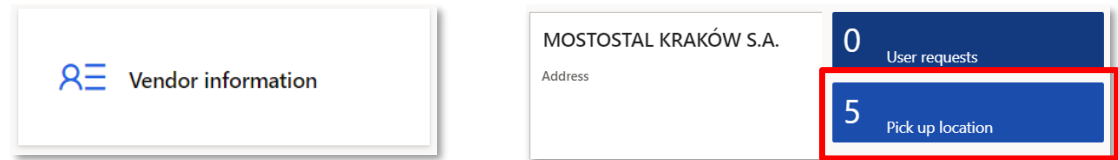
After the Provisioning the contact receives an onboarding email with the instructions to access.

VENDOR INFORMATION: MANAGE PICK UP LOCATION (1/2)

Process Phase	Activity		
	#	Macro Task	Description
START & ENGAGEMENT	02	Manage Vendor informations	<ul style="list-style-type: none"> Check & create contacts Check & create Pick up locations

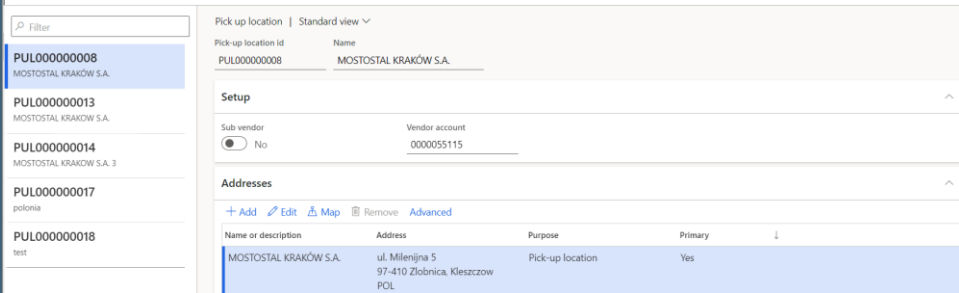
1.ACCESS VENDOR INFORMATION

Click on the Workspace tile on the dashboard “Vendor information”
Click on Pick up location tile.



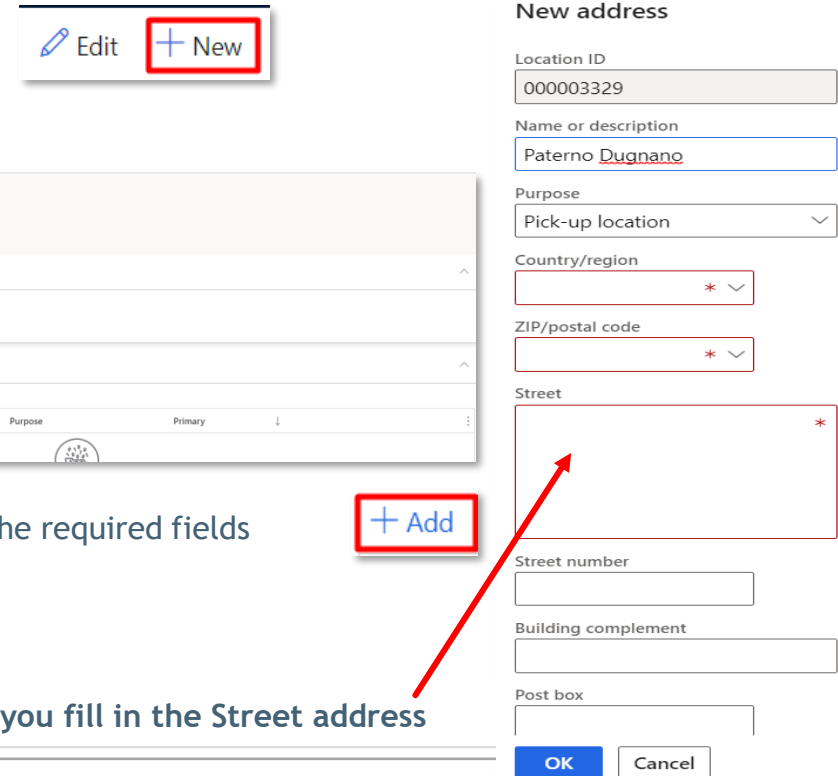
2.VIEW PICK UP LOCATION

Access the list of Pick up locations already inserted



3.CREATE NEW PICK UP LOCATION

- Select NEW on the top page
- Insert the name



- “Add” to complete the form with the required fields
- Flag as "Primary"
- Click on OK

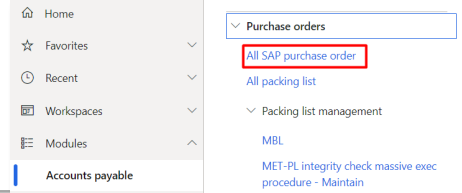


Please do not leave any row empty when you fill in the Street address

VENDOR INFORMATION: MANAGE PICK UP LOCATION (2/2)

Process Phase	Activity		
	#	Macro Task	Description
START & ENGAGEMENT	02	Manage Vendor informations	<ul style="list-style-type: none"> Check & create contacts Check & create Pick up locations

4. ACCESS ALL PURCHASE ORDER AREA
Click on the Main Menu on “Account payable”



5. SEARCH & VIEW CONTENT
Select the PO by clicking on PO number

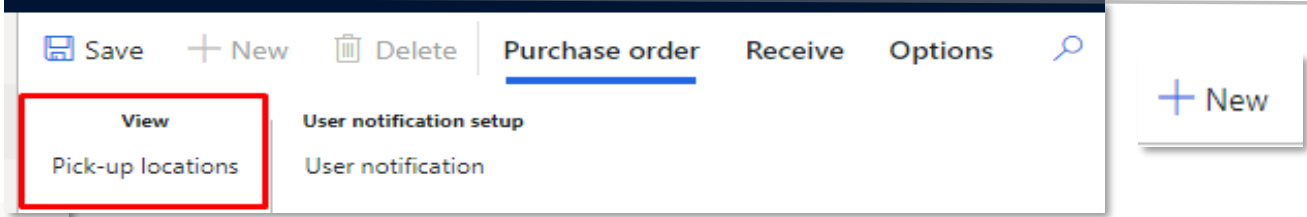
All SAP purchase order | Standard view

Filter

	Purchase order	Vendor account	Vendor name	Project ID	Purchase type	Approval status
<input type="radio"/>	7500066747	0000055115	MOSTOSTAL KRAKÓW S.A.	4112	Purchase order	Approved
<input checked="" type="radio"/>	7500066765	0000055115	MOSTOSTAL KRAKÓW S.A.	4112	Purchase order	Confirmed
<input type="radio"/>	7500066769	0000055115	MOSTOSTAL KRAKÓW S.A.	3971	Purchase order	Confirmed

6. ASSOCIATE PUL WITH PO

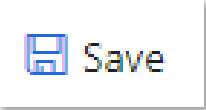
- Click on «Pick up locations» on the top left page
- Click on New on the top left page
- Select Pick-up location id from drop down list
- Click Save



PO Pick-up location

Filter

	Pick-up location id	Name
<input type="radio"/>		
<input checked="" type="radio"/>	PUL000000008	MOSTOSTAL KRAKÓW S.A.
<input type="radio"/>	PUL000000013	MOSTOSTAL KRAKÓW S.A.



OVERVIEW ON PO CONTENT

Process Phase

Activity

PO & PL CHECK

#

Macro Task

Description

03

Overview of PO & PL content

- Check own POs & PL list

3.ACCESS ALL PURCHASE ORDER AREA
Click on the Main Menu on "Account payable"

4.VIEW ALL SAP PURCHASE ORDER
Select from the list the PO to see the details of Header and Lines

Purchase order	Vendor account	Invoice account	Vendor name	Project ID	Purchase order class	Approval status	Currency
7500066747	0000055115	0000055115	MOSTOSTAL KRAKÓW S.A.	4112	Sap	Confirmed	PLN
7500066765	0000055115	0000055115	MOSTOSTAL KRAKÓW S.A.	4112	Sap	Confirmed	EUR
7500066769	0000055115	0000055115	MOSTOSTAL KRAKÓW S.A.	3971	Sap	Confirmed	EUR
7500066771	0000055115	0000055115	MOSTOSTAL KRAKÓW S.A.	4112	Sap	Confirmed	PLN
7500067411	0000055115	0000055115	MOSTOSTAL KRAKÓW S.A.	4112	Sap	Confirmed	EUR
7500067628	0000055115	0000055115	MOSTOSTAL KRAKÓW S.A.	4153	Sap	Confirmed	PLN
7500067646	0000055115	0000055115	MOSTOSTAL KRAKÓW S.A.	4153	Sap	Confirmed	EUR
7500067648	0000055115	0000055115	MOSTOSTAL KRAKÓW S.A.	4153	Sap	Confirmed	EUR
7500067655	0000055115	0000055115	MOSTOSTAL KRAKÓW S.A.	4153	Sap	Confirmed	EUR

Header details:

Lines details:

Line number	Item number	Short description	Material group	Material group description	Quantity	Unit	Unit price	Net amount
1	I59421621	AJI30SC14	AIA003	Steel gratings	6,895.00	M2	97.80	674,331.00
2	I59421622	AJI30SC15	AIA003	Steel gratings	96.00	M2	143.80	13,804.80
3	I59421624	AJI30SC31	AIA003	Steel gratings	244.00	NO	61.80	15,079.20

Process Phase

Activity

PO & PL CHECK

#

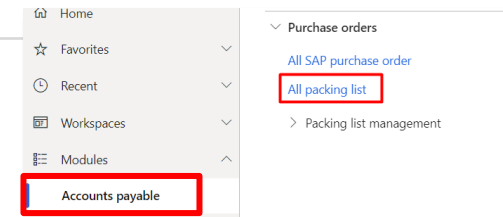
03

Macro Task

Overview of PO & PL content

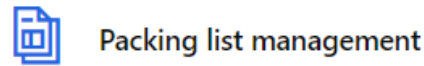
Description

- Check own POs & PL list



1. ACCESS PACKING LIST

Click on the Workspace tile on the dashboard or from the Main Menu “Account Payable”



2. VIEW ALL PACKING LIST

Select from the list the PL to see the details from the Header and Lines

[Edit](#) [New](#) [Delete](#) **Packing list management** [Options](#)

MBL **Integrity checks** **Update**
 Generate PL content Integrity check validation PL Status update
 PL bulk upload Reset to 00.DRAFT

All packing list | Standard view

Filter

Packing list	Preliminary	Vendor account	Invoice account	Vendor name	Purchase order class	Packing list order status	Currency	Delivery date
7500066747-0001		0000055115	0000055115	MOSTOSTAL KRAKÓW S.A.	Packing list	05.REWORK	PLN	5/17/2021
7500066747-0002		0000055115	0000055115	MOSTOSTAL KRAKÓW S.A.	Packing list	20.ACCEPTED	PLN	5/17/2021
7500066747-0003		0000055115	0000055115	MOSTOSTAL KRAKÓW S.A.	Packing list	20.ACCEPTED	PLN	5/17/2021
7500066747-0004		0000055115	0000055115	MOSTOSTAL KRAKÓW S.A.	Packing list	20.ACCEPTED	PLN	5/18/2021
7500066747-0005		0000055115	0000055115	MOSTOSTAL KRAKÓW S.A.	Packing list	00.DRAFT	PLN	5/24/2021
7500066747-0006		0000055115	0000055115	MOSTOSTAL KRAKÓW S.A.	Packing list	05.REWORK	PLN	5/25/2021
7500066747-0007		0000055115	0000055115	MOSTOSTAL KRAKÓW S.A.	Packing list	05.REWORK	PLN	6/3/2021
7500066747-0008	✓	0000055115	0000055115	MOSTOSTAL KRAKÓW S.A.	Packing list	00.DRAFT	PLN	6/4/2021
7500066747-0009		0000055115	0000055115	MOSTOSTAL KRAKÓW S.A.	Packing list	25.PRICED	PLN	6/4/2021
7500066747-0010		0000055115	0000055115	MOSTOSTAL KRAKÓW S.A.	Packing list	00.DRAFT	PLN	6/7/2021

Header details:

All packing list | Standard view

7500067724-0010 : 0000055115 - MOSTOSTAL KRAKÓW S.A. Lines Header Open order

MET – Packing list 7500067724-0010 | MOSTOSTAL KRAKÓW S.A. | 0000055115 | 9/29/2021 | EUR

PURCHASE ORDER Purchase order 7500067724-0010 Vendor name MOSTOSTAL KRAKÓW S.A.	PL revision 00 Packing list type 100 - Steel Packing list order status 00.DRAFT Issue date	FASTENERS PL Fasteners PL <input type="radio"/> No PACKING INSPECTION WAIVED Packing inspection waived <input type="radio"/> No DELIVERY Delivery date 9/29/2021 Incoterms FCA	Name of goods a Name of goods 2nd language a Classification resolution position
VENDOR Vendor account 0000055115 Contact Vendor Gmail MET	MWP No. 4112.B.002 SAP PO 7500067724		
CONTACT INFORMATION Internet address			

Lines details:

All packing list | Standard view

7500067724-0010 : 0000055115 - MOSTOSTAL KRAKÓW S.A. Lines Header Open order

Packing list header

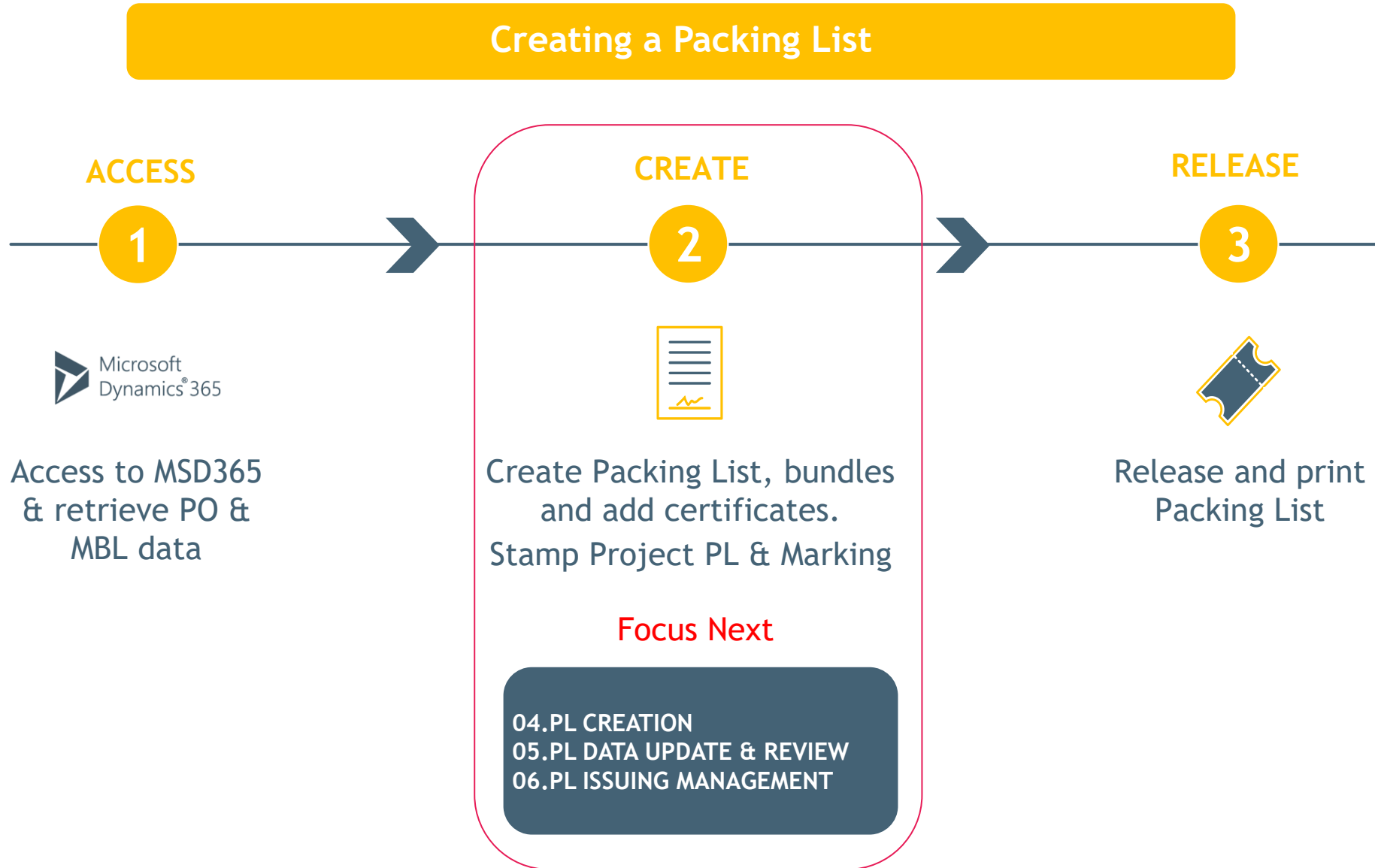
Packing list lines

Remove Package

Line number	Mark	No.	UoM	Quantity	Weight per unit	Total weight	UoM Weight	Single mark qu...	Total mark qua...	Unit	Stock/Mill	Description
1	724PRC11AB0B06	1	pcs	1.00	1.00	kg	1.00	1.00	KG	Mill	724PRC11AB0B	
2	724PRC11AB0B07	1	pcs	8.00	8.00	kg	8.00	8.00	KG	Mill	724PRC11AB0B	
3	724PRC11AB0B08	1	pcs	5.00	5.00	kg	5.00	5.00	KG	Mill	724PRC11AB0B	

02.CREATE PACKING LIST

PACKING LIST & BUNDLES PREPARATION & RELEASE



PROCESS - DETAILS

Process Phase	Activity		
	#	Macro Task	Description
PL MANAGEMENT	04	PL creation	<ul style="list-style-type: none">• First creation of PL• Bulk Upload from Excel• Add lines manually & manage Packages
	05	PL data update & review	<ul style="list-style-type: none">• Update Preliminary & Final PL• Input Expected EXW Delivery date
	06	PL issuing management	<ul style="list-style-type: none">• First issuing of Preliminary/Final PL• Issuing upon Rework requested



MANAGE PL: CREATION OF PL

VENDOR

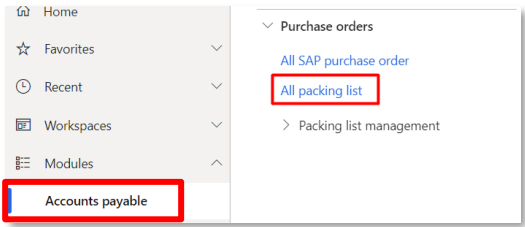
PRELIMINARY

FINAL

Process Phase	#	Macro Task	Activity
PL MANAGEMENT	04	PL creation	• Fist creation of PL: new PL

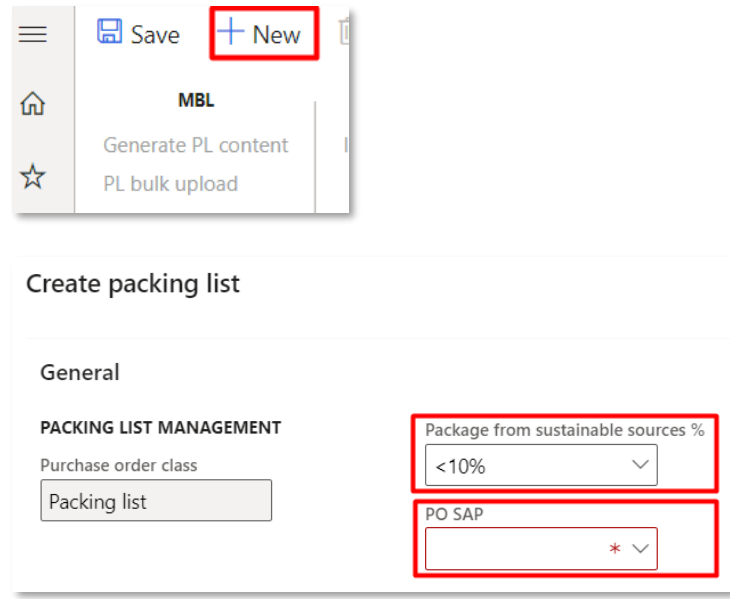
1. ACCESS ALL PACKING LIST AREA

a) From the menu on the left click on ACCOUNTS PAYABLE
b) Select ALL PACKING LIST



2. CREATE NEW PACKING LIST

a) Click on NEW
b) Select the Package from sustainable sources % (the default value is <10%)
c) Select the Purchase Order (PO)
d) Fill in all the mandatory fields (check the asterisk)
d) Click on OK



Vendor

Name: MOSTOSTAL KRAKÓW S.A.
Contact: Vendor Gmail MET

General

PURCHASE ORDER

Packing list: 7500066747-0035
Packing list num: 35
Name: MOSTOSTAL ...

PACKING LIST MANAGEMENT

Purchase order class: Packing list

Preliminary: No

Name of goods 2nd language:
Delivery place: 17
Name: ANWIL
Address: ul. Toruńska 222, 87-805 Włocławek, POL

Move "Preliminary" flag from No to Yes to create Preliminary PL

Preliminary

Yes



MANAGE PL: BULK UPLOAD

PRELIMINARY

FINAL

VENDOR

Process Phase	#	Activity	Description
PL MANAGEMENT	04	PL creation	• Bulk Upload from Excel

3.ADD PL LINES AUTOMATICALLY:

PREPARE YOUR FILE BEFOREHAND! - see next slide

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

c) 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.

c) SAVE

The screenshot shows the 'Packing list management' interface. The top navigation bar includes 'Save', 'New', 'Delete', and 'Options'. The main menu has 'MBL' (with 'Generate PL content' and 'PL bulk upload' sub-items), 'Integrity checks' (with 'Integrity check validation'), 'Update' (with 'PL Status update' and 'Reset to 00.DRAFT'), and 'Print management' (with 'Print Packing List & Marking List'). Below the menu, a table titled 'PL bulk upload' is visible with columns for 'HEAT No.', 'Mark', and a status indicator. A context menu is open over the 'HEAT No.' column, showing options: 'Form information', 'Export all rows', 'Group by this column', and 'Freeze column'. At the bottom right, there are 'Save' and 'New' buttons.

CHECK TEMPLATE & ERRORS HANDLINGS

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

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 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	
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

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: at least one mandatory only for the Packing list with OSD/NC field is flagged in Header section

MTC ID, Heat No: at least one 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	Punch 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

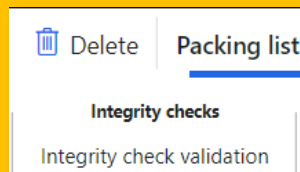
Process Phase	#	Macro Task	Activity
PL MANAGEMENT	04	PL creation	<ul style="list-style-type: none"> Bulk Upload from Excel

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.



All packing list | Standard view

7500066747-0037 : 0000055115 - MOSTOSTAL KRA

Packing list header

Packing list lines

Remove Package

	Package management	No.	UoM	Quantity
Where used	11AB0012	1	pcs	

Package management

PACKAGE HEADER

Packing list
7500067833-0022

+ New Remove Copy package header

Package ID	Progressive	Vendor package Id	Total net weight	Gross weight	Weight UOM
75000678330000068	1		364.450	500.000	KG

PACKAGE LINES

Line number	Mark	Stock/Mill	Quantity	Net weight	Total net weight
1	1112PR001I04AB0001	Mill	1.00	62.230	62.23
2	1112PR001I04AB0002	Mill	1.00	144.290	144.29
3	1112PR001I04AB0003	Mill	1.00	157.930	157.93

Save + New

MANAGE PL: ADD LINES MANUALLY

PRELIMINARY

FINAL

Process Phase

Activity

PL MANAGEMENT

#

Macro Task

Description

04

PL creation

- Add lines manually & manage Packages

1. GENERATE PL CONTENT

a) Click on GENERATE PL CONTENT

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

Generate PL content

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

Line number	Mark	No.	UoM	Quantity	Stock/Mill
1	1112PR001104AB0001	1	pcs		A01 Mill
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

Save + New Delete

MBL: **Generate PL content** PL bulk upload

Integrity checks: Integrity check validation

Update: PL Status update Reset to 00.DRAFT

Print management: Print Packing List & Marking List

Packing list lines

Remove Package

Line number	Mark	No.	UoM	Quantity	Stock/Mill
1	1112PR001104AB0001	1	pcs		A01 Mill
2	1112PR001104AB0002	1	pcs	144.29	144.29

Integrity check

Validation error:

Integrity check	Description
HS Code	HS code for Mark 1112PR001104AB0001 (Mill) is not populated.

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

Package management	No.	UoM	Quantity
Where used 11AB0012	1	pcs	

+ New Remove

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

PACKAGE LINES

Line number	Mark	Stock/Mill	Quantity	Net weight	Total net weight

< Add > Remove

PACKING LIST LINES

Package line re...	Line number	Mark	Stock/Mill
1.00	1	410PR0011AB0008	Mill

MANAGE PL: UPDATE CONTENT

PRELIMINARY

FINAL

VENDOR

Process Phase

Activity

PL MANAGEMENT

#

Macro Task

Description

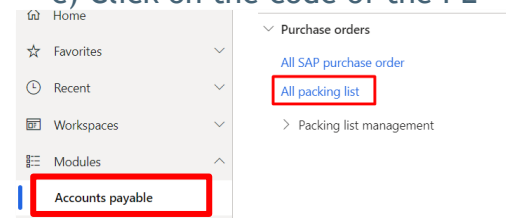
05

PL data update & review

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

1. ACCESS ALL PACKING LIST AREA

- From the menu on the left click on ACCOUNTS PAYABLE
- Select ALL PACKING LIST
- Click on the code of the PL

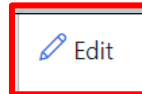


All packing list
Standard view

Filter	Packing list	Preliminary
	7500066747-0005	
	7500066747-0006	
	7500066747-0007	
	7500066747-0008	✓

2A. UPDATE PACKING LIST HEADER

- Select the PL & EDIT
- Choose Header
- Click on SAVE when done



Header

TURN PRELIMINARY INTO FINAL: Switch Preliminary to NO

A screenshot of the 'Packing list header' form for '7500066747-0008 : 0000055115 - MOSTOSTAL KRAKÓW S.A.'. The 'PRELIMINARY' status is highlighted with a red box. A red arrow points from the yellow text box to this status. Other fields include Vendor account (0000055115), Issue date, MWP No. (410-PR0011_A), SAP PO (7500066747), and Delivery date (6/4/2021). A 'PL dates' sidebar on the right shows 'Expected EXW Delivery' as 9/29/2021, also highlighted with a red box.

PL STATUS ALLOWED
00.DRAFT

2B. UPDATE PACKING LIST LINES

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

A screenshot of the 'Packing list lines' table for '7500067724-0010 : 0000055115 - MOSTOSTAL KRAKÓW S.A.'. The table has columns for Line number, Mark, No., UoM, Quantity, Weight per unit, Total weight, UoM Weight, Single mark qu..., Total mark qua..., and Unit. Three lines are listed:

Line number	Mark	No.	UoM	Quantity	Weight per unit	Total weight	UoM Weight	Single mark qu...	Total mark qua...	Unit
1	724PRC1A80B06	1	pcs	1.00	1.00	kg	1.00	1.00	KG	
2	724PRC1A80B07	1	pcs	8.00	8.00	kg	8.00	8.00	KG	
3	724PRC1A80B08	1	pcs	5.00	5.00	kg	5.00	5.00	KG	

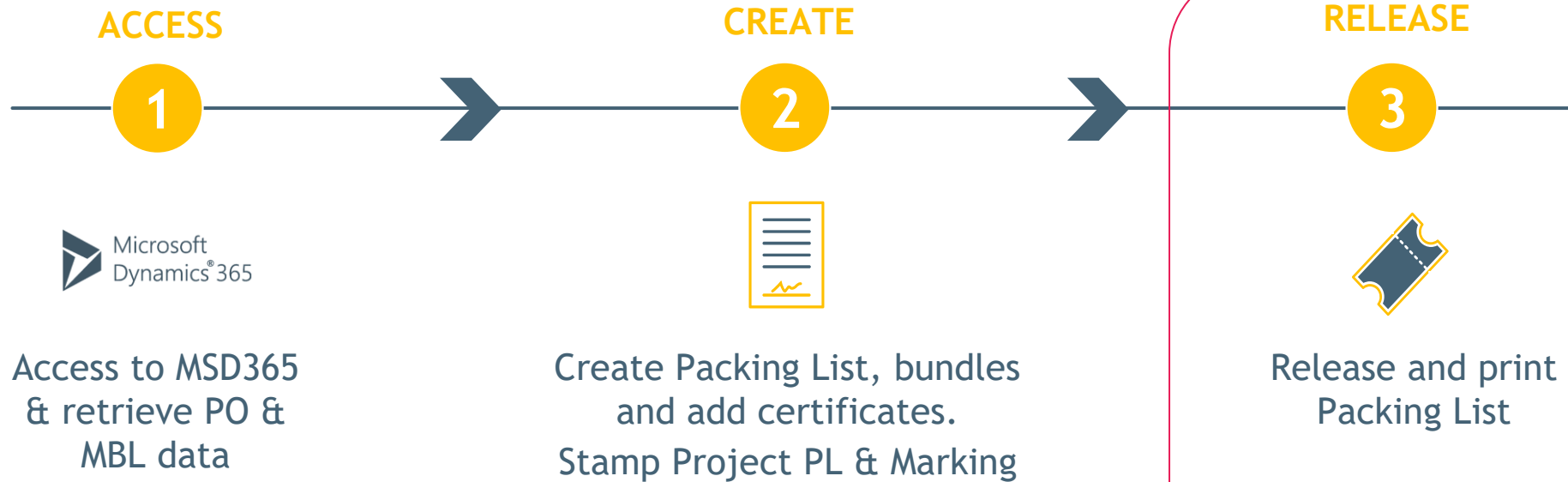
TO UPDATE PACKING LIST LINES ALSO THROUGH THE BULK UPLOAD FUNCTION

MBL
Generate PL content
PL bulk upload

03.RELEASE PACKING LIST

PACKING LIST & BUNDLES PREPARATION & RELEASE

Creating a Packing List



Focus Next

- 06.PL ISSUING
- 07.ADD DOCUMENTS TO PL
- 08.PRINT PL PROJECT & MARKING
- 09.MANAGES DATES FOR DAP/DDP



PROCESS - DETAILS

Process Phase	Activity		
	#	Macro Task	Description
PL ISSUING	06	PL issuing management	<ul style="list-style-type: none">• First issuing• Review an issued PL• Issuing upon Rework requested
LOAD DOCUMENTS	07	Add documents to PL	<ul style="list-style-type: none">• Uploads documents to PL
PRINT MARKING LIST & PL	08	Make Prints of Marking and PL content	<ul style="list-style-type: none">• Prints Marking and PL
ADD SITE DATES	09	Manage dates for DAP/DDP	<ul style="list-style-type: none">• Adds Vendor Estimated Arrival to site date

PL ISSUING

#	Macro Task	Description
06	PL issuing management	<ul style="list-style-type: none"> 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

Accounts payable

- Common
- Organization administration

- Purchase orders
 - All SAP purchase order
 - All packing list

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

PL STATUS ALLOWED
00.DRAFT

Packing list status update

Parameters

Next packing list status: 10.ISSUED

Note: [Empty]

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

Integrity check

Validation error	Description	PO SAP	Tag
Integrity check	Mark weight for Mark 724PR001A80006 (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 724PR001A80006 (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 724PR001A80007 (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 724PR001A80007 (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

Process Phase	#	Macro Task	Activity
PL ISSUING	06	PL issuing management	<ul style="list-style-type: none"> First issuing Review an issued PL Issuing upon Rework requested

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

Integrity check validation

Update

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

Integrity check validation

Update

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 (Mtl) 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 (Mtl) 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 (Mtl) 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 (Mtl) on Packing List 7500067724-0004 (Packing List Line 2) is different from related MBL Single Mark Quantity as per PO UoM.	7500067724	7500067724-0004

Process Phase	#	Macro Task	Activity
PL ISSUING	06	PL issuing management	<ul style="list-style-type: none"> First issuing Review an issued PL Issuing upon Rework requested

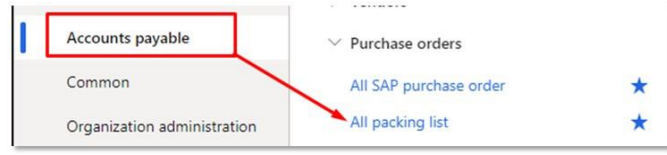
MET Inspex requires a review.

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

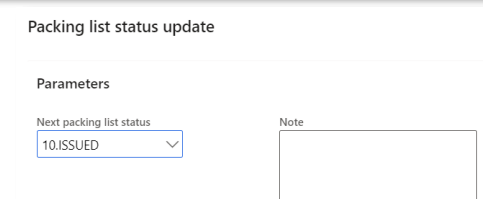
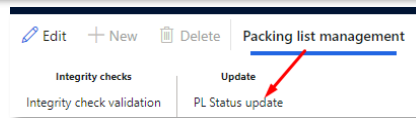
- Access Packing List
- Select the PL in status «05.REWORK»
- Click on Edit on the top page to edit the content
- Follow steps in slide: “Manage PL: update content”
- Click on Save



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



Integrity check

Validation error:

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

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»

Process Phase

Activity

Description

LOAD DOCUMENTS

#

Macro Task

Uploads documents to PL - Manage attachments

07

Add documents to PL

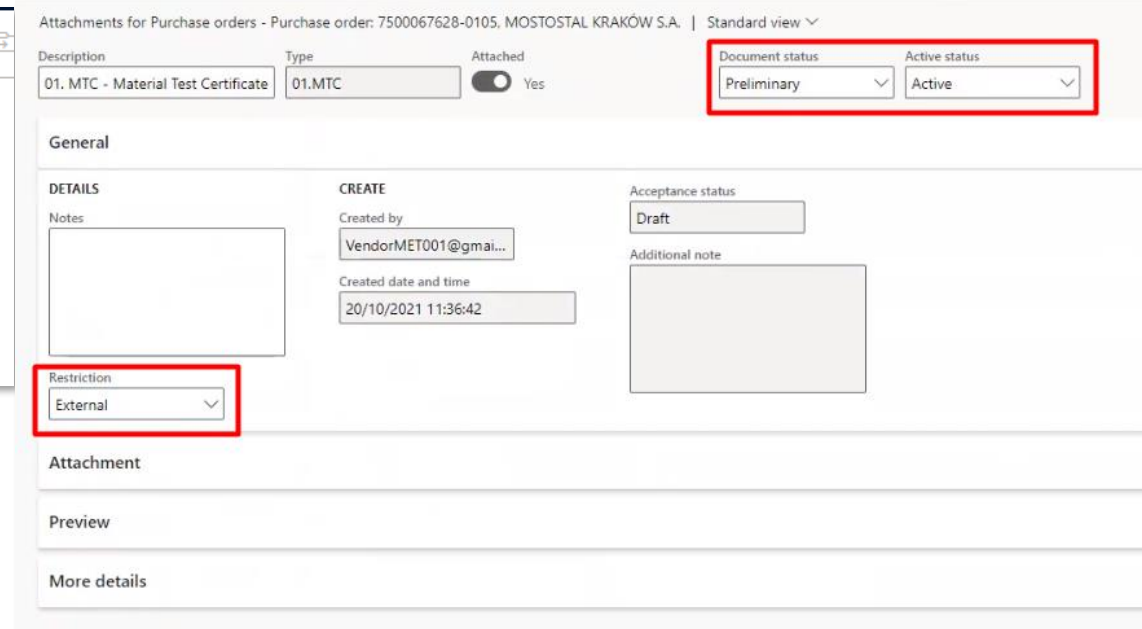
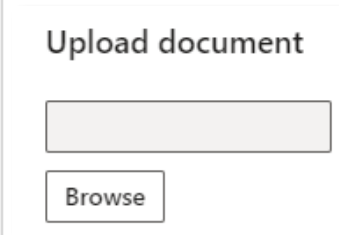
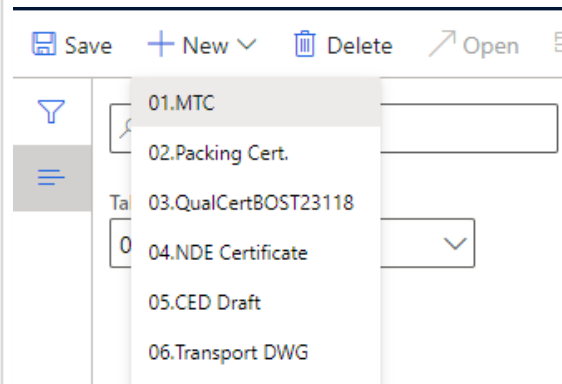
1. ACCESS ATTACHMENTS AREA
 1. After selected the PL:
 2. Move to Header section
 3. From the top page select the attachments icon that displays the number of current attachments available



PL STATUS ALLOWED
 ALL

2. ADD ATTACHMENTS

- a) Click on New
- b) Select from the List the type of document
- c) Upload the document
- d) Complete the additional fields
 - Document status
 - Active status
 - Restriction:
 - a) External: makes the attachment visible to the Vendor itself & MET
 - b) Internal: makes the attachment visible only to MET
 - Notes if required
- e) SAVE



PRINTS MARKING LIST AND PL CONTENT

Process Phase

Activity

PRINT MARKING LIST & PL

#

Macro Task

Description

08

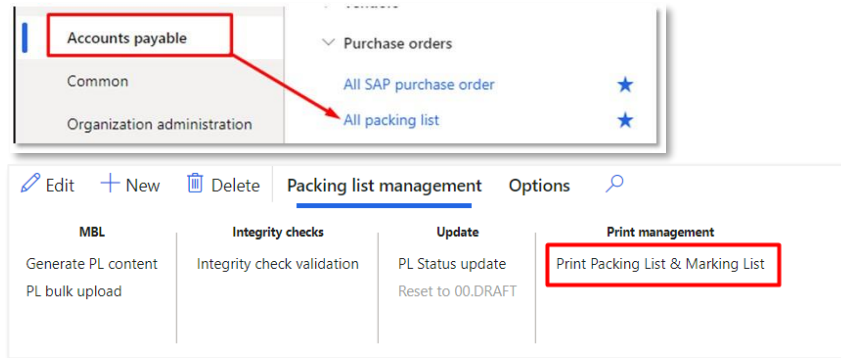
Make Prints of Marking and PL content

- Prints Marking and PL

PRINT MARKING & PROJECT PACKING LIST FORMAT

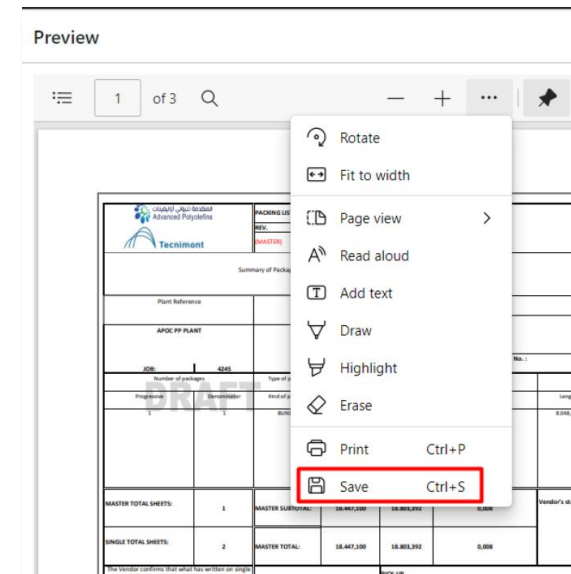
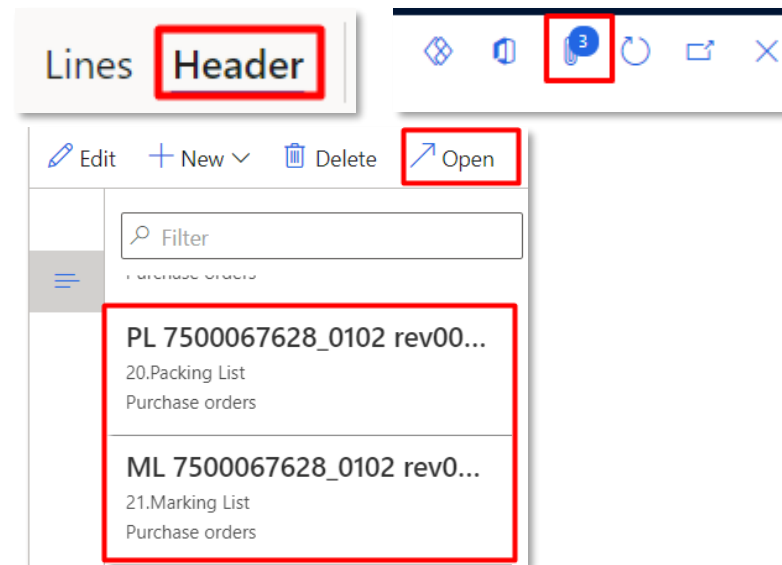
- Access Packing List
- Select the desired PL
- Click on Print PL & Marking List
- A message informs you that the printout documents will be generate soon
- When the number of attachments increases, access to Attachments Area after selecting the Header section of the PL.
- Select the last PL or ML and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

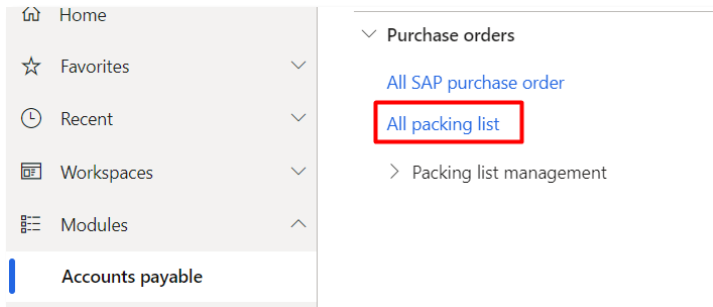


ON DAP/DDP: ADD VENDOR ESTIMATED ARRIVAL DATE TO SITE

Process Phase	Activity		
	#	Macro Task	Description
ADD SITE DATES	09	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



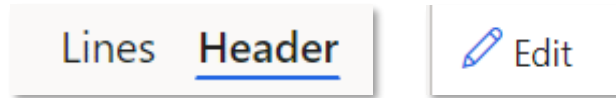
b) Select ALL PACKING LIST to see the PL list

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 Lines Header Open order

7500066747-0005 : 0000055115 - MOSTOSTAL KRAKÓW S.A.

Routing Method

Delivery places and pick-up locations

PL dates

VENDOR EXW	INSPEX DATE	LOGIS & ICA DATES	SITE DATES	Forwarder Estimated Arrival
Actual EXW Delivery <input type="text"/>	Accepted date <input type="text"/>	Actual Departure <input type="text"/>	ETA Site (calculated) <input type="text"/>	<input type="text"/>
Expected EXW Delivery 9/1/2021 <input type="text"/>	Last rework <input type="text"/>	Custom clearance <input type="text"/>	Site Arrival <input type="text"/>	<input type="text"/>
		ICA <input type="text"/>		

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	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"> Gross Weight must be greater than Net Weight or equal In case of "LOOSE" Package the Gross Weight must be only equal
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

Z.TASK RECORDER

TASK RECORDER

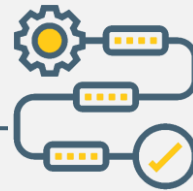
You will have available the **in tool record of the process**, that will provide an online step by step instructional **guide**



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



**Maire
Tecnimont**

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>
 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>

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

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

VENDOR

EXPEDITER

