MetaDynamic

MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

Packing Orders, Approvals & Packing Lists

Explore the documented MetaDynamic packing extension for Business Central: setup, sales-order packing preparation, conditional approval, manager review and packing-list generation.

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Packing managers, merchandising teams and distribution leaders

Current documented packing workflow only. Split packing and partial packing remain labelled as planned enhancements.

01 / IMPLEMENTATION RESOURCE

Overview: connect preparation with approval

The documented solution creates a controlled packing-order process around a sales order. Merchandising prepares the order, the configured approval rules determine the review route, and the packing team generates the packing list from approved information.

This is a specialist packing extension for Business Central. Its order statuses, manager cues, number series and approval rules belong to the configured application; they are not presented as a standard feature set included in every Business Central environment.

This public walkthrough describes the current documented workflow. It deliberately keeps future split-packing and partial-packing requirements separate from the available process.

01 Configure controls

02 Prepare full order

03 Review approval

04 Get approved lines

05 Print packing list

02 / IMPLEMENTATION RESOURCE

Setup: establish the approval path

The manual documents an approval on/off control in Sales and Receivables Setup and a packing-list number series. User Setup identifies the merchandising manager and packing-order approver for the process.

The packing order is associated with the sales order. Carton dimensions are taken from the relevant item unit-of-measure setup, and the documented process permits supporting attachments.

Treat the approval setting and user responsibilities as part of the application setup. Before rollout, demonstrate the configured route for both discrepancy and no-discrepancy examples so that preparers and approvers understand which orders require intervention.

03 / IMPLEMENTATION RESOURCE

Packing order: prepare and review the full quantity

Prepare the packing order against the sales order and review the packing lines, quantities, carton information and supporting material. In the documented current version, the packing order covers the full sales-order quantity.

When the configured approval process identifies a discrepancy, the order moves through the approval route. The manual also describes automatic approval for the no-discrepancy case when approval is enabled. The exact route depends on the installed setup.

The documented packing-order statuses are Open, Pending Approval, Approved and Cancelled. These statuses should be explained as application-specific packing controls rather than general Business Central sales-order statuses.

04 / IMPLEMENTATION RESOURCE

Packing list: use approved information

The Packing Manager role centre provides the documented operational cues. The packing team uses the approved orders as the input for packing-list preparation.

Use Get Packing Lines to bring the relevant approved information into the packing list. Review the resulting lines and print the packing list through the configured application process.

A packing list is not, by itself, evidence that a warehouse shipment, invoice, gate exit or government document has been posted or issued. Those later steps need their own system records and agreed integration scope.

05 / IMPLEMENTATION RESOURCE

Current scope, future requirements and measurement

Split packing lines for non-standard carton sizes and packing orders for only part of a sales-order quantity are identified as planned enhancements in the source manual. They are not described here as available functions or completed delivery.

For a similar engagement, validate carton units, dimensions, quantities and weight definitions. Gross weight must not be lower than the corresponding net weight. The inconsistent sample weights from the source document are omitted from this public edition.

Suggested future measures include approval turnaround, orders returned for correction and packing-list preparation time. These are a measurement framework, not achieved improvements. Demonstrate the current workflow and agree any further extension separately.

Related MetaDynamic service

https://metadynamic.in/business-central/packing-gate-entry-logistics/

Contact MetaDynamic to discuss your project.