

Transportation Management Configuration Deep Dive - Rating & Routing TechTalk

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Agenda

1. Core Configurations
2. Functionality
3. Tips & Tricks

Core Configurations

Core Configurations

Transportation Management Parameters

- Initialize base engine data for rating

Rating Profiles / Masters / Base Assignments / Bases

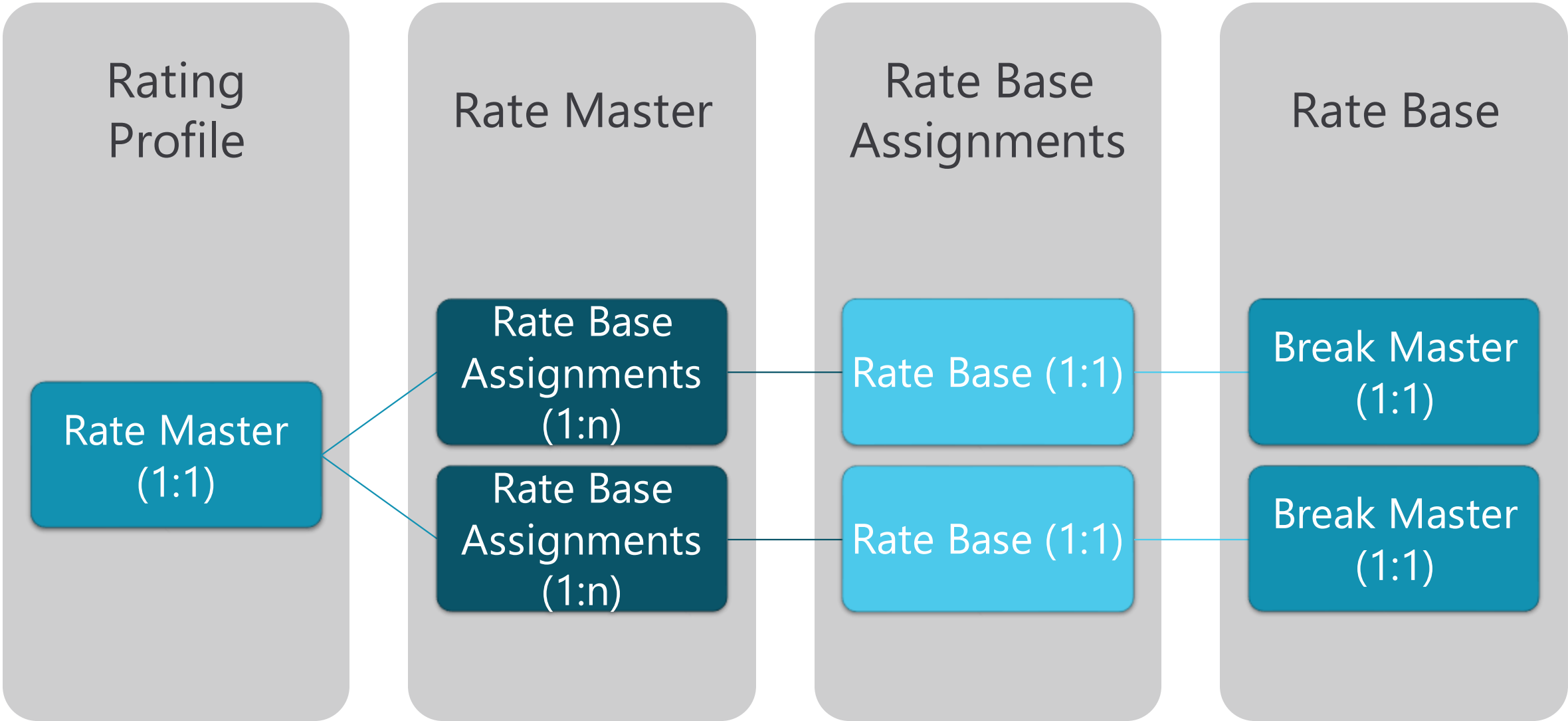
- Define the query structure for the rate engine

Routing Guides / Plans / Schedules

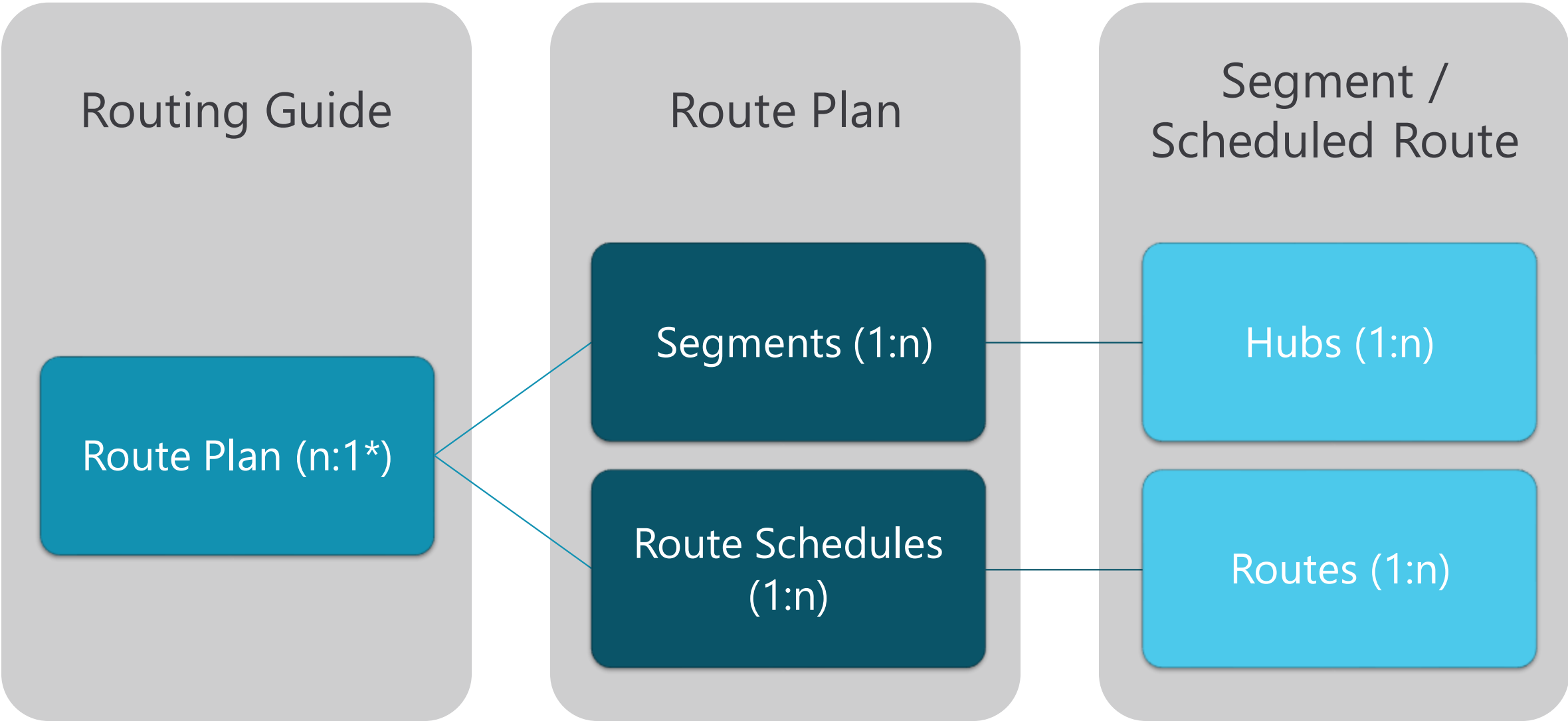
- Define the query structure for the route operations

Functionality

Rating



Routing

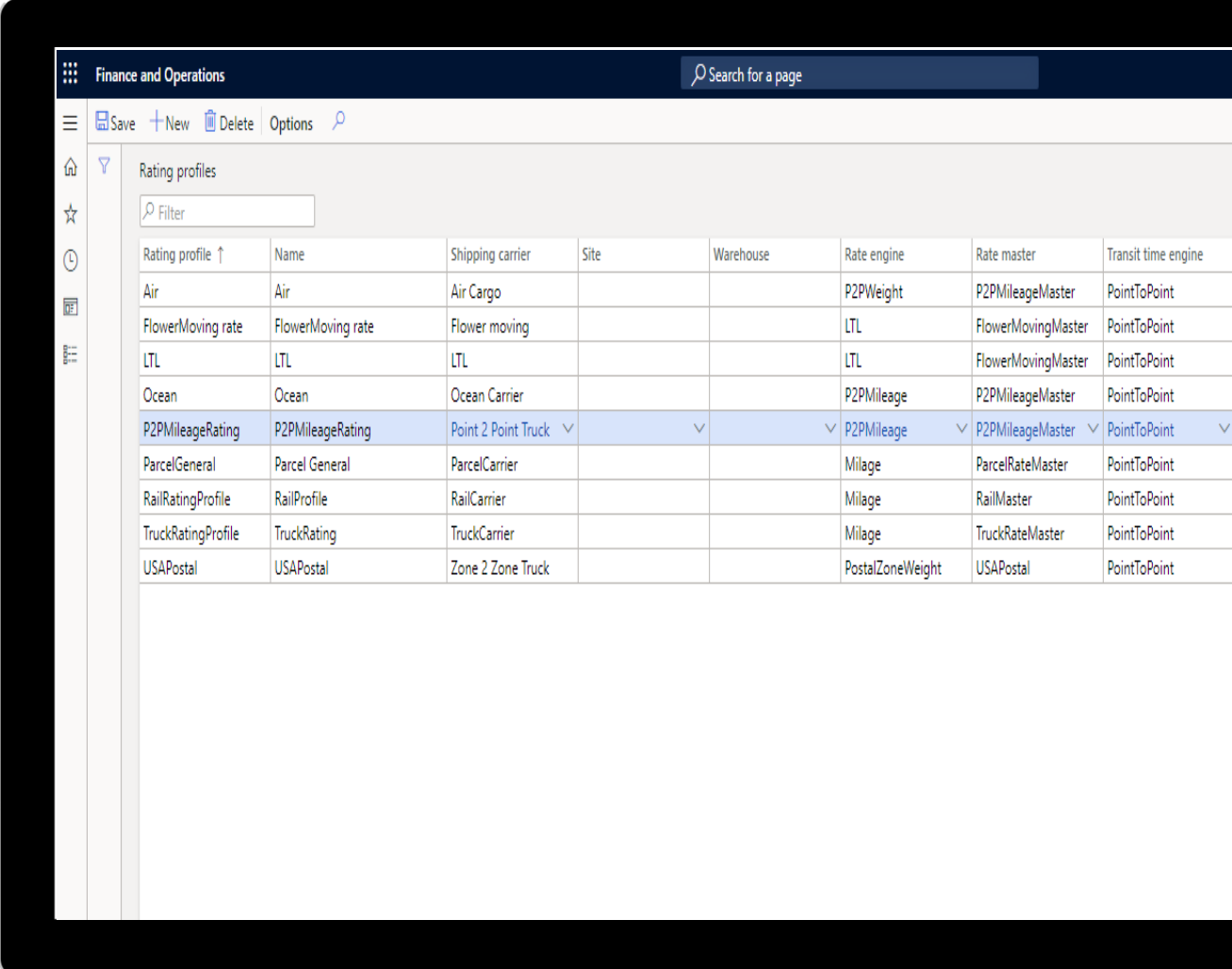


Tips & Tricks

Tips & Tricks

Rating

- Rating profile
 - Leave Site/Warehouse <blank>
- Rate master
 - Verify rating metadata
- Rate base assignments
 - Leave effective dates <blank>
- Rate base
 - Leave effective dates <blank>
- Break master
 - Choose right data type for unit



The screenshot shows the SAP Finance and Operations interface for Rating profiles. The table lists various rating profiles with their associated shipping carriers, sites, warehouses, rate engines, rate masters, and transit time engines. The 'P2PMileageRating' profile is highlighted in blue.

Rating profile ↑	Name	Shipping carrier	Site	Warehouse	Rate engine	Rate master	Transit time engine
Air	Air	Air Cargo			P2PWeight	P2PMileageMaster	PointToPoint
FlowerMoving rate	FlowerMoving rate	Flower moving			LTL	FlowerMovingMaster	PointToPoint
LTL	LTL	LTL			LTL	FlowerMovingMaster	PointToPoint
Ocean	Ocean	Ocean Carrier			P2PMileage	P2PMileageMaster	PointToPoint
P2PMileageRating	P2PMileageRating	Point 2 Point Truck			P2PMileage	P2PMileageMaster	PointToPoint
ParcelGeneral	Parcel General	ParcelCarrier			Milage	ParcelRateMaster	PointToPoint
RailRatingProfile	RailProfile	RailCarrier			Milage	RailMaster	PointToPoint
TruckRatingProfile	TruckRating	TruckCarrier			Milage	TruckRateMaster	PointToPoint
USAPostal	USAPostal	Zone 2 Zone Truck			PostalZoneWeight	USAPostal	PointToPoint

Tips & Tricks

Routing

- Routing guide
 - Define the direction
- Route plan
 - Add spot rates
- Hubs
 - Populate address
- Route schedules
 - Activate route recurrence
- Constraints
 - Define item / shipment restrictions

The screenshot displays the 'Routing guide' configuration page in Microsoft Dynamics 365 Finance and Operations. The page is titled 'Finance and Operations' and includes a search bar at the top right. The left sidebar shows a list of routing guides: 'WA to GA' (Washington to Georgia), 'WA to LA' (Washington to Los Angeles), and 'WA-CA-GA-GA' (Wh61 to Cust 003 004 019). The main content area is for the 'WA to GA' routing guide, with the name 'Washington to Georgia' entered. The 'Information' section includes fields for Direction (None), Equipment, Site, Effective start date and time, Active (Yes), Residential (No), Warehouse, and Effective end date and time. The 'Accounts' section includes Origin and Destination details, such as ZIP/postal code, Hub, Country/region, Zone master, and Zone. The 'Limits' section is currently empty. The 'Result' section includes fields for Mode, Shipping carrier, Carrier service, Carrier group, Route plan (WA to GA), Delivery terms, and Equipment.

Q&A

Thank you!

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