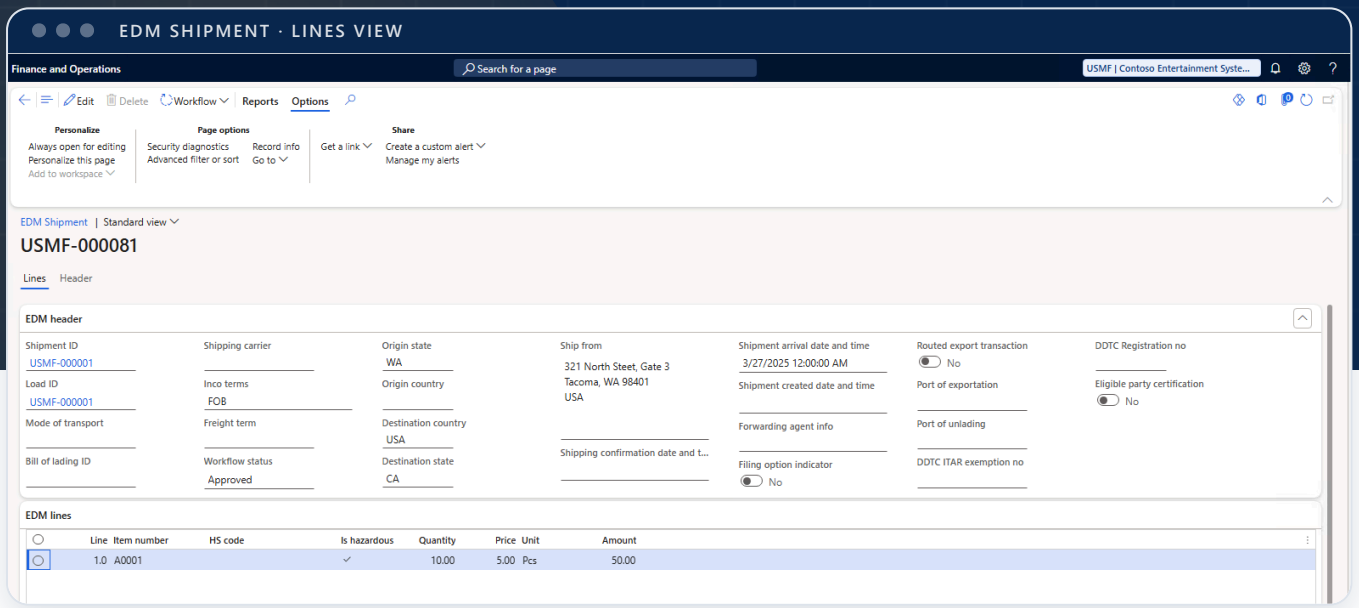
EXPERT DYNAMICS GROUP

MICROSOFT DYNAMICS 365
FINANCE & SUPPLY CHAIN MANAGEMENT

EDG EXPORT DOCUMENT MANAGEMENT

Export compliance, built into Dynamics 365.

Generate export documents and file Electronic Export Information with CBP's Automated Export System – straight from your shipment data.



PRODUCT BROCHURE

An ISV module for Dynamics 365 Finance and Operations

For exporters, compliance teams and operations users who file U.S. export shipments.

8
export documents generated

26
CBP AES long-test scenarios covered

15
setup & reference data forms

THE CHALLENGE

Stop re-keying shipments into separate export systems.

Every U.S. export shipment needs accurate party, commodity, licensing and transport data – and much of it already lives in Dynamics 365. EDM brings that data together into one controlled export record, then documents and files it for you.

WITHOUT EDM

Manual, disconnected, error-prone

- Shipment, customer and item data copied by hand into filing tools
- Export documents assembled separately for every shipment
- Licensing, ECCN and DDTC details tracked outside the ERP
- Rejected filings corrected and re-sent with no clear trail

WITH EDM

One export record, end to end

- ✓ EDM records auto-created from warehouse shipments and sales orders
- ✓ Eight export documents generated from the same record
- ✓ Compliance codes maintained centrally inside Dynamics 365
- ✓ AES responses handled with change, cancel and resubmit actions

HOW IT WORKS

From warehouse shipment to accepted AES filing

1. **Create** – EDM Creation Job builds the export record from shipment, order, customer and item data.
2. **Validate** – Review header, parties, transport and commodity lines; correct anything flagged.
3. **Approve** – Route the shipment through the configured EDM approval workflow.
4. **Generate & send** – Generate the AES file and transmit it to CBP over a secure MQ connection.
5. **Receive response** – Read the AES response and identify warnings, errors or acceptance.
6. **Close or correct** – Update EDM with the ITN and status – or correct and resubmit.

Less manual entry

Party, address, transport and line data is derived from records already in Dynamics 365.

Stronger compliance

HTS, ECCN, license, DDTC and port codes are applied consistently to every shipment.

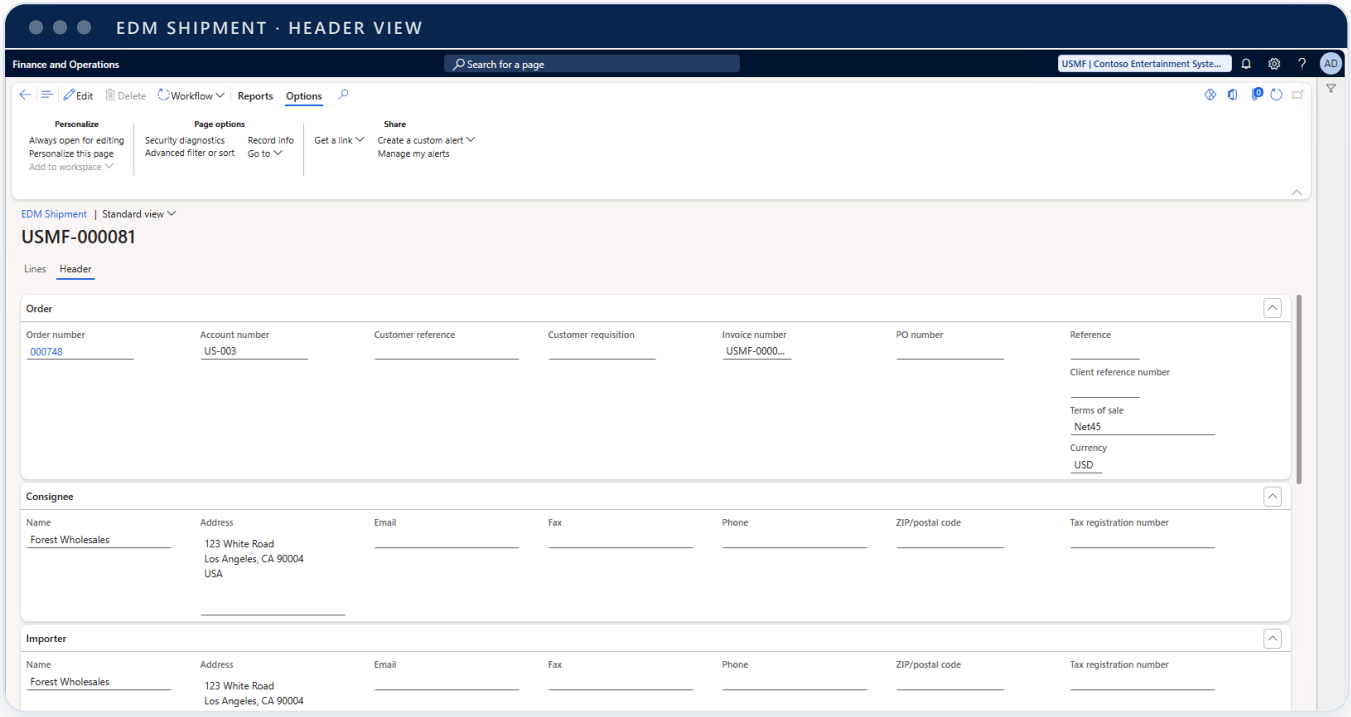
Controlled release

Workflow approval gives compliance leads a checkpoint before anything is filed.

EDM SHIPMENTS

Every export party and detail, populated for you.

The EDM Shipment form brings order, consignee, importer, exporter, purchaser and intermediate consignee details together – each mapped from its source record in Dynamics 365 and editable according to workflow status.



Sourced from your records

Warehouse shipments and loads, sales orders, customers, vendors, purchase orders, released products, company info and the global address book.

All export parties

Consignee, importer, exporter, purchaser, forwarding agent and intermediate consignee for intercompany or direct-delivery scenarios.

Transport & AES fields

Mode of transport, carrier, Incoterms, ports, filing option, routed export and DDTC indicators on the EDM header.

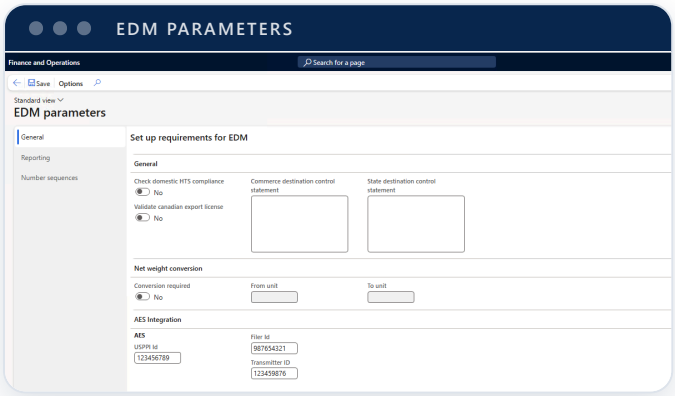
Commodity line detail

Item, quantity, price, HS code, origin, hazardous flag, UN number, weight, volume, ECCN and license number per line.

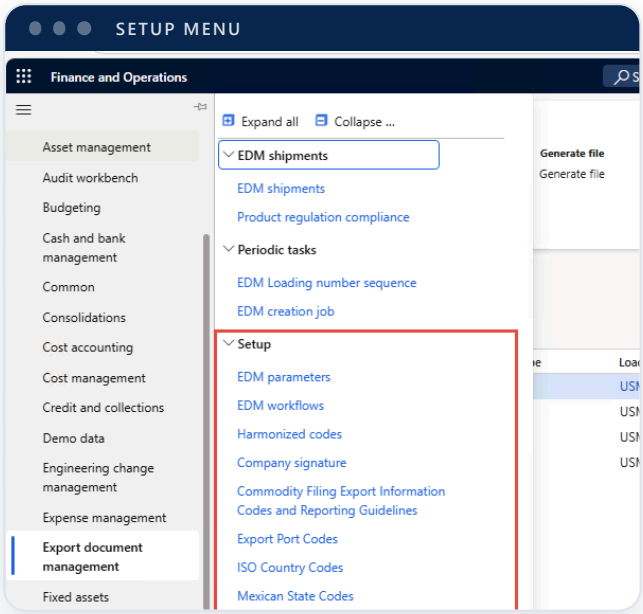
CONFIGURE ONCE

Reference data that keeps every filing consistent.

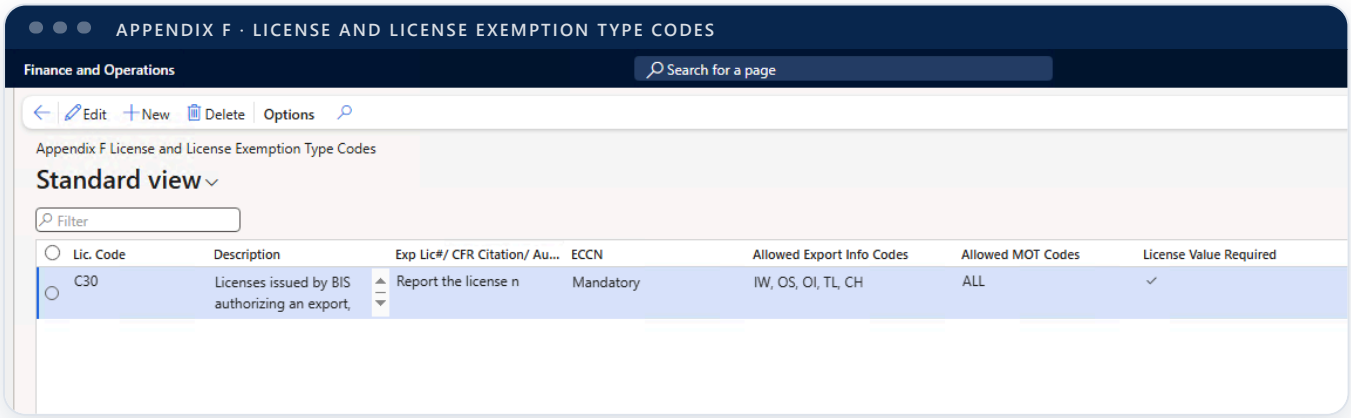
Set your AES identifiers, compliance checks and regulatory code tables once, inside Dynamics 365. EDM applies them to every shipment it creates.



AES integration IDs, HTS compliance, Canadian license validation and net-weight conversion.



The full Export Document Management module in the Dynamics 365 navigation.



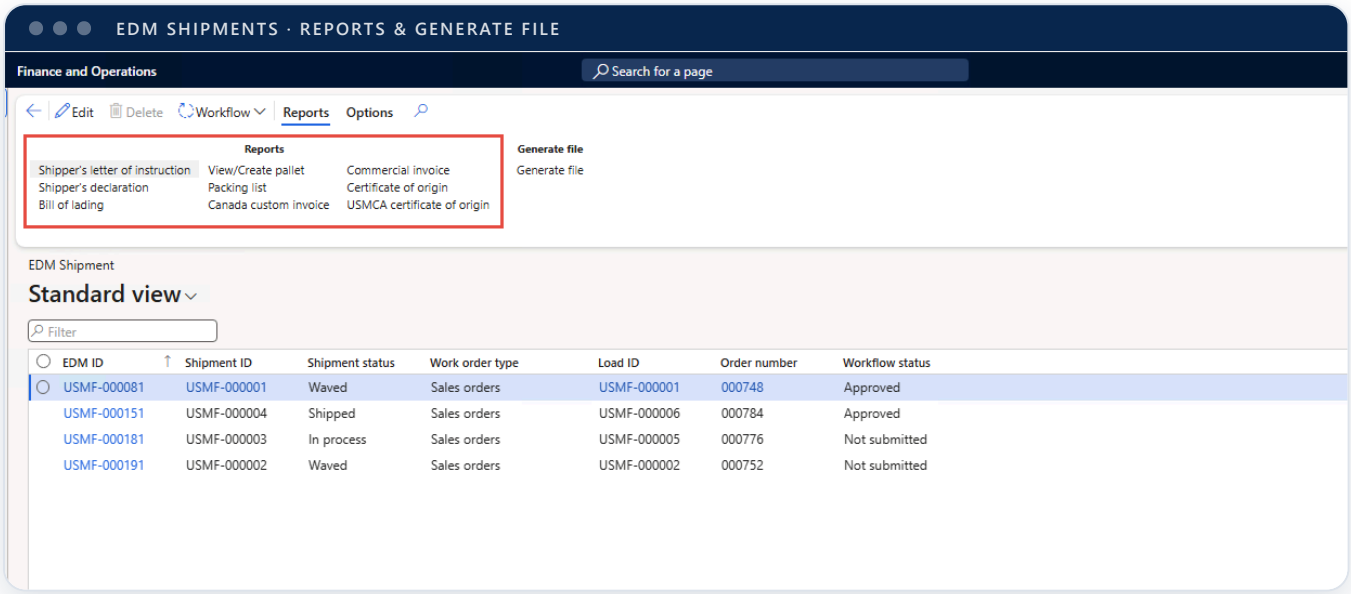
15 setup and reference data forms included

- EDM parameters
- EDM workflows
- Harmonized codes
- Company signature
- Commodity filing EIC codes
- Export port codes
- ISO country codes
- Mexican state codes
- Mode of transport
- Appendix V HTS codes
- Appendix K units of measure
- Appendix F license codes
- DDTC ITAR exemptions
- DDTC units of measure
- DDTC USML categories

DOCUMENTS & AES FILING

Print the paperwork. File with CBP. From the same screen.

The EDM Shipments list gives you every export document and the AES file generation action in one place, alongside shipment and workflow status.



Export documents

- Commercial invoice
- Packing list
- Bill of lading
- Certificate of origin
- USMCA certificate of origin
- Shipper's letter of instruction
- Shipper's declaration
- Canada customs invoice

Electronic AES filing

Secure MQ transmission

Filings are sent to CBP through an IBM MQ Client over TLS, authenticated with your issued client certificate.

Response handling

AES responses are retrieved from the outbound queue so errors and warnings can be corrected and resubmitted.

Batch-ready

The EDM Creation Job runs on a schedule so records are prepared ahead of shipment.

PROVEN AGAINST CBP'S SCENARIOS

Validated across all 26 CBP AES long-test scenarios.

CBP requires filers to pass its AES long tests before operational certification. EDM's filings were exercised against every scenario, built to the AESTIR record structure.

STANDARD FILINGS

Everyday exports

Basic EEI filing, ocean/vessel shipments, air, truck and rail modes, multiple commodities and dual units of measure.

CHANGES & CORRECTIONS

Amend with confidence

Cancelling accepted shipments, adding or deleting commodity lines, correcting dates, conveyance names and export ports.

VALIDATION HANDLING

Errors caught and fixed

Out-of-range quantities, impossible export dates, blank conveyance names and invalid Puerto Rico routing – rejected, corrected and resubmitted.

REGULATED & SPECIAL GOODS

Beyond the basics

BIS/ECCN licensed goods, mixed USML shipments, US–UK Defense Trade Cooperation Treaty, post-departure filing, household goods, exhibition goods and used vehicles.

What you'll need

- Dynamics 365 Finance and Supply Chain Management
- A CBP filer account (USPPI, Filer and Transmitter IDs)
- IBM MQ Client with CBP-issued certificates
- Outbound firewall access to the CBP AES gateway

Who it's for

- U.S. exporters running Dynamics 365
- Export compliance and trade teams
- Warehouse and shipping operations
- Dynamics 365 administrators and partners

NEXT STEP

See EDM in your environment.

Talk to Expert Dynamics Group about a walkthrough, CBP certification readiness and deployment into your Dynamics 365 Finance and Operations environment.

Available on Microsoft Marketplace.

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