



DYNAMICS 365

FINANCE AND OPERATIONS

SETUP GUIDE

LogTrade

2018-12-07



1 GENERAL

This document describes the basic setup of LogTrade Connect for Dynamics 365 Finance and Operations. The setup is done with a wizard that takes you through each necessary step.

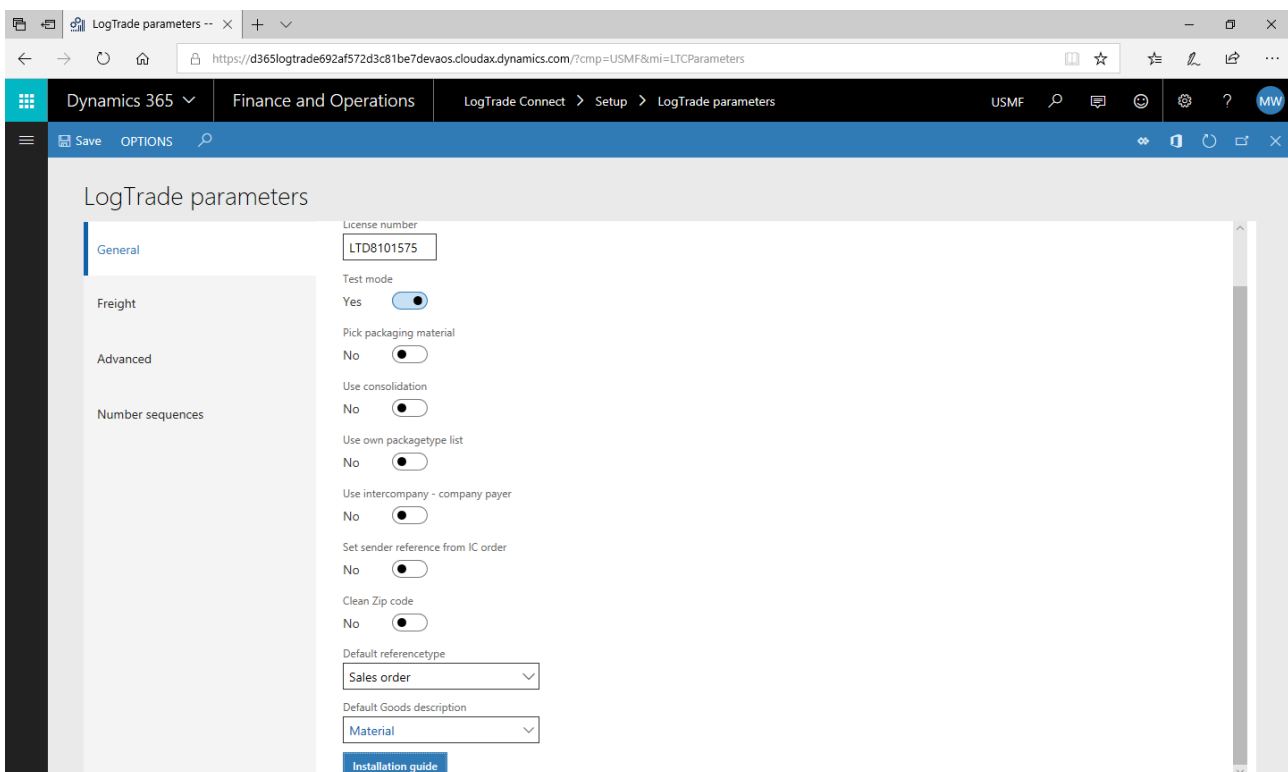
1.1 PREPARATIONS IN LOGTRADE PLATFORM

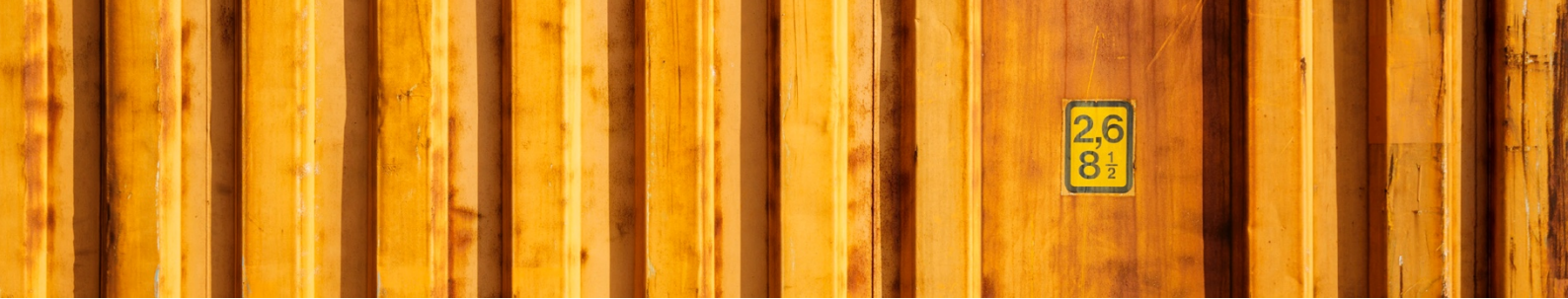
Before starting the setup in Dynamics 365 you must setup user accounts and print queues in LogTrade.

1.2 SETUP IN DYNAMICS 365

In *LogTrade parameters* there is a button for the Installation guide. The guide will help you through the initial setup.

The first step is to enter the license number, user id and password. For that window to open you need to click *Installation guide* in the first window that opens and choose the *Identification* tab. There is a possibility to test the credentials before proceeding which is recommended.





Logtrade setup -- Finan x

https://d365logtrade692af572d3c81be7devaos.cloudax.dynamics.com/?cmp=USMF&mi=LTCParameters

Dynamics 365 Finance and Operations LogTrade Connect > Setup > LogTrade parameters USMF MW

Save OPTIONS

Logtrade setup

Welcome **Identification** Get base data Select printerqueue Goods description Package type groups

License number

User Id

Password

Test credentials

Back Next Cancel

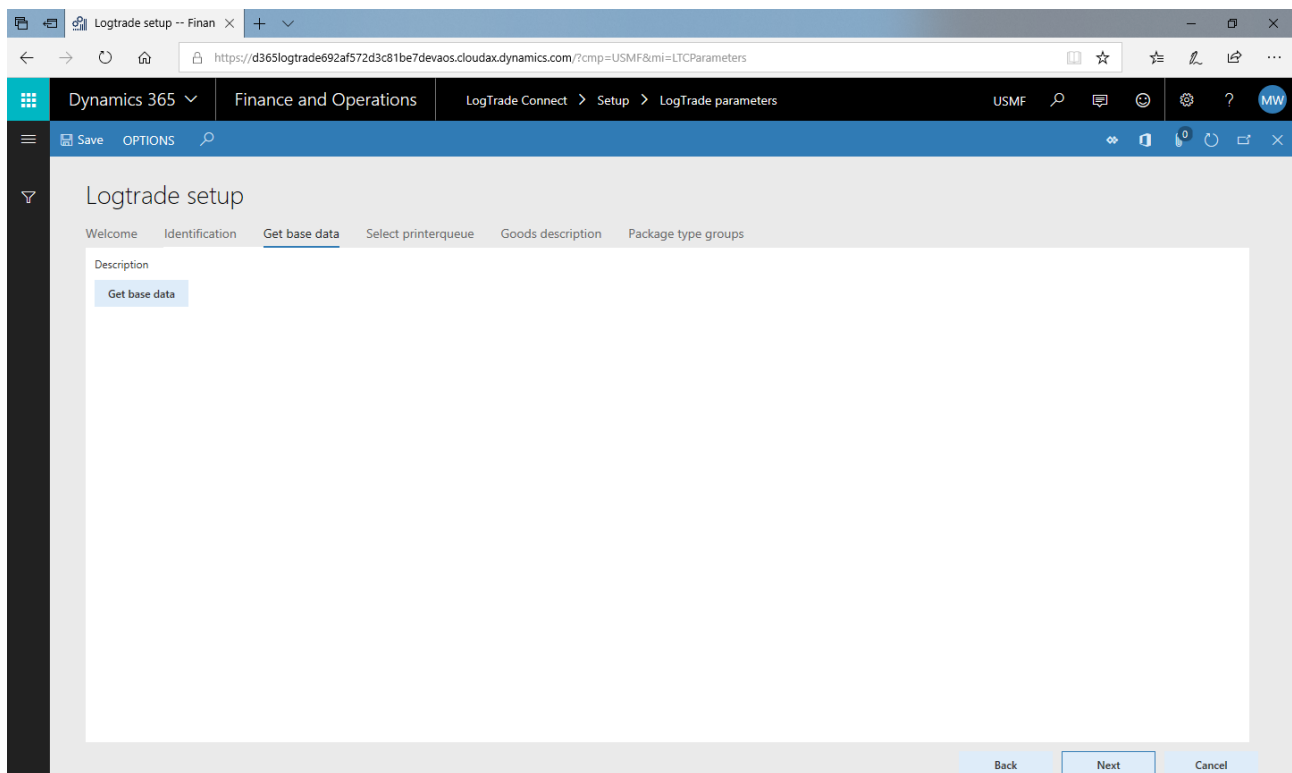


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1.3 GET BASE DATA

After the credentials have been entered and tested press the *Get base data* on the *Get base data* tab to fetch the base data for the system from the LogTrade platform.

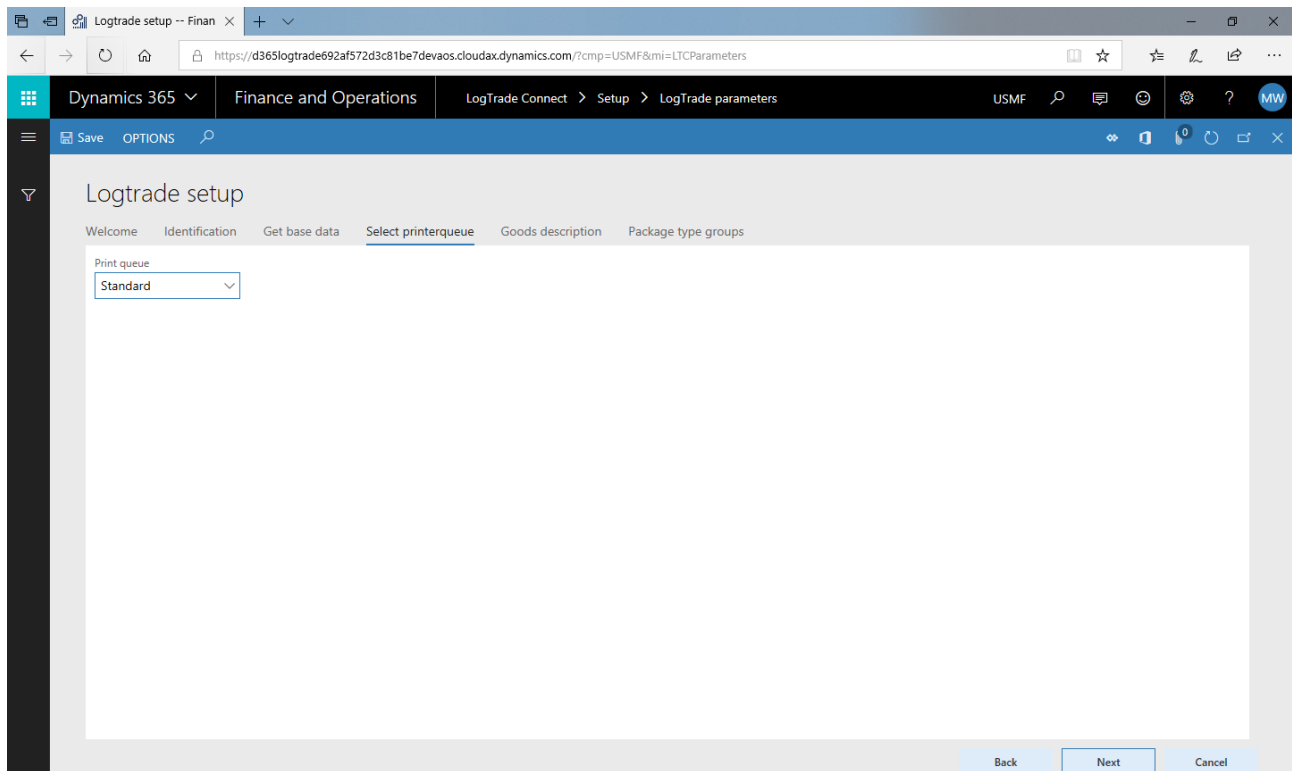
This step will normally take up to 10 minutes.





1.4 PRINT QUEUES

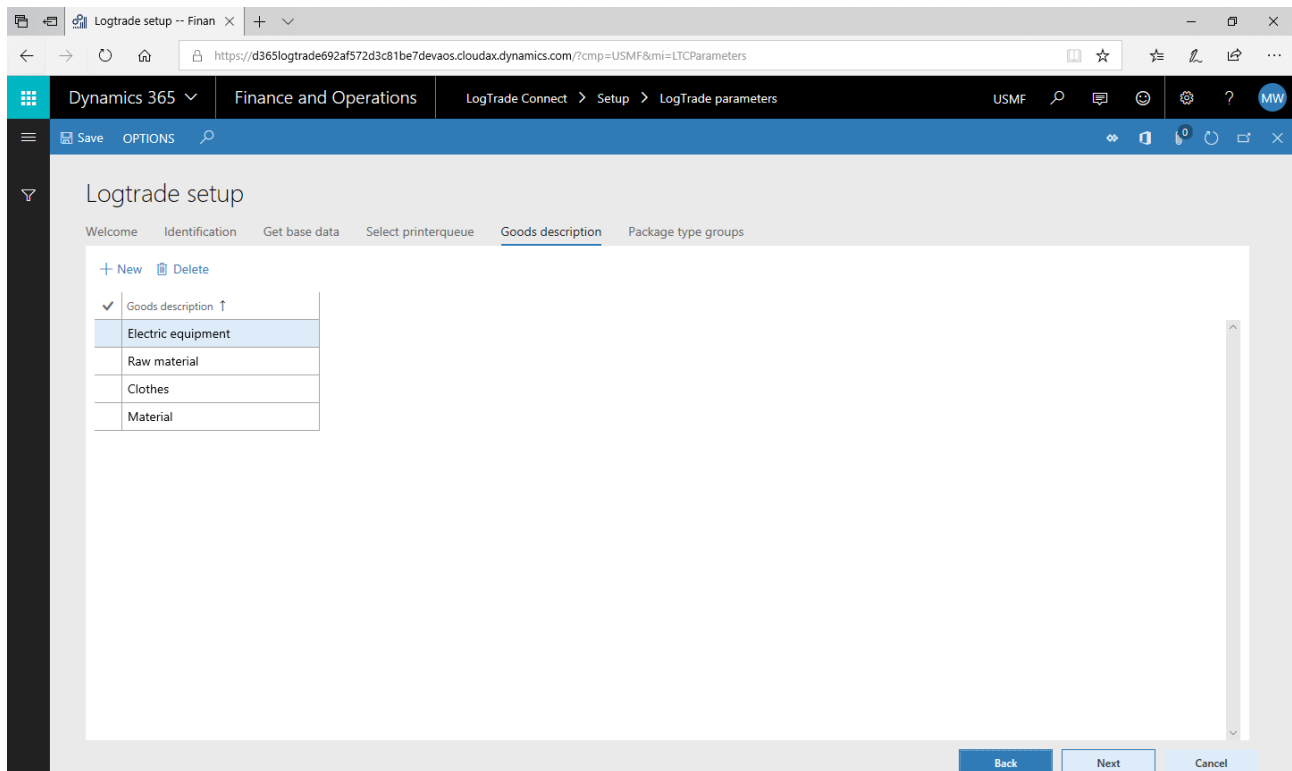
Next step is to point out which print queue that should be used for your LogTrade user account as the default print queue. This is done under the tab *Select printerqueue*.





1.5 GOODS DESCRIPTION

Next step is to define goods descriptions that you are working with. One of the descriptions can later be defined as default in the *LogTrade parameters* and will automatically be used on new goods item lines.





1.6 PACKAGE TYPE GROUPS

A *package type group* will be mapped to the transporters package type codes per delivery mode. *Package type groups* usually is Package and Pallet, but others could be used depending on your needs.

The screenshot shows the Dynamics 365 LogTrade setup interface. The browser address bar displays the URL: <https://d365logtrade692af572d3c81be7devaos.cloudax.dynamics.com/?cmp=USMF&mi=LTCParameters>. The navigation pane on the left shows 'LogTrade Connect > Setup > LogTrade parameters'. The main content area is titled 'Logtrade setup' and has tabs for 'Welcome', 'Identification', 'Get base data', 'Select printerqueue', 'Goods description', and 'Package type groups'. The 'Package type groups' tab is active, showing a table with the following data:

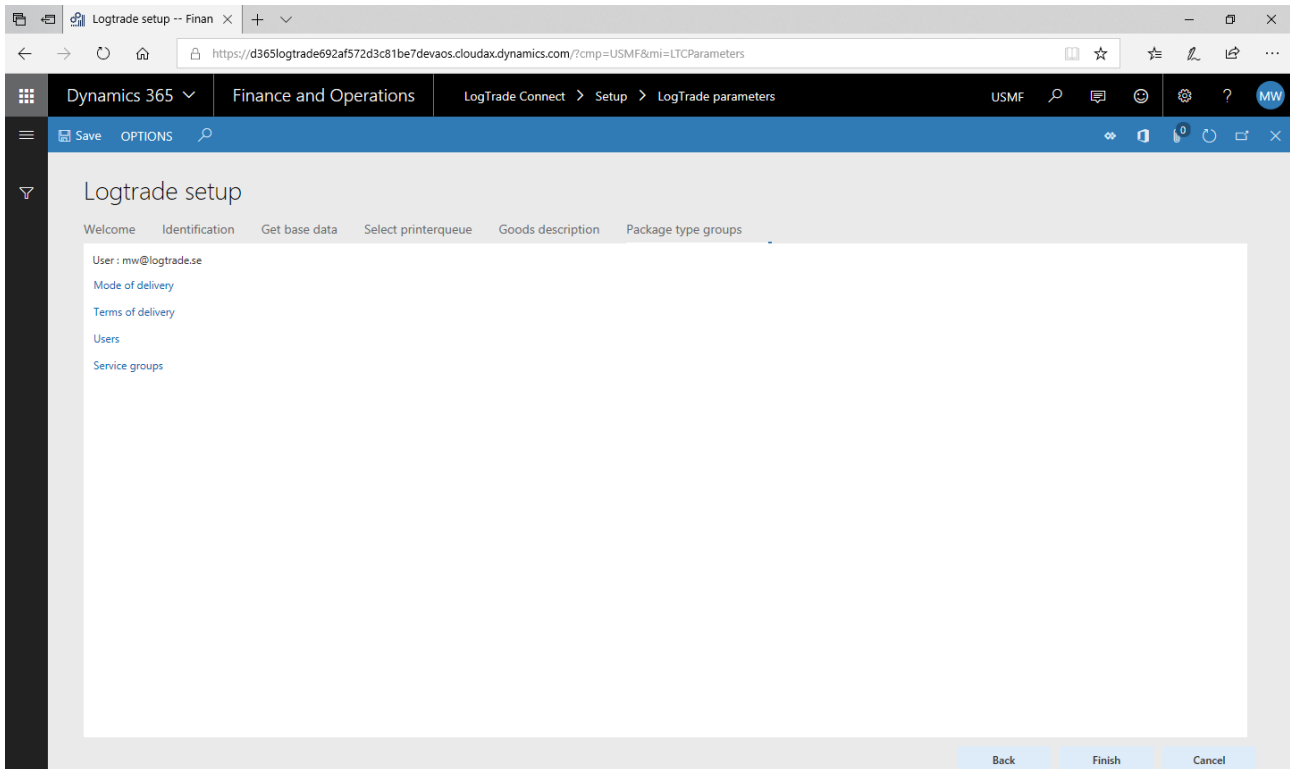
Package type group	Description
Package	Package
Pallet	Pallet

At the bottom of the interface, there are 'Back', 'Next', and 'Cancel' buttons.

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1.7 ADDITIONAL STEPS

Now the guide is done, and shortcuts can be found for the next steps.
Go thru them in the order they are presented.





1.8 MODE OF DELIVERY

In *Mode of delivery* you will see all your defined delivery modes in the system.

You need to map them (all or the ones you will use) to a carrier and a carrier product.

You can also map the carriers package type code to the *Package type group* that where defined earlier in the wizard.

The screenshot shows the Dynamics 365 Finance and Operations interface for configuring a 'Mode of delivery'. The browser address bar shows the URL: <https://d365logtrade692af572d3c81be7devaos.cloudax.dynamics.com/?cmp=USMF&mi=LTCdlvModeSettings>. The page title is 'Mode of delivery'. On the left, there is a table of defined delivery modes:

Mode of deli...	Description
40	Ocean
50	Parcel
60	Customer pickup
AGENT	Agent delivery
Air C-Air	Air Cargo-Air
EXPRESS	Express package
Flowe-STD	Flower moving-STD
FULLLOAD	Fulload/Direct
HOME	Home delivery
LTL-LTL	LTL-LTL
Ocean-Ocea	Ocean Carrier-Ocean
PARCEL	Parcel
Parce-STD	ParcelCarrier-STD
PARTLOAD	Partload
Point-STD	Point 2 Point Truck-STD
RailC-Rail	RailCarrier-Rail
Truck-Truc	TruckCarrier-Truck
Zone -STD	Zone 2 Zone Truck-STD

The right side of the page shows the configuration for the selected 'PARTLOAD' mode:

- Mode of delivery:** PARTLOAD
- Description:** Partload
- Logtrade settings:**
 - Carrier: SchenkerSweden
 - Price quote support: Yes (checked)
 - Line function: NoCreate
 - Product code: SchenkerSweden_System
 - Timetable support: Yes (checked)
 - Freight calculation: LTC
- Package type groups:**
 - Buttons: + New, Delete
 - Table:

Package type group	Package type
Package	pc
Pallet	EP





1.9 TERMS OF DELIVERY

In *Terms of delivery* you will see all your defined delivery terms.

You need to map them (all or the ones you will use) to a carrier's delivery terms codes. This is done per *delivery mode* that is mapped to a carrier above.

These *delivery terms codes* are used for international shipments.

Freight payer also needs to be defined for each *delivery term*. This will be used for domestic deliveries.

The screenshot shows the Dynamics 365 interface for configuring LogTrade delivery terms. The main area is titled 'Terms of delivery' and contains a table of standard delivery terms and their descriptions. To the right, there are configuration sections for 'Logtrade settings' and 'Logtrade delivery terms'.

Delivery terms	Description
CFR	Cost and freight
CIF	Cost, insurance, freight
DDP	Delivered duty paid
DES	Delivered ex ship
EXW	Ex works
FAS	Free along ship
FCA	Free carrier (place)
FOB	Free on Board

Logtrade settings

Freight payer: Sender

Logtrade delivery terms

Mode of delivery	Delivery terms code
FULLLOAD	006
PARTLOAD	0004





1.10 USERS

In the *Users* form you can add more LogTrade accounts, and connect them to their correct associated *print queue*. In general you need one LogTrade account per *print queue*. You can also map system users to LogTrade accounts in this form so the system know which account to use, and which *print queue* to use.

✓	User Id	Password	Print queue	Default
	1click_mw@logtrade.se	*****	Pdf	<input type="checkbox"/>
	mw@logtrade.se		Standard	<input checked="" type="checkbox"/>

✓	User ID	Operator name
	Admin	Admin





1.11 SERVICE GROUPS

In *Service groups* you can create a group that defines a service that you would like to work with. By adding the *service group* to a shipment (either manually or automatically), it will then translate that group to a carrier service when the shipment record is sent to the LogTrade platform.

In this form you can define the *service groups* and also map them to the carriers service code per *delivery mode*.

There is also the possibility to auto create *service groups* that are LogTrade defined.

Service group	Description
LogtradeDeliveryAdvi	LogTrade Delivery Advice
LogtradeDocumentAdvi	Logtrade transport document li...
LogtradeEmailAdviceS	LogTrade email advice
LogtradeLoginAdviceS	Logtrade login link advice
LogtradeSmsAdviceSer	LogTrade SMS advice
Heat	Heat

Mode of delivery	Service code
AGENT	PostNordSwedenLogtradeEmail
FULLLOAD	DhlSwedenLogtradeEmailAdvic...
HOME	PostNordSwedenLogtradeEmail...
PARCEL	DhlSwedenLogtradeEmailAdvic...
PARTLOAD	SchenkerSwedenLogtradeEmail...

