



# USER GUIDE

# LOGTRADE CONNECT

# ASSISTED SETUP

**LogTrade Connect for Microsoft Dynamics 365 Business Central**

V 1.0.0.0



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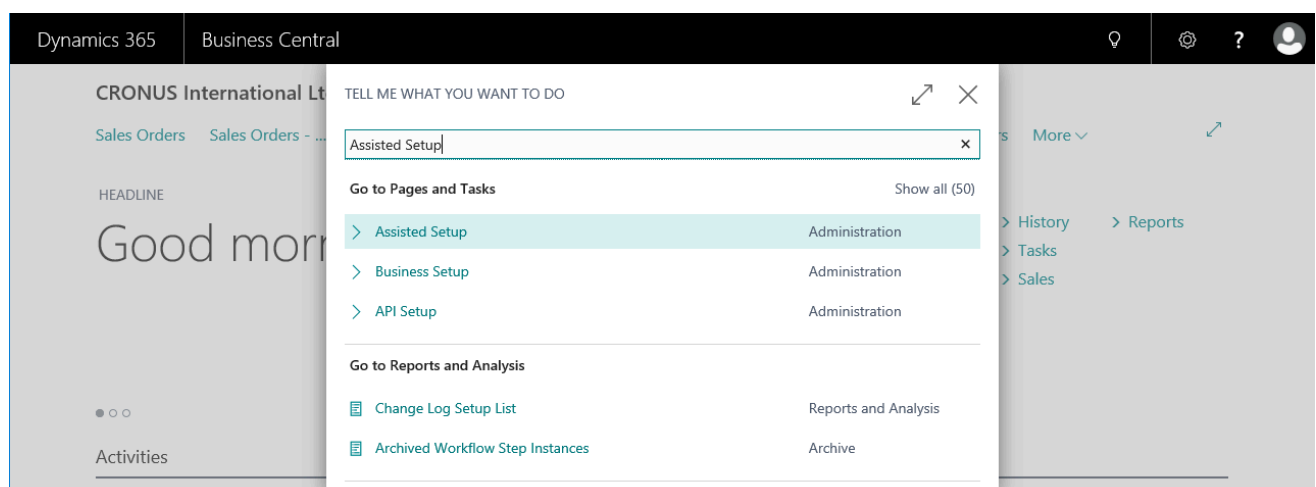
## 1 GENERAL

This document describes how to do assisted setup in LogTrade Connect for Microsoft Dynamics 365 Business Central. After the assisted setup is completed the system is ready for creating transport documents or you can do more advanced setup. During the setup process necessary codes and values are downloaded from LogTrade. For example, carrier product codes, package types and more. A carrier product is a service the carrier has, for example part load, full load, agent delivery, home delivery, business package service etc.

It is recommended to use LogTrade Integrated Printing for high performance printing, but pdf download is also available. More information and Setup Guide about LogTrade Integrated Printing can be found as a separate user guide.

## 2 ASSISTED SETUP

Open *Assisted Setup* by searching with the search functionality.





| Dynamics 365 Business Central Assisted Setup |               |  |
|--|---------------|--|
| ASSISTED SETUP                               |               |  |
| Search Open in Excel Actions Less options    |               |  |
| NAME   | STATUS        |  |
| Set up cash flow forecast                    | Not Completed |  |
| Set up approval workflows                    | Not Completed |  |
| Set up a customer approval workflow          | Not Completed |  |
| Set up email                                 | Not Completed |  |
| Set up email logging                         | Not Completed |  |
| Set up your Business Inbox in Outlook        | Not Completed |  |
| Set up reporting data                        | Not Completed |  |
| Set up an item approval workflow             | Not Completed |  |
| Set up Azure Active Directory                | Not Completed |  |
| Set up a payment approval workflow           | Not Completed |  |
| Set up Dynamics 365 for Sales connection     | Not Completed |  |
| Set up VAT                                   | Not Completed |  |
| Set up consolidation reporting               | Not Completed |  |
| Set up Intelligent Cloud                     | Not Completed |  |
| Set up LogTrade Connect                      | Not Completed |  |

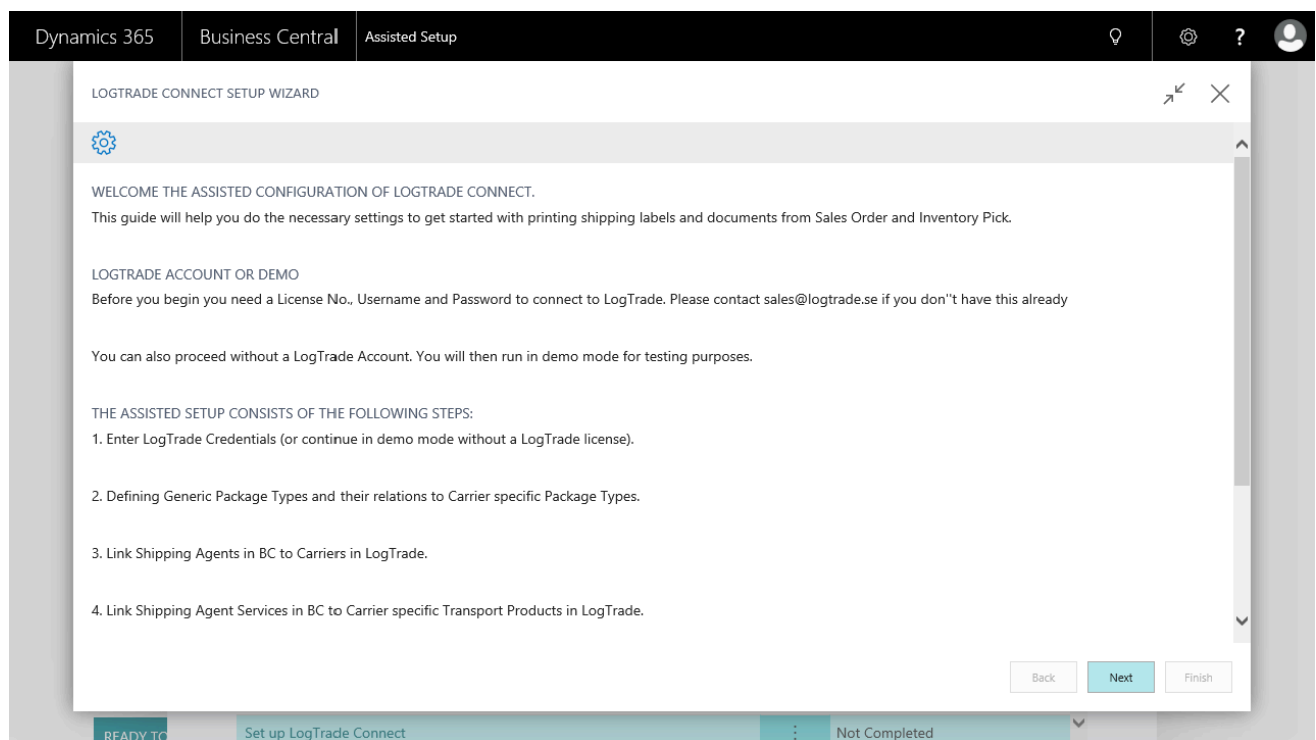
Click on *Set up LogTrade Connect* to start the setup process.



## 2.1 INTRODUCTION

The first step is an introduction to the setup process. Each step is briefly explained. The *Assisted Setup* process is divided into 6 steps. The steps are:

- LogTrade credentials
- General package types
- Linking shipping agents to LogTrade carriers
- Linking shipping agent services to LogTrade carrier products
- Linking shipment methods to carrier specific shipment methods
- Other setup





## 2.2 LOGTRADE CREDENTIALS

To communicate with LogTrade you need to specify your credentials. The credentials are generated from LogTrade after an agreement is signed and sent to the agreement contact person e-mail address. The credentials needed are your license number, e-mail address and password.

### 2.2.1 DEMO MODE

To run in demo mode, simply just leave all credentials fields blank. Note that your web browser might have filled in your login in name already and in that case you need to remove it.

When running demo mode, you will use a preconfigured environment just for test purposes so you can try the workflows in Microsoft Dynamics 365 Business Central.

Dynamics 365 Business Central Assisted Setup

LOGTRADE CONNECT SETUP WIZARD

LOGTRADE CREDENTIALS

Please enter your credentials for LogTrade. We will verify these against LogTrade and fetch settings for Carriers, packages types etc. when you click Next.

License No. LTD8102810

User ID demo\_bc\_se@logtradeconnect.se

Password .....

DEMO ACCOUNT

You can also proceed without specifying credentials. You will then use a demo account that can be used for testing purposes.

THIS CAN TAKE A WHILE

When you click next a number of settings will be downloaded from LogTrade. Just relax and be patient and we will continue with the next step.

Back Next Finish

READY TO Set up LogTrade Connect Not Completed

Once you have entered your credentials, some base data information is downloaded to Microsoft Dynamics 365 Business Central from LogTrade. For each carrier necessary information such as product codes, package types and shipment methods (Terms of delivery)



are downloaded for later use in linking Microsoft Dynamics 365 Business Central with LogTrade.

Depending on the content in the LogTrade license this can be a lengthy operation. Be prepared for this step to take several minutes.

Dynamics 365 Business Central Assisted Setup

LOGTRADE CONNECT SETUP WIZARD

LOGTRADE CREDENTIALS

Please enter your credentials for LogTrade. We will verify these against LogTrade and fetch settings for Carriers, packages types etc. when you click Next.

License No. LTD8102810

User ID demo\_bc\_se@logtradeconnect.se

Password

Working on it...  
Updating Carrier: Bring, Sweden

DEMO ACCOUNT

You can also proceed without specifying credentials. Y

THIS CAN TAKE A WHILE

When you click next a number of settings will be downloaded from LogTrade. Just relax and be patient and we will continue with the next step.

Back Next Finish

READY TO Set up LogTrade Connect Not Completed





## 2.3 PACKAGE TYPES

Each carrier product there are a specify set of package types available. For some carriers it can be hundreds of allowable package type codes. To make it easier for the end user LogTrade Connect defines general package types with relations to carrier product specific codes. Out of the box a predefined setup is used but it is possible to change for each company.

The screenshot shows the 'LOGTRADE CONNECT SETUP WIZARD' window. The 'PACKAGE TYPES' section is active, displaying a table of predefined package types. The table has two columns: 'CODE' and 'DESCRIPTION'. Below the table are 'Back', 'Next', and 'Finish' buttons. At the bottom of the wizard, a progress bar shows 'Set up LogTrade Connect' as the current step, with 'READY TO' and 'Not Completed' sections.

| CODE       | DESCRIPTION |
|------------|-------------|
| EUR PALLET | EUR Pallet  |
| HALFPALLET | Half Pallet |
| PACKAGE    | Package     |
| PALLET     | Pallet      |

It is possible to add or remove general package types by clicking *Manage / New Line* or *Manage / Delete Line*. To create or change relations to specific carrier products you click *Manage / Relations*. This will open a window with all linked carrier product package codes for the selected general package type, see picture below.



Dynamics 365 Business Central Assisted Setup > PACKAGE

LOGTRADE C PACKAGE

## Package Type Relations

Search + New Edit List Delete Open in Excel

| CARRIER    | CARRIER PRODUCT               | PRODUCT PACKAGE TYPE CODE |
|------------|-------------------------------|---------------------------|
| DhlEurope  | DhlEurope_B2C                 | CP                        |
| DhlEurope  | DhlEurope_DomesticExpress     | CP                        |
| DhlEurope  | DhlEurope_DomesticExpress0900 | CP                        |
| DhlEurope  | DhlEurope_DomesticExpress1200 | CP                        |
| DhlEurope  | DhlEurope_DomExpress1030      | CP                        |
| DhlEurope  | DhlEurope_EconomySelect       | CP                        |
| DhlEurope  | DhlEurope_Express0900         | CP                        |
| DhlEurope  | DhlEurope_Express1030         | CP                        |
| DhlEurope  | DhlEurope_Express1200         | CP                        |
| DhlEurope  | DhlEurope_ExpressEnvelope     | CP                        |
| DhlEurope  | DhlEurope_ExpressWorldwide    | CP                        |
| DhlEurope  | DhlEurope_GlobalmailBusiness  | CP                        |
| DhlEurope  | DhlEurope_MedicalExpress      | CP                        |
| DhlGermany | DhlGermany_DhlPaket           | PK                        |
| DhlGermany | DhlGermany_DhlPaketReturn     | PK                        |
| DhlGermany | DhlGermany_Euroconnect        | PA                        |
| DhlGermany | DhlGermany_EuroconnectB2C     | PA                        |
| DhlGermany | DhlGermany_Euroconnect        | PA                        |



## 2.4 CARRIERS AND CUSTOMER NUMBERS

In next step it is time to link shipping agents with carriers from LogTrade. Each carrier in LogTrade is represented by a carrier code, for example DhlEurope and UpsGlobal. By linking these codes Microsoft Dynamics 365 Business Central still uses shipping agents but communicates carrier codes to LogTrade. For each shipping agent you must also specify your carrier customer number.

**LOGTRADE CONNECT SETUP WIZARD**

**CARRIERS AND CUSTOMER NUMBERS**  
In this step you link your Shipping Agents to Carriers in LogTrade and setup your Customer Number for each Carrier.

You can skip this step if you plan to use Shipment Templates on Shipping Agent Services.

**Shipping Agents** | Manage

| CODE       | NAME                | CARRIER NAME | PAYER CUSTOMER NO. |
|------------|---------------------|--------------|--------------------|
| DHLFREIGHT | DHL Freight, Sweden | DhlSweden    | 333333             |
| OWN LOG.   | Own Logistics       |              |                    |
| POSTNORD   | PostNord, Sweden    |              |                    |
| SCHENKER   | DB Schenker, Sweden |              |                    |

**Carrier Selection Dropdown:**

| NAME               | DESCRIPTION                    |
|--------------------|--------------------------------|
| BringSweden        | Bring, Sweden                  |
| DhlSweden          | DHL Freight, Sweden            |
| DsvRoadSweden      | DSV Road, Sweden               |
| GenericForwarder_1 | SIS Standard (Generic Carri... |
| PostNordSweden     | PostNord, Sweden               |
| SchenkerSweden     | DB Schenker, Sweden            |

Select from full list

Back Next Finish

READY TO Set up LogTrade Connect Not Completed

You should setup all your shipping agents with carrier codes and customer numbers. A carrier code that starts with GenericForwarder means that it is a self-defined carrier in LogTrade, normally smaller carrier companies or your own carrier capacity. A generic carrier must first be configured in LogTrade web platform before it will be available in Microsoft Dynamics 365 Business Central.



Dynamics 365 | Business Central | Assisted Setup

### LOGTRADE CONNECT SETUP WIZARD

**CARRIERS AND CUSTOMER NUMBERS**  
In this step you link your Shipping Agents to Carriers in LogTrade and setup your Customer Number for each Carrier.

You can skip this step if you plan to use Shipment Templates on Shipping Agent Services.

**Shipping Agents** | Manage

| CODE       | NAME                | CARRIER NAME       | PAYER CUSTOMER NO. |
|------------|---------------------|--------------------|--------------------|
| DHLFREIGHT | DHL Freight, Sweden | DhlSweden          | 333333             |
| OWN LOG.   | Own Logistics       | GenericForwarder_1 | 44444444           |
| POSTNORD   | PostNord, Sweden    | PostNordSweden     | 222222222          |
| SCHENKER   | DB Schenker, Sweden | SchenkerSweden     | 1111111            |

Back Next Finish

READY TO GO | Set up LogTrade Connect | Not Completed

When you have linked all of your shipping agents you should also link their corresponding shipping agent services. A shipping agent service corresponds to a carrier product like part load, full load, agent delivery, business parcel, home delivery etc.

A shipping agent service can be linked to a product code or a shipment template code. A shipment template is a predefined shipment including additional services like advice, heat or cold delivery, time definite delivery and more variants. In this setup it is also possible to predefine a default package type for current shipping agent.

A shipment template must first be configured in LogTrade web platform before it will be available in Microsoft Dynamics 365 Business Central.





Dynamics 365 | Business Central | Assisted Setup

### LOGTRADE CONNECT SETUP WIZARD

In this step you link your Shipping Agent Services to Carrier Products or Shipment Templates in LogTrade. On each Shipping Agent Service you can also setup a default Package Type Code

**Shipping Agent Services** | Manage

| SHIPPING AGENT CODE | CODE       | PRODUCT NAME                 | SHIPMENT TEMPLATE CODE | DEFAULT PACKAGE TYPE CODE |
|---------------------|------------|------------------------------|------------------------|---------------------------|
| DHLFREIGHT          | FULLLOAD   | DhlSweden_DhlParti           |                        | PALLET                    |
| DHLFREIGHT          | PARTLOAD   |                              | PART INCL. ADVICE      | PACKAGE                   |
| OWN LOG.            | CITY ROUTE | GenericForwarder_1_0         |                        | PACKAGE                   |
| POSTNORD            | AGENT      | PostNordSweden_MyPackCollect |                        | PACKAGE                   |
| POSTNORD            | PALLET     | PostNordSweden_Pallett       |                        | HALFPALLET                |
| POSTNORD            | PARCEL     | PostNordSweden_Parcel18      |                        | PACKAGE                   |
| SCHENKER            | PARCEL     | SchenkerSweden_Parcel        |                        | PACKAGE                   |

Refresh Shipment Templates | Back | Next | Finish

Set up LogTrade Connect | Not Completed

When product name is defined you might get a question about adding terms of delivery setup linked to shipment methods. This is to predefine terms of delivery setup based on existing shipment methods.



## 2.5 TERMS OF DELIVERY

For international deliveries it is normally mandatory to use Terms of Delivery codes. Depending on the carriers you use the terms of delivery codes can be different. Unfortunately, the different carriers might have different Terms of Delivery codes in their integration specifications. That's why it is important to link shipment methods in Microsoft Dynamics 365 Business Central to terms of deliveries in LogTrade.

LOGTRADE CONNECT SETUP WIZARD

Here you specify who pays for the freight.

For each Shipping Term you can view/create relations to Carrier specific Delivery Terms

**Shipment Methods** | Manage

| CODE     | DESCRIPTION           | FREIGHT PAYER | NO. OF TERMS OF DELIVERY RELATIONS |
|----------|-----------------------|---------------|------------------------------------|
| DAF      | Delivered at Frontier | Sender        | 4                                  |
| DDP      | Delivered Duty Paid   | Sender        | 1                                  |
| DDU      | Delivered Duty Unpaid | Sender        | 1                                  |
| DELIVERY | DELIVERY              | Sender        | -                                  |
| DEQ      | Delivered ex Quay     | Sender        | 1                                  |
| DES      | Delivered ex Ship     | Sender        | 1                                  |
| EXW      | Ex Warehouse          | Recipient     | 2                                  |

Back Next Finish

Set up LogTrade Connect Not Completed

The form shows the automatic Terms of Delivery setup done based on your shipment methods. It is necessary to define who is the freight payer for each shipment method since that is used in the communication to the carrier, so they invoice the right company.

It is possible to change, add and delete terms of deliveries by clicking on *Manage* in the menu above the lines.





Dynamics 365 Business Central Assisted Setup > Terms of Delivery Relations

LOGTRADE C

TERMS OF DELIVERY RELATIONS

Search + New Edit List Delete Process Open in Excel

| SHIPMENT METHOD CODE ▼ | SHIPPING AGENT CODE | SHIPPING AGENT SERVICE CODE | TERMS OF DELIVERY CODE | DESCRIPTION                            | USE PAYER                |
|------------------------|---------------------|-----------------------------|------------------------|--|--------------------------|
| DAF                    | DHLFREIGHT          | FULLLOAD                    | 018                    | DAF Delivered at Frontier (named te... | <input type="checkbox"/> |
| DAF                    | OWN LOG.            | CITY ROUTE                  | DAF                    | Delivered At Frontier (named place...  | <input type="checkbox"/> |
| DAF                    | SCHENKER            | PARCEL                      | 018                    | DAF Delivered at Frontier (named te... | <input type="checkbox"/> |
| DAF                    | SCHENKER            | PARTLOAD                    | 018                    | DAF Delivered at Frontier (named te... | <input type="checkbox"/> |

Set up Log

Finish



## 2.6 OTHER SETUP

The last page in the *Assisted Setup* is called *Other Setup*. This is settings that predefine specific values, number series etc. Some fields are not enabled when running in demo mode. Each field is explained below:

**Consignment Nos.** is the number series used as identification between Microsoft Dynamics 365 Business Central and LogTrade for each shipment.

**LogTrade Action** defines if a shipment should be sent directly to the carrier (Released) or first be prepared and released later on, normally when the carrier picks up the goods.

**Integrate Printing Active** indicates if the software LogTrade Integrated Printing is installed and used for fastest and most convenient printing. If not the system is intended to use pdf files instead.

**Default Print Queue** is only used if *Integrated Printing* is active. This field defines where the transport documents should be printed by default if not changed.

**Goods Type** is default content in the package, on the pallet etc.

**LogTrade Locale** defines the language used in the integration between Microsoft Dynamics 365 Business Central and LogTrade to show messages, carrier names etc. in correct language. Possible values are English and Swedish.

**Shipment Date** is the default date sent to the carrier. Available options are *Workdate* and *Shipment Date* from the source document. The source document date can be used if you prepare shipments ahead in time, before the actual shipping date when the carrier picks up the goods.

**Test Mode** is used when testing LogTrade Connect. No external communication from LogTrade will be done to the carriers, no advice e-mails or SMS messages will be sent. This is very convenient when testing your setup, printing software etc. All printed documents will have a water mark printed with the text *TEST*.

**Remove Country Code from Post Code** means that any country code in the beginning of the *post code* will be removed before sent to the carrier. The country code should normally not be in the post code since it is also sent in a specific field to LogTrade.



Dynamics 365 Business Central Assisted Setup

### LOGTRADE CONNECT SETUP WIZARD

✓

Other Setup

Consignment Nos. LOGTRADE

LogTrade Action Prepare

Integrated Printing Active ☒

Default Print Queue Standard

Goods Type Spareparts

LogTrade Locale English

Shipment Date Workdate

Test Mode ☒

Remove Country Code from Post Code ☒

Back Next Finish

Set up LogTrade Connect Not Completed

