USER GUIDE

LOGTRADE CONNECT ASSISTED SETUP

LogTrade Connect for Microsoft Dynamics 365 Business Central

V 2.0.0.0

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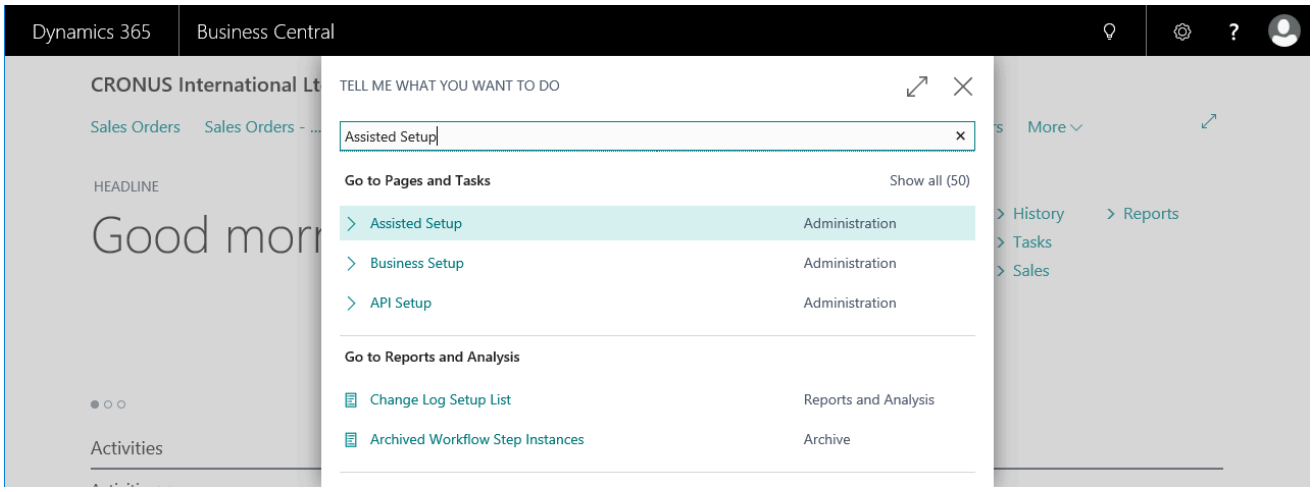
1 GENERAL

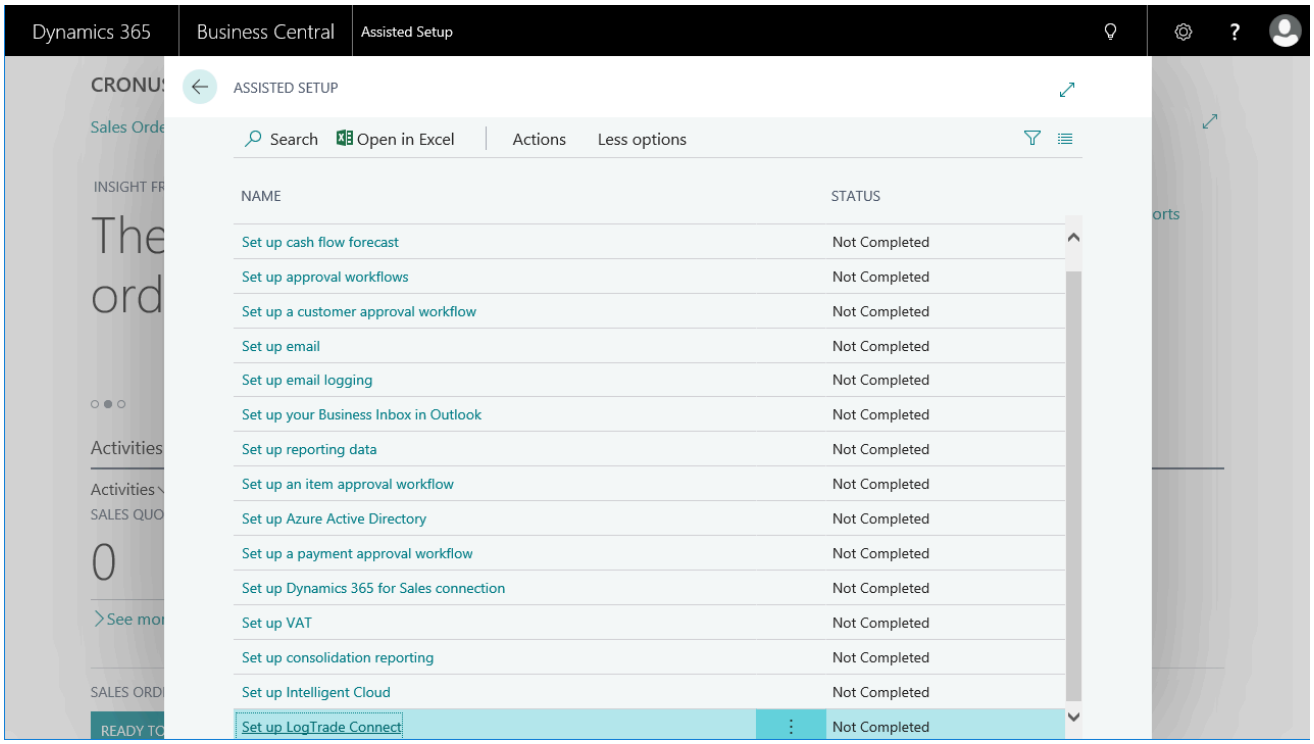
This document describes how to do assisted setup in LogTrade Connect for Microsoft Dynamics 365 Business Central. After the assisted setup is completed the system is ready for creating transport documents or you can do more advanced setup. During the setup process necessary codes and values are downloaded 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.



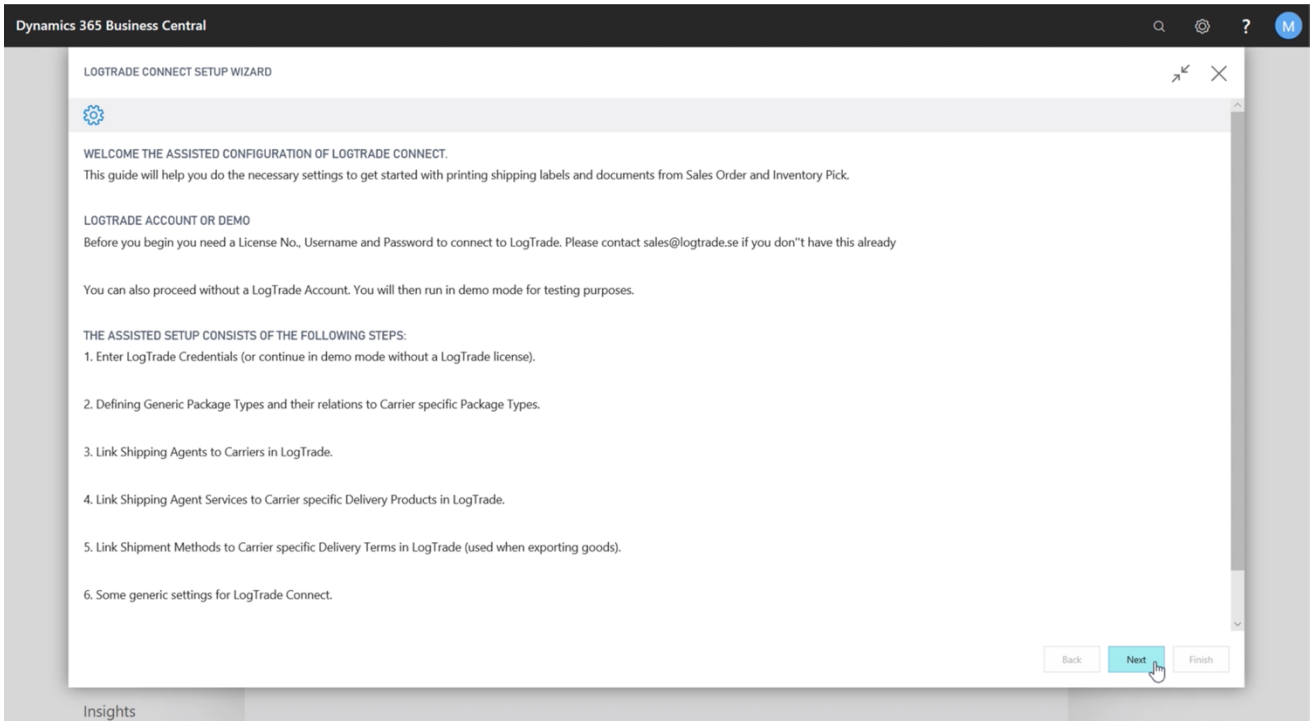


Click on *Set up LogTrade Connect* to start the setup process.

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



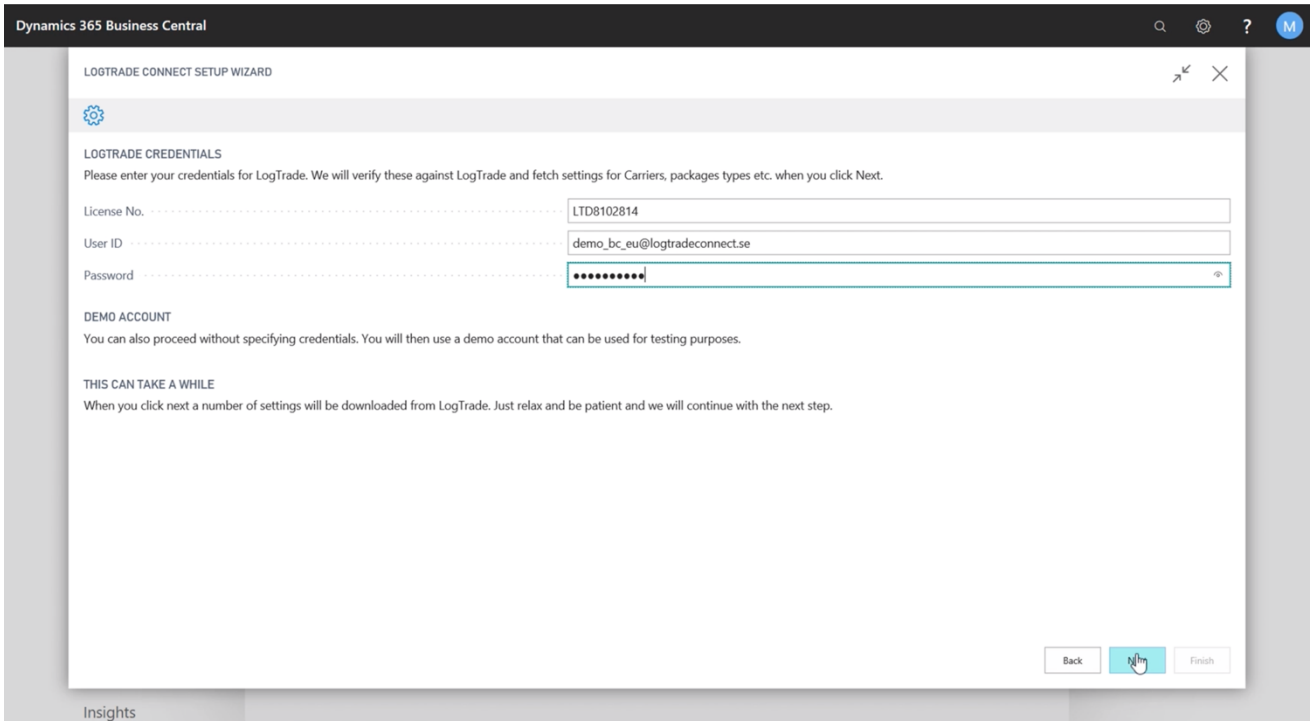
2.2 LOGTRADE CREDENTIALS

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

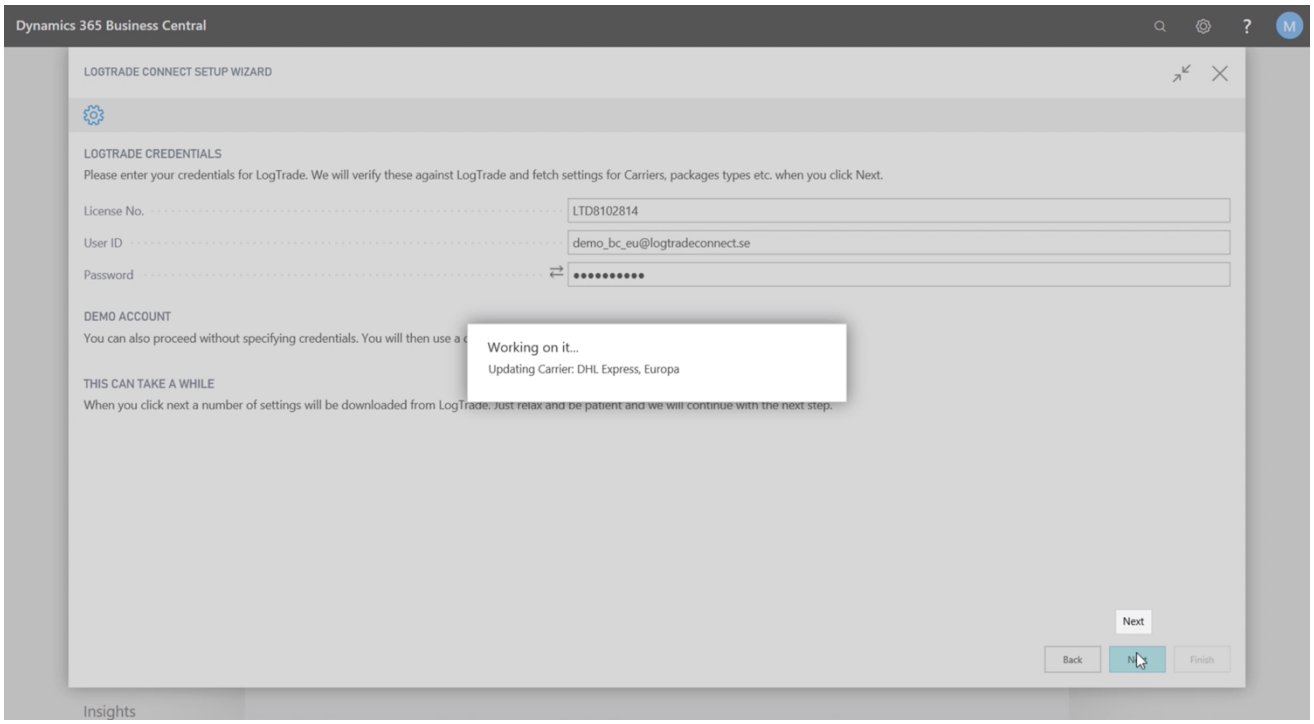
To run in demo mode, simply just leave all credentials fields blank. Note that your web browser might have filled in your login in name already and in that case you need to remove it.

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.



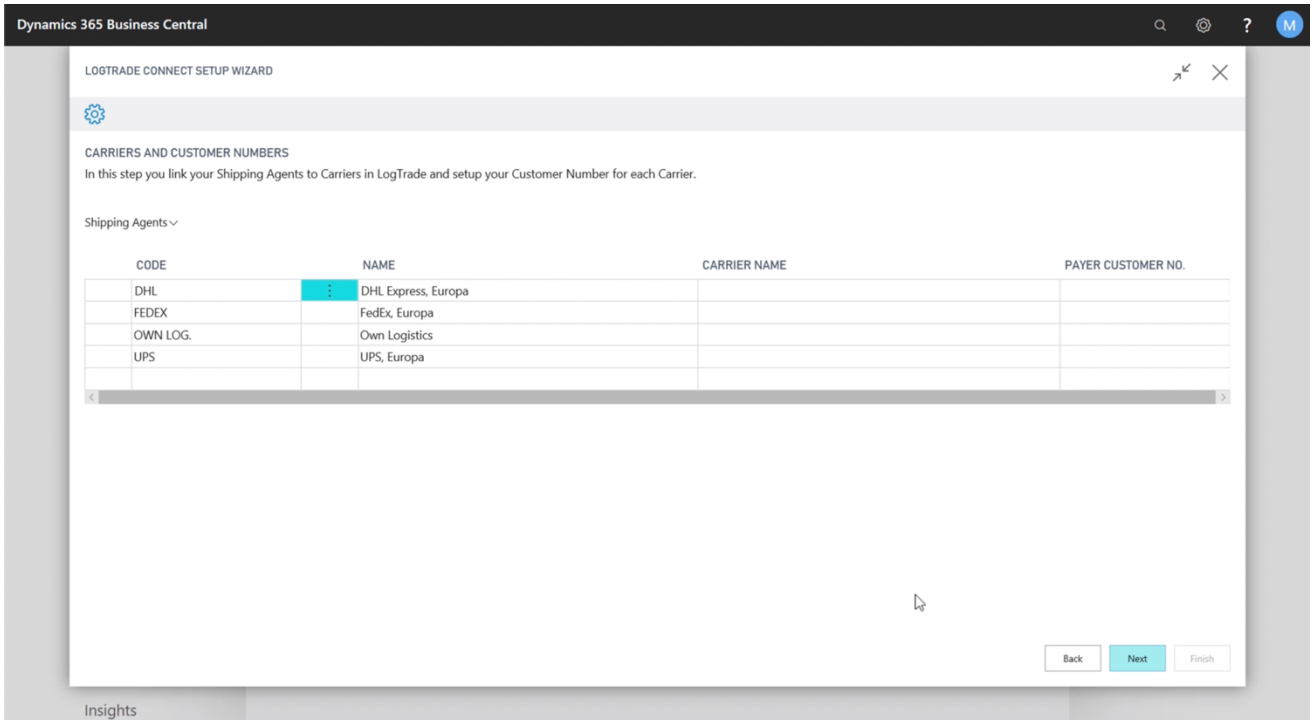
Once you have entered your credentials, some base data information is downloaded to Microsoft Dynamics 365 Business Central from LogTrade. For each carrier necessary information such as product codes, package types and shipment methods (Terms of delivery) are downloaded for later use in linking Microsoft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

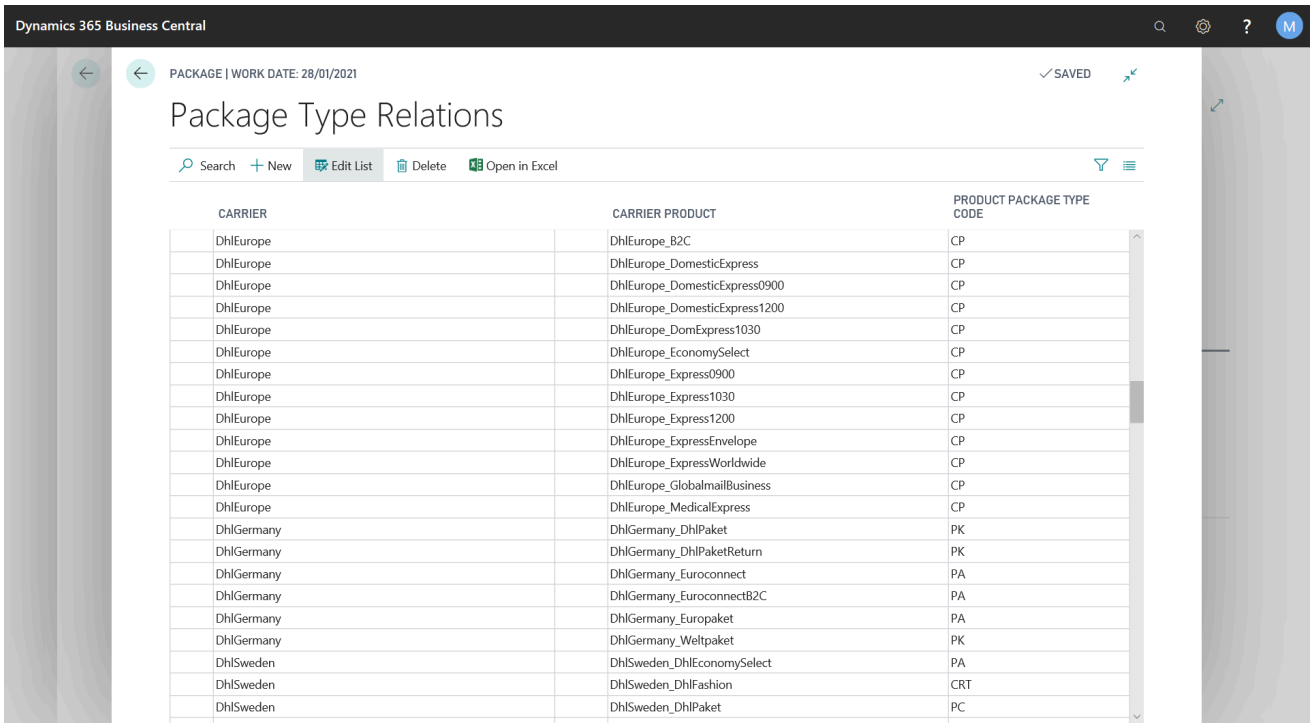


2.3 PACKAGE TYPES

For each carrier product, there are different 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.

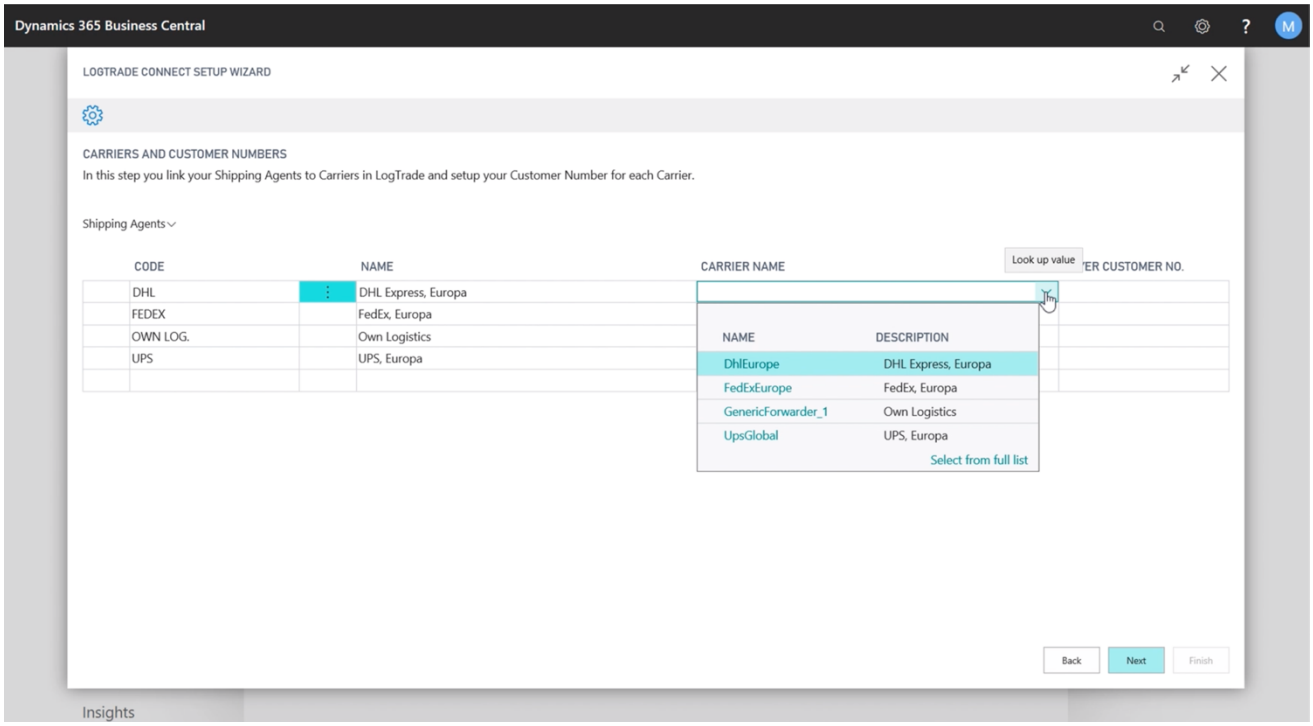


It is possible to add or remove general package types by clicking *Manage / New Line* or *Manage / Delete Line*. To create or change relations to specific carrier products you click *Manage / Relations.* This will open a window with all linked carrier product package codes for the selected general package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

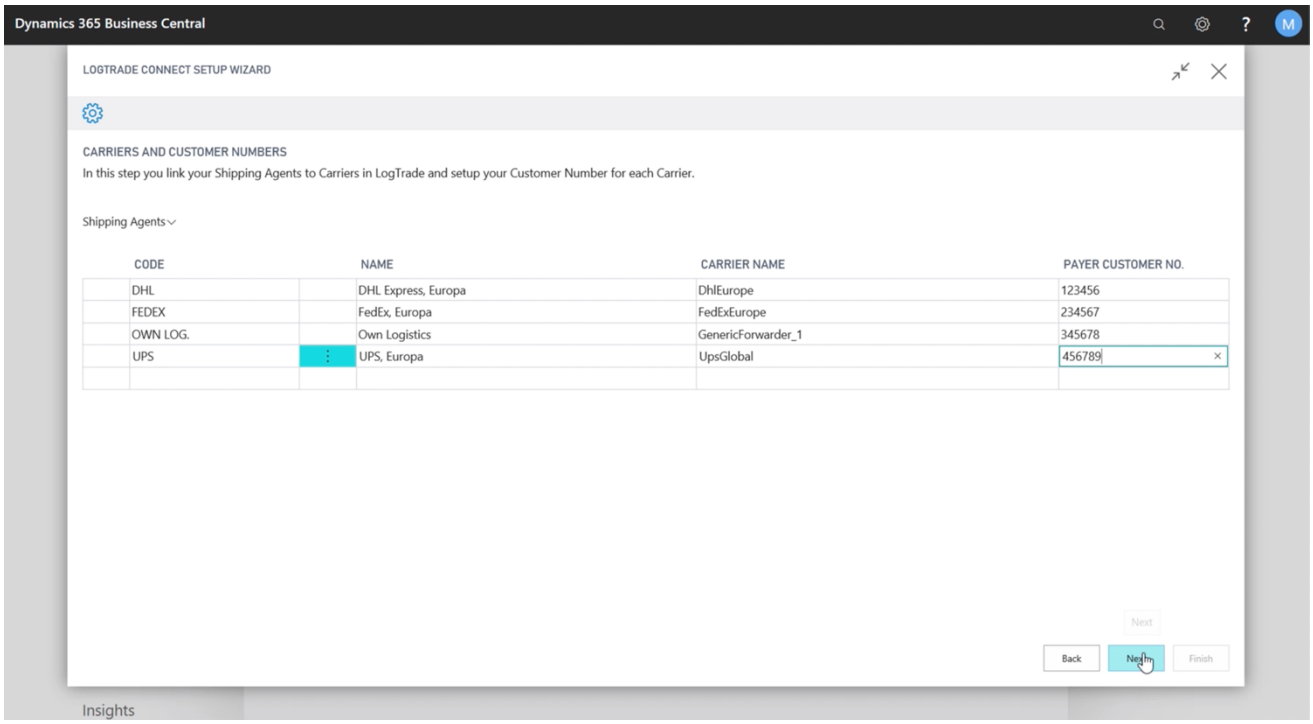

Dynamics 365 Business Central
PACKAGE | WORK DATE: 28/01/2021
SAVED
Package Type Relations
Search
New
Edit List
Delete
Open in Excel
CARRIER
CARRIER PRODUCT
PRODUCT PACKAGE TYPE CODE
DhlEurope DhlEurope_B2C CP
DhlEurope DhlEurope_DomesticExpress CP
DhlEurope DhlEurope_DomesticExpress0900 CP
DhlEurope 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_Europaket PA
DhlGermany DhlGermany_Weltpaket PK
DhlSweden DhlSweden_DhlEconomySelect PA
DhlSweden DhlSweden_DhlFashion CRT
DhlSweden DhlSweden_DhlPaket PC

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.

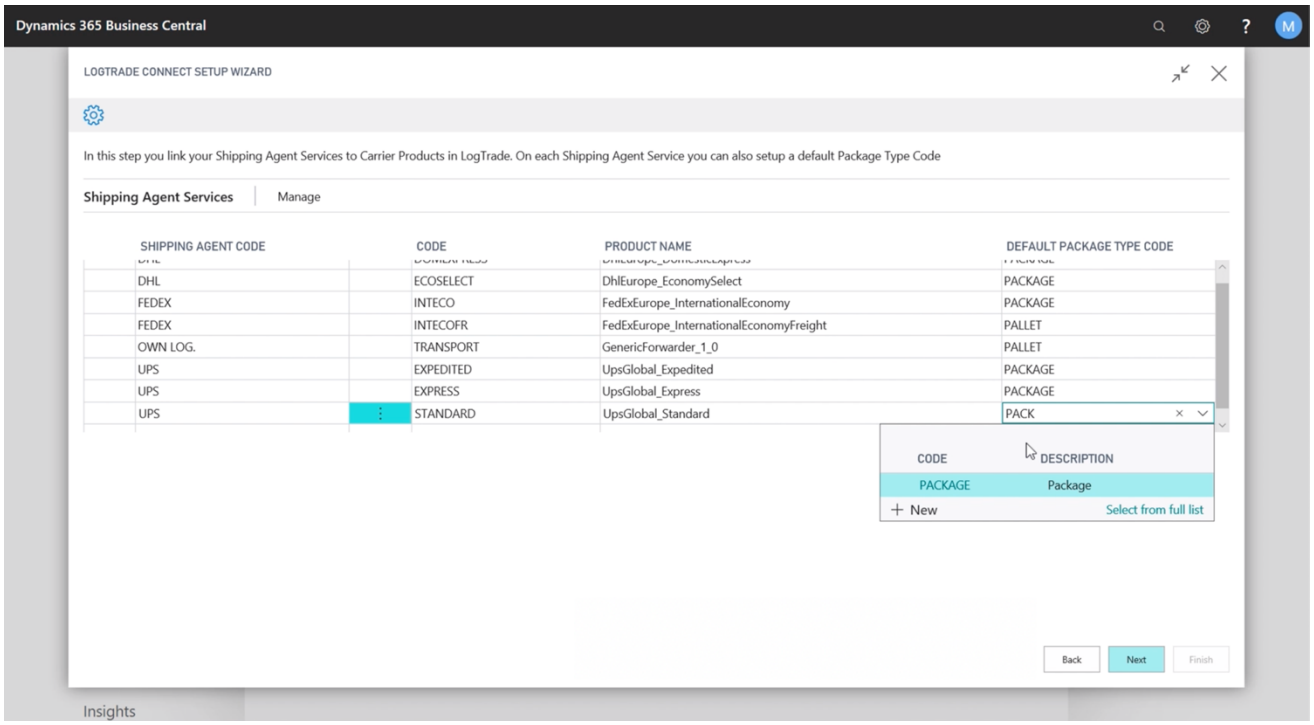


You should setup all your shipping agents with carrier codes and customer numbers. A carrier code that starts with GenericForwarder means that it is a self-defined carrier in LogTrade, normally smaller carrier companies or your own carrier capacity. A generic carrier must first be configured in LogTrade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



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.

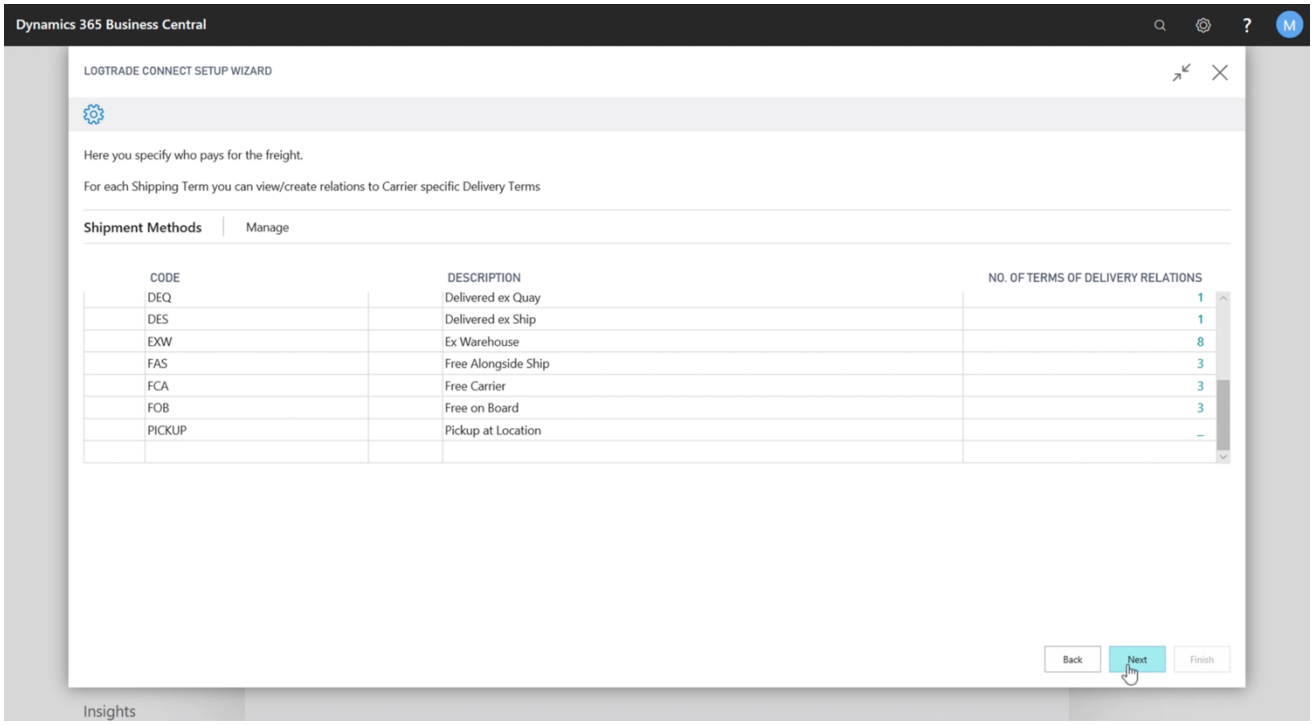
A shipping agent service has to be linked to a product code. In this setup it is also possible to predefine a default package type for current shipping agent service code.



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.

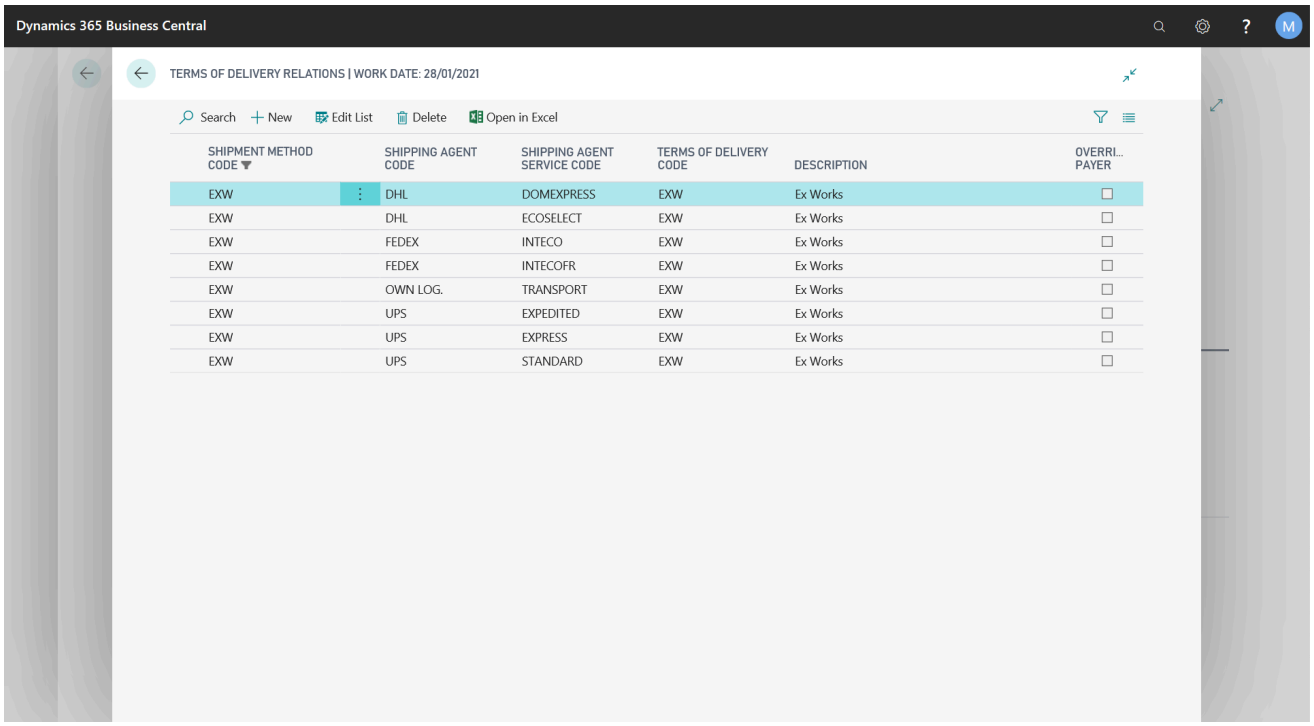
2.5 TERMS OF DELIVERY

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.



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
TERMS OF DELIVERY RELATIONS | WORK DATE: 28/01/2021
Search
New
Edit List
Delete
Open in Excel
SHIPMENT METHOD CODE
SHIPPING AGENT CODE
SHIPPING AGENT SERVICE CODE
TERMS OF DELIVERY CODE
DESCRIPTION
OVERRI... PAYER
EXW DHL DOMEXPRESS EXW Ex Works
EXW DHL ECOSELECT EXW Ex Works
EXW FEDEX INTECO EXW Ex Works
EXW FEDEX INTECOFR EXW Ex Works
EXW OWN LOG. TRANSPORT EXW Ex Works
EXW UPS EXPEDITED EXW Ex Works
EXW UPS EXPRESS EXW Ex Works
EXW UPS STANDARD EXW Ex Works

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.

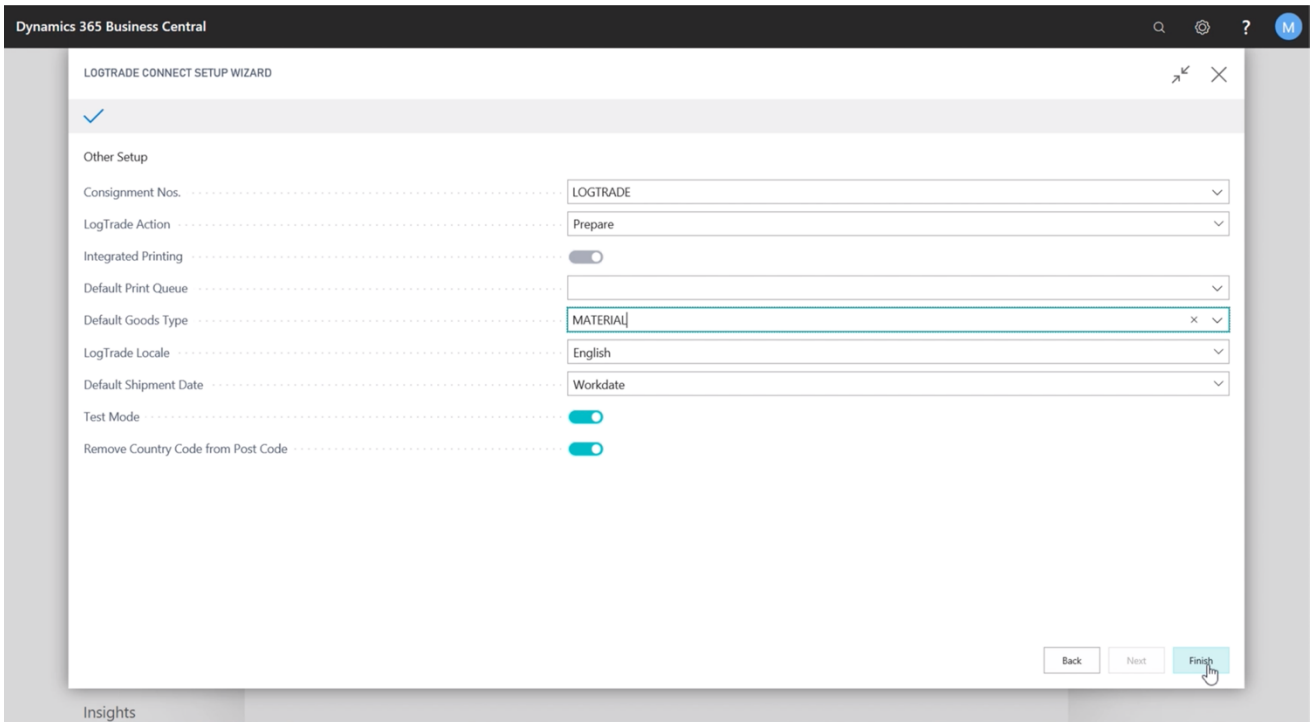
Goods Type is default content in the package, on the pallet etc.

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
LOGTRADE CONNECT SETUP WIZARD
Other Setup
Consignment Nos.
LOGTRADE
LogTrade Action
Prepare
Integrated Printing
Default Print Queue
Default Goods Type
MATERIAL
LogTrade Locale
English
Default Shipment Date
Workdate
Test Mode
Remove Country Code from Post Code
Back
Next
Finish
Insights