ROUTINE DESCRIPTION

LOGTRADE CONNECT ASSISTED SETUP

LogTrade Connect for Microsoft Dynamics 365 Business Central
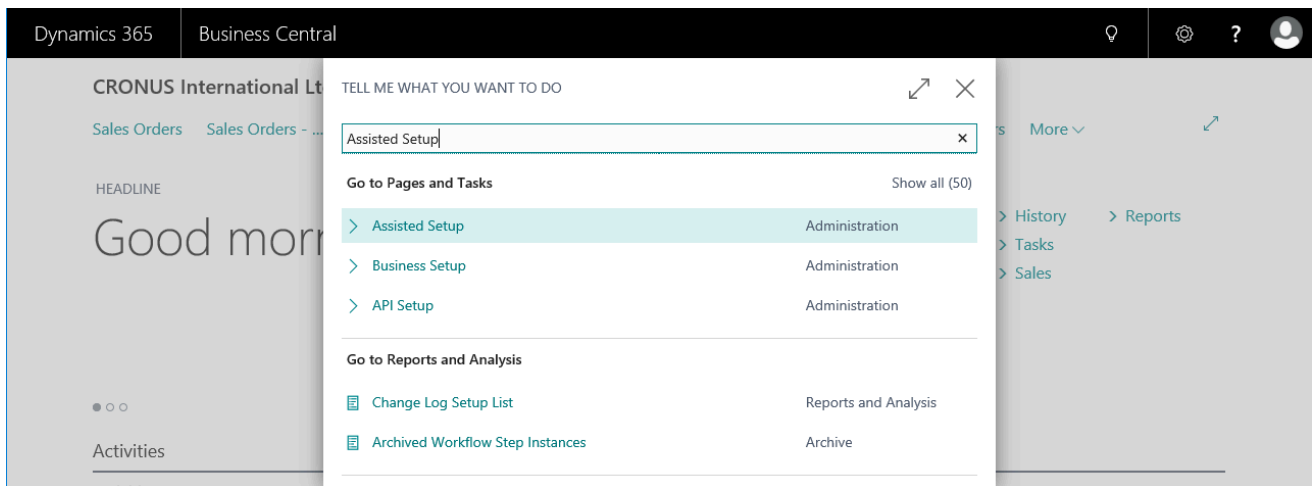
1 GENERAL

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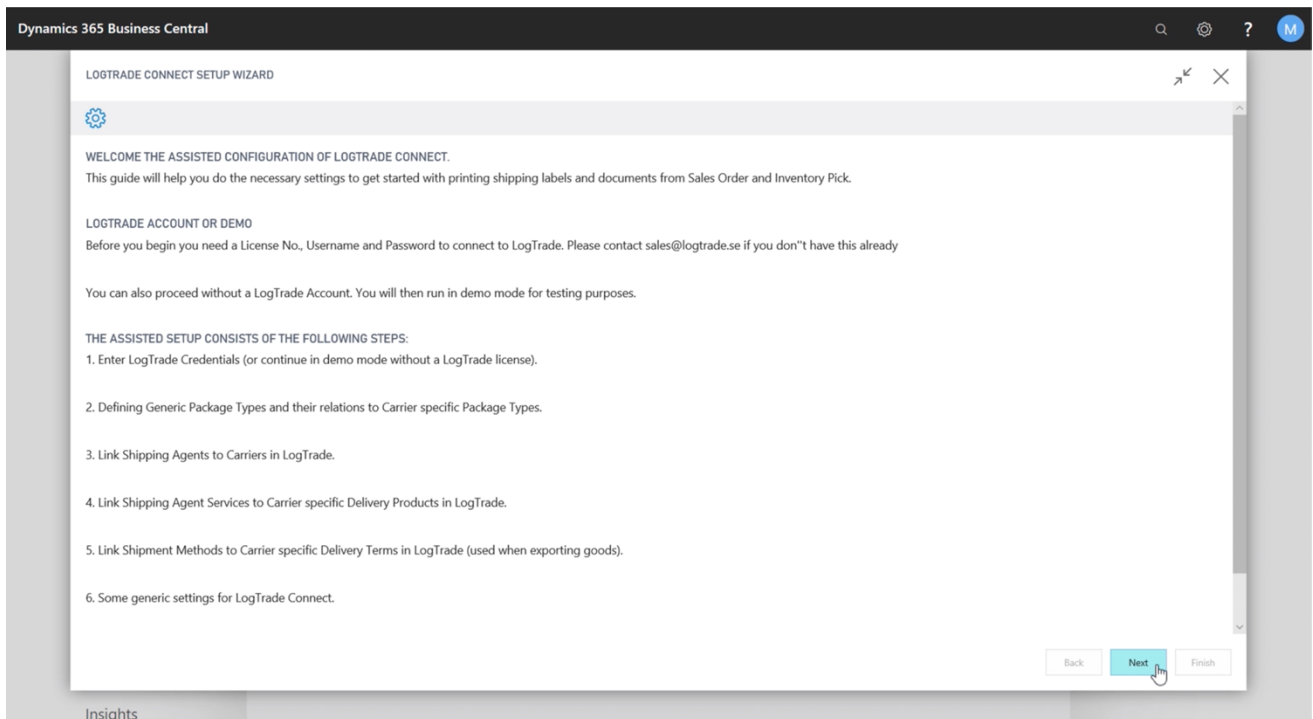
The first step is an introduction to the setup process. Each step is briefly explained. The *Assisted Setup* process is divided into 6 steps. The steps are:

- 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.

Dynamics 365 Business Central

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.   LTD8102814
User ID   demo_bc_eu@logtradeconnect.se
Password   ●●●●●●●●●

DEMO ACCOUNT

You can also proceed without specifying credentials. You will then use a d

> Working on it...
> Updating Carrier: DHL Express, Europa

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.
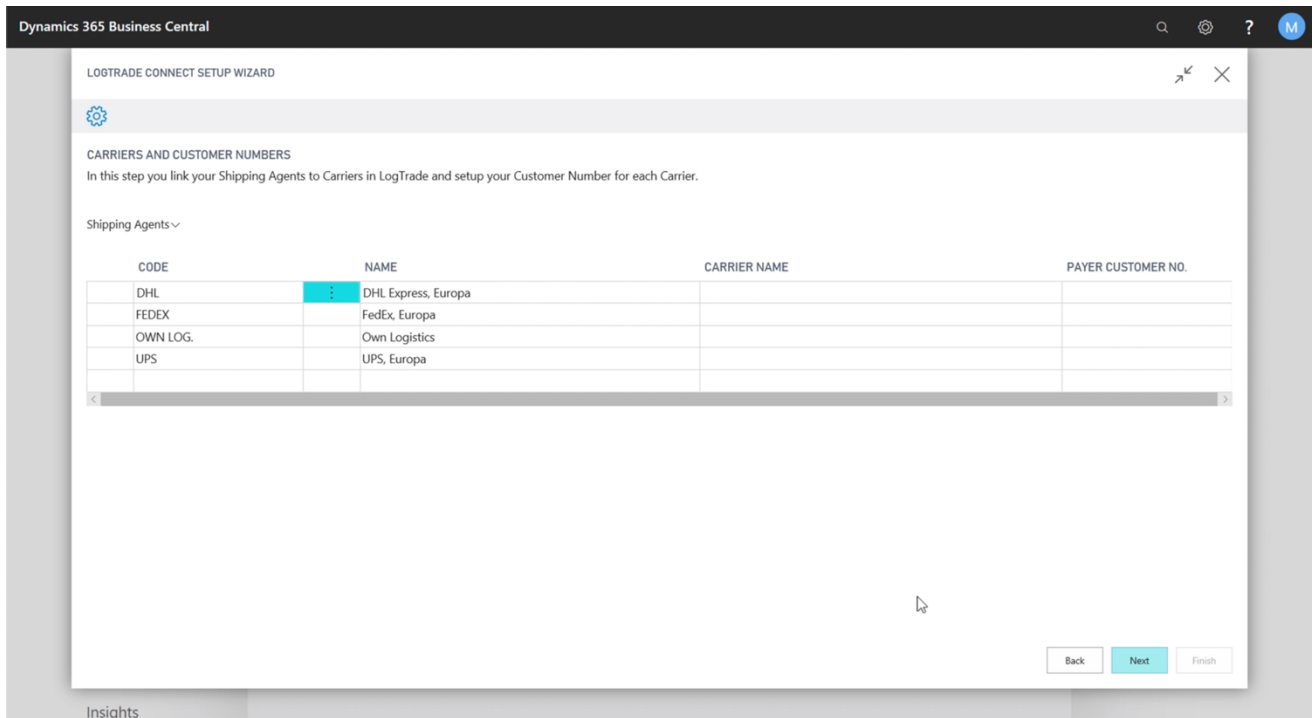
Next

Back   N   Finish

Insights

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.

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✓SAVED

Package Type Relations

🔍 Search ＋ New 📝 Edit List 🗑 Delete 📊 Open in Excel

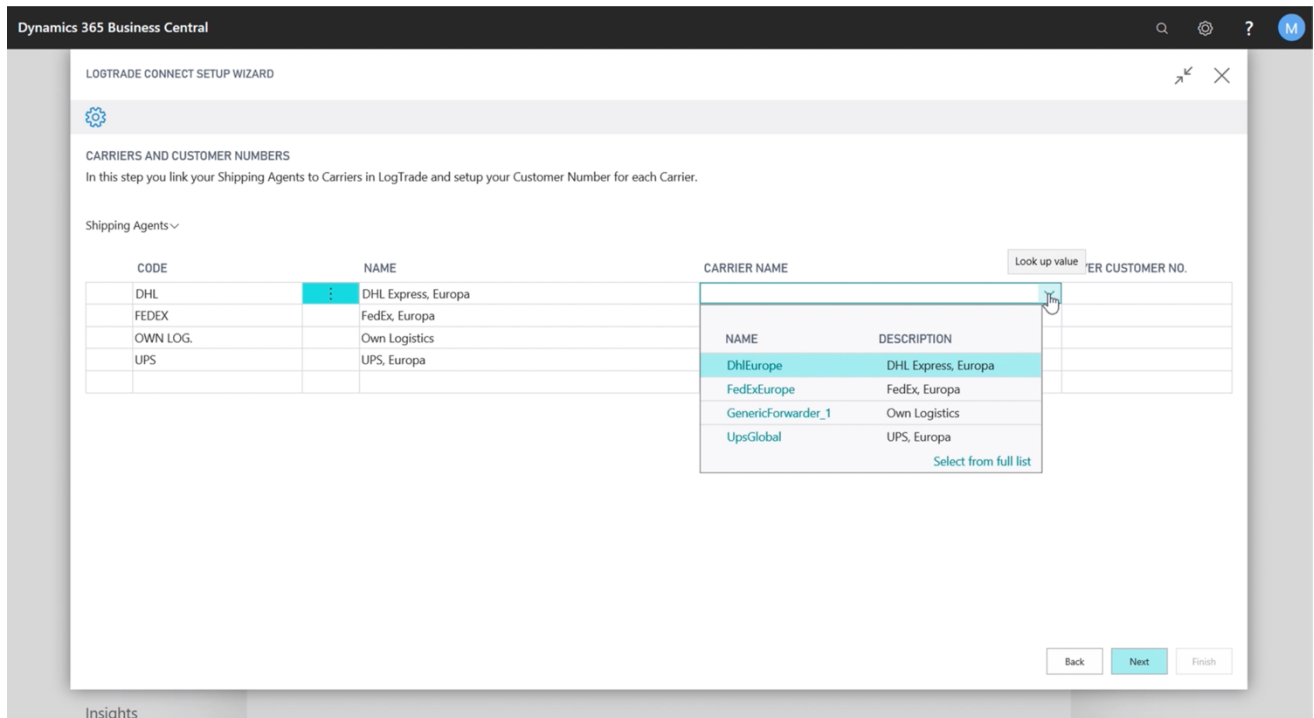| CARRIER	CARRIER PRODUCT	PRODUCT PACKAGE TYPE CODE
DhlEurope	DhlEurope_B2C	CP
DhlEurope	DhlEurope_DomesticExpress	CP
DhlEurope	DhlEurope_DomesticExpress0900	CP
DhlEurope	DhlEurope_DomesticExpress1200	CP
DhlEurope	DhlEurope_DomExpress1030	CP
DhlEurope	DhlEurope_EconomySelect	CP
DhlEurope	DhlEurope_Express0900	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.
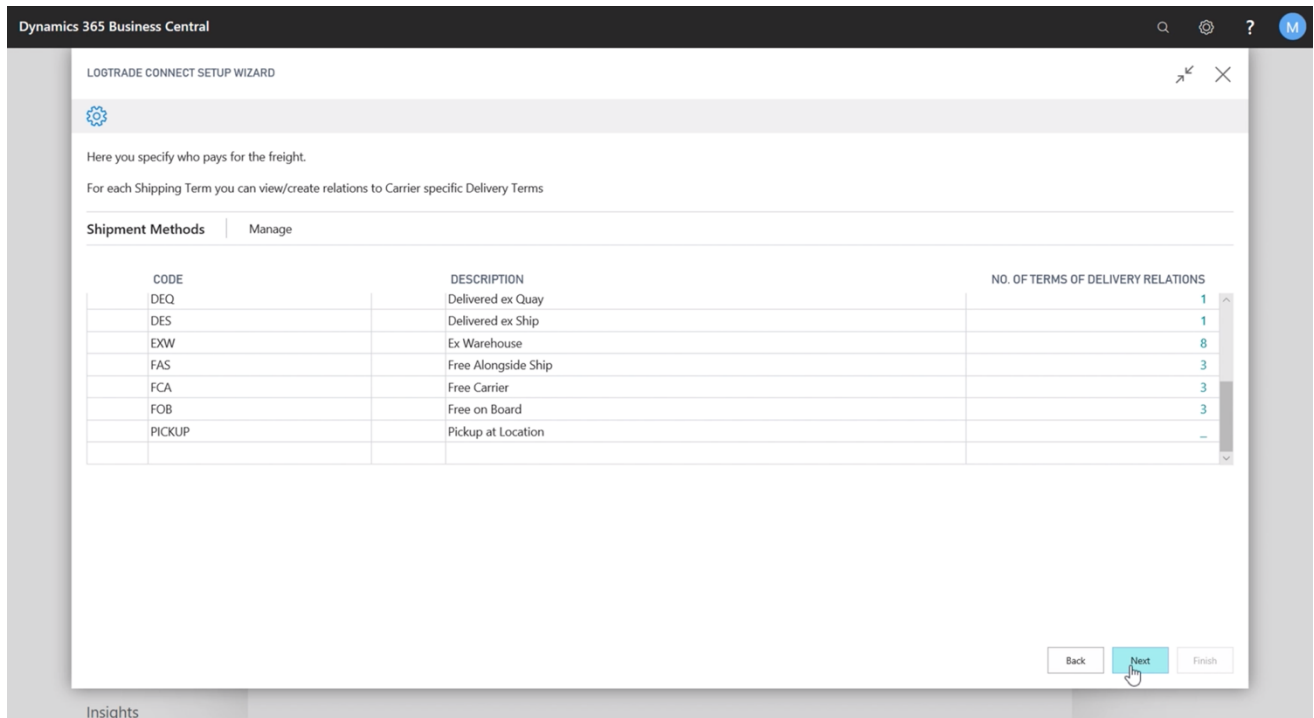
When product name is defined you might get a question about adding terms of delivery setup linked to shipment methods. This is to predefine terms of delivery setup based on existing shipment methods.

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:

MENU NAME	DESCRIPTION
CONSIGNMENT NOS.	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 Shipping Agent (Released) or first be prepared and released later on, normally when the Shipping Agent picks up the goods.
INTEGRATED PRINTING ACTIVE	Defines 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	Used only if *Integrated Printing* is active. This field defines which print queue the transport documents should be printed on by default if not changed on the consignment.
GOODS TYPE	Default Goods Type Code for the content in the package, on the pallet etc.
LOGTRADE LOCALE	Available options: • Swedish • English

	Defines the language used in the integration between Microsoft Dynamics 365 Business Central and LogTrade to show messages, carrier names etc. in correct language.
SHIPMENT DATE	Available options: • Work Date • Source Document Shipment Date • Warehouse Shipment Shipment Date This is the default date used as the date to pick up goods. 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	This is used when testing LogTrade Connect. No external communication from LogTrade will be done to the Shipping Agents, 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	This means that any country code in the beginning of the *post code* will be removed before sent to the Shipping Agent. The country code should normally not be in the post code since it is also sent in a specific field to LogTrade.