



USER GUIDE

LOGTRADE CONNECT

ROLE CENTERS

LogTrade Connect for Microsoft Dynamics 365 Business Central



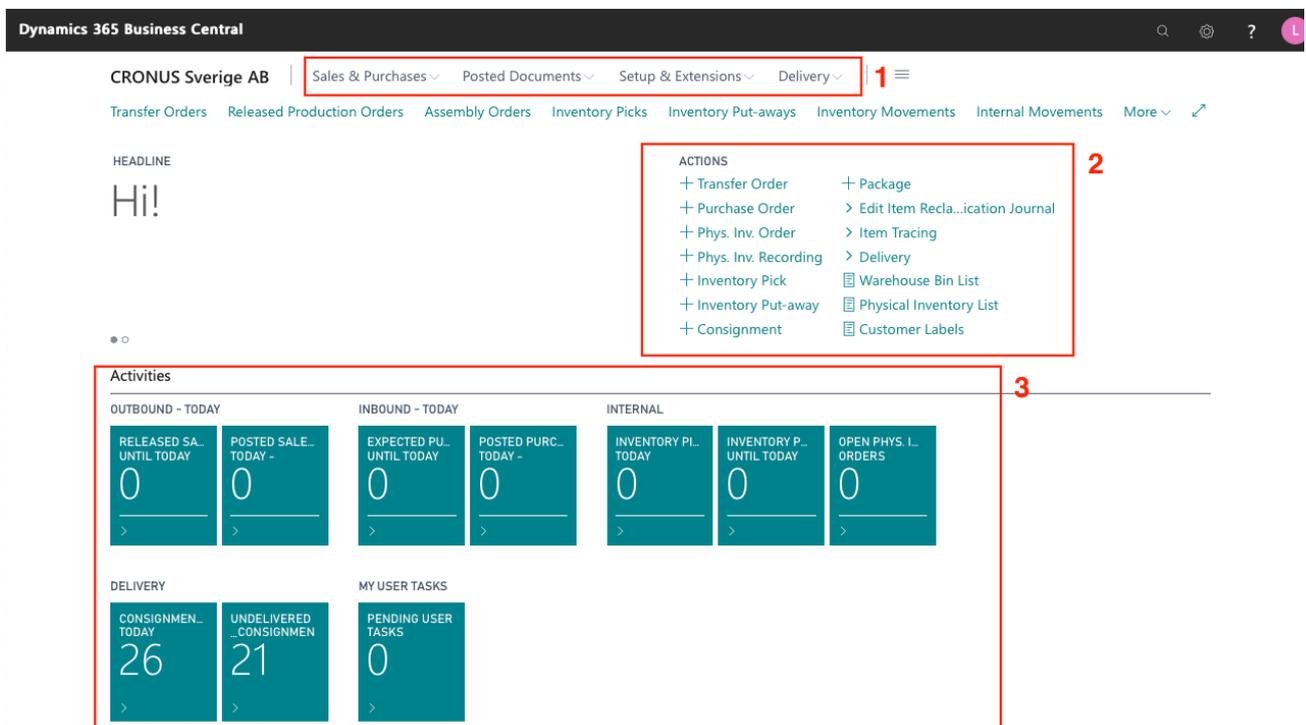


1 GENERAL

There are several different role centers in Microsoft Dynamics 365 Business Central depending on which roles and responsibilities each employee has. A role center is a dashboard for the user where his most common work tasks and information are collected on one page.

2 ROLE CENTER STRUCTURE

A role center is divided in different parts and LogTrade Connect has implemented information in several of the parts depending on the role centers. These parts are mentioned and described below and in following chapters each modified role center is described.



- 1) Navigation Menu - The top-level navigation consists of one or more root menu items that expand to display links to other pages.
- 2) Action bar - The actions bar provides links to pages, reports, and codeunits. The links can be displayed on the root-level or grouped in a sub-menu.
- 3) Activities Data Cues - Provide a visual representation of aggregated business data, such as the number of open sales invoices or the total sales for the month.





3 LOGTRADE CONNECT IN DIFFERENT ROLE CENTERS

3.1 SHIPPING AND RECEIVING – ORDER-BY-ORDER

Dynamics 365 Business Central

CRONUS Sverige AB | Sales & Purchases | Posted Documents | Setup & Extensions | Delivery

Transfer Orders Released Production Orders Assembly Orders Inventory Picks Inventory Put-aways Inventory Movements Internal Movements More

HEADLINE
Good afternoon!

ACTIONS
 + Transfer Order
 + Purchase Order
 + Phys. Inv. Order
 + Phys. Inv. Recording
 + Inventory Pick
 + Inventory Put-away
 + Consignment
 + Package
 > Edit Item Recla...ication Journal
 > Item Tracing
 > Delivery
 Warehouse Bin List
 Physical Inventory List
 Customer Labels

Activities

OUTBOUND - TODAY

RELEASED SA... UNTIL TODAY 0	POSTED SALE... TODAY - 0
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INBOUND - TODAY

EXPECTED PU... UNTIL TODAY 0	POSTED PURC... TODAY - 0
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INTERNAL

INVENTORY PL... TODAY 0	INVENTORY P... UNTIL TODAY 0	OPEN PHYS. I... ORDERS 0
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DELIVERY

CONSIGNMEN... TODAY 19	UNDELIVERED... CONSIGNMEN 13
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MY USER TASKS

PENDING USER TASKS 0

3.1.1 NAVIGATION MENU

Consignments Packages Released Consignments

MENU NAME	DESCRIPTION
CONSIGNMENTS	Opens a list of all consignments that has not yet been released.
PACKAGES	Opens a list of all defined packages belonging to consignments that has not been released yet.
RELEASED CONSIGNMENTS	Opens a list of all released consignments. From this list it is possible to track goods, see costs etc.





3.1.2 ACTION BAR

HEADLINE

Good afternoon!

Activities

ACTIONS

- + Transfer Order
- + Purchase Order
- + Phys. Inv. Order
- + Phys. Inv. Recording
- + Inventory Pick
- + Inventory Put
- + Consignment
- + Package
- > Edit Item Recla...ication Journal
- > Item Tracing
- > Delivery
- Consignment Worksheet in List
- Released Consignments tory List
- Consignments
- Labels
- Consignments
- Packages

MENU NAME	DESCRIPTION
+CONSIGNMENT	This is used to create a new consignment without starting from a source document.
+PACKAGE	This is used to create a new package without starting from a consignment.
DELIVERY / CONSIGNMENT WORKSHEET	Opens the <i>Consignment Worksheet</i> where it is possible to release consignments that initiates EDI, advice e-mails etc.
DELIVERY / RELEASED CONSIGNMENTS	Opens a list of all released consignments. From this list it is possible to track goods, see costs etc.
DELIVERY / CONSIGNMENTS	Opens a list of all consignments that has not yet been released.
DELIVERY / PACKAGES	Opens a list of all defined packages belonging to consignments that has not been released yet.



3.1.3 ACTIVITIES DATA CUES

Activities

OUTBOUND - TODAY

RELEASED SA.
UNTIL TODAY
0

POSTED SALE...
TODAY -
0

INBOUND - TODAY

EXPECTED PU...
UNTIL TODAY
0

POSTED PURC...
TODAY -
0

INTERNAL

INVENTORY PI...
TODAY
0

INVENTORY P...
UNTIL TODAY
0

OPEN PHYS. I...
ORDERS
0

DELIVERY

CONSIGNMEN...
TODAY
19

UNDELIVERED
...CONSIGNMEN
13

MY USER TASKS

PENDING USER
TASKS
0

MENU NAME	DESCRIPTION
DELIVERY / CONSIGNMENTS TODAY	This cue shows the number of created Consignments today. Only non-released consignments are shown.
DELIVERY / UNDELIVERED CONSIGNMENTS	This cue shows how many Consignments that has not yet been delivered to the recipient. For this cue to show up the company has to be licensed for Push Tracking Status (additional cost may apply).



3.2 SHIPPING AND RECEIVING – WAREHOUSE MANAGEMENT SYSTEM

Dynamics 365 Business Central

LogTrade Technology AB | < erence Data | Journals | Worksheet | Posted Documents | Registered Documents | Setup & Extensions | Delivery

Warehouse Shipments Warehouse Receipts Transfer Orders Physical Inventory Orders Physical Inventory Recordings Released Production Orders More

HEADLINE
Good afternoon!

ACTIONS
 + Whse. Shipment > Whse. Phys. Invt. Journal
 + Transfer Order > Item Tracing
 + Purchase Order > Delivery
 + Whse. Receipt [] Picking List
 + Phys. Inv. Order [] Put-away List
 + Phys. Inv. Recording [] Movement List
 + Consignment [] Whse. Shipment Status
 + Package [] Warehouse Bin List
 > Put-away Worksheet [] Whse. Adjustment Bin
 > Pick Worksheet [] Warehouse Physi... Inventory List
 > Movement Worksheet [] Phys. Inventory List
 > Whse. Item Journal [] Customer - Labels

Activities

OUTBOUND - TODAY

RELEASED S... TODAY - 2	SHIPMENTS - TODAY 0	PICKED SHIP... TODAY - 0	POSTED SHIP... TODAY - 0
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INBOUND - TODAY

EXPECTED PU... ORDERS 0	ARRIVALS 0	POSTED RECE... TODAY 0
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INTERNAL

PICKS - ALL 0	PUT-AWAYS - ALL 0	MOVEMENTS - ALL 0	REGISTERED ... TODAY - 0
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DELIVERY

CONSIGNMEN... TODAY 26	UNDELIVERED ... CONSIGNME 2
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MY USER TASKS

PENDING USE... TASKS 0

3.2.1 NAVIGATION MENU

Consignments Packages Released Consignments

MENU NAME	DESCRIPTION
CONSIGNMENTS	Opens a list of all consignments that has not yet been released.
PACKAGES	Opens a list of all defined packages belonging to consignments that has not been released yet.
RELEASED CONSIGNMENTS	Opens a list of all released consignments. From this list it is possible to track goods, see costs etc.

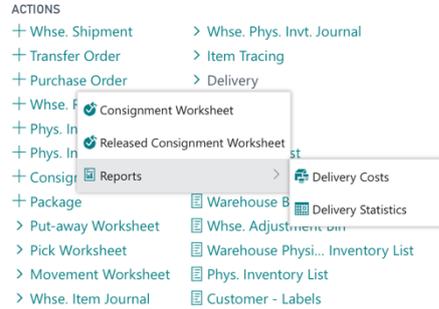




3.2.2 ACTION BAR

HEADLINE

Good afternoon!

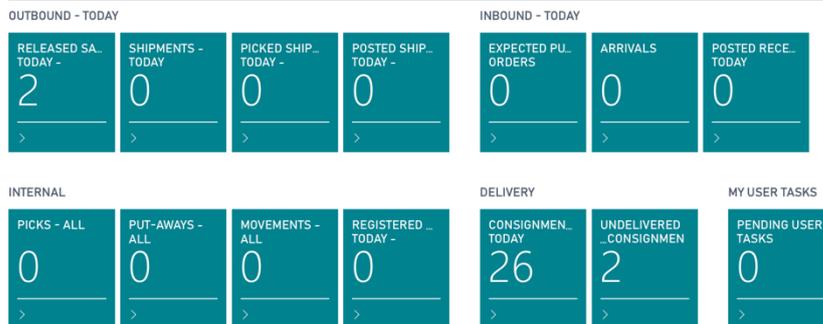


MENU NAME	DESCRIPTION
+CONSIGNMENT	This is used to create a new consignment without starting from a source document.
+PACKAGE	This is used to create a new package without starting from a consignment.
DELIVERY / CONSIGNMENT WORKSHEET	Opens the <i>Consignment Worksheet</i> where it is possible to release consignments that initiates EDI, advice e-mails etc.
DELIVERY / RELEASED CONSIGNMENT WORKSHEET	Opens the <i>Released Consignment Worksheet</i> where it is possible to print consignments again etc.
DELIVERY / REPORTS / DELIVERY COSTS	Opens a report that shows costs for consignments. Possible to filter on <i>Recipient, Shipping Agent</i> etc.
DELIVERY / REPORTS / DELIVERY STATISTICS	Opens a report that shows details of the delivery process for all consignments. With this report it is easy to follow-up on how long time each shipment has taken from pickup to delivery. Possible to filter on <i>Recipient, Shipping Agent</i> etc.



3.2.3 ACTIVITIES DATA CUES

Activities



MENU NAME	DESCRIPTION
DELIVERY / CONSIGNMENTS TODAY	This cue shows the number of created Consignments today. Only non-released consignments are shown.
DELIVERY / UNDELIVERED CONSIGNMENTS	This cue shows how many Consignments that has not yet been delivered to the Recipient. For this cue to show up the company has to be licensed for Tracking Push Status (additional cost may apply).



3.3 WAREHOUSE WORKER - WAREHOUSE MANAGEMENT SYSTEM

Dynamics 365 Business Central

LogTrade Technology AB | Reference Data | Journals | Worksheet | Registered Documents | Delivery

Picks Put-aways Movements Warehouse Shipments Warehouse Receipts Transfer Orders Assembly Orders Bin Contents

HEADLINE
Good afternoon!

ACTIONS
 + Consignment
 > Whse. Physical Invt. Journal
 > Whse. Item Journal
 > Pick Worksheet
 > Put-away Worksheet
 > Movement Worksheet
 > Delivery
 Warehouse Bin List
 Warehouse Adjustment Bin
 Whse. Phys. Inventory List
 Prod. Order Picking List
 Customer Labels

Activities

OUTBOUND		INBOUND		INTERNAL		DELIVERY	
UNASSIGNED PICKS 0	MY PICKS 0	UNASSIGNED PUT-AWAYS 0	MY PUT-AWAYS 0	UNASSIGNED MOVEMENTS 0	MY MOVEMENTS 0	CONSIGNMEN... TODAY 26	UNDELIVERED... CONSIGNMEN 2

MY USER TASKS
PENDING USER TASKS
0

3.3.1 NAVIGATION MENU

LogTrade Technology AB | Reference Data | Journals | Worksheet | Registered Documents | Delivery

Consignments Packages Released Consignments

MENU NAME	DESCRIPTION
CONSIGNMENTS	Opens a list of all consignments that has not yet been released.
PACKAGES	Opens a list of all defined packages belonging to consignments that has not been released yet.
RELEASED CONSIGNMENTS	Opens a list of all released consignments. From this list it is possible to track goods, see costs etc.





3.3.2 ACTION BAR

HEADLINE

Good afternoon!

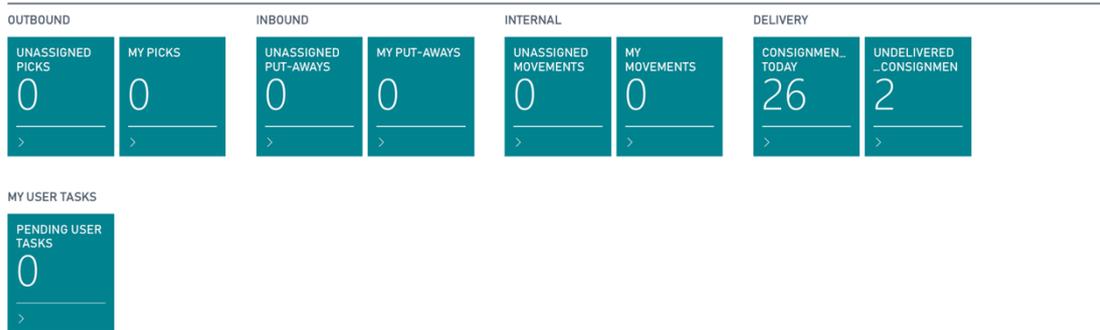
ACTIONS

- + Consignment > Delivery
- > Whse. Physical Inventory List
- > Whse. Item Journal Adjustment Bin
- > Pick Worksheet Released Consignment Worksheet Inventory List
- > Put-away Worksheet Reports > Delivery Costs
- > Movement Worksheet Customer Labels Delivery Statistics

MENU NAME	DESCRIPTION
+CONSIGNMENT	This is used to create a new consignment without starting from a source document.
DELIVERY / CONSIGNMENT WORKSHEET	Opens the <i>Consignment Worksheet</i> where it is possible to release consignments that initiates EDI, advice e-mails etc.
DELIVERY / RELEASED CONSIGNMENT WORKSHEET	Opens the <i>Released Consignment Worksheet</i> where it is possible to print consignments again etc.
DELIVERY / REPORTS / DELIVERY COSTS	Opens a report that shows costs for consignments. Possible to filter on <i>Recipient, Shipping Agent</i> etc.
DELIVERY / REPORTS / DELIVERY STATISTICS	Opens a report that shows details of the delivery process for all consignments. With this report it is easy to follow-up on how long time each shipment has taken from pickup to delivery. Possible to filter on <i>Recipient, Shipping Agent</i> etc.

3.3.3 ACTIVITIES DATA CUES

Activities



MENU NAME	DESCRIPTION
DELIVERY / CONSIGNMENTS TODAY	This cue shows the number of created Consignments today. Only non-released consignments are shown.
DELIVERY / UNDELIVERED CONSIGNMENTS	This cue shows how many Consignments that has not yet been delivered to the Recipient. For this cue to show up the company has to be licensed for Tracking Push Status (additional cost may apply).





3.4 SALES ORDER PROCESSOR

Dynamics 365 Business Central

LogTrade Technology AB | Sales | Purchasing | Inventory | Posted Documents | Setup & Extensions | Delivery

SALES ORDERS | Items | Customers | Item Journals | Sales Journals | Cash Receipt Journals | Transfer Orders

HEADLINE
Good afternoon!

ACTIONS
 + Sales Quote | + Sales Return Order | > Tasks | > History
 + Sales Invoice | + Sales Credit Memo | > Sales
 + Sales Order | + Consignment | > Reports

Activities

Activities | SALES QUOTES - OPEN: 0 | SALES ORDERS - OPEN: 47

SALES ORDERS RELEASED NOT SHIPPED

READY TO SHIP: 20	PARTIALLY SHIPPED: 5	DELAYED: 2	AVERAGE DAYS DELAYED: 3,0
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RETURNS

SALES RETUR... OPEN - : 0	SALES CREDIT... OPEN - : 1
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DELIVERY

CONSIGNMEN... TODAY: 26	UNDELIVERED... CONSIGNMEN: 2
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MY USER TASKS

3.4.1 NAVIGATION MENU

Consignments | Released Consignments

MENU NAME	DESCRIPTION
CONSIGNMENTS	Opens a list of all consignments that has not yet been released.
RELEASED CONSIGNMENTS	Opens a list of all released consignments. From this list it is possible to track goods, see costs etc.





3.4.2 ACTION BAR

HEADLINE

Good afternoon!

• • •

HEADLINE

Good afternoon!

• • •

Activities

Activities ▾

HEADLINE

Good afternoon!

• • •

ACTIONS

+ Sales Quote + Sales Return Order > Tasks > History
 + Sales Invoice + Sales Credit Memo
 + Sales Order + Consignment

- Sales Journal
- Sales Price Worksheet
- Consignment Worksheet

ACTIONS

+ Sales Quote + Sales Return Order > Tasks > History
 + Sales Invoice + Sales Credit Memo > Sales
 + Sales Order + Consignment > Reports

- Customer >
- Sales >
- Delivery >
 - Delivery Costs
 - Delivery Statistics

ACTIONS

+ Sales Quote + Sales Return Order > Tasks > History
 + Sales Invoice + Sales Credit Memo
 + Sales Order + Consignment

- Navigate
- Released Consignment Worksheet

MENU NAME	DESCRIPTION
+CONSIGNMENT	This is used to create a new consignment without starting from a source document.
TASKS / CONSIGNMENT WORKSHEET	Opens the <i>Consignment Worksheet</i> where it is possible to release consignments that initiates EDI, advice e-mails etc.
REPORTS / DELIVERY / DELIVERY COSTS	Opens a report that shows costs for consignments. Possible to filter on <i>Recipient, Shipping Agent</i> etc.
REPORTS/ DELIVERY / DELIVERY STATISTICS	Opens a report that shows details of the delivery process for all consignments. With this report it is easy to follow-up on how long time each shipment has taken from pickup to delivery. Possible to filter on <i>Recipient, Shipping Agent</i> etc.
HISTORY / RELEASED CONSIGNMENT WORKSHEET	Opens the <i>Released Consignment Worksheet</i> where it is possible to print consignments again etc.



3.4.3 ACTIVITIES DATA CUES

Activities

Activities ▾

SALES QUOTES - OPEN

0

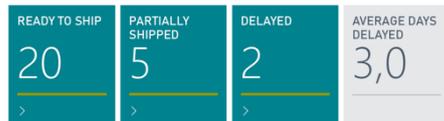
>See more

SALES ORDERS - OPEN

47

>See more

SALES ORDERS RELEASED NOT SHIPPED



RETURNS



DELIVERY



MENU NAME

DESCRIPTION

DELIVERY / CONSIGNMENTS TODAY

This cue shows the number of created Consignments today. Only non-released consignments are shown.

DELIVERY / UNDELIVERED CONSIGNMENTS

This cue shows how many Consignments that has not yet been delivered to the Recipient. For this cue to show up the company has to be licensed for Tracking Push Status (additional cost may apply).





3.5 BUSINESS MANAGER

Dynamics 365 Business Central

LogTrade Technology AB | < ish Management Sales Purchasing Setup & Extensions Intelligent Cloud Insights Delivery

Customers Vendors Items Bank Accounts Chart of Accounts

HEADLINE
Good afternoon!

ACTIONS
 + Sales Quote + Purchase Order > Payments Excel Reports
 + Sales Order + Purchase Invoice > Reports
 + Sales Invoice + Consignment > Setup
 + Purchase Quote > New > Delivery

Activities

Activities > INTELLIGENT CLOUD

Learn More Intelligent Cloud Insights

SALES THIS MONTH
491£
> See more

OVERDUE SALES INVOICE AMOUNT
77£
> See more

OVERDUE PURCH. INVOICE AMOUNT
0£
> See more

ONGOING SALES DELIVERY ONGOING PURCHASES

SALES QUOTES SALES ORDERS SALES INVOICES
0 74 1

CONSIGNMEN... TODAY UNDELIVERED... CONSIGNMEN
26 2

PURCHASE ORDERS ONGOING PUR... INVOICES PURCH. INVOL... NEXT WEEK
21 0 35

APPROVALS PAYMENTS INCOMING DOCUMENTS MY USER TASKS PRODUCT VIDEOS

3.5.1 NAVIGATION MENU

Consignments Released Consignments

MENU NAME	DESCRIPTION
CONSIGNMENTS	Opens a list of all consignments that has not yet been released.
RELEASED CONSIGNMENTS	Opens a list of all released consignments. From this list it is possible to track goods, see costs etc.





3.5.2 ACTION BAR

HEADLINE

Good afternoon!

• •

HEADLINE

Good afternoon!

• •

ACTIONS

- + Sales Quote + Purchase Order > Payments Excel Reports
- + Sales Order + Purchase Invoice > Reports
- + Sales Invoice + Consignment > Setup
- + Purchase Quote > New > Delivery

- Consignment Worksheet
- Released Consignment Worksheet

ACTIONS

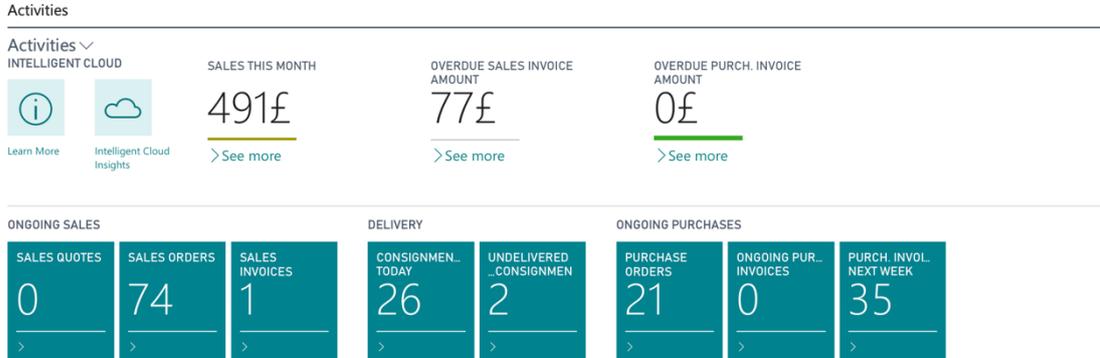
- + Sales Quote + Purchase Order > Payments Excel Reports
- + Sales Order + Purchase Invoice > Reports
- + Sales Invoice + Consignm ● Financial Statements >
- + Purchase Quote > New Delivery >

- Delivery Costs
- Delivery Statistics

MENU NAME	DESCRIPTION
+CONSIGNMENT	This is used to create a new consignment without starting from a source document.
DELIVERY / CONSIGNMENT WORKSHEET	Opens the <i>Consignment Worksheet</i> where it is possible to release consignments that initiates EDI, advice e-mails etc.
DELIVERY / RELEASED CONSIGNMENT WORKSHEET	Opens the <i>Released Consignment Worksheet</i> where it is possible to print consignments again etc.
REPORTS / DELIVERY / DELIVERY COSTS	Opens a report that shows costs for consignments. Possible to filter on <i>Recipient, Shipping Agent</i> etc.
REPORTS/ DELIVERY / DELIVERY STATISTICS	Opens a report that shows details of the delivery process for all consignments. With this report it is easy to follow-up on how long time each shipment has taken from pickup to delivery. Possible to filter on <i>Recipient, Shipping Agent</i> etc.



3.5.3 ACTIVITIES DATA CUES



MENU NAME	DESCRIPTION
DELIVERY / CONSIGNMENTS TODAY	This cue shows the number of created Consignments today. Only non-released consignments are shown.
DELIVERY / UNDELIVERED CONSIGNMENTS	This cue shows how many Consignments that has not yet been delivered to the Recipient. For this cue to show up the company has to be licensed for Tracking Push Status (additional cost may apply).