

# DYNAMICS 365 FINANCE AND OPERATIONS SETUP GUIDE

**LogTrade**  
2021-05-21

# 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 thru 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.

The screenshot shows the 'LogTrade parameters' window in Dynamics 365. The window has a dark blue header with the Dynamics 365 logo and navigation tabs for 'Finance and Operations' and 'LogTrade Connect'. The 'LogTrade parameters' tab is active, showing a sub-tab 'Setup' and a search bar. The main content area is titled 'LogTrade parameters' and contains a sidebar with tabs: 'General', 'Freight', 'Advanced', and 'Number sequences'. The 'General' tab is selected, displaying various configuration options: 'License number' (text input with 'LTD8101575'), 'Test mode' (toggle switch set to 'Yes'), 'Pick packaging material' (radio button set to 'No'), 'Use consolidation' (radio button set to 'No'), 'Use own packagetype list' (radio button set to 'No'), 'Use intercompany - company payer' (radio button set to 'No'), 'Set sender reference from IC order' (radio button set to 'No'), 'Clean Zip code' (radio button set to 'No'), 'Default referencetype' (dropdown menu set to 'Sales order'), and 'Default Goods description' (dropdown menu set to 'Material'). At the bottom of the 'General' tab is a blue button labeled 'Installation guide'.

The screenshot shows the 'Logtrade setup' window in Dynamics 365 Finance and Operations. The 'Identification' tab is active, displaying fields for 'License number' (LTD8101575), 'User id' (mw@logtrade.se), and 'Password' (masked with dots). A 'Test credentials' button is located below the password field. The navigation bar at the top includes 'Welcome', 'Identification', 'Get base data', 'Select printerqueue', 'Goods description', and 'Package type groups'. The bottom of the window features 'Back', 'Next', and 'Cancel' buttons.

### 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.

The screenshot shows the 'Logtrade setup' window in Dynamics 365 Finance and Operations, now on the 'Get base data' tab. The 'Description' section contains a 'Get base data' button. The navigation bar at the top is the same as in the previous screenshot. The bottom of the window features 'Back', 'Next', and 'Cancel' buttons.

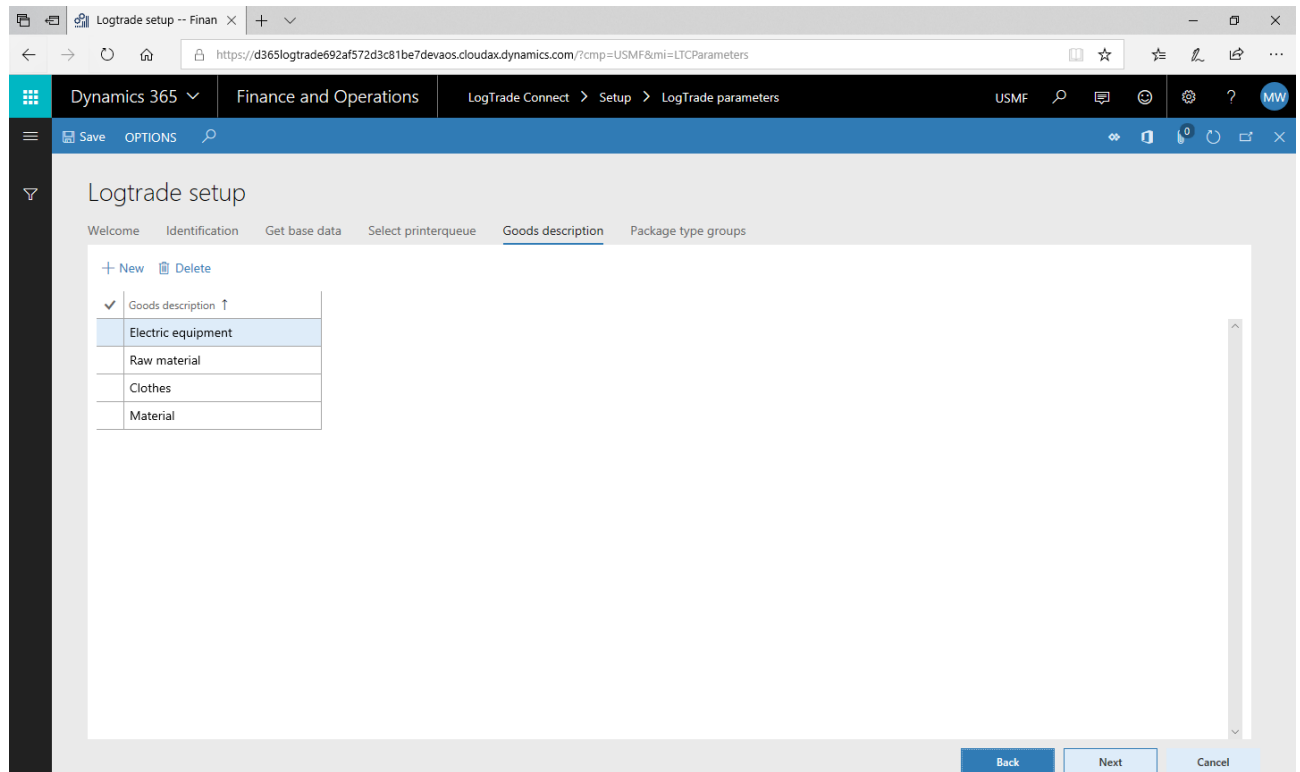
## 1.4. Print queues

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*.

The screenshot shows the 'Logtrade setup' interface in a web browser. The browser's address bar displays the URL: <https://d365logtrade692af572d3c81be7devaos.cloudax.dynamics.com/?cmp=USMF&mi=LTCParameters>. The Dynamics 365 navigation bar at the top includes 'Dynamics 365', 'Finance and Operations', and 'LogTrade Connect > Setup > LogTrade parameters'. The 'Logtrade setup' page has a sidebar with a search icon and a 'Save' button. The main content area has tabs: 'Welcome', 'Identification', 'Get base data', 'Select printerqueue' (selected), 'Goods description', and 'Package type groups'. Under the 'Select printerqueue' tab, there is a 'Print queue' dropdown menu with 'Standard' selected. At the bottom right of the setup area are 'Back', 'Next', and 'Cancel' buttons.

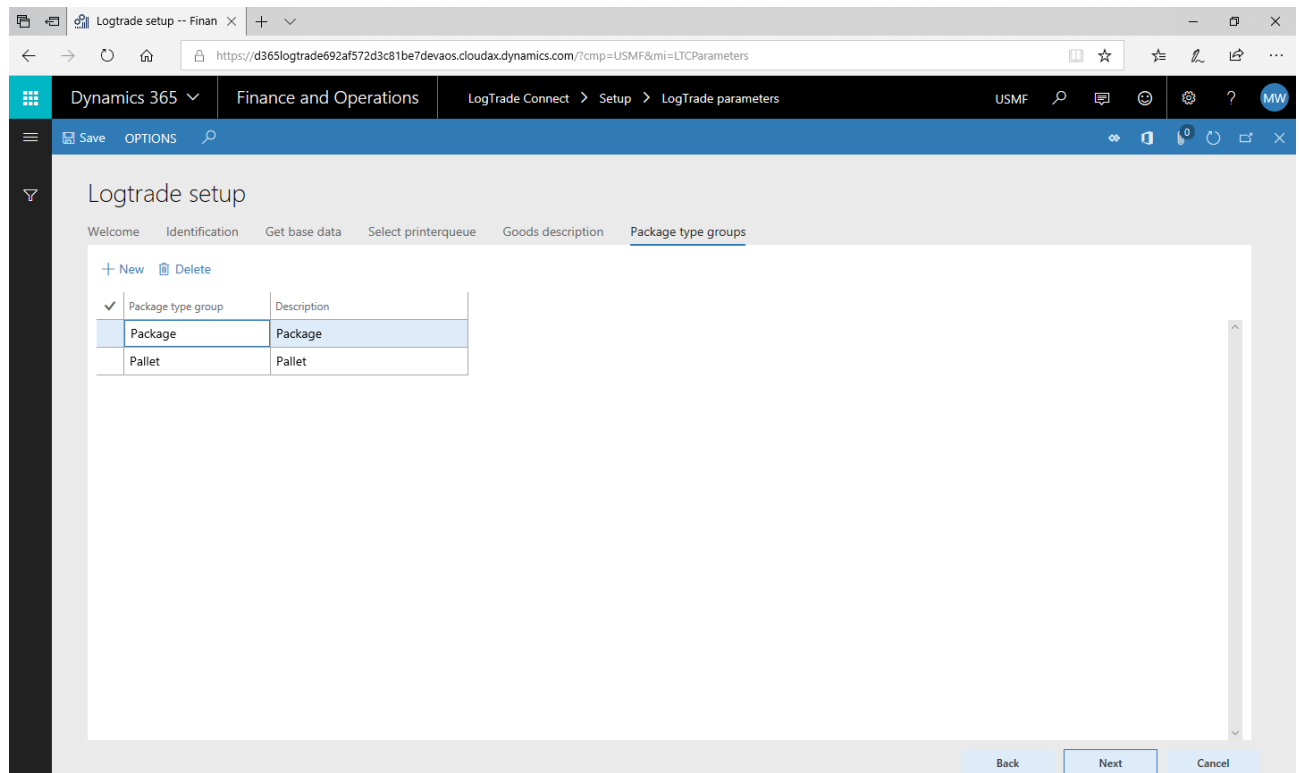
## 1.5. Goods description

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.



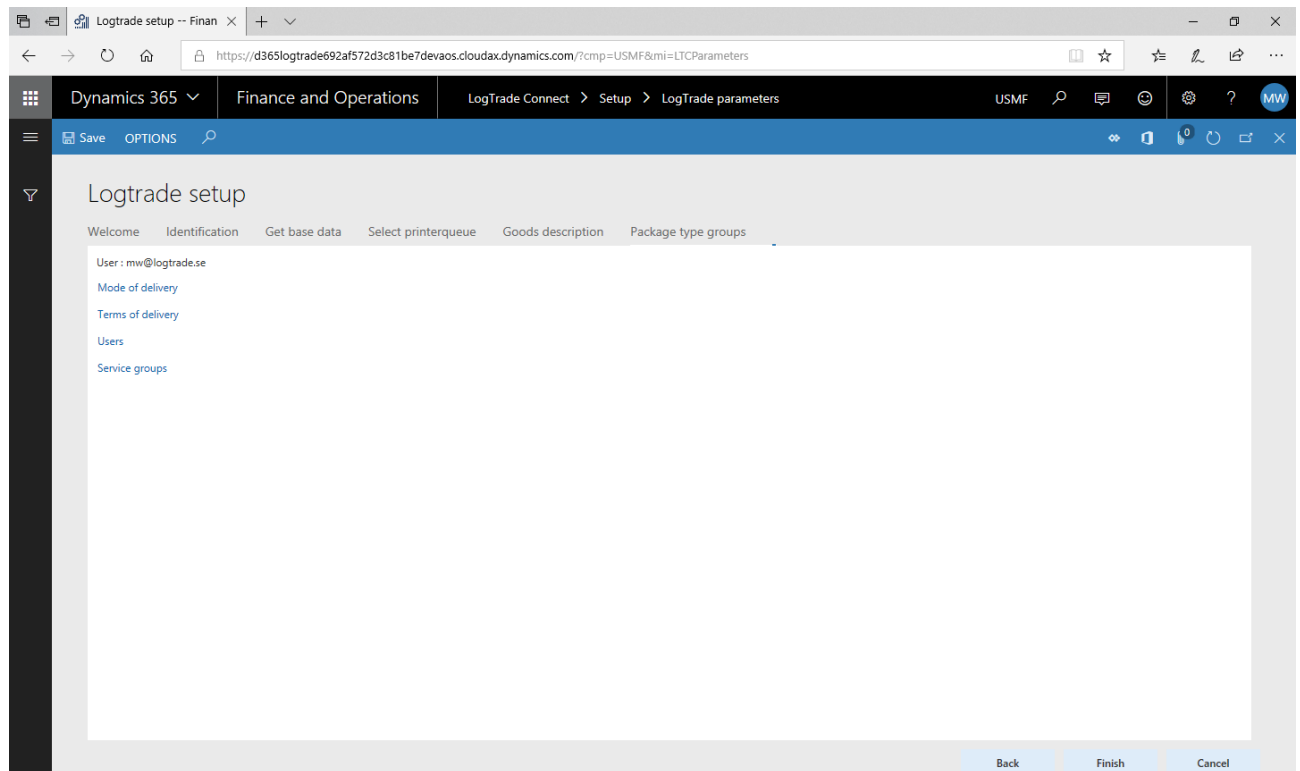
## 1.6. Package type groups

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.



## 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 were defined earlier in the wizard.

Mode of delivery

Address setup

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
<b>PARTLOAD</b>	<b>Partload</b>
Point-STD	Point 2 Point Truck-STD
RailC-Rail	RailCarrier-Rail
Truck-Truc	TruckCarrier-Truck
Zone -STD	Zone 2 Zone Truck-STD

Mode of delivery  
**PARTLOAD**

Description  
Partload

Logtrade settings

Carrier  
SchenkerSweden

Price quote support  
Yes

Line function  
NoCreate

Product code  
SchenkerSweden\_System

Timetable support  
Yes

Freight calculation  
LTC

Package type groups

+ New Delete

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 consignments.

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

The screenshot shows the Dynamics 365 LogTrade interface. The main section is titled 'Terms of delivery'. It contains a table with delivery terms and their descriptions:

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

Below this table, there are two sections:

**Logtrade settings**

Freight payer:

**Logtrade delivery terms**

Buttons: + New, Delete

Mode of delivery	Delivery terms code
<input checked="" type="checkbox"/> FULLLOAD	006
<input type="checkbox"/> 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 knows which account to use, and which *print queue* to use.

The screenshot shows the Dynamics 365 interface for the 'Users' form. The breadcrumb trail is: Dynamics 365 > Finance and Operations > LogTrade Connect > Setup > LogTrade parameters. The form has two main sections, each with a '+ New' and 'Delete' button.

**Left Section:**

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

**Right Section:**

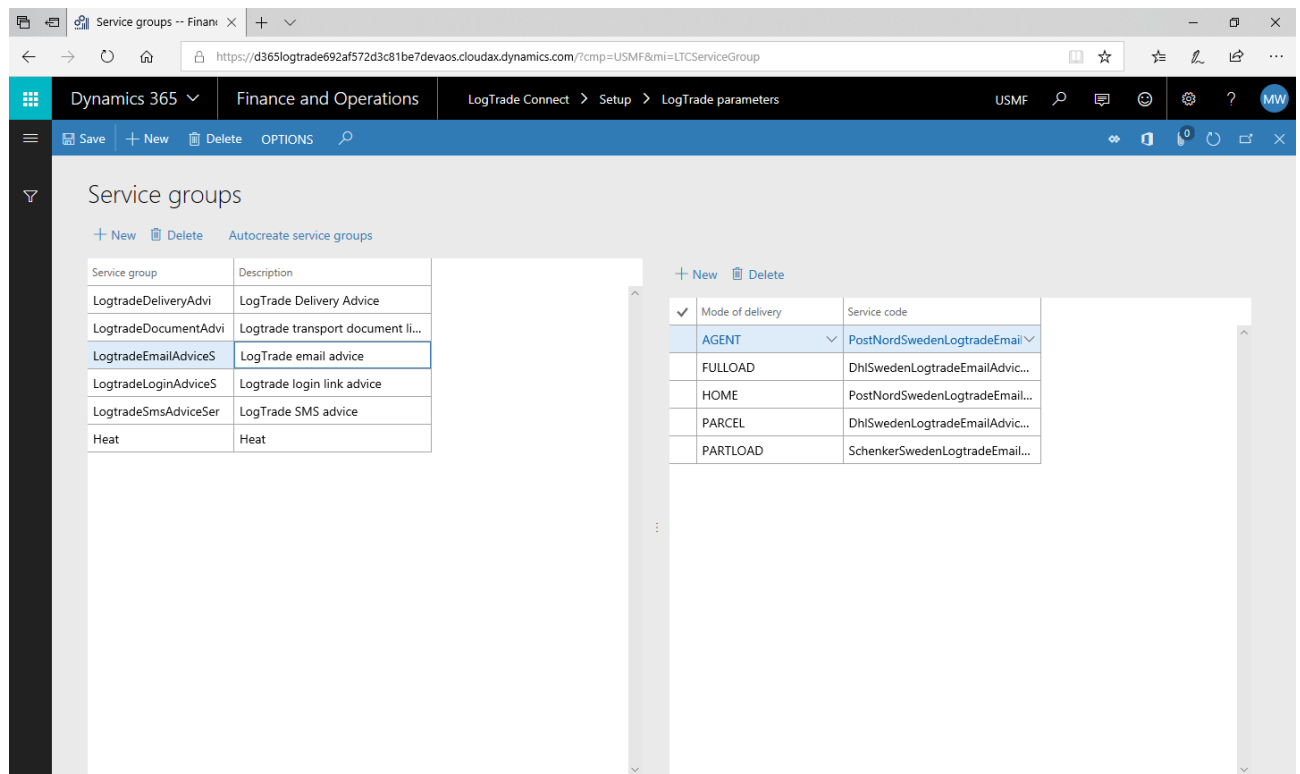
✓ User ID	Operator name
Admin	Admin

## 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 consignment (either manually or automatically), it will then translate that group to a carrier service when the consignment record is sent to the LogTrade platform.

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

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



The screenshot shows the Dynamics 365 interface for 'Service groups'. The top navigation bar includes 'Dynamics 365', 'Finance and Operations', and 'LogTrade Connect > Setup > LogTrade parameters'. The main content area is titled 'Service groups' and includes a sub-header 'Autocreate service groups'. There are two tables displayed:

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...

## 2. Business rules

Business Rules is used when you want predefined rules in Logtrade to determine which carrier and product you should use.

To use Business Rules from Dynamics 365 Finance and Operations you first create a Generic Carrier in Logtrade and map this carrier and product to a Mode of Delivery. This is only to be able to map package types, service groups etc.

Point out this Mode of Delivery in settings *Logtrade parameters* and the field *Business Rules Mode of Delivery*.

The screenshot shows the 'LogTrade parameters' setup screen. On the left, there is a sidebar with icons for 'Save', 'Options', and a search icon. Below these are icons for 'Home', 'Star', 'Clock', and 'List'. The main area is titled 'LogTrade parameters' and has a 'General' tab selected. Under 'General', there are three sub-sections: 'Freight', 'Advanced', and 'Number sequences'. The 'Setup' section on the right contains the following fields and options:

- License number: LTD8101575
- Test mode: ☒ Yes
- Pick packaging material: ☒ Yes
- Use consolidation: ☐ No
- Use own packagetype list: ☐ No
- Use intercompany - company ...: ☐ No
- Set sender reference from IC o...: ☐ No
- Clean Zip code: ☐ No
- Default referencetype: [Dropdown]
- Default Goods description: Spare parts [Dropdown]
- Business Rules Mode of Delivery: BUSRULES [Dropdown] (highlighted with a red arrow)
- Installation guide: [Link]

This setting will affect the creating of a consignment. When a consignment is created for the *Business Rules Mode of Delivery* a specific code will be sent to Logtrade (AnyForwarder\_AnyProduct) to activate Business Rules for that consignment.