

# ROUTINE DESCRIPTION LOGTRADE CONNECT ASSISTED SETUP

LogTrade Connect for Microsoft Dynamics 365 Business Central



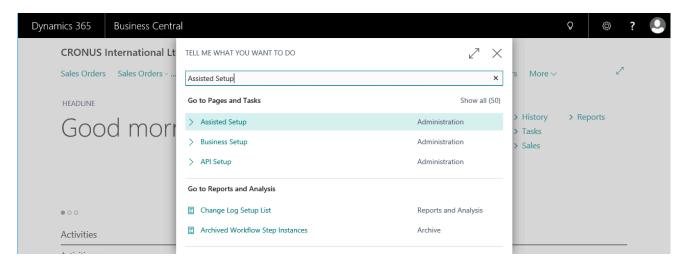
# **1** GENERAL

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.





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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

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LOGTRADE CONNECT SETUP WIZARD	,,⊭ ×	
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WELCOME THE ASSISTED CONFIGURATION OF LOGTRADE CONNECT. This guide will help you do the necessary settings to get started with printing shipping labels and documents from Sales Order and Inventory Pick.		
LOGTRADE ACCOUNT OR DEMO Before you begin you need a License No., Username and Password to connect to LogTrade. Please contact sales@logtrade.se if you don"t have this already		
You can also proceed without a LogTrade Account. You will then run in demo mode for testing purposes.		
THE ASSISTED SETUP CONSISTS OF THE FOLLOWING STEPS: 1. Enter LogTrade Credentials (or continue in demo mode without a LogTrade license).		
2. Defining Generic Package Types and their relations to Carrier specific Package Types.		
3. Link Shipping Agents to Carriers in LogTrade.		
4. Link Shipping Agent Services to Carrier specific Delivery Products in LogTrade.		
5. Link Shipment Methods to Carrier specific Delivery Terms in LogTrade (used when exporting goods).		
6. Some generic settings for LogTrade Connect.	Ĵ	
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## 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.

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LOGTRADE CREDENTIALS Please enter your credentials for LogTrade. We will verify these against LogTrade and fetch se	ettings for Carriers, packages types etc. when you click Next.		
License No.	LTD8102814		L
User ID	demo_bc_eu@logtradeconnect.se		L
Password	••••••	\$	I
You can also proceed without specifying credentials. You will then use a demo account that c THIS CAN TAKE A WHILE			
When you click next a number of settings will be downloaded from LogTrade. Just relax and b	be patient and we will continue with the next step.		I
			I
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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.





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<b>*</b>		
LOGTRADE CREDENTIALS Please enter your credentials for LogTrade. We will verify these against LogTra	ade and fetch settings for Carriers, packages types etc. when you click Next.	
License No.	LTD8102814	
User ID · · · · · · · · · · · · · · · · · ·	demo_bc_eu@logtradeconnect.se	
Password	→	
	Working on it Updating Carrier: DHL Express, Europa	
		Next





## 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.

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LOGTRADE CONNECT SETUP WIZAP	RD		$_{\pi^{\ell}}$ $\times$
\$			
CARRIERS AND CUSTOMER NUMI In this step you link your Shipping	BERS J Agents to Carriers in LogTrade and setup your Customer Nu	umber for each Carrier.	
Shipping Agents $\checkmark$			
CODE	NAME	CARRIER NAME	PAYER CUSTOMER NO.
DHL	DHL Express, Europa		
FEDEX	FedEx, Europa		
OWN LOG.	Own Logistics		
UPS	UPS, Europa		
<			,
		$\triangleright$	
		-0 	
			Back Next Finish
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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.



← ←	PACKAGE   WORK DATE: 28/01/2021		✓ SAVED <sup>★</sup>
	Package Type Relations		
		pen in Excel	7 ≣
	CARRIER	CARRIER PRODUCT	PRODUCT PACKAGE TYPE CODE
	DhlEurope	DhlEurope_B2C	CP
	DhlEurope	DhlEurope_DomesticExpress	СР
	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	РК
	DhlGermany	DhlGermany_DhlPaketReturn	PK
	DhlGermany	DhlGermany_Euroconnect	PA
	DhlGermany	DhlGermany_EuroconnectB2C	PA
	DhlGermany	DhlGermany_Europaket	PA
	DhlGermany	DhlGermany_Weltpaket	РК
	DhlSweden	DhlSweden_DhlEconomySelect	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.

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	LOGTRADE CONNECT SETUP WIZARD				~~ ×
	\$				
I	CARRIERS AND CUSTOMER NUMBE	29			
1		gents to Carriers in LogTrade and setup your Customer Nu	mber for each Carrier.		
1					
	Shipping Agents $\checkmark$				
	CODE	NAME	CARRIER NAME	Look up valu	'ER CUSTOMER NO.
	DHL	DHL Express, Europa		Jim	
	FEDEX	FedEx, Europa		$\circ$	
	OWN LOG.	Own Logistics	NAME	DESCRIPTION	
	UPS	UPS, Europa	DhlEurope	DHL Express, Europa	
			FedExEurope	FedEx, Europa	
			GenericForwarder_1	Own Logistics	
			UpsGlobal	UPS, Europa	
				Select from full list	
				В	ack Next Finish

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.



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CARRIERS AND CUSTOMER NUMBE			
In this step you link your Shipping A	Agents to Carriers in LogTrade and setup your Customer Nu	mber for each Carrier.	
Shipping Agents $\sim$			
Subbuild a derive -			
CODE	NAME	CARRIER NAME	PAYER CUSTOMER NO.
DHL	DHL Express, Europa	DhlEurope	123456
FEDEX	FedEx, Europa	FedExEurope	234567
OWN LOG.	Own Logistics	GenericForwarder_1	345678
UPS	UPS, Europa	UpsGlobal	456789 ×

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.





In this step you link your Shipping Agent Servic	es to Carrier Products in LogTrade. On ea	ach Shipping Agent Service you can also setup a default Pack	age Type Code	
Shipping Agent Services Manage				
SHIPPING AGENT CODE	CODE	PRODUCT NAME		DEFAULT PACKAGE TYPE CODE
DHL	ECOSELECT	DhlEurope_EconomySelect		PACKAGE
FEDEX	INTECO	FedExEurope_InternationalEconomy		PACKAGE
FEDEX	INTECOFR	FedExEurope_InternationalEconomyFreight		PALLET
OWN LOG.	TRANSPORT	GenericForwarder_1_0		PALLET
UPS	EXPEDITED	UpsGlobal_Expedited		PACKAGE
UPS	EXPRESS	UpsGlobal_Express		PACKAGE
UPS	STANDARD	UpsGlobal_Standard		PACK × V
			CODE	
			PACKAGE	Package
			+ New	Select from full list

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.

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Here you specify	y who pays for the freight.		
		28 D.P	
For each Shippin	ng Term you can view/create relations to Carrier spo	ecific Delivery Terms	
Shipment Met	thods Manage		
COD	DE	DESCRIPTION	NO. OF TERMS OF DELIVERY RELATIONS
DEQ	t.	Delivered ex Quay	1 ^
DES		Delivered ex Ship	1
EXW	1	Ex Warehouse	8
FAS		Free Alongside Ship	3
FCA		Free Carrier	3
FOB		Free on Board	3
PICK	(UP	Pickup at Location	-
			×

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.



Search + New      Edit List	t 📋 Delete 📲 Op SHIPPING AGENT	en in Excel	TERMS OF DELIVERY		V ≡ OVERRI
CODE T	CODE	SERVICE CODE	CODE	DESCRIPTION	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:

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	$\checkmark$				
	Other Setup				
	Consignment Nos.	LOGTRADE		$\sim$	
	LogTrade Action	Prepare		$\sim$	
	Integrated Printing				
	Default Print Queue			$\sim$	
	Default Goods Type	MATERIAL	×	~	
	LogTrade Locale	English		$\sim$	
	Default Shipment Date	Workdate		~	
	Test Mode				
	Remove Country Code from Post Code				
		Back Net	d Finis	5	
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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 <i>Integrated Printing</i> 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<br/>document date can be used if you prepare shipments ahead in time,<br/>before the actual shipping date when the carrier picks up the goods.**TEST MODE**This is used when testing LogTrade Connect. No external communication<br/>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<br/>setup, printing software etc. All printed documents will have a water mark<br/>printed with the text TEST.**REMOVE COUNTRY CODE**<br/>FROM POST CODEThis means that any country code in the beginning of the *post code* will be<br/>removed before sent to the Shipping Agent. The country code should<br/>normally not be in the post code since it is also sent in a specific field to<br/>LogTrade.

