# TRANSSMART

Makes you deliver!

# Boxwise & MyTranssmart
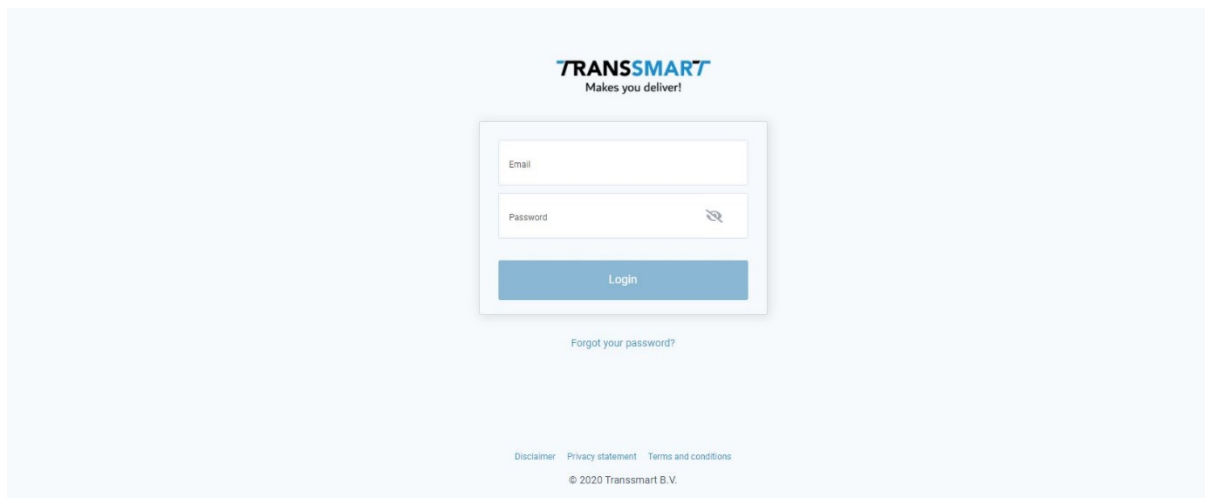
Quick configuration guide

# Contents

Boxwise is your core application in which you create shipments and which is used for Track & Trace purposes. Boxwise has developed a new version of the Transsmart connection. For this new connection you need to do some extra setup in the Transsmart application. This document describes the steps to take in the MyTranssmart dashboard, from now on called MyTS.

*Note: This document does not describe the setup of a (label) printer for booking manual shipments in MyTS, since the shipments are created and printed in Boxwise. In case this is needed, Transsmart has a manual available on [how to setup SmartPrint in MyTS](#).*

# 1   Login to MyTranssmart

Before you can start you have to login https://my.transsmart.com with your credentials which are an e-mail address as user name and a password. These credentials are known by you or someone in your organization since these were used during the implementation of Transsmart within Boxwise.



If you do not have a user name and password, please contact Boxwise support via https://www.boxwise.nl/support/ so we can obtain them for you.

*Be careful: you can use the link 'Forgot password' to request a new password for an e-mail address if it's known in the Transsmart database. When you do this for the (one and only) main account, the integration between Boxwise and Transsmart will not work anymore until the new password is entered in the Boxwise configuration!*

# 2 Configure the global settings

*Note: to read about how to register the default values, go to step 2.4.*

The first step in configuring your account is by clicking on the 'Manage account' section in the top bar and take the next steps:



## 2.1 Booking profiles

To create shipments you need to setup (a) booking profile(s). These settings are picked up by Boxwise so you can select them in the Boxwise system. These settings are mandatory to setup for the new Transsmart connection. Configure the profiles that are used to book shipments so these will be available in Boxwise.
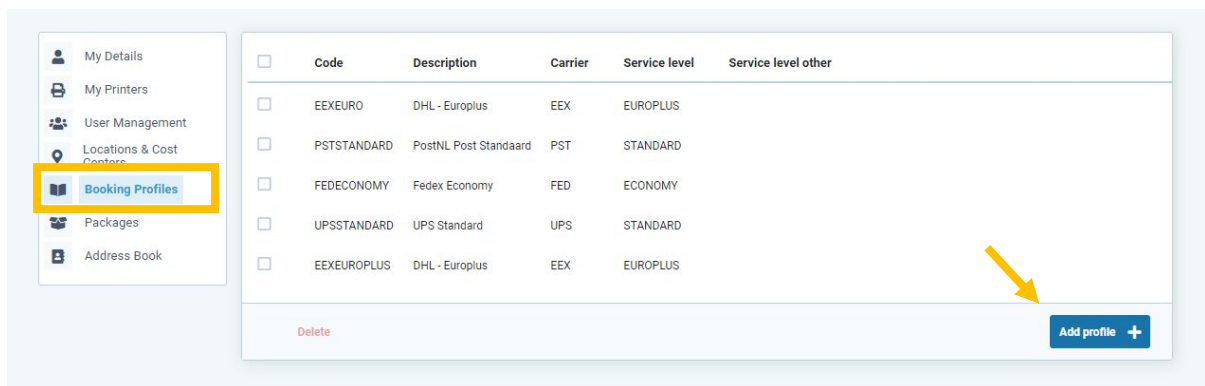


**Explanation of the fields**

- Booking profile code: give each booking profile a unique code.
- Description: give each booking profile a description.
- Carrier: choose the carrier.
- Service Level Time: choose the service level.
- Service Level Other: if necessary choose a service level time other.
- Cost center: if necessary choose a cost center.
- Select incoterms: if necessary choose an incoterm.
- Mail type: choose a default mail type.

## 2.2 Locations & Cost Centers

You have to set your dispatch location so it is prefilled, or easy to select as sender address on the create shipment page. You can set this on a user level, but first you will need to create it.

Click 'Locations & Cost Centers' and then 'Add location'. Fill in the fields and add the location. For the new Boxwise integration this is mandatory.



## 2.3 Setting your defaults

Click 'My Details' under manage account. Fill in your preferred defaults. These defaults will be prefilled when creating a new shipment in MyTS. This is not mandatory for the new Boxwise integration.
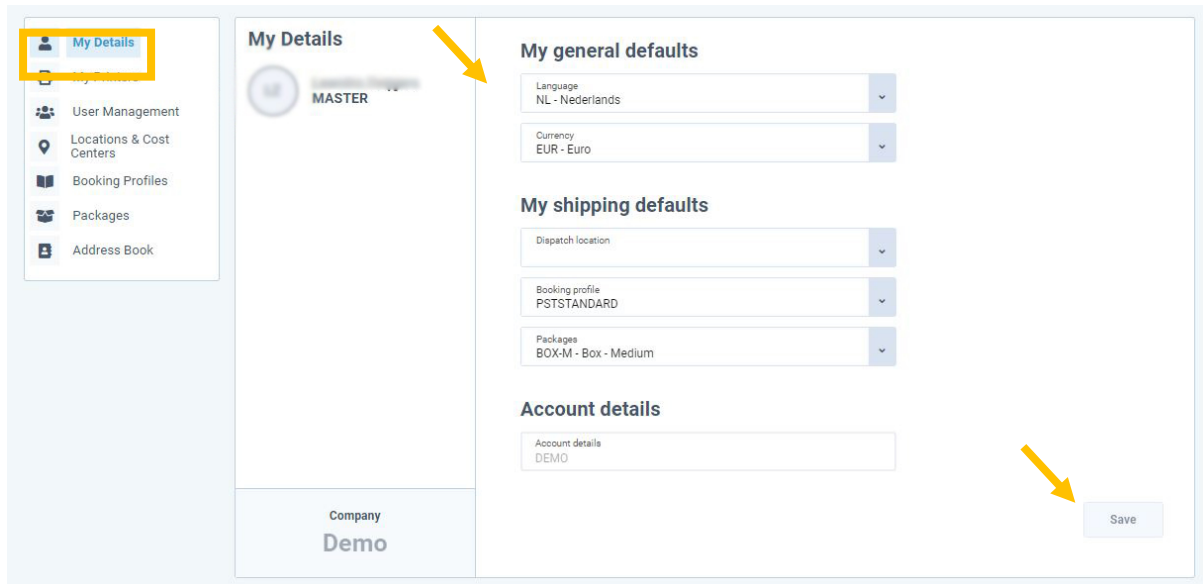
With these basic settings you are ready to use MyTS for some basic functionalities.

As mentioned above, this document does not describe the setup of a (label) printer for booking manual shipments, since the shipments are printed in Boxwise. In case this is needed, there is a manual available how to setup SmartPrint in MyTS.

# 3   Optional: User Management

**Add user(s)**

We advise you to make separate user accounts for co-workers if you are going to do manual actions; for instance the occasional creation of bookings. There are several reasons to do this, like separation of responsibilities and saving of user preferences. Settings are stored locally in your browser. When changing columns and when multiple users are using one account, these settings can conflict within the different used browsers.

Maintaining users can be done in the 'User Management' section.



In the next screen, fill in all fields. Fields that are marked with a * are mandatory fields which have to be filled in order to be able to add a new user.

## User role

There are three main user roles:

| Role | Explanation |
|---|---|
| Administrator | A user with this role can do everything in MyTS. |
| Standard | A user with this role can create and post shipments but has limited access to the Account section. This user cannot change global settings or create users. |
| View only | A user with this role only has insight in shipments. |

## Show on shipment page

If you don't want to be bothered by options on the shipment page that you are never going to use, in this section you can hide certain functionalities that you would usually see when creating a manual shipment. Just activate the functionalities that you do want to see.

Some options may not be visible, depending on your license. For instance 'SmartScan' needs to be in your license in order to see and activate it.

**Show on shipment page**

| Addresses | Packages | Shipping |
|---|---|---|
| ☑ Sender | ☑ Packages | ☑ General |
| ☑ Receiver | ☑ Delivery Note | ☑ Shipping Information |
| ☑ Invoice | ☑ Dangerous Goods | ☑ Smart Scan |
| ☑ Third Party | | |

Cancel    Add user

As soon as you have filled in all mandatory fields, the button 'Add user' will become clickable and you are then able to save the new user.

You can continue creating new users if needed.

## And that's it!

# 4 Need support?

Need support from Transsmart? You can reach us via MyTranssmart, by clicking 'Help center' in the top menu.