

Boxwise & MyTranssmart

Quick configuration guide

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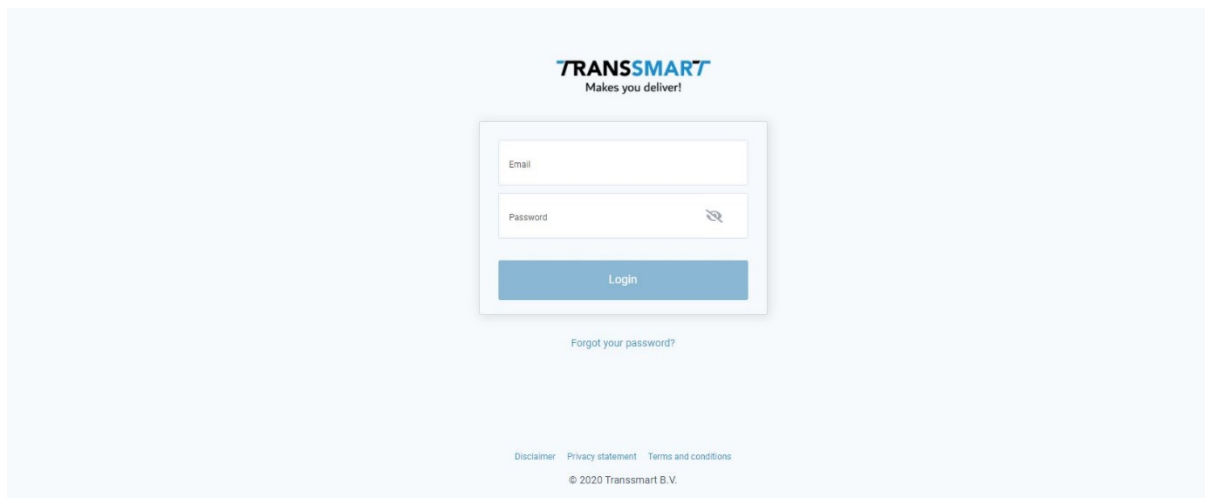
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Boxwise is your core application in which you create shipments and which is used for Track & Trace purposes. Boxwise has developed a new version of the Transsmart connection. For this new connection you need to do some extra setup in the Transsmart 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

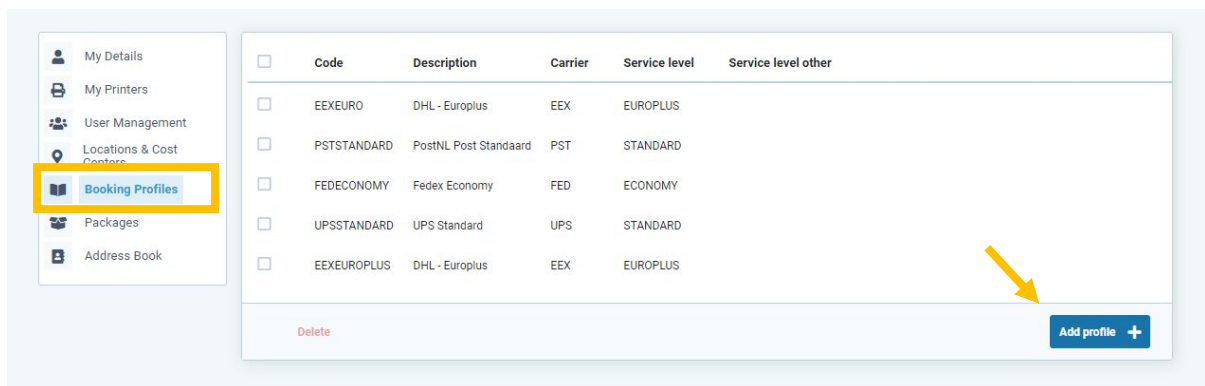
Note: to read about how to register the default values, go to step 2.4.

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

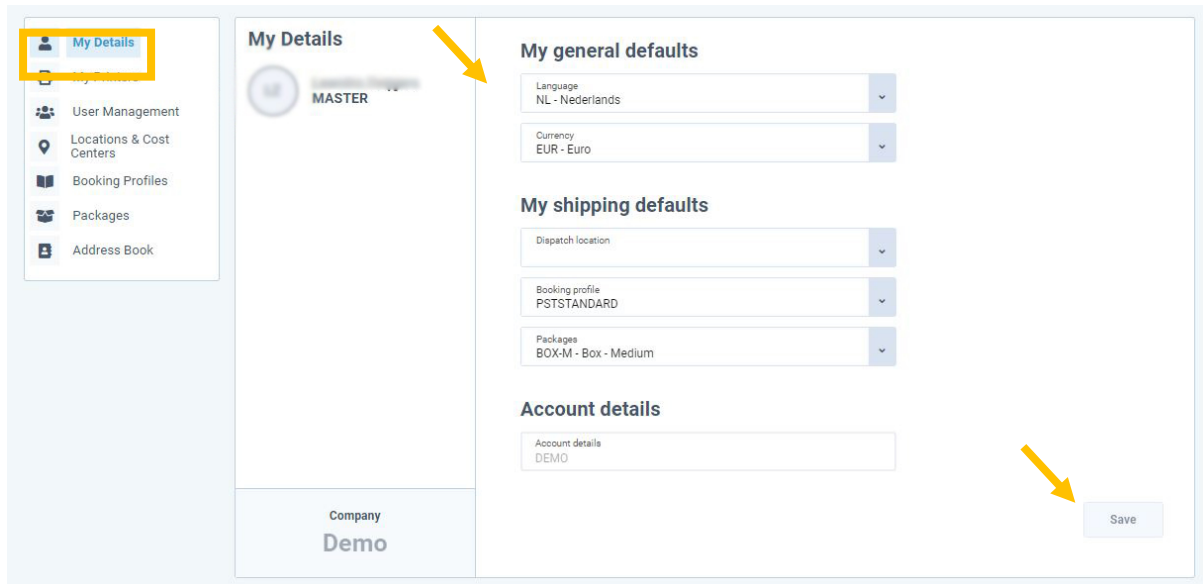
You have to set your dispatch location so it is prefilled, or easy to select as sender address on the create shipment page. You can set this on a user level, but first you will need to create it.

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

The screenshot displays the 'Dispatch locations' management interface. On the left, a sidebar menu includes 'My Details', 'My Printers', 'User Management', 'Locations & Cost Centers' (highlighted with a yellow box), 'Booking Profiles', 'Packages', and 'Address Book'. The main area features a table with columns: Name, Address, Zip/Postal code, City, and Country. The table is currently empty, with the text 'Add your first dispatch location.' and an 'Add location +' button centered below it. A modal window titled 'Add location' is open, showing the following fields: Name (with example 'location name'), Address line 1 (with a Number field), Address line 2, Address line 3, Zip/postal code (with example 'WCTA 1AH'), City (with example 'London'), Country (dropdown), State/Province/Region, Contact person (Receiver), and Phone number. At the bottom of the modal are 'Cancel' and 'Add location' buttons. Two yellow arrows point to 'Add location +' buttons in the table area.

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.

The screenshot displays the TRANSSMART dashboard. The top navigation bar contains four tiles: 'My Details' (with an 'Edit' link), 'My Printers' (marked 'Improved'), 'Theme settings' (marked 'Coming Soon'), and 'User Management' (with a yellow arrow pointing to it). The 'User Management' tile is selected, leading to a page with a sidebar on the left containing 'My Details', 'My Printers', 'User Management' (highlighted with a yellow box), 'Locations & Cost Centers', 'Booking Profiles', 'Packages', and 'Address Book'. The main content area shows a table of users:

<input type="checkbox"/>	Name	Email	User role
<input type="checkbox"/>	Uwe van der Pijl	uwe.van.der.pijl@transsmart.com	Administrator
<input type="checkbox"/>	Uwe van der Pijl	uwe.van.der.pijl@transsmart.com	Administrator
<input type="checkbox"/>	Uwe van der Pijl	uwe.van.der.pijl@transsmart.com	Administrator

At the bottom of the table, there is a 'Delete' link and an 'Add user +' button (highlighted with a yellow arrow).

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.

Add user

* Full name
Example: John Doe

* Email
Example: john.doe@mail.com

* Password

Blank password

* User role
Standard

* Language
EN - English

- At least 8 characters
- Should contain at least 3 of the following 4 types of characters:
 - Lowercase characters (a-z)
 - Uppercase characters (A-Z)
 - Digits (0-9)
 - Special characters (l@#\$\$%^&*)

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

- Sender
- Receiver
- Invoice
- Third Party

Packages

- Packages
- Delivery Note
- Dangerous Goods

Shipping

- General
- Shipping Information
- Smart Scan

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.

