Shipping Connector

for Microsoft Dynamics 365 Business Central

Quick-Start Setup Guide

Sales Order shipping with FedEx Ship Manager

I.   Purpose of this document

This guide will assist you with initial configuration of Shipping Connector to enable you to ship a package using FedEx Ship Manager and then apply the shipment details to a Sales Order in Microsoft Dynamics 365 Business Central.

This guide will demonstrate the minimal configuration required to enable the above scenario to be completed. For an in-depth explanation and review of the Shipping Connector, options and usage please refer to the Shipping Connector User Manual and/or the context sensitive help on the Shipping Connector pages in Dynamics 365 Business Central.

Please also see the following Quick Start guides:

Sales Order shipping with UPS WorldShip
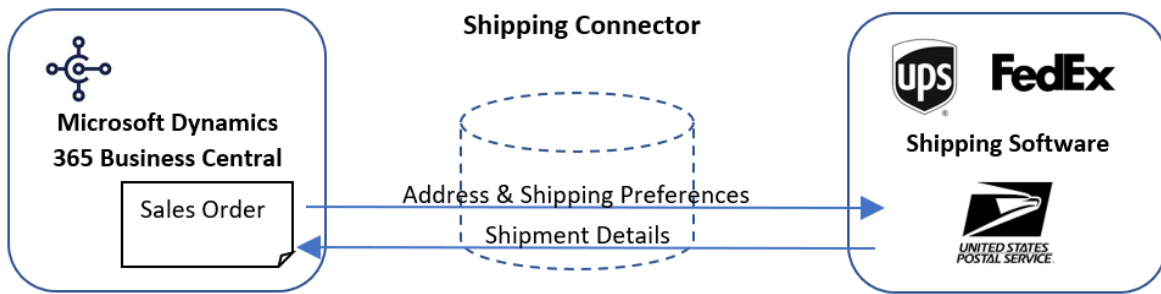
Sales Order shipping with FedEx Ship Manager LTL

Sales Order shipping with Stamps.com Internet Postage

II.   Overview

The Shipping Connector manages the exchange of address and shipment information between Microsoft Dynamics 365 Business Central and Third-Party Shipping Software (e.g., UPS WorldShip, FedEx Ship Manager, Stamps.com Internet Postage, or other). When an order is "Released" in Dynamics 365 Business Central the ship-to address and shipping preferences are exported to a data cache on the shipping workstation (where the shipping software is installed). The shipping software imports that information and the shipment is processed. When a shipping label is created, the shipment details are written to the data cache and the Shipping Connector then relays the information back to the Dynamics 365 Business Central server.

All of that action is behind the scenes – you don't see it. What you do see is an 'Apply Shipping' action on the Sales Order page – when you press it the shipping details are applied to the Sales Order resulting in shipping charge and tracking information lines added to the order.

The graphic below depicts the data exchange flow.

Shipping Connector

Microsoft Dynamics 365 Business Central — Sales Order

Address & Shipping Preferences

Shipment Details

Shipping Software — UPS, FedEx, United States Postal Service

In the sections that follow we will walk you through the steps required to configure Shipping Connector for first-time use and then we'll process a shipment using UPS WorldShip.

III.   Installation & Registration

First, you will need to publish and install the Shipping Connector extension app into your Dynamics 365 Business Central system. You can find Shipping Connector in the Microsoft AppStore or (for on-prem environments) you can download it from our website at https://shippingconnector365.com/download.

After installation you will need to start a 30-day free trial to obtain a registration:

- Open the Shipping Connector Setup page (type 'Shipping Connector Setup' in the Search box).
- Click on the Registration option and then select the "Start 30-day Free Trial" action
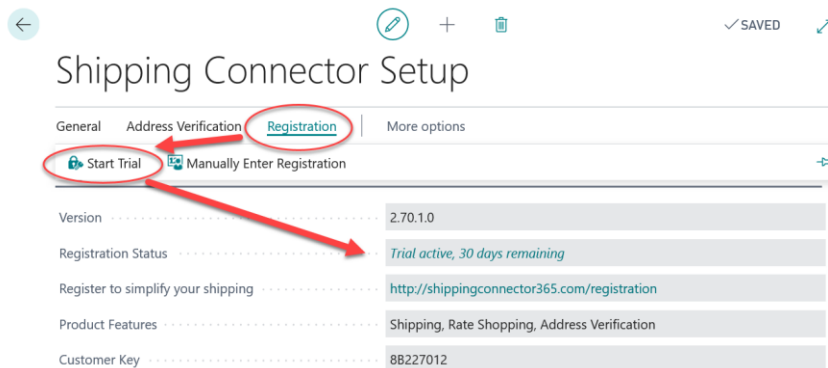
IV.   Configure a Web Service Access Key (OnPrem Environments only)

Skip this section if you are working in a Cloud/SaaS environment.

The Shipping Connector Workstation application (which is installed and run on the shipping workstation - we'll get to that below) communicates with Shipping Connector in Business Central via the Shipping Connector Web Service.

To enable communication via web services Business Central requires authentication.
Business Central supports two web service authentication methods – Credentialed and OAuth2.

Credentials are only supported by the OnPrem environment, they use the Web Service Access Key. OAuth2 is required by the Cloud/SaaS environment (see the OAuth2 section below).

To configure authentication, you must select a Business Central user account, create a Web Service Access Key, and add the Shipping Connector Permission Set to the account permissions.

 (Complete details are available [here](#)). For the purpose of this guide we'll give the condensed version – follow these steps:

In Dynamics 365 Business Central:

- Choose the Search icon, enter **Users**, choose the related link, and then find the user account that you wish to use for web service data exchange.
- In the **Web Service Access** section, select the **Web Service Access Key** field.
- In the **Set the Web Service Access Key** window, select the **Key Never Expires** check box.
- Choose the OK button.
- The access key is automatically generated and appears in the **Web Service Access Key** field.
- We will need the key below
- Make sure the **Shipping Connector Permission Set** has been added to the user account permissions at the bottom of the **Users** dialog

NOTE: In order to configure a **Web Service Access Key** you must be logged into Business Central under the account you wish to configure – Business Central will not allow you to configure a **Web Service Access Key** for other user accounts.

## V.   Shipping Connector Setup (in Dynamics 365 Business Central)

Next, you will need to configure a few options such that Shipping Connector knows how to place shipping charges onto a Sales Order.

- Open the Shipping Connector Setup page (type 'Shipping Connector Setup' in the Search box)
- Scroll down to the "Numbering" fast-tab
- Set "Shipping Charges Type" to "G/L Account"
- Set "Shipping Charges No." to "40200" (or select an appropriate G/L income account)
- Set "Tax Group Code" to "NONTAXABLE" (or select an appropriate tax group code)

While we're on this page let's also copy & save the Shipping Connector Web Services URL – we'll need it in a later step.

- Scroll down to the "Web Service" fast-tab
- Copy the Web Service URL (double click to select all, then right-click and select Copy)
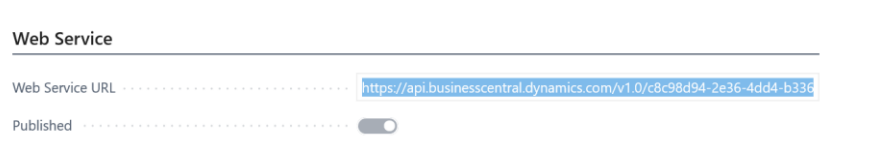
- Save that value

VI.   Shipping Connector Workstation Setup

Now we need to install the Shipping Connector Workstation application on the computer where UPS WorldShip (or other shipping software) is installed. The Shipping Connector Workstation application manages information exchange between the shipping software and the Business Central server.

- Download the application installer from https://shippingconnector365.com/download.
  Note: After downloading, make sure to "unblock" the file:
    o   right-click on the file, select "Properties"
    o   check the "Unblock" checkbox if it appears at the bottom of the dialog
    o   select OK to close the Properties dialog
- Run the Shipping Connector Workstation installer
  (choose the option to run the configuration utility when setup completes)

When the Shipping Connector Workstation Configuration wizard appears, we'll use it to setup a connection to the Business Central server.

- In the Configurator select **Web Services** for the data exchange method
- Select **Next** to move to the **Web Services** tab
- Paste the URL you saved in the previous step into the **Web Services URL** field
- Enter the **Web Services Account Username** (do not include a domain name) for which you configured a **Web Services Access Key**
- Enter the **Web Services Access Key**
- Press the **Verify Web Service** button

Successful verification will be indicated and you will then be able to move to the next tab.

Note: The 'SQL Server' tab is present but is not used with Dynamics 365 Business Central in-cloud. Shipping Connector has been around since Dynamics NAV v3.7 (back then it was called Microsoft Business Solutions Navision) and the SQL Server data exchange option is still available for the on-prem environment.
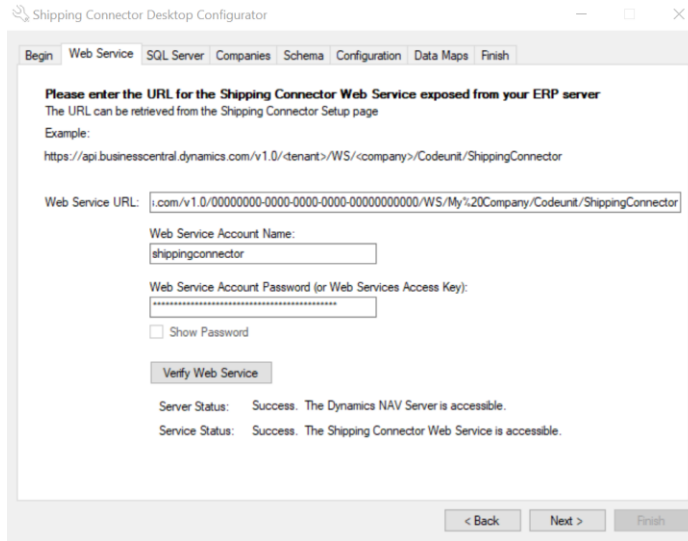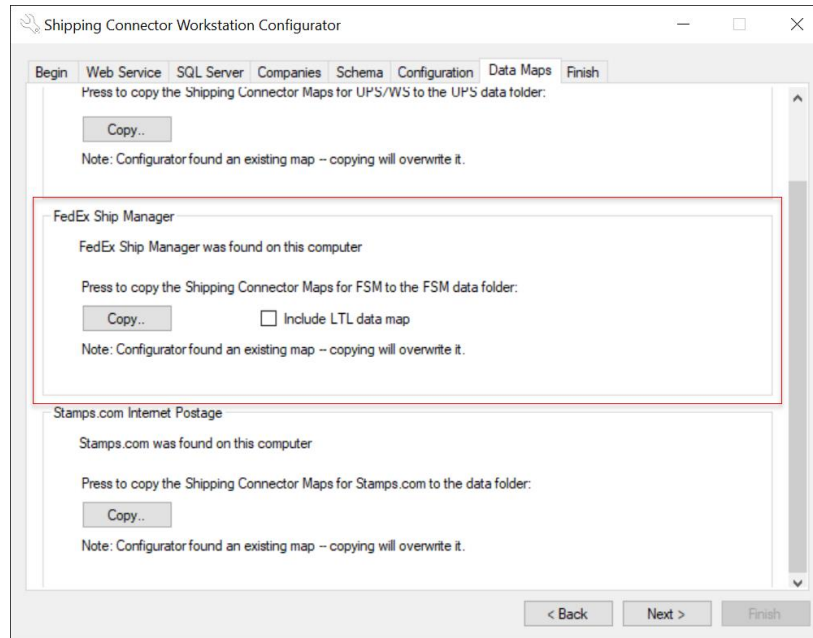
- Press the **Next** button to move to the **Companies** tab
- Select the companies with which you would like to exchange data
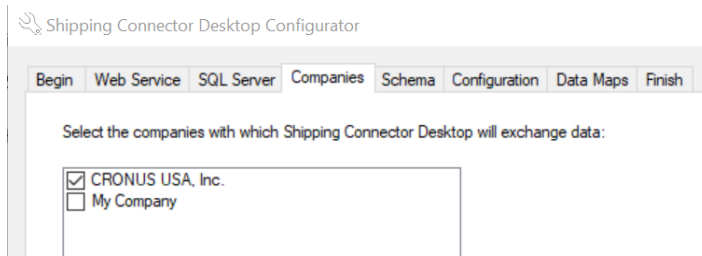
- Press the **Next** button to move to the **Schema** tab
  The **Schema** tab is for informational purpose only – no changes can be made

- Press the **Next** button to move to the **Configuration** tab
  The Shipping Connector Workstation configuration will be saved, confirmation will be displayed

- Press the **Next** button to move to the **Data Maps** tab
- Press the **Copy** button in the FedEx Ship Manager area (see graphic below)
  This will copy the import/export maps into the FedEx Ship Manager configuration

  Note: If you intend to use FedEx Ship Manager LTL services then you will also need to copy the
  LTL data map – to do so, select the "Include LTL data map" checkbox

- Press the **Next** button to move to the **Finish** tab
- Select the startup options
- Press the **Finish** button - Shipping Connector Workstation will display in the System Tray

VII. Configure FedEx Ship Manager for use with Shipping Connector

Shipping Connector makes use of a FedEx Ship Manager built-in facility that enables exchange of data via ODBC. To turn on data exchange do the following:

- Open FedEx Ship Manager
- Turn on the "Integration" profile
  Integration → Dynamics
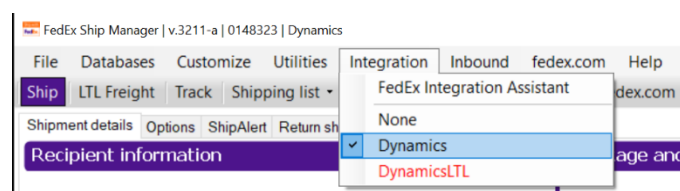
Note: If the Dynamics Integration Profile does not display in the menu then you will need to rerun the configuration tools and make sure that you copy the map(s) when on the Data Maps step.

VIII. Process a Shipment

We're now ready to begin shipping – let's process a shipment.

- In Dynamics 365 Business Central open a Sales Order
- If the Sales Order is currently Released you will need to Reopen it
- In the Shipping and Billing fast-tab area set the Shipping Agent to FEDEX and the Shipping Agent Service to 2DAY

- Release the Sales Order
  It is the Release action that initiates data exchange to FedEx Ship Manager.
  Note the Sales Order number (in this example it is S-ORD101001)

- On the shipping workstation hold down the Ctrl key and left click on the Shipping Connector tray icon – this will manually initiate data synchronization – which will pull over the shipping information from the Sales Order that was just released

- In FedEx Ship Manager enter the Sales Order number into the Keyed Import dialog and press the Enter key

The recipient ship-to information and shipping options will auto populate

- Enter a shipping weight (or place the package on an attached scale)
- Press the Ship button (lower right corner)

FedEx Ship Manager will now print a shipping label and export the shipping details to Shipping Connector. The Shipping Connector tray icon will flash green, indicating that shipment information is being relayed back to Dynamics 365 Business Central.

- Back to Business Central, on the Sales Order (#S-ORD10100) press the Shipping Connector 'Apply Shipping' action: Actions → Shipping Connector → Apply Shipping
Shipping Connector will now add the shipment information lines to the Sales Order.
It will also populate the Package Tracking Number, Shipping Agent and Shipping Agent Service fields in the Shipping and Billing area.

- The Sales Order is now ready to Post

Congratulations, you have just shipped your first order.

IX.   More Information

In this guide we have only touched on the basic feature of Shipping Connector – processing a shipment for a Sales Order. There is a lot more to Shipping Connector including:
- Address Verification
- Rate Shopping
- Rate Adjustments
- Purchase Return Orders, Transfer Orders, Service Orders

We invite you to check out the feature descriptions and in-depth guides available on our web site @ https://shippingconnector365.com/guides.

Happy Shipping!