# **Shipping Connector**

for Microsoft Dynamics 365 Business Central

# Quick-Start Setup Guide

Sales Order shipping with FedEx Ship Manager LTL

# I. Purpose of this document

This guide will assist you with initial configuration of Shipping Connector to enable you to ship a skid using FedEx Ship Manager LTL 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 <u>Shipping Connector User Manual</u> 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

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.



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 <u>https://shippingconnector365.com/download</u>.

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

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. 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.

(Complete details are available <u>here</u>). 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)

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Shipping Connector	Setup				
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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)

Web Service	
Web Service URL	https://api businesscentral dynamics.com/v1.0/c8c98d94-2e36-4dd4-b336
Published	

- 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 <a href="https://shippingconnector365.com/download">https://shippingconnector365.com/download</a>. 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
  - 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.

🖏 Shipping Connecto	or Desktop Configurator – 🗆 🗙
Begin Web Service	SQL Server Companies Schema Configuration Data Maps Finish
	e URL for the Shipping Connector Web Service exposed from your ERP server etrieved from the Shipping Connector Setup page
Example:	
https://api.busines	scentral.dynamics.com/v1.0/ <tenant>/WS/<company>/Codeunit/ShippingConnector</company></tenant>
Web Service URL:	: i.com/v1.0/0000000-0000-0000-0000-000000000/WS/My%20Company/Codeunit/ShippingConnector
	Web Service Account Name:
	shippingconnector
	Web Service Account Password (or Web Services Access Key);
	web Service Account rassword (or web Services Access Rey).
	Show Password
	Verify Web Service
	Server Status: Success, The Dynamics NAV Server is accessible.
	Service Status: Success. The Shipping Connector Web Service is accessible.
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- Press the **Next** button to move to the **Companies** tab
- Select the companies with which you would like to exchange data

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- 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: 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

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- 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 LTL 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 → DynamicsLTL

📰 FedEx Ship Manager   v.3211-a   👘 👘   Dyna	micsLTL
File Databases Customize Utilitie	Integration Inbound fedex.com
Ship LTL Freight Track Shipping list	FedEx Integration Assistant
Shipment details Options ShipAlert Return	sh None
Recipient information	Dynamics
	DynamicsLTL

Note: If the DynamicsLTL Integration Profile does not display in the menu then you will need to rerun the configuration tools and make sure that you select the LTL option when copying the FedEx 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 FREIGHTPRI (FedEx Freight Priority)

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S-ORD1	01001	Ad	atum Co	rno	ration								
	51001	/ (G		npo	ration								
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- 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

ookup Value	
nter the lookup value for the	he package(s) you wish to import.
Lookup:	S-ORD1003
Loonap.	5

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

🐷 FedEx Ship Manager   v.	3211-a   DynamicsLTL			- 🗆 X
File Databases	Customize Utilities Integration Inbound fedex.co	m Help		
Ship LTL Freight	Track Shipping list - Address Book Reports Close	fedex.com		FedEx.
Origin/Destination Ship	ment Details Options/Instructions ShipAlert Pickup			
LTL Freight Temp	late ID: Select an item ~			Shortcuts
Account:		Service Type:	FedEx Freight Priority ~	Auto Track
Payment Type:	Shipper View/Edit	Guaranteed Service:	None ~	
Payment Terms:	Prepaid ~	BOL Type:	Straight ~	
Shipper informat	ion	Consignee inform	nation	
Shipper:	· • •	Consignee:	~ <b>A</b>	
Country:	US - United States 🗸	Country:	US - United States ~	
Contact name:		Contact name:	Robert Townes	
Company name:		Company name:	Adatum Corporation	
Address 1:		Address 1:	192 Market Square	
Address 2:		Address 2:		
Postal Code:	State/Province: NC - Nort 🗸	Postal Code:	31772- State/Province: GA - Ge 🗸	
City:	✓ ✓	City:	Atlanta 🗸 🗸	
Telephone:	Ext:	Telephone:	(888) 877-8866 Ext:	
Ship ID1:	Ship ID2:	Consignee ID:		
	This is a residential address		This is a residential address	
	Save in/update my address book		Save in/update my address book	
			Auto Track	
Clear fields Repeat	Shipment   Override prefs   Save As LTL Freight Template	Rate Quote and Trans	sit Times	Ship
				Saturday, December 7, 2019 12:45 PM

- On the Shipment Details tab enter values for the Handling Unit(s)
- Enter any other shipping options
- 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.

$\leftarrow$	SALES ORDER   WORK DAT	E: 4/8/2019			Ø	+ 🗊					$\checkmark$	SAVED	جر م
	S-ORD101	001 · A	Adatum Corp	oration									
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		1996-S	ATLANTA Whiteboard, base		12		-	PCS	1,397.30	ATLANTA, GA	FURNITURE		
	Comment		Shipped: 2019-04-08				-						
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	Comment		Tracking ID: 4210547644				-						
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	Ship-to		Default (Sell-to Address)		~								
	Contact		Robert Townes			Ship-to Veri	fication Status						
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- 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 @ <u>https://shippingconnector365.com/guides</u>.

Happy Shipping!