

# Shipping Connector

for Microsoft Dynamics 365 Business Central

## Quick-Start Setup Guide

**Sales Order shipping with UPS WorldShip**

### I. Purpose of this document

This guide will assist you with initial configuration of Shipping Connector to enable you to ship a package using UPS WorldShip 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 FedEx Ship Manager](#)

[Sales Order shipping with FedEx Ship Manager LTL](#)

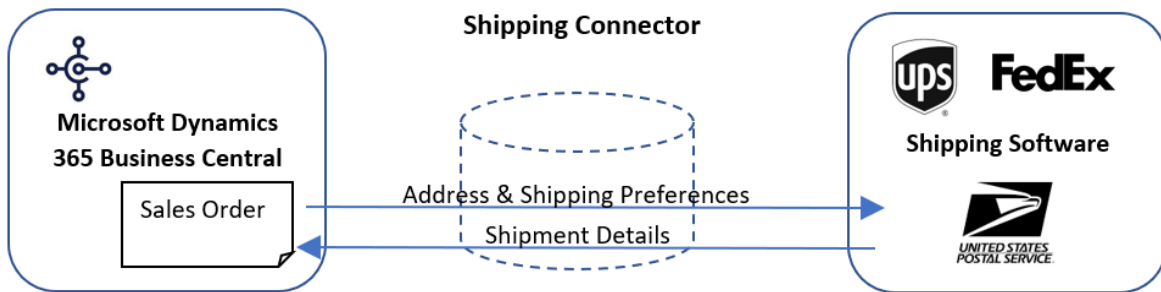
[Sales Order shipping with Stamps.com Internet Postage](#)

### 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.



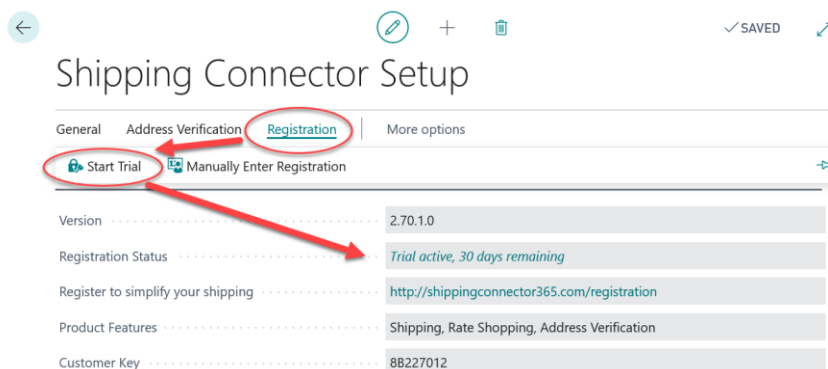
In the sections that follow we will walk you through the steps required to configure Shipping Connector for first-time use and then we'll process a shipment using UPS WorldShip.

### 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)

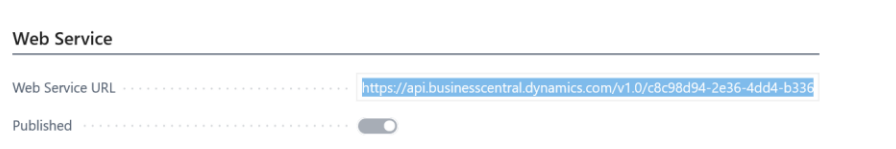
Next, you will need to configure a few options such that Shipping Connector knows how to place shipping charges onto a Sales Order.

- 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)

The screenshot displays the 'Shipping Connector Setup' page in Dynamics 365 Business Central. The page has a navigation bar at the top with a back arrow, a search icon, a plus sign, a trash icon, and a 'SAVED' status indicator. Below the navigation bar, the page title 'Shipping Connector Setup' is displayed. The page is divided into several sections: 'General', 'Address Verification', 'Registration', and 'More options'. The 'Registration' section is currently selected and shows '2.70.1.0', 'Trial active, 30 days remaining', and '88227012'. The 'General' section shows three 'No' buttons. The 'Numbering' section is expanded and shows the following settings: 'SALES ORDERS' (Shipping Charges Type) set to 'G/L Account', 'Shipping Charges No.' set to '40200', and 'Tax Group Code (Shipping)' set to 'NONTAXABLE'.

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

If OnPrem:

- Select Authentication = Credentials
- 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

If SaaS:

- Select Authentication = OAuth2
- Select Hosting = Business Central/SaaS
- Press the **Verify Web Service** button

You will need to authorize using a Business Central Login Account that has sufficient permissions to interact with the web services. If the account you select is not authorizes you will need to clear the stored authorization and try again with a different account.

Note: If you are not guided to the account authorization dialog when you press the **Verify Web Service** button then you will need to authorize the Shipping Connector app in your Azure tenant. Please see the [OAuth2 Configuration Guide](#) for more information.

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

The screenshot shows the 'Shipping Connector Workstation Configurator' window with the 'Web Service' tab selected. The dialog contains the following fields and options:

- Protocol:** Radio buttons for  OData and  SOAP.
- Web Service URL:** Text box containing `http://bchost:20003/BC/ODataV4/?tenant=default`.
- Tenant Id:** Text box containing `default`.
- Authentication:** Radio buttons for  Credentials and  OAuth2.
- Username:** Text box containing `phil`.
- Password or Key:** Password field with a 'Show Password' checkbox.
- Buttons:** '< Back', 'Next >', and 'Finish'.
- Status:** 'Server Status: Success. The Dynamics Server is accessible.' and 'Service Status: Success. The Shipping Connector Web Service is accessible.'

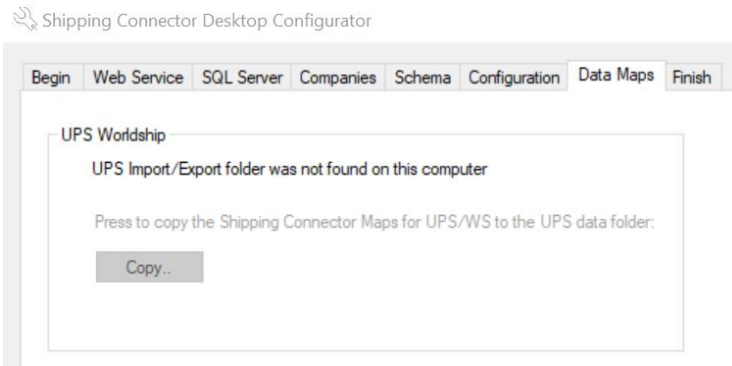
- Press the **Next** button to move to the **Companies** tab
- Select the companies with which you would like to exchange data

The screenshot shows the 'Shipping Connector Desktop Configurator' window with the 'Companies' tab selected. The dialog contains the following elements:

- Text:** 'Select the companies with which Shipping Connector Desktop will exchange data:'
- List:** A list box containing two items:  CRONUS USA, Inc. and  My Company.
- Buttons:** '< Back', 'Next >', and 'Finish'.

- 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 UPS WorldShip area
- This will copy the import/export maps into the UPS WorldShip configuration



Note: UPS WorldShip supports a client/server installation mode. If installing into a client/server environment the map configuration must be performed on the workstation acting as server.

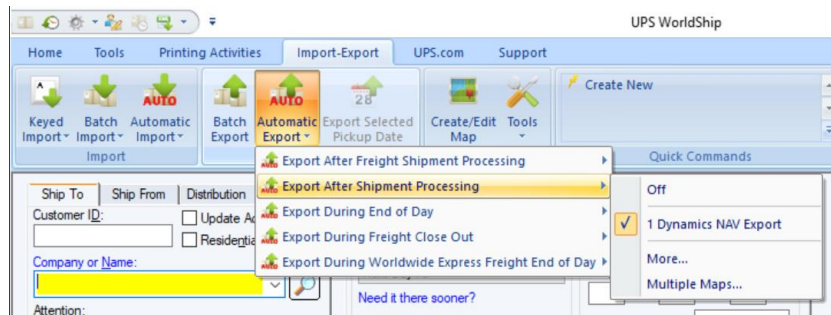
- Press the **Next** button to move to the **Finish** tab
- Select the startup options
- Press the **Finish** button - Shipping Connector Workstation will display in the System Tray



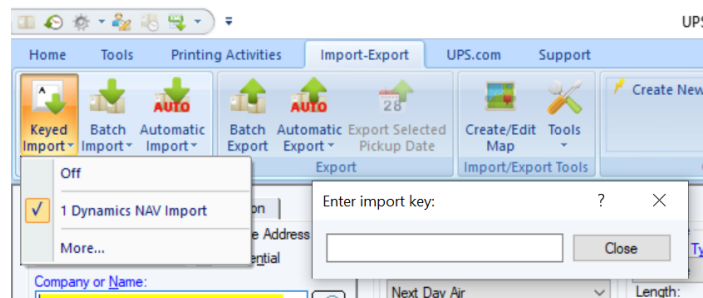
## VII. Configure UPS WorldShip for use with Shipping Connector

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

- Open UPS WorldShip
- Turn on the Export map  
Import-Export → Automatic Export → Export After Shipment Processing → More... → Select 'Dynamics Export'



- Turn on the Keyed Import map  
Import-Export → Keyed Import → More... → Select 'Dynamics Import'

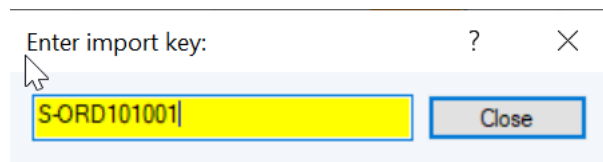


The Keyed Import dialog will display.

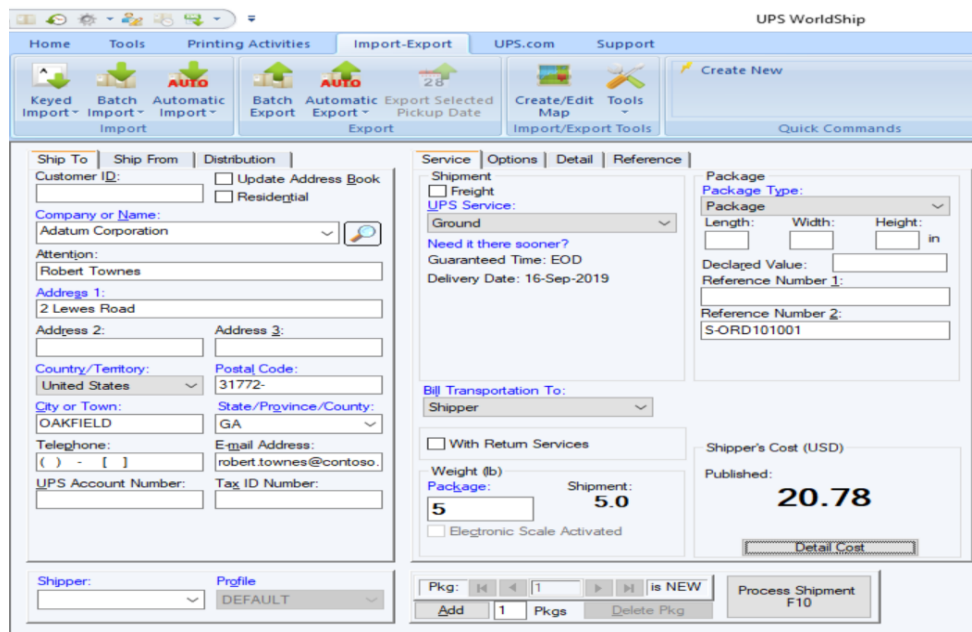
## VIII. Process a Shipment

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 UPS and the Shipping Agent Service to GROUND
- Release the Sales Order  
It is the Release action that initiates data exchange to UPS WorldShip.  
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 UPS WorldShip enter the Sales Order number into the Keyed Import dialog and press the Enter key



The ship-to information and service options will auto populate





- Enter a shipping weight (or place the package on an attached scale)
- Press the Process Shipment button

UPS WorldShip 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

← SALES ORDER | WORK DATE: 08/04/2019 ✓ SAVED ↗

## S-ORD101001 · Adatum Corporation

New Process Report Release Posting Prepare Order Request Approval Print/Send Navigate | Actions Navigate Report Fewer options ⓘ

**General** > 02/04/2019 02/04/2019 02/05/2019

**Lines** | Manage More options ⓘ

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	RESERVED QUANTITY	UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	TAX AREA CODE	TAX GROUP CODE	DIS
Item	1996-S	ATLANTA Whiteboard, base		12	-	PCS	1,397.30	ATLANTA, GA	FURNITURE	
Comment		Shipped: 2019-10-09			-					
Comment		Via: UPS Ground			-					
Comment		Tracking ID: 1523c933-d0e7-46fe...			-					
G/L Account	40200	Shipping Charge		1	-		20.78	ATLANTA, GA	NONTAXABLE	

Congratulations, you have just shipped your first order.

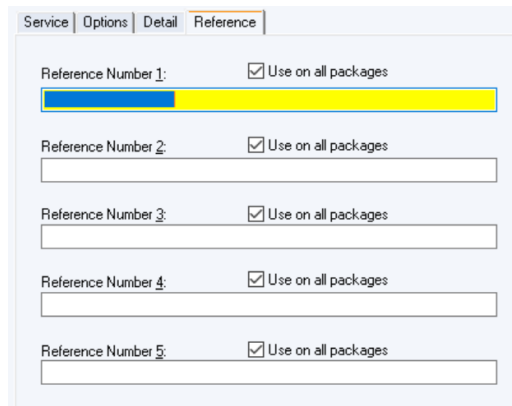
## IX. Configure for Multi-package Shipments

If you intend to ship multi-package shipments, then perform the following configuration.

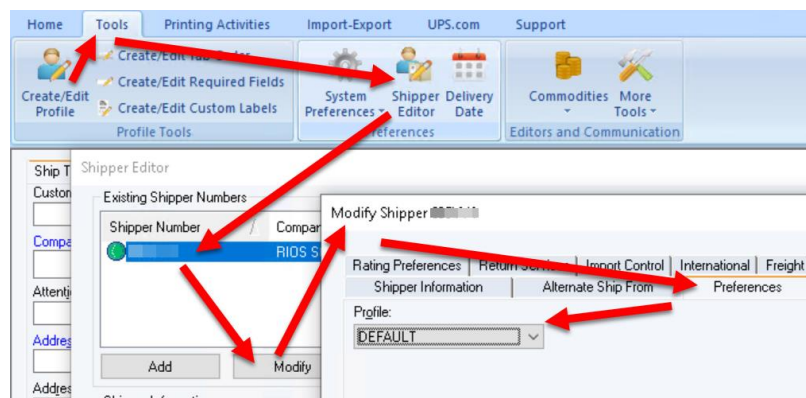
- Open the UPS WorldShip Profile Editor  
Tools > Create/Edit Profile



- On the References tab mark all reference fields 'Use on All Packages'



- Close and save the profile  
Enter a name for the profile (DEFAULT is a good choice).
- Now configure the profile to load by default
- Select the profile in the Shipper Preferences  
Tools > Shipper Editor > Shipper > Modify > Preferences > Profile



## X. 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!