User Guide

EasyPost Services Connector

Last updated: December 12, 2022

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1.   ABOUT

The EasyPost Services Connector allows users to send packages using the sales order functionality in Microsoft Dynamics 365 Business Central. Send packages all around the world using a system that you are already familiar with. Get up and running in no time.
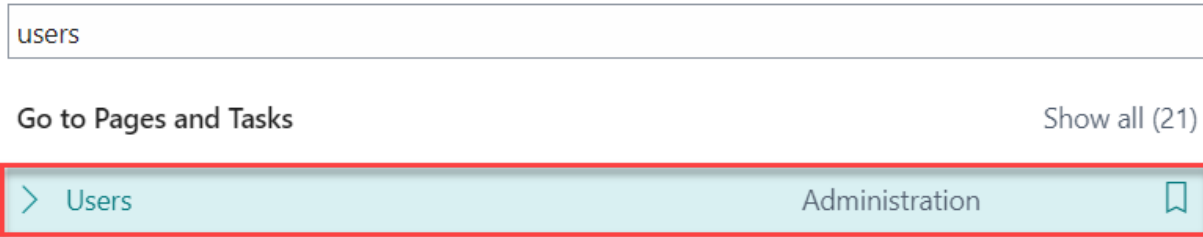
For more information, please go to https://www.websan.com/easypost-services-connector-for-dynamics-365 .
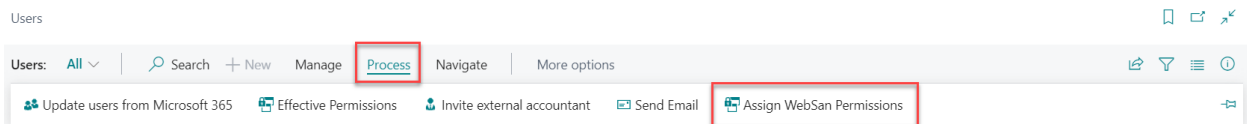
2. BASIC SETUP

This section covers the basic system setup needed to start using the EasyPost Services Connector application. These steps should be completed prior to using the app.

Assign User Permissions

To begin the set up of the app, search for Users. This will open the Users window.
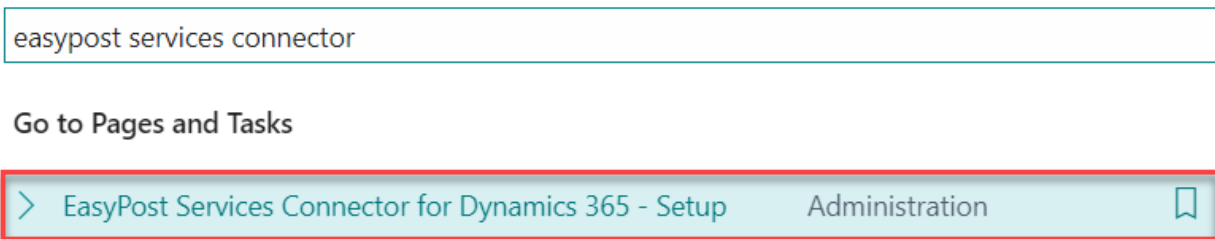
users

Go to Pages and Tasks   Show all (21)

> Users   Administration   🔖

At the top of the Users window, expand the Process menu, then, select Assign WebSan Permissions.

Users

Users: All ∨ | 🔍 Search + New Manage Process Navigate | More options

👥 Update users from Microsoft 365 🖥 Effective Permissions 👤 Invite external accountant ✉ Send Email 🖥 Assign WebSan Permissions

This will assign permissions to the EasyPost Services Connector app to all the users loaded in the system at that time.

EasyPost Services Connector Setup

To set up the EasyPost Services Connector, search for EasyPost Services Connector and select the option that appears in the image below. From the setup window, users are able to perform various tasks, such as defining an Operating Mode, entering API keys, and selecting a Label Format.

easypost services connector

Go to Pages and Tasks

> EasyPost Services Connector for Dynamics 365 - Setup   Administration   🔖

In the Settings page that appears:

1. Select an Operating Mode. Test Mode allows users to verify functionality without being charged by EasyPost. When Production Mode is selected, users will be responsible for all charges from EasyPost.

2. Input the test and production API keys into their respective fields. To obtain your API Keys, you must generate a relationship with EasyPost and carriers. Note that you will be responsible for maintaining such relationships and charges that may be incurred. The EasyPost Services Connector application allows usage of the EasyPost API directly from Dynamics 365 Business Central.
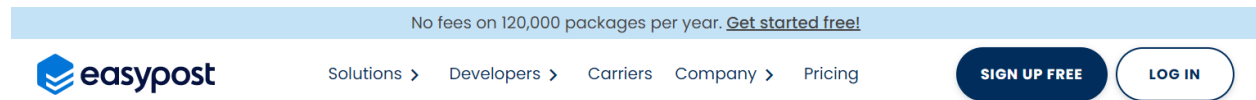
3. Users may decide to enter additional configuration settings, such as Label Format or a weight unit of measure.

Additional configuration fields include:

- Purchase In Label Format - When enabled, the label will be purchased in the Format Specified in Label-Format. Only when labels are purchased in PNG can they be converted to other formats

- Send Customer Tracking Email - When enabled, if the customer has an E-Mail address defined, they will be sent the master tracking information.

- Option Default - When set, this will automatically set the shipment options on a new shipment to the selected set of options.

- Default Order Details - When Set, Option settings for Order information will be automatically populated on label.

- Auto Update Shipping Agent to Order - When set, this will automatically update associated document Shipping Agent Code & Shipping Agent Service code values. Please make sure appropriate Shipping Agent mappings are defined for this to function.

- Use Custom Printing - When set, the label will be sent to the WebSan Printing Framework. This will need to be configured if using this option.

- Print Package Labels - If using Custom Printing, you can print a custom ZPL box label per package. Contact WebSan Support for details.

- Print Labels on Purchase - When set, the label will be printed when EPOrder is purchased.

- Charge Customer for Shipping - Charge Customer for Shipping.

- Item Charge for Shipping - This will be the item charge used when charging shipping charges to associated document.

- Item Used for Charging Shipping - This will be the item used when charging shipping charges to the associated document.

- Weight in Lbs - When enabled, weight is expressed in Lbs.

- Department Dimension - When using Default Order Details, this will define which dimension should be assigned as the department on shipping label.

- Default ShipTo Company Name - This option can be used to default the Ship-To Company on EasyPost Orders.

- Default E-mail into Address - When enabled, E-mail addresses will default into EasyPost ShipTo/ShipFrom address records

- Auto Update Order Tracking - When true, a jobqueue will be setup to automatically update EasyPost order tracking within the past month.

- Commercial Invoice Images - Set this to true if commercial invoice images have been provided to easypost support.

- Auto Set Package Weight - When true, the package weight will be updated based on calculated weight (Due to item weight setup).
- BC Weight Unit - This is used to define what weight unit is being used in Business Central.

EasyPost Carriers

Before orders can be made, users need to set up the carriers that the EasyPost Services Connector app will use. To import carriers to Business Central, first, search for EasyPost Carriers.

EasyPost Carriers

Go to Pages and Tasks

> EasyPost Carriers   Administration

In the EasyPost Carriers window that appears, select the button Update Carriers & Service.

EasyPost Carriers   ✓ Saved

| 🔍 Search | 📝 Edit List | 🗑 Delete | **Update Carriers & Service** | Automate ∨ | Fewer options |

Carrier ↑	Carrier Account ↑	Description
(There is nothing to show in this view)		

The carriers that have been set up in the EasyPost website will be imported to Business Central by the EasyPost Services Connector app and will automatically appear in the EasyPost Carriers window.

| 🔍 Search | 📝 Edit List | 🗑 Delete | Update Carriers & Service | Automate ∨ | Fewer options |

Carrier ↑		Carrier Account ↑	Description
→ FedEx	⋮	CA_D4A4FD41876…	
USPS		CA_89FC61A8A83F…	

EasyPost Option Defaults (Optional Configuration)

The EasyPost Services Connector app allows users to set a large number of configurations to ensure that parcels are managed and delivered according to specification. For users' convenience, sets of default configurations can be created; these default-configuration sets can be later applied to different packs as needed. This feature saves users' time and ensures proper pack handling. Note that this is an optional configuration and may be performed at any point during the use of the app.
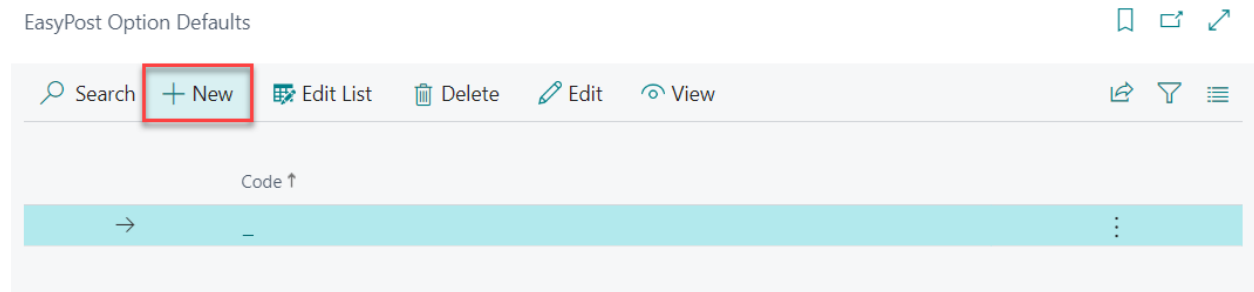
To create an EasyPost Option Default, search for EasyPost Option Defaults.

easypost option defaults

Go to Pages and Tasks

> EasyPost Option Defaults   Lists

In the EasyPost Option Defaults window that appears, select New. This will take you to the EasyPost Option Defaults window. Next, select New.

EasyPost Option Defaults

🔍 Search   + New   📝 Edit List   🗑 Delete   ✏ Edit   👁 View

Code ↑

→   _

In the window that appears, enter the name for this default-configuration set in the Options Code field. Then, enter the appropriate configurations in the remaining fields.

Options Code		Hold for Pickup	⚪
Additional Handling	⚪	Incoterm	▽
Address Validation Level		Invoice Number	
Alcohol	⚪	Label Date	📅
By Drone	⚪	Machinable	⚪
Carbon Neutral	⚪	Print Custom 1	
COD Amount	0.00	Print Custom 2	
COD Method	▽	Print Custom 3	

After all the configurations have been entered, go back. You will find that the set has been saved.

EasyPost Option Defaults

|	Code ↑	
→	_	⋮
	OPTDEF1	
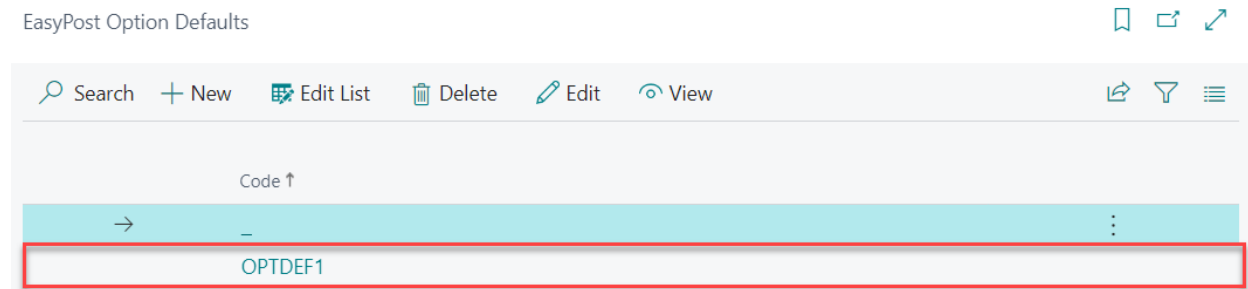
EasyPost Predefined Parcels (Optional Configuration)

The EasyPost Services Connector app allows users to create predefined parcel sizes that can be later applied to parcels as needed. This feature saves users' time and helps ensure the proper parcel size is being used. Note that this is an optional configuration and may be performed at any point during the use of the app.
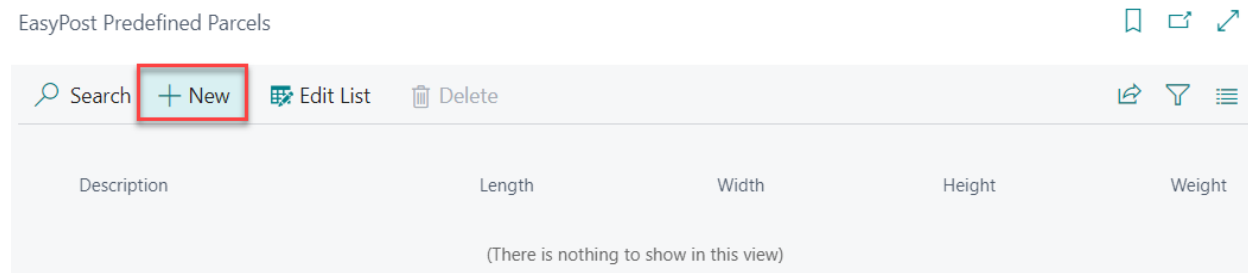
To create an EasyPost Predefined Parcel, search for EasyPost Predefined Parcels.

easypost predefined parcels

Go to Pages and Tasks

> EasyPost Predefined Parcels   Lists
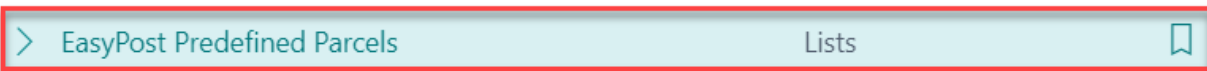
You will be taken to the EasyPost Predefined Parcels window. Click New.

EasyPost Predefined Parcels

Description	Length	Width	Height	Weight
(There is nothing to show in this view)				

In the fields that will appear in the table grid below, enter a Description, and the size specifications of the predefined parcel (i.e., length, width, height, and weight). Note that not all size fields must be populated to create a predefined parcel.

EasyPost Predefined Parcels

Search	New	Edit List	Delete

Description ↑		Length	Width	Height	Weight
Test		15.0	10.0	6.0	5.0

After the desired size specifications have been entered, you will find that your parcel has been saved.

EasyPost Predefined Parcels

Search	New	Edit List	Delete

| Description ↑		Length	Width	Height	Weight
Test		15.0	10.0	6.0	5.0

3. FUNCTIONALITY

The EasyPost Services Connector app allows users send packages using the Sales Order and Transfer Order functionalities of Business Central, configure the dimensions of packages, generate rate queries, create pickup requests, and more.

Users can create and access EasyPost orders from various locations within Business Central, including Sales Orders, Transfer Orders, Posted Sales Invoices, Posted Sales Shipments, and Posted Transfer Orders. This allows users to access information from EasyPost orders, even if the Sales/Transfer Order has been shipped or invoiced. Moreover, this functionality allows users to create or finalize EasyPost orders directly from a posted sales/transfer document as long as the Sales Order/Transfer Order from where it originated still exists (i.e., when a partial shipment is made).

Note that, prior to creating a new EasyPost order from a posted sales/transfer document, at least one EasyPost order must have been created from the corresponding Sales Order or Transfer Order.

Creating an EasyPost Order

To create an EasyPost order from a Sales Order, expand the EasyPost menu located at the top of the Sales Order window, then, select EasyPost Order.
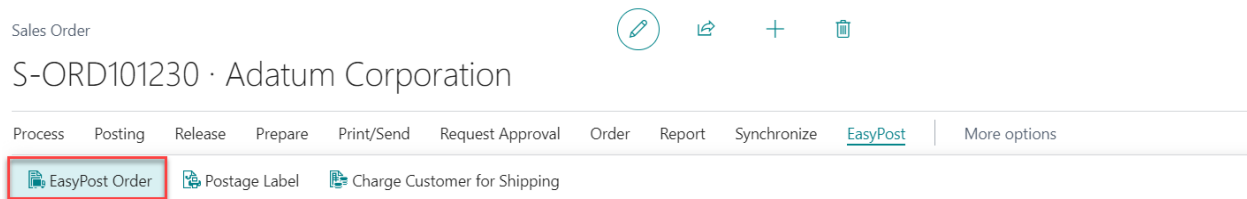
If this is not the first EasyPost order created for the Sales Order you are working with:

- You will be presented with the EasyPost Order List window. Here, users will find a list of the EasyPost orders previously created for the Sales Order in question. EasyPost orders can be created and edited from this window.
  To edit or view an existing order, click on your preferred Order ID; this will take you to the EasyPost Order window.

Order List			✓ Saved

🔎 Search   ⊞ Edit List   🗑 Delete   ✏ Edit   👁 View | Actions ⌄   Automate ⌄   Fewer options

	Order ID ↑		Purchased
→	8	⋮	☐
	9		☐

If this is the first EasyPost order created for the Sales Order you are working with:

- You will be taken directly to the EasyPost Order window. Here, users can enter all the information necessary to complete the order.

In the EasyPost Order window, users will find that the ShipFrom section will be populated using the address of the Location Code defined in the Sales Order; otherwise, the address provided in the Company Information Card will be used. The ShipTo information will be collected from the Sell-to section of the Sales Order. Note that address changes in the order are possible and are not reflected on the Sales Order.

Order: S-ORD101261 EasyPost Order: 12

🌐 Shipping Rates   🖃 Buy Order   🖅 Charge Customer for Shipping   🖺 EP Order Packing   ⋯

ShipFrom   Show more

Address	220 Yonge St		ZipCode	M5E 1G5
City	Toronto		Country	CA
State	Ontario		Phone	+1 425 555 0100

ShipTo   Show more

Address	100 Queen Street, Suite 500		Zip Code	K1P 1J9
City	Ottawa		Country	CA
State	ON			

If necessary, users can also specify a Return Address directly in the EasyPost Order window.

Return Address   Show more

Address · · · · · · · · · · · · [   ]   Zip Code · · · · · · · · · · · [⌄]

City · · · · · · · · · · · · · [⌄]   Country · · · · · · · · · · · [⌄]

State · · · · · · · · · · · · · [   ]

Next, before getting shipping rates, users need to specify all the characteristics of the package that will be shipped (i.e., length, width, height, and weight). At the top of the EasyPost Order window, select the EP Order Packing button. This will take you to the Pack Out window.

Order: S-ORD101261 EasyPost Order: 12

🌐 Shipping Rates   📦 Buy Order   📑 Charge Customer for Shipping   📑 EP Order Packing   📑 Apply Agent To Doc   ⋯

In the Pack Out window, click New, then Add Pack.

🔍 Search   📝 Edit List   🗑 Delete   New   📦 Suggest Parcels   📑 Shipping Options   ⋯   ↗ 🔽 ☰

➕ Add Pack   📌

If applicable, users may decide to use a Predefined Package size; otherwise, size measures can be entered manually one by one. To select a Predefined Package size, click the Predefined Package field. Then, select an option from the menu. Refer to the Basic Setup section of the present user guide to learn how to create predefined package sizes.

🔍 Search 📝 Edit List 🗑 Delete New 📦 Suggest Parcels 📑 Shipping Options 📑 Customs Info 📑 Postage Label 📑 Commercial Invoice ⋯   ↗ 🔽 ☰

Pack No. ↑	Contained Item	Predefined Package	Height	Length	Width	Weight	Tracking No.
→ 1 ⋮		[⌄]	0.00	0.00	0.00	0.00	

	Description	Length	Width	Height
	Test	15.0	10.0	6.0

Note: users can generate as many packs as needed to ship an order; each will be assigned an individual tracking number and postage label.

Pack No. ↑	Contained Item	Predefined Package	Height	Length	Width	Weight	Tracking Nc
→ 1 ⋮			15.00	30.00	10.00	5.00	
2		Test	10.00	15.00	5.00	1.00	

Still in the Pack Out Window, select the Shipping Options button located at the top of the screen.

In the Shippment Options window that appears, enter the configurations requiered for this parcel or click Use Default Option to select an existing configuration set. Refer to the Basic Setup section of the present user guide to learn how to create Option Defaults.

Once the pack information has been entered, go back to the EasyPost Order window and select Shipping Rates.

All the rates from the carriers that have been set up will be displayed in the Rates section, found at the bottom of the EasyPost Order window – to learn how to set up a carrier, refer to the Basic Setup section of the present user guide. If a carrier is not supported based on the shipping locations entered, this will be noted in the list of shipping rates.

To purchase a service, expand the EasyPost Shipping Carrier field and select a carrier. Next, select a Carrier Service and Carrier Account. Then, click Buy Order. To charge customers for shipping, after buying the service, select Charge Customer for Shipping; a shipping charge will be added to the Purchase Order.
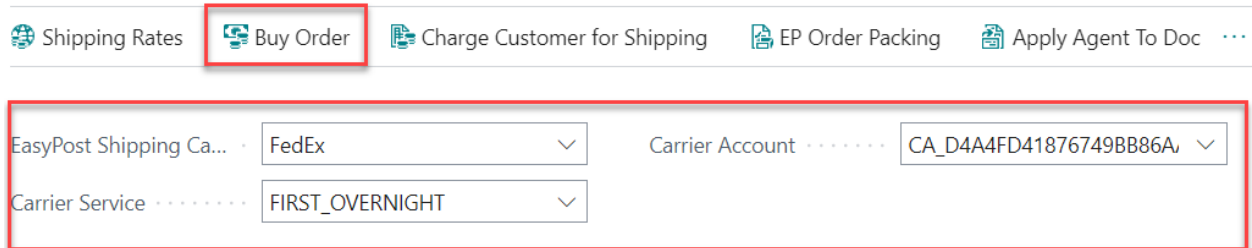
Once the service has been purchased, users can print the Postage Label. To complete this task, first select the EP Order Packaging button found at the top of the window. Then, in the Pack Out window that appears, select Postage Label.
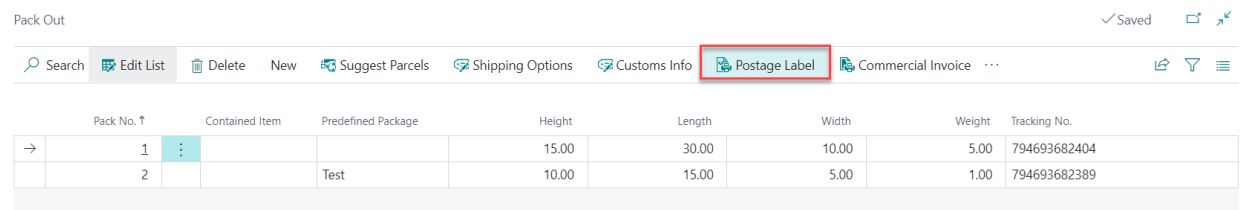
Creating an EasyPost Order from the Sales Orders List

To create an EasyPost order from the Sales Orders list, search for Sales Orders. In the Sales Orders window that appears, select the Sales Order for which you wish to create an EasyPost Order. Next, expand the EasyPost menu located at the top window and select EasyPost Order.
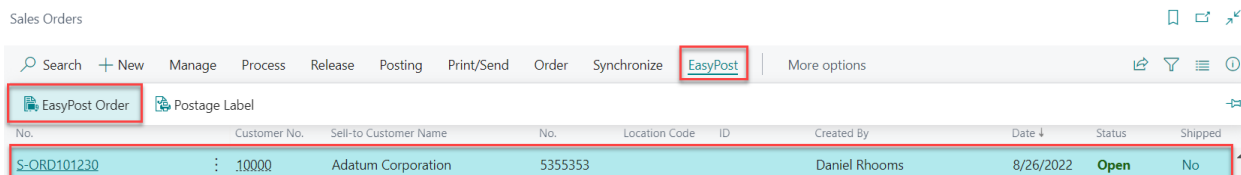
This will open the EasyPost Order window. To complete the order, follow the steps outlined in the previous section of the present user guide.

Creating an EasyPost Order from a Transfer Order

To create an EasyPost order from a Transfer Order, search for Transfer Orders.

transfer orders

Go to Pages and Tasks

> Transfer Orders   Lists
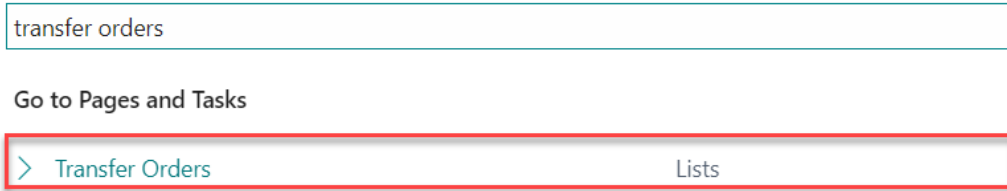
Select your desired Transfer Order from the list. Then, at the top of the Transfer Order window,
select EasyPost, and EasyPost Order. This will take you to the EasyPost Order window.

Transfer Order
1018

Process   Posting   Release   Prepare   Print/Send   Order   EasyPost   More options

EasyPost Order   Postage Label

To finish the EasyPost order, follow the steps outlined in the Creating an EasyPost Order
subsection of the present user guide. Note that, similar to Sales Orders, users have the option
to create new EasyPost orders from the Transfer Orders list window. To learn how to create an
EasyPost order from the Transfer Orders list window, refer to the subsection of the present
user guide: Creating an EasyPost Order from the Sales Order List.

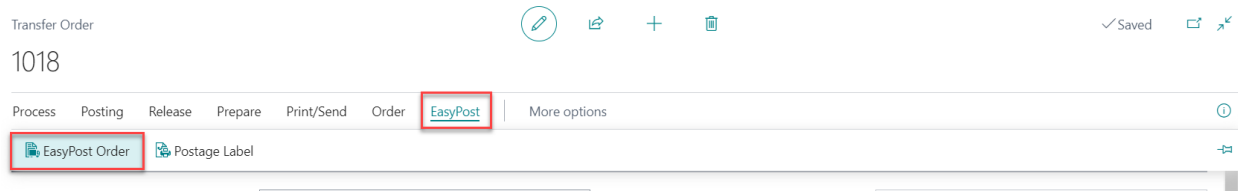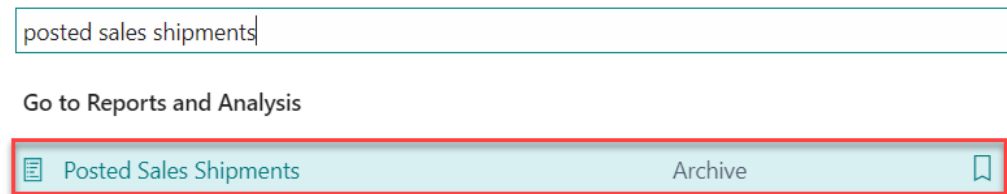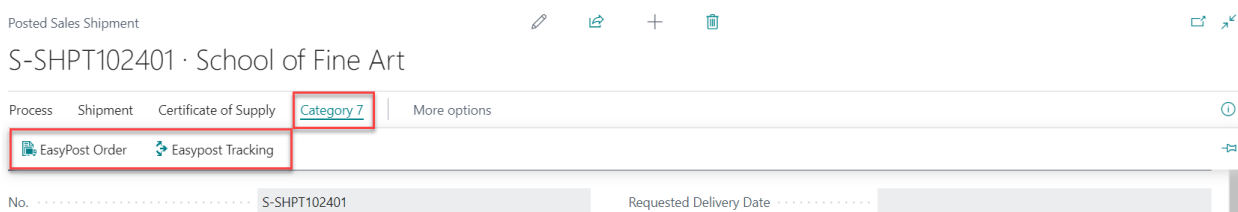## Creating an EasyPost Order from a Posted Sales Shipment

To create an EasyPost order from the Posted Sales Shipments window, search for Posted Sales
Shipments.

posted sales shipments

Go to Reports and Analysis

Posted Sales Shipments   Archive

In the Posted Sales Shipment window that appears, open your preferred Posted Sales
Shipment. At the top of the window, select EasyPost, and then, EasyPost Order. To complete
the EasyPost order, follow the steps outlined in the Creating an EasyPost Order subsection of
the present user guide.

Posted Sales Shipment
S-SHPT102401 · School of Fine Art

Process   Shipment   Certificate of Supply   Category 7   More options

EasyPost Order   Easypost Tracking

No. ·························· S-SHPT102401   Requested Delivery Date ················

Creating an EasyPost Order from a Posted Sales Invoice

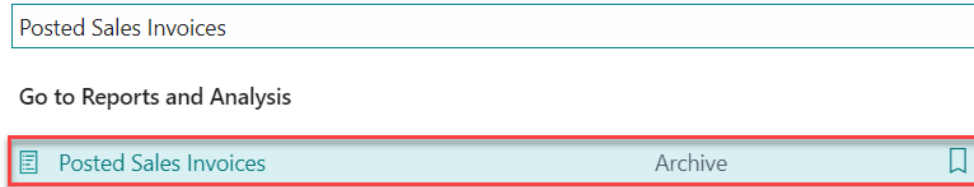To create a New EasyPost order from the Posted Sales Invoices window, search for Posted Sales Invoices.


Open your desired Posted Sales Invoice. At the top of the Sales Invoice window, select EasyPost, then EasyPost Order. This will take you to the EasyPost Order window. To complete the EasyPost order, follow the steps outlined in the Creating an EasyPost Order subsection of the present user guide.
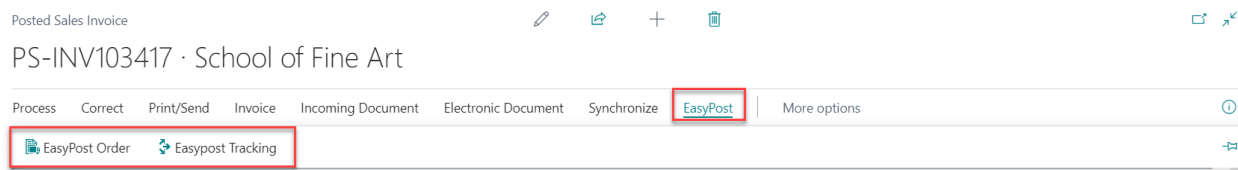
Customs Information

Users must provide customs information to complete international shipments. Users need to define the customs lines for the items in the package. To enter a parcel customs information, generate an EasyPost Order. Then, select the EP Order Packing button located at the top of the window; this will take you to the Pack Out window.

In the Pack Out window, select Customs Info.
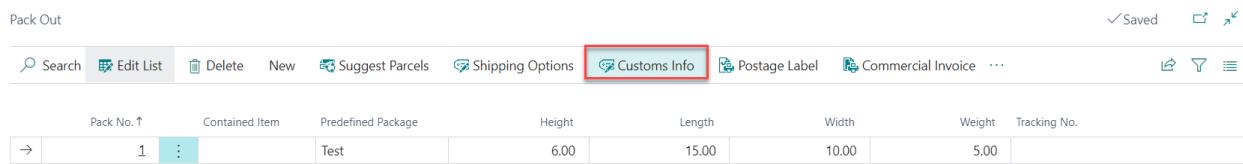
In the Customs Information window that appears, users can enter details required by customs. In the EEL or PFC field, users need to select an option based on the value of the goods shipped. Additional details like Contents Type, Customs Certify, and Restrictions are available. The Create Items from Packout option has been provided to create item lines based on the Sales Order; however, users must enter any missing details.

Customs Information

EEL or PFC · · · · · · · · · · [▽]   Customs Signer · · · · · · · [   ]

Contents Type · · · · · · · · [▽]   Non-Delivery Option · · · [return   ▽]

Contents Explanation · · · [   ]   Restriction Type · · · · · · · [▽]

Customs Certify · · · · · · · (●)   Restriction Comments · · · [   ]

Customs Items | Manage   ⬆️ ⬈

⬚ New Line   ✖ Delete Line   📧 Create Items from Packout   📌

| → | * | | * | 0.00 | 0.00 | | |

Pickup Request

The EasyPost Services Connector app allows users to generate and buy pickup requests. To generate a Pickup Request, after buying an order, go to EP Order Packaging.

Order: S-ORD101261 EasyPost Order: 12

🌐 Shipping Rates   🖧 Buy Order   📇 Charge Customer for Shipping   📄 EP Order Packing   📇 Apply Agent To Doc   ···

In the Pack Out window that appears, select Pickup Request. The Pickups window will appear.

Pack Out   ✓ Saved ⬆ ↙

🔍 Search   📝 Edit List   🗑 Delete   New   📇 Suggest Parcels   📇 Shipping Options   📇 Customs Info   📇 Postage Label   📇 Commercial Invoice   ···   ⬆ ▽ ≡

	Pack No. ↑	Contained Item	Predefined Package	Height	Length	Wi		Tracking No.
→	1 ⋮		Test	6.00	15.00	10		794694219886

📇 Pickup Request
↻ Tracking
  More options

Click on the calendar buttons to set dates for the Earliest Pickup and Latest Pickup fields. Enter instructions for delivery.

Status · · · · · · · · · · ·   unknown   Instructions · · · · · · · · ·   Corner of King and Yonge

Earliest Pickup · · · · · ·   12/7/2022 12:00 PM   📅   Confirmation No. · · · · · ·   [   ]

Latest Pickup · · · · · · ·   12/8/2022 12:00 PM   📅

The ShipFrom section will be populated based on the ShipFrom data contained in the EasyPost order.

Next, expand the Actions menu found at the top of the window and select Pickup Rates.

At the bottom of the window, in the Pickup Rates section, expand the Manage menu and select Buy Pickup to purchase the service.

To cancel a pickup, select the pickup service you want to cancel, then, click Cancel Pickup.


If the request is cancelled, you will be able to create a new pickup request for the EasyPost order.

4.	REPORTING

The EasyPost Services Connector app centralizes all the information pertaining to the shipping of a parcel. From the EasyPost Order window, users can consult the details of orders, including the ship-from & ship-to addresses, the service purchased, etc. Moreover, users can track the real-time location of shipped packages within Business Central, or directly from the EasyPost's website.

Tracking

Once an order has been purchased, users have access to real-time tracking information of a package. To track a package, locate your EasyPost Order. Then, select EasyPost Tracking.
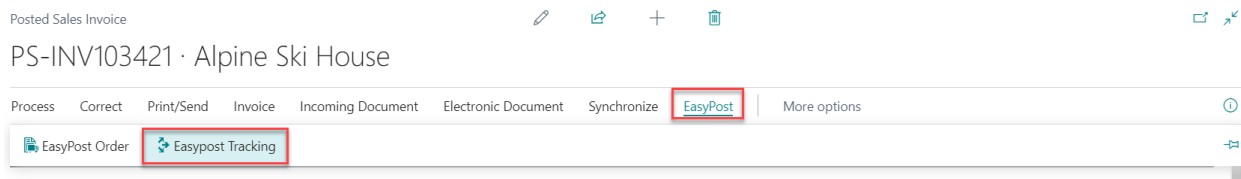
In the Tracking window that appears, users will find all the tracking details of the order.

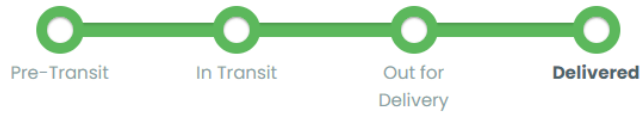Additionally, users may decide to access the Public URL found in the Tracking window to consult the tracking details of orders.

easypost

Sign up free to start saving on postage

Pre-Transit   In Transit   Out for   **Delivered**
Delivery

Delivered On

Thursday, Nov 10

FedEx.

794693908734

Note: This is not a real tracking code

FedEx times are in the UTC (not local) time zone.

Last Updated: **December 06 05:59PM UTC**

November 10, 2022

9:32am ✓ **Delivered**
ATLANTA, GA 30320 US

2:09am 🕐 **On FedEx vehicle for delivery**
MARIETTA, GA 30067 US

November 09, 2022

8:23am ○ **At local FedEx facility**
MARIETTA, GA 30067 US

3:30am ○ **At destination sort facility**
ATLANTA, GA 30320 US

November 08, 2022

2:50am ○ **Departed FedEx location**
MEMPHIS, TN 38118 US

5.   SECURITY

The Item Attributes for Dynamics 365 App, along with the rest of WebSan Inc.'s Dynamics 365 apps, have a built-in AutoPermission security functionality. When a user with the proper credentials installs an App, the AutoPermission function automatically triggers and assigns or updates the user's permissions. No other action is needed from the user.

When a user without the proper credentials installs an App, the AutoPermission function allows the installation, but user permissions are not changed. In this case, a user with the proper security credentials can change the user's permissions later.

To change user permissions, search and go to the User list.
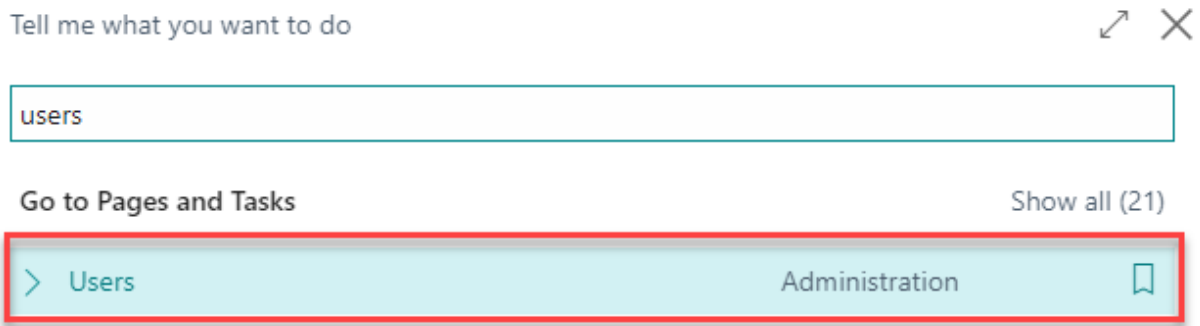
In the Users window, select Assign WebSan Permissions to assign all users the WebSan Permission Set.
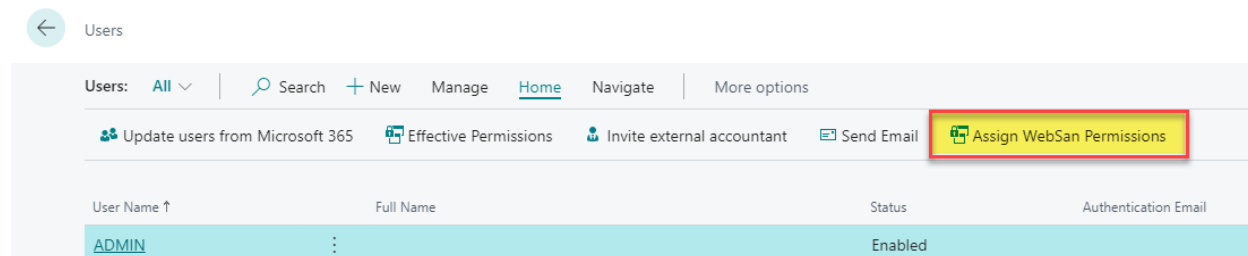
6.   REGISTRATION

To register a WebSan Inc.'s application, in Business Central, search WebSan Client Information and select WebSan Client Information – Administration.

In the WebSan Client Information window, enter your company's contact and billing information. After your information is complete, select Transmit Data.