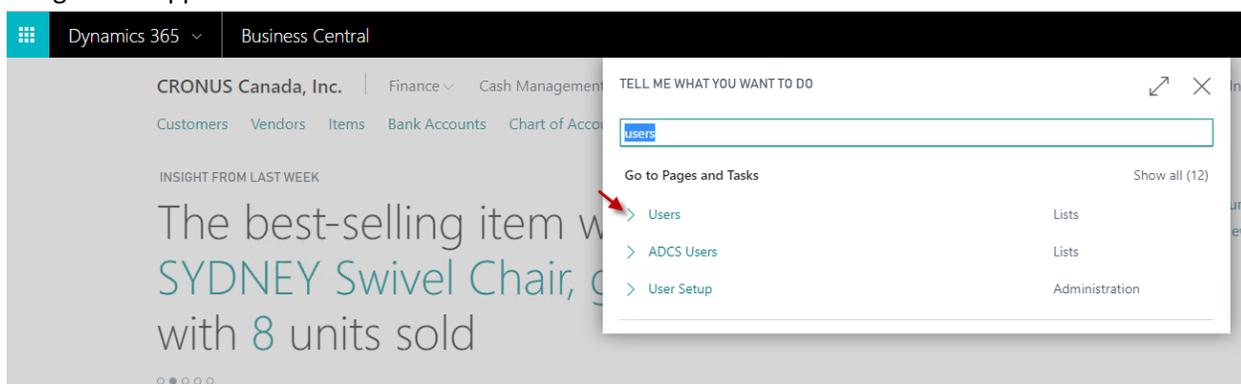


EasyPost Services Connector for Microsoft Dynamics 365 Business Central

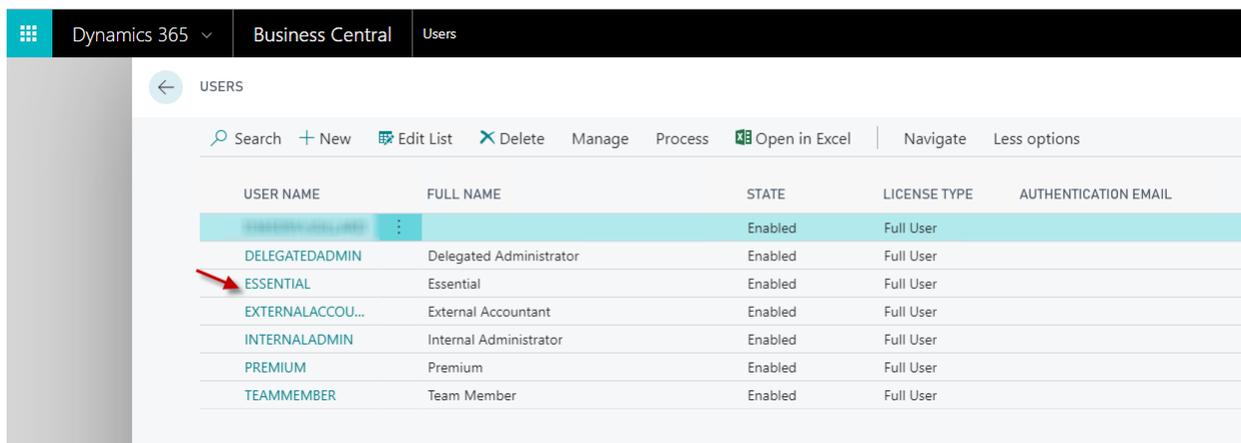
If you would like to purchase our app, scroll to the last page. If you have any question about our guide, contact us: info@websan.com

Setup

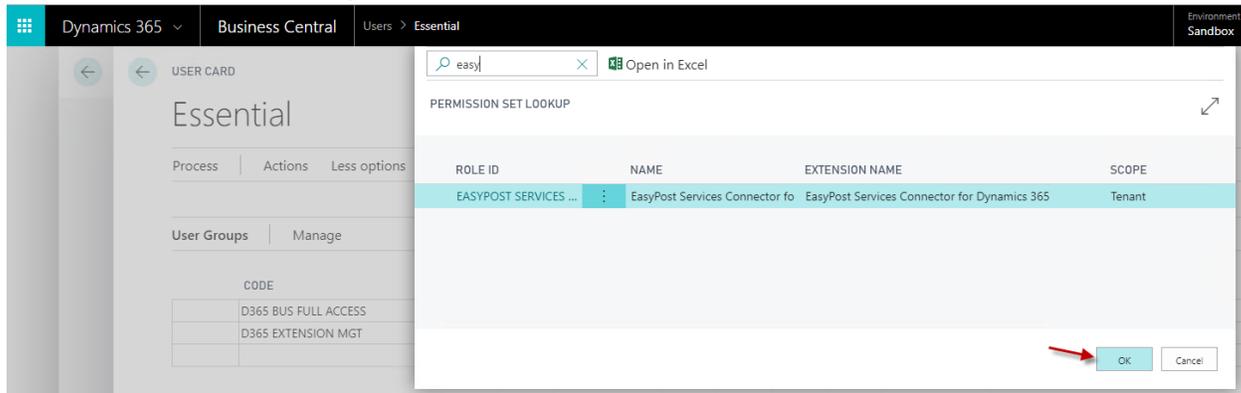
1. Assign User App Permissions



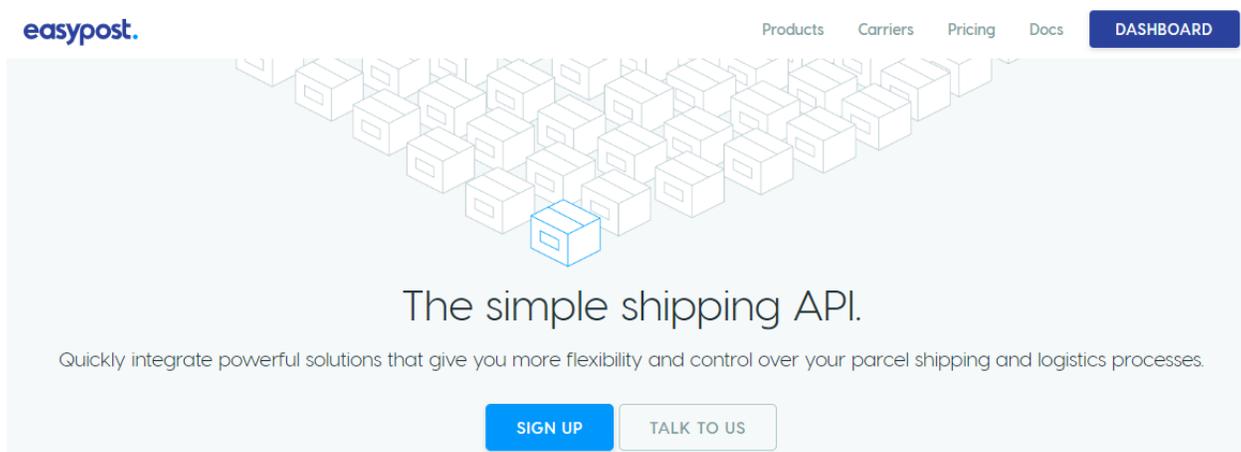
2. Drill into user.



3. Add EASYPOST SERVICES CO permission set.

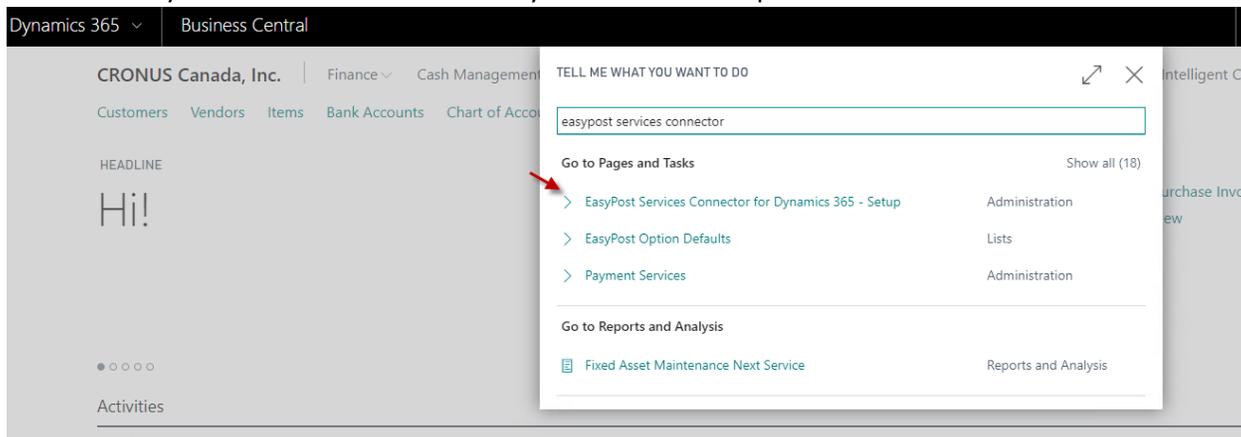


4. Setup a Relationship with EasyPost. You will be responsible for maintaining your relationship with EasyPost. All charges for use of the API with EasyPost are your responsibility. Our EasyPost Services Connector application allows usage of the EasyPost API directly within Dynamics 365 Business Central.

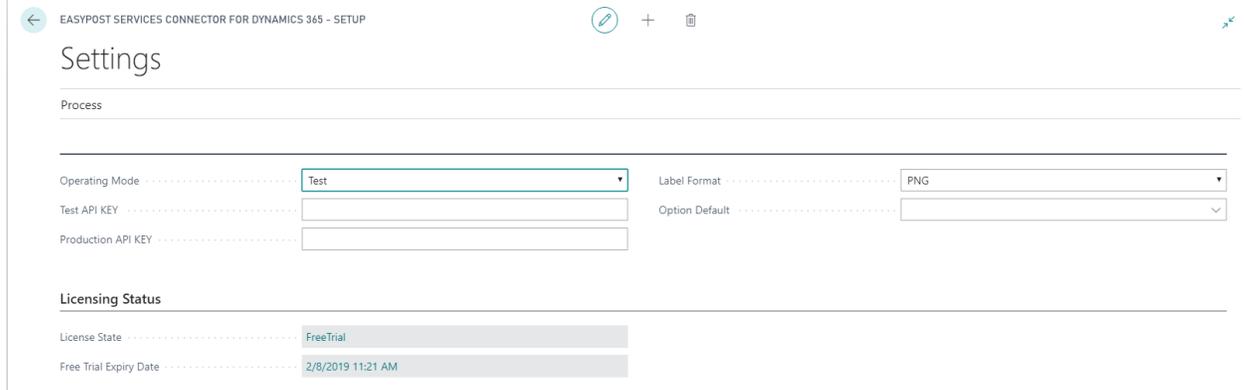


5. Within the EasyPost Dashboard, you will be able to locate your API Keys. These will be used in **Step 8**.

6. Go to the EasyPost Services Connector for Dynamics 365 – Setup.

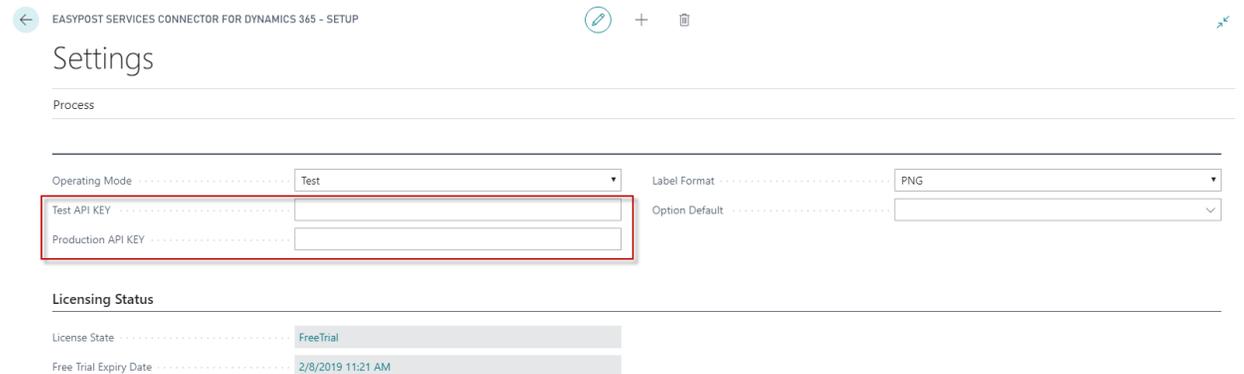


- From this page, you can define your Operating Mode. Enter your EASYPOST API Keys, Setup the Label format and define an Option Default. You can also see your current Licensing Status for the application.



When the operating mode is in test, you are testing the EasyPost functionality. (You will not be charged for these transactions by EasyPost) When you are in Production Mode, you will be responsible for all charges from EasyPost.

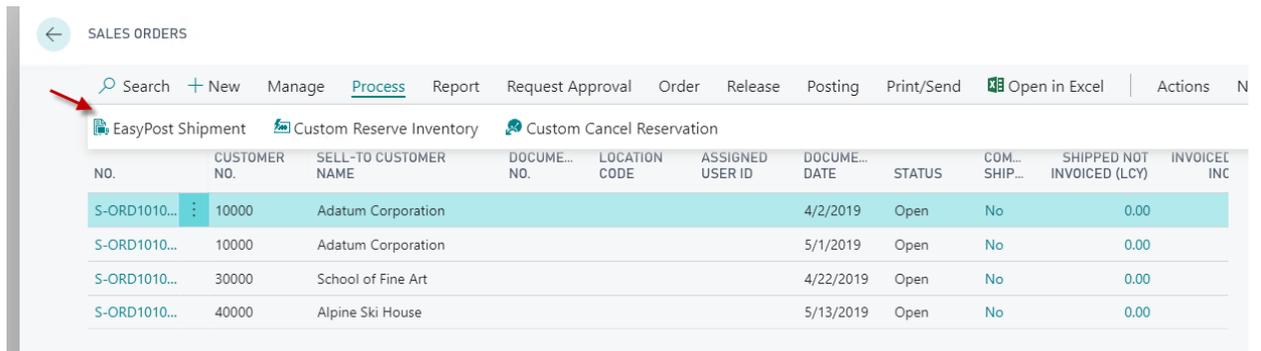
- Input your API keys into the appropriate API KEY fields.



- If you would like to purchase our app, scroll to the last page.

Using the Application

- You can create an EasyPost Shipment from both the sales order list and from the sales order itself.



NO.	CUSTOMER NO.	SELL-TO CUSTOMER NAME	DOCUME... NO.	LOCATION CODE	ASSIGNED USER ID	DOCUME... DATE	STATUS	COM... SHIP...	SHIPPED NOT INVOICED (LCY)	INVOICET INC
S-ORD1010...	10000	Adatum Corporation				4/2/2019	Open	No	0.00	
S-ORD1010...	10000	Adatum Corporation				5/1/2019	Open	No	0.00	
S-ORD1010...	30000	School of Fine Art				4/22/2019	Open	No	0.00	
S-ORD1010...	40000	Alpine Ski House				5/13/2019	Open	No	0.00	

SALES ORDER

S-ORD101001 · Adatum Corporation

Your App: "EasyPost Services Connector for Dynamics 365" Free Trial will soon expire. [Click Here](#)

Process | Report | Release | Posting | Order | Request Approval | Actions | Navigate | Report | Less options

Custom Reserve Inventory | Custom Cancel Reservation | Create Inventory...t-away/Pick... | Email Confirmation... | Print Confirmation... | **EasyPost Shipment**

Customer No. 10000 | Order Date 4/2/2019
 Customer Name Adatum Corporation | Due Date 5/2/2019
 SELL-TO | Requested Delivery Date 4/3/2019
 Address 360 Main Street, Suite 1150 | Promised Delivery Date
 Address 2
 City

Documents

Sell-to Customer Sales Hist

Ongoing Sales Quotes	0	Ongoing Sales Blanket Orders	0	Ongoing Sales Orders	0
----------------------	---	------------------------------	---	----------------------	---

- EasyPost shipments can also be viewed/created from posted sales shipments/Posted sales invoices. (As long as the posted sales shipment/posted sales invoice was created from an sales order) This allows you access to view previous EasyPost shipment information after an order has been completely shipped/invoiced. Or, you can create a new EasyPost shipment directly from a posted sales document.

POSTED SALES SHIPMENTS

Search | Manage | **Process** | Open in Excel | Actions | Navigate | Less options

Print... | Navigate | **EasyPost Shipment** | Statistics

S-SHP1102022	40000	Alpine Ski House
S-SHPT102021	50000	Relecloud
S-SHPT102020	10000	Adatum Corporation

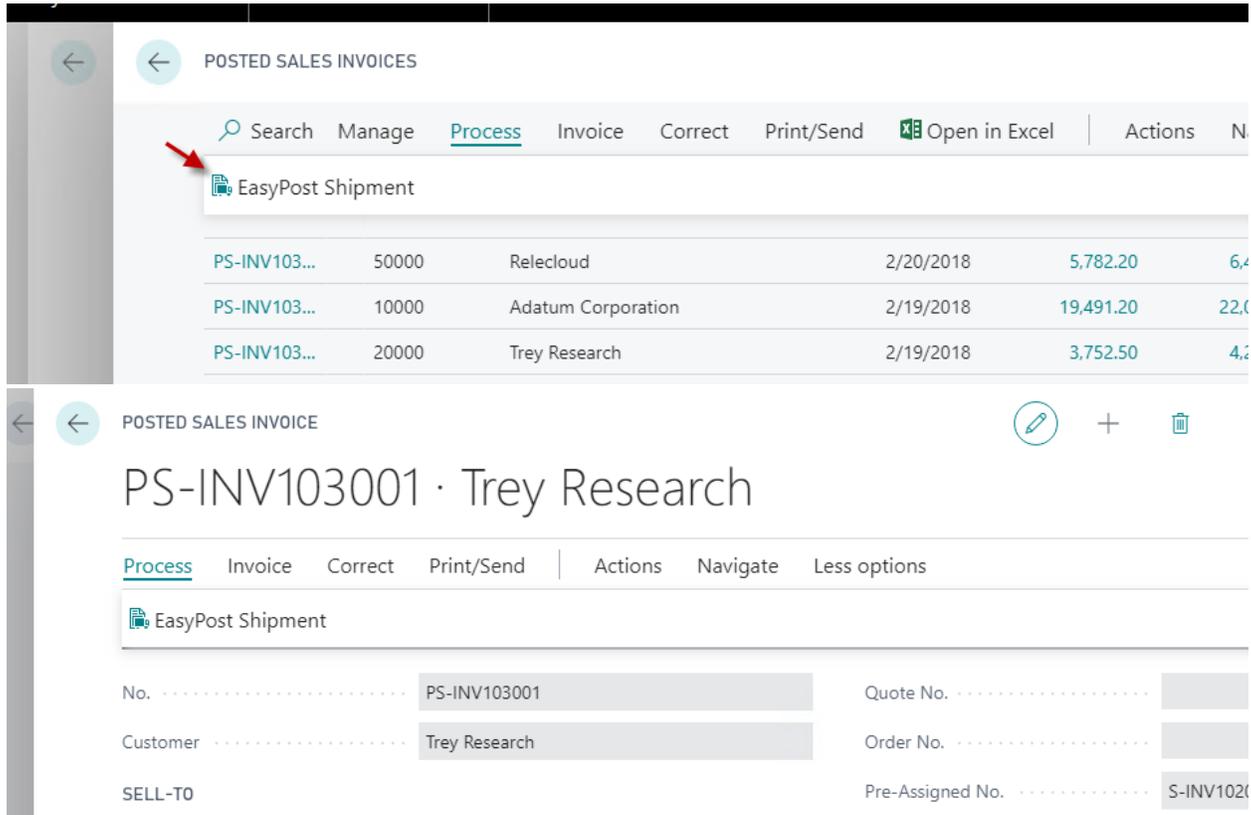
POSTED SALES SHIPMENT

S-SHPT102021 · Relecloud

Process | **Actions** | Navigate | Less options

Functions | Print... | Navigate | **EasyPost Shipment**

No. S-SHPT102021 | Requested Delivery D...
 Customer Relecloud | Promised Delivery Date
 Contact Jesse Homer | Quote No.
 Posting Date 2/20/2018 | Order No.



POSTED SALES INVOICES

Search Manage Process Invoice Correct Print/Send Open in Excel Actions N

EasyPost Shipment

PS-INV103...	50000	Relecloud	2/20/2018	5,782.20	6.4
PS-INV103...	10000	Adatum Corporation	2/19/2018	19,491.20	22.0
PS-INV103...	20000	Trey Research	2/19/2018	3,752.50	4.2

POSTED SALES INVOICE

PS-INV103001 · Trey Research

Process Invoice Correct Print/Send Actions Navigate Less options

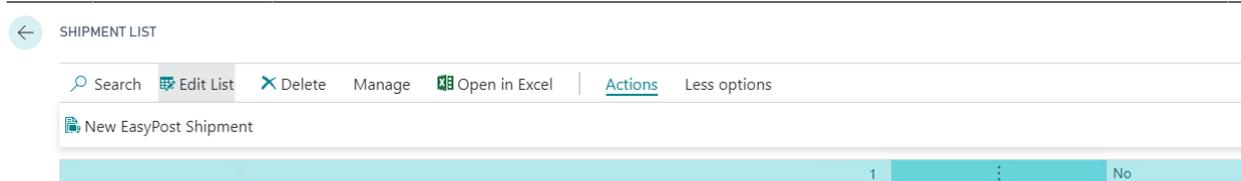
EasyPost Shipment

No. PS-INV103001 Quote No.

Customer Trey Research Order No.

SELL-TO Pre-Assigned No. S-INV102

- If this is the first EasyPost shipment created for a sales order, you will be taken directly to the EasyPost shipment record. Otherwise, you will be presented with a list of EasyPost shipments for the order. On this page, you can create a new EasyPost shipment or select the existing EasyPost shipment.



SHIPMENT LIST

Search Edit List Delete Manage Open in Excel Actions Less options

New EasyPost Shipment

1	No
---	----

- When you create an EasyPost shipment, the 'ship from' information will come from your company information if the order has no location code defined. Otherwise, the data will come from your location. The Ship-to information will come from your sales order. This information can be changed on the EasyPost shipment. (**Note:** Changes on the shipment will not be reflected on your sales order)

SHIPMENT ✎ + 🗑

Shipment: 1

Process

ShipFrom Show less

Description	<input type="text"/>	Country	CA <input type="text"/>
Address	220 Yonge St	Company Name	CRONUS Canada, Inc.
Address 2	<input type="text"/>	Contact	<input type="text"/>
City	Toronto <input type="text"/>	Phone	+1 425 555 0100
State	Ontario <input type="text"/>	E-Mail	<input type="text"/>
ZipCode	M5E 1G5 <input type="text"/>		

ShipTo Show less

Description	<input type="text"/>	Country	CA <input type="text"/>
Address	360 Main Street, Suite 1150	Company Name	<input type="text"/>
Address 2	<input type="text"/>	Contact	Robert Townes
City	<input type="text"/>	Phone	<input type="text"/>
State	MB <input type="text"/>	E-Mail	<input type="text"/>
Zip Code	R3C 3Z3 <input type="text"/>		

- To be able to obtain rates for a shipment, you will need to define the attributes of the package you are shipping. The package length, width, height and weight are required. This is defined in the package section. Predefined packages allow you to setup the common package sizes your company uses.

Package

Predefined Package	<input type="text"/>	Height	<input type="text"/> 0.0
Length	<input type="text"/> 0.0	Weight	<input type="text"/> 0.0
Width	<input type="text"/> 0.0	Shipping Insurance	<input type="text"/>

- Once you have entered the package information, you may request shipping rates. All rates from carriers you have setup in your EasyPost account will be returned. If a carrier is not supported based on your shipping locations, this will be noted in the returned list of shipping rates.

Shipment: 1

[Process](#)

[Shipping Rates](#)
[Shipping Options](#)
[Customs Info](#)
[Postage Label](#)
[Pickup Request](#)
[Tracking](#)
[Refund Request](#)

ShipFrom

Description	<input type="text"/>	Country	CA
Address	220 Yonge St	Company Name	CRONU
Address 2	<input type="text"/>	Contact	<input type="text"/>
City	Toronto	Phone	+1 425
State	Ontario	E-Mail	<input type="text"/>
ZipCode	M5E 1G5		

ShipTo

Description	<input type="text"/>	Country	CA
Address	360 Main Street, Suite 1150	Company Name	<input type="text"/>

PURCH...	CARRIER	SERVICE	CURRENCY	RATE	DELIVERY DATE	DELIVE... DATE GUARA...	DELIVERY DAYS
<input type="checkbox"/>	CanadaPost	ExpeditedParcel	CAD	13.91		<input type="checkbox"/>	3
<input type="checkbox"/>	CanadaPost	Priority	CAD	40.60		<input type="checkbox"/>	1
<input type="checkbox"/>	CanadaPost	RegularParcel	CAD	13.91		<input type="checkbox"/>	4
<input type="checkbox"/>	CanadaPost	Xpresspost	CAD	15.82		<input type="checkbox"/>	2
<input type="checkbox"/>	USPS	"rate_error"-Unable to retrieve USPS rates for no...				<input type="checkbox"/>	

- To purchase a given service, select the shipping rate line you wish to purchase and select the "Buy Shipment" action. The line will update to indicate it has been purchased.

Shipping Rates	Manage						
Buy Shipment							
PURCH...	CARRIER	SERVICE	CURRENCY	RATE	DELIVERY DATE	DELIVE... DATE GUARA...	DELIVERY DAYS
<input type="checkbox"/>	CanadaPost	ExpeditedParcel	CAD	13.91		<input type="checkbox"/>	3
<input type="checkbox"/>	CanadaPost	Priority	CAD	40.60		<input type="checkbox"/>	1
<input checked="" type="checkbox"/>	CanadaPost	RegularParcel	CAD	13.91		<input type="checkbox"/>	4
<input type="checkbox"/>	CanadaPost	Xpresspost	CAD	15.82		<input type="checkbox"/>	2
<input type="checkbox"/>	USPS	"rate_error"-Unable to retrieve USPS rates for no...				<input type="checkbox"/>	

Shipping Rates	Manage						
Buy Shipment							
PURCH...	CARRIER	SERVICE	CURRENCY	RATE	DELIVERY DATE	DELIVE... DATE GUARA...	DELIVERY DAYS
<input type="checkbox"/>	CanadaPost	ExpeditedParcel	CAD	13.91		<input type="checkbox"/>	3
<input type="checkbox"/>	CanadaPost	Priority	CAD	40.60		<input type="checkbox"/>	1
<input checked="" type="checkbox"/>	CanadaPost	RegularParcel	CAD	13.91		<input type="checkbox"/>	4
<input type="checkbox"/>	CanadaPost	Xpresspost	CAD	15.82		<input type="checkbox"/>	2
<input type="checkbox"/>	USPS	"rate_error"-Unable to retrieve USPS rates for no...				<input type="checkbox"/>	

- Once your shipment has been created, you can print out a postage label. The format of the label is determined by the "Label Format" defined in your EasyPost page.

For Testing Purposes Only
A des fins de test uniquement

Regular Parcel™ | Colis standard^{MC}

Tracking Number

Numéro de repérage

Instructions

1. Choose a box designed for shipping.
2. Wrap your items so that they are secure in the box and seal the box using proper shipping tape.
3. Cut the label on the dotted line and retain this half for tracking purposes.
4. Tape the label so it appears squarely on the largest side of the box (do not bend it around sides or end of box). Do not tape over any part of the barcode on the label.
5. Take the parcel to a Canada Post retail outlet for shipping. All items except PriorityTM may also be deposited in a Street Letter Box.

1. Choisissez une boîte conçue pour l'expédition.
2. Embaquez solidement vos articles dans la boîte et scellez le tout avec du ruban d'expédition.
3. Découpez l'étiquette le long du pointillé et conservez cette partie pour suivi.
4. Apposez l'étiquette pour qu'elle paraisse entièrement sur le côté le plus grand de la boîte (ne pas la replier sur les côtés). Ne recouvrez aucune partie du code à barres de l'étiquette.
5. Apportez le colis à un comptoir postal de Postes Canada pour expédition. Tous les envois sauf ceux utilisant PriorityTM peuvent aussi être déposés dans une boîte aux lettres publique.

A barcode should be printed on the label because Delivery Confirmation is selected. If no bar code is visible, please contact the help desk at 1-877-376-1212 for assistance.
Un code à barres devrait être imprimé sur l'étiquette lorsque la confirmation de livraison est choisie. Si le code à barres n'apparaît pas, veuillez communiquer avec le service d'assistance au 1-877-376-1212.

To: ROBERT TOWNES
A: Order No.: P123456789
N° d'commande: P123456789

Customer Credit Card Receipt / Reçu de carte de crédit

The online transaction has been approved by the credit card issuer. / La transaction en ligne a été approuvée par l'établissement émetteur de la carte de crédit.

Transaction type: Sale / Vente
Type de transaction: Sale / Vente
Card Type: / Type de carte: VIS

Name on Card: / Nom sur la carte: John Doe

Order Sub-Total: \$13.25 CAD
Total partiel de la commande: \$13.25 CAD
GST / TPS (#119321495): \$0.66 CAD
PST / TVP: \$0.00 CAD
HST / TVH: \$0.00 CAD

Total Transaction Amount: \$13.91 CAD
Montant total de la transaction: \$13.91 CAD
Authorization Code: 007564
Code d'autorisation: 007564
Date and Time: 2019 02 01 11:45 EST
Date et heure: 2019 02 01 11:45 EST
Merchant Name: Canada Post
Nom du commerçant: Canada Post
Merchant Online Address: Postes Canada
www.canadapost.ca
Adresse Web du commerçant: www.postescanada.ca

CUT HERE / DÉCOUPER ICI

For Testing Purposes Only
A des fins de test uniquement

3

Regular Parcel™ | Colis standard^{MC}

TO: / A:
ROBERT TOWNES
360 MAIN STREET, SUITE 1150
SOMEWHERE MB R3C 3Z3

R3C 3Z3

TRACKING NUMBER N° DE REPÉRAGE

Sender warrants that this item does not contain non-mailable matter.
L'expéditeur garantit que cet envoi ne contient pas d'objet inadmissible.

FROM: / DE: CRONUS Canada, Inc. 220 Yonge St Toronto ON M5E 1G5	12.7x12.7x12.7cm 0.350 KG VE/ÉV MANIFEST NOT REQ MANIFESTE NON REQ (1)
EST/CE: V1809 1380 SPC/2696 V2	P/F: 8282532 CC
PIN / NIP:	

Order No.: / N° d'commande: P123456789
Auth Number: / N° d'autorisation: 007564

In case of non-delivery, return at sender's expense at counter rates.
En cas de non-livraison manquée, renvoyer aux frais de l'expéditeur aux tarifs du comptoir.

Shipping Options

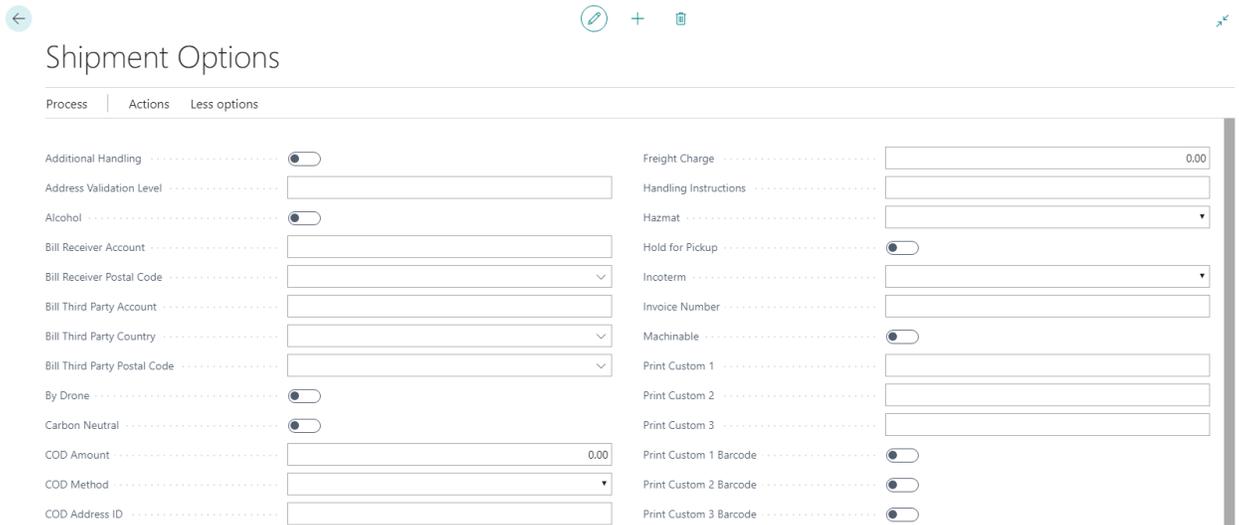
1. There are a multitude of shipping options that you can set on your shipment before you request your shipping rates.

Process

Shipping Rates Shipping Options Customs Info Postage Label Pickup Request Tracking Refund Request

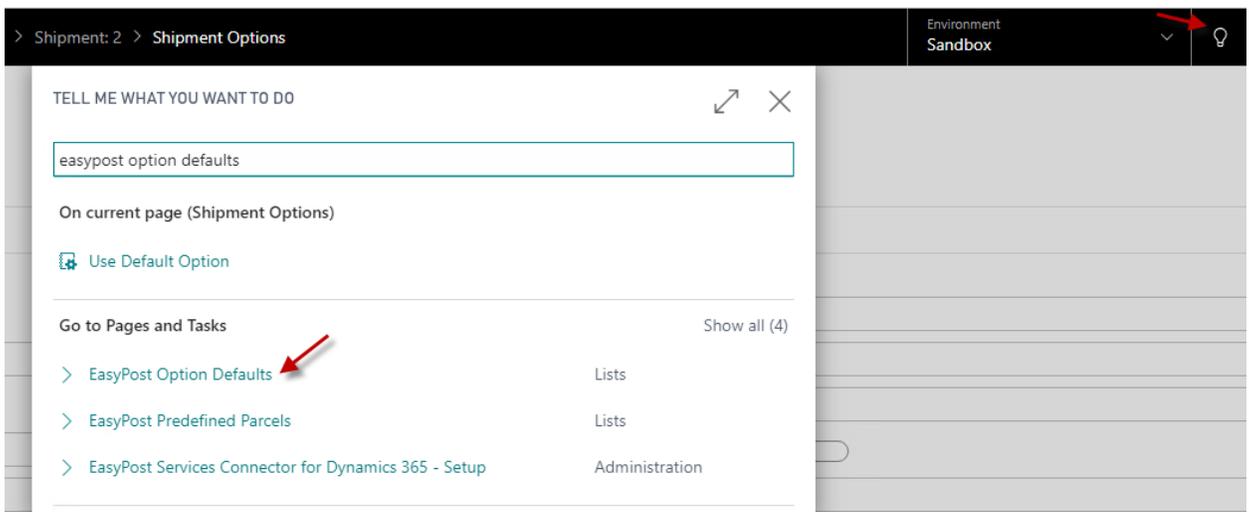
ShipFrom Show less

Description	<input type="text"/>	Country	CA
Address	220 Yonge St	Company Name	CRONUS Canada, Inc.
Address 2	<input type="text"/>	Contact	<input type="text"/>

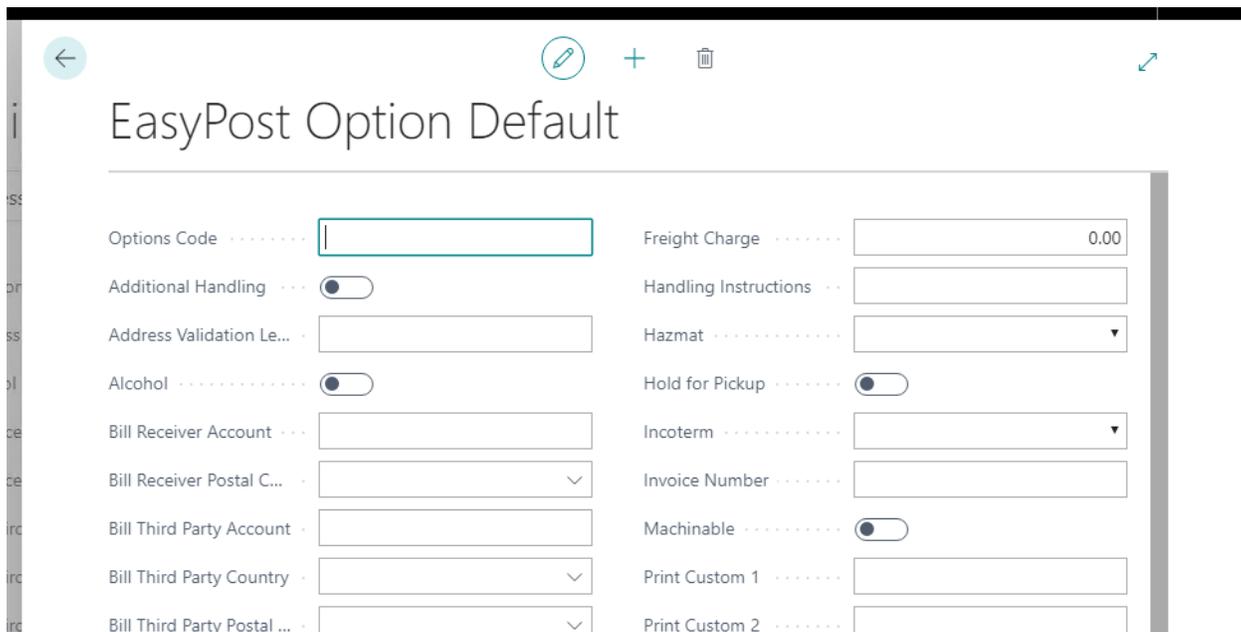
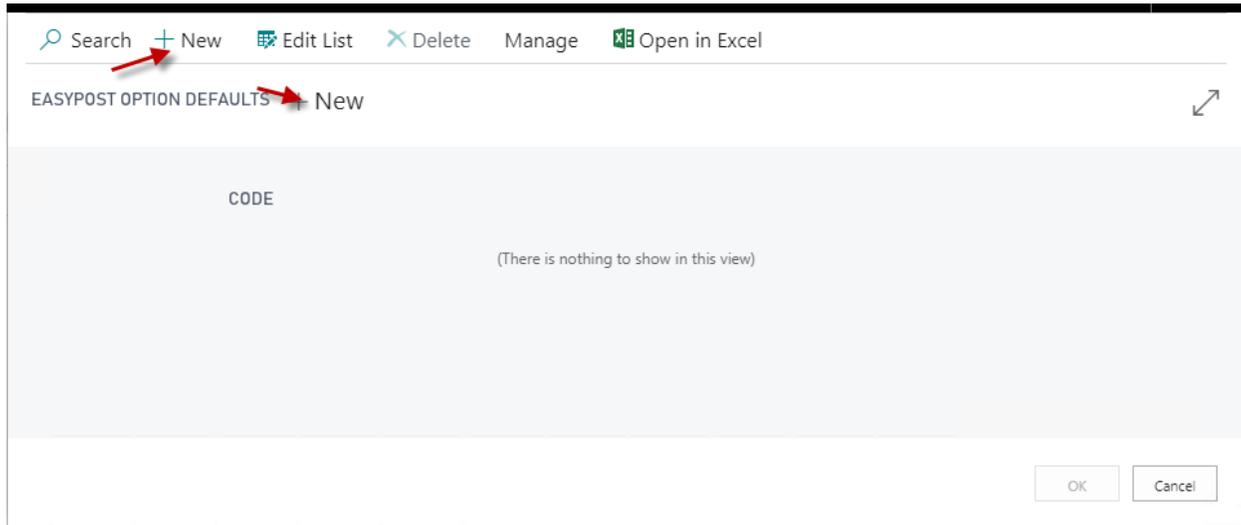


You can setup a set of shipping options (known as default options) to be applied against a shipment. These can be applied to a specific EasyPost shipment using the “Use Default Option” action. If you want to use the same shipping options as a default on your shipments, this can be setup on the EasyPost setup page.

You can access the EasyPost option defaults by searching for the EasyPost Option Defaults page.



Or, when using the “Use Default Option” selection page, you can click “new” to create a new Option Set.



Customs Info

1. Customs Information is required when you are using an international shipment. You will need to define the customs lines for the items in your package. An action "Create Items from Document" has been provided which will create item lines based on your sales order. You will need to update the missing information.

Customs Information

Actions

EEL or PFC

Contents Type

Contents Explanation

Customs Certify

Customs Signer

Non-Delivery Option

Restriction Type

Restriction Comments

Customs Items | [Manage](#)

[New Line](#) [Delete Line](#) [Create Items from document](#)

DESCRIPTION	QUANTITY	VALUE	WEIGHT	HS TARIFF NUMBER	CODE	ORIGIN COUNTRY
* <input type="text"/>	* <input type="text"/>	0.00	0.00			*

Tracking

- Once you have purchased a shipment, you will have real-time access to tracking information of your package.

Shipment: 1

[Process](#)

[Shipping Rates](#) [Shipping Options](#) [Customs Info](#) [Postage Label](#) [Pickup Request](#) [Tracking](#) [Refund Request](#)

ShipFrom Show less

Description

Country

Shipment Tracking

Actions

Tracking Show less

Tracking Code SDEF4F4A-148E-401F-8F25-BE1751AB835F

Status delivered

Carrier CanadaPost

Service

Signed By

Weight

Estimated Delivery Date 2/1/2019

Estimated Delivery Date (Local)

Estimated Delivery Time (Local)

Initial Delivery Attempt 1/5/2019 5:57 PM

Guaranteed Delivery Date

Container Type

PublicURL <https://track.easypost.com/djE6dHJrX2U3YjYkNzQ0NDZmZjRm...>

Tracking Detail

DATETIME	STATUS	MESSAGE	CITY	STATE	ZIP	COUNTRY
1/5/2019 5:57 PM	delivered	Delivered	Radnor	PA	19087	US
1/5/2019 10:34 AM	out_for_delivery	Out For Delivery	Radnor	PA	19087	US
1/4/2019 4:48 PM	in_transit	Arrived at Distribution Center	Radnor	PA	19087	US
1/4/2019 11:55 AM	in_transit	Departed Sort Facility	Chicago	IL	60290	US
1/3/2019 11:15 AM	in_transit	Arrived at Sort Facility	Chicago	IL	60290	US
1/2/2019 4:48 PM	in_transit	Picked Up	Oakland	CA	94612	US
1/2/2019 11:37 AM	pre_transit	Shipping label created				
1/1/2019 4:48 PM	pre_transit	Pre-Shipment information received				

- Clicking the Public URL will take you to an easily readable page of tracking information provided by EasyPost.

easypost.



Delivered On

Saturday, Jan 05



5DEF4F4A-148E-401F-8F25-BE1751ABB35F

Note: This is not a real tracking code

Last Updated: February 01 04:48PM UTC

January 05, 2019	
5:57pm	 Delivered Radnor, PA 19087 US
10:34am	 Out For Delivery Radnor, PA 19087 US
January 04, 2019	
4:48pm	 Arrived at Distribution Center Radnor, PA 19087 US
11:55am	 Departed Sort Facility Chicago, IL 60290 US
January 03, 2019	

Pickup Request

1. If you wish to have the carrier pick up your package, you can create a pickup request. (This feature is dependent on the carrier)

Shipment: 1

[Process](#)

[Shipping Rates](#)
[Shipping Options](#)
[Customs Info](#)
[Postage Label](#)
[Pickup Request](#)
[Tracking](#)
[Refund Request](#)

ShipFrom

Description Country

Pickup Request

[Actions](#)

 Pickup Rates 

Status unknown

Instructions *

Earliest Pickup *

Latest Pickup *

Confirmation No.

ShipFrom Show more

Address 220 Yonge St

City Toronto

State Ontario

ZipCode MSE 1G5

Country CA

Phone +1 425 555 0100

E-Mail *

Pickup Rates | Manage

PURCHASED	CARRIER	SERVICE	CURRENCY	RATE
(There is nothing to show in this view)				

The ShipFrom information is populated based on the ShipFrom on your EasyPost shipment. To retrieve the pickup rates from the carrier, you must fill out the information and press the Pickup Rates action. This will populate the pickup Rates Section.

Pickup Request

[Actions](#)

 Pickup Rates 

Status unknown

Instructions Ring buzzer

Earliest Pickup 2/2/2019 12:00 PM

Latest Pickup 2/6/2019 12:00 PM

Confirmation No.

ShipFrom Show more

Address 220 Yonge St

City Toronto

State Ontario

ZipCode MSE 1G5

Country CA

Phone +1 425 555 0100

E-Mail joe@smith.com

Pickup Rates | Manage

PURCHASED	CARRIER	SERVICE	CURRENCY	RATE
<input type="checkbox"/>	CanadaPost	OnDemand	CAD	
<input type="checkbox"/>	CanadaPost	OnDemand16:00	CAD	

Select your choice of Pickup Service and press the “Buy Pickup” option to purchase the service.

PURCHASED		CARRIER	SERVICE	CURRENCY	RATE
<input type="checkbox"/>		CanadaPost	OnDemand	CAD	
<input type="checkbox"/>		CanadaPost	OnDemand16:00	CAD	

- There is also the option to attempt cancellation a Pickup that you have purchased. Just highlight the purchased pickup request and use the Cancel Pickup option. The pickup request Status will appear indicating the status of the cancellation request.

Pickup Request

[Actions](#)

[Pickup Rates](#)

Status	cancelled	Instructions	ring bell
Earliest Pickup	2/4/2019 12:00 PM	Confirmation No.	
Latest Pickup	2/6/2019 12:00 PM		

ShipFrom Show more

Address	220 Yonge St	Country	CA
City	Toronto	Phone	+1 425 555 0100
State	Ontario	E-Mail	joe@smith.com
ZipCode	M5E 1G5		

PURCHASED		CARRIER	SERVICE	CURRENCY	RATE
<input type="checkbox"/>		CanadaPost	OnDemand	CAD	
<input type="checkbox"/>		CanadaPost	OnDemand16:00	CAD	

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

Refund Request

- If you wish to try and cancel your EasyPost shipment, you may click the Refund Request Action.

Shipment: 2

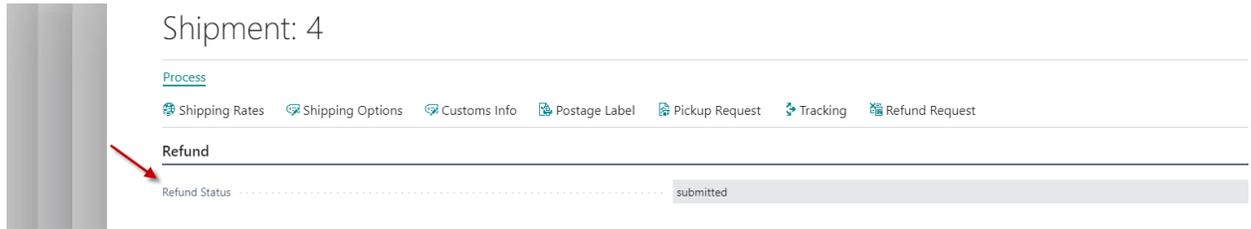
[Process](#)

[Shipping Rates](#) [Shipping Options](#) [Customs Info](#) [Postage Label](#) [Pickup Request](#) [Tracking](#) [Refund Request](#)

ShipFrom

Description		Country	CA
Address	220 Yonge St	Company Name	CRONUS Canada, Inc.
Address 2		Contact	

- Depending on the carrier selected and the current state of your parcel, you will be shown the refund status for your EasyPost shipment.

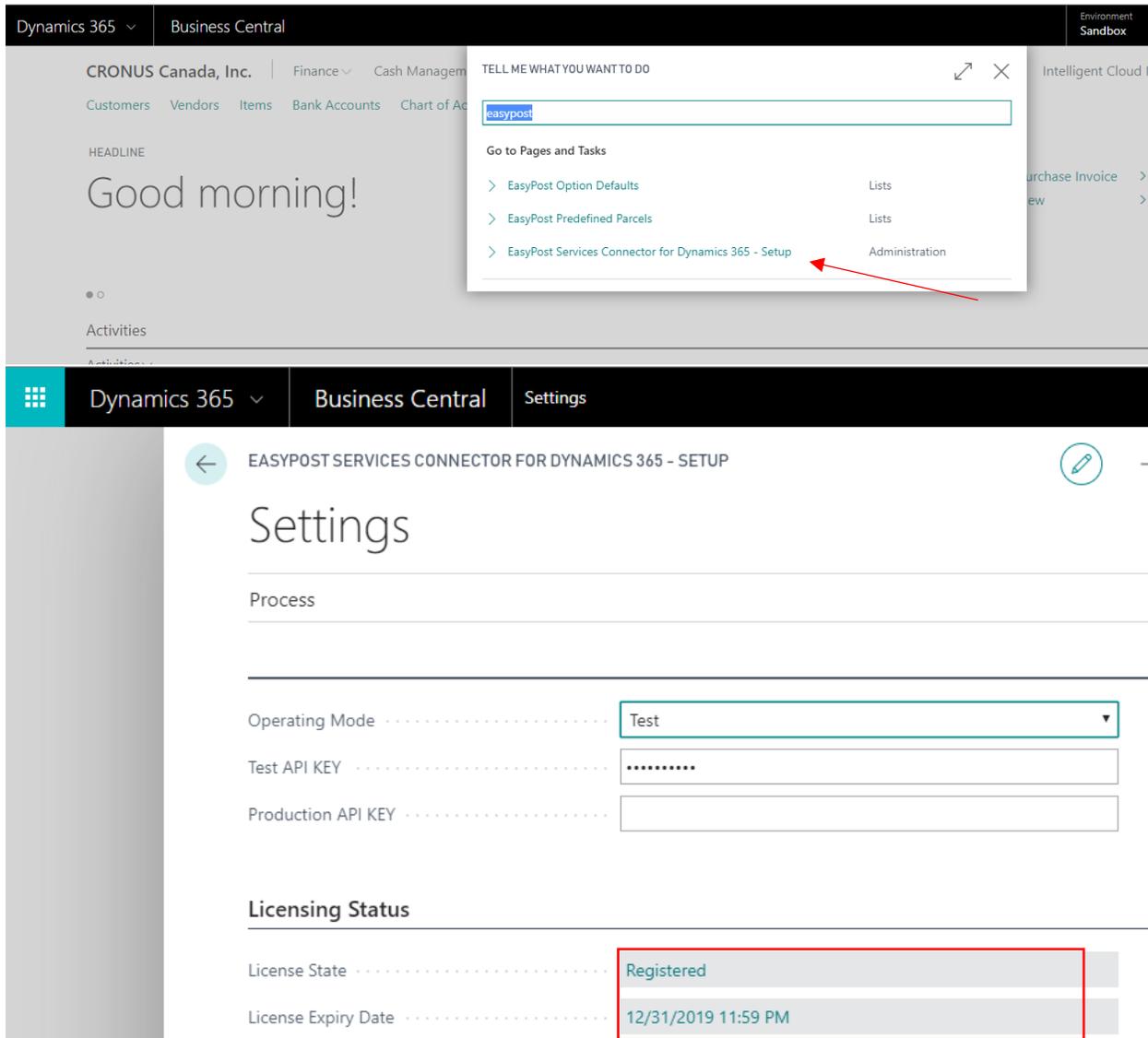


Please see the EasyPost information on refunds for further information:

<https://www.EasyPost.com/docs/api#refunds>

How to purchase our EasyPost Services Connector for Dynamics 365.

You will get access to our EasyPost Services Connector for Dynamics 365 free for 30 days. If you would like to view the free trial expire date, search for EasyPost Connector in the search bar.



Dynamics 365 Business Central Environment Sandbox

CRONUS Canada, Inc. Finance Cash Management

Customers Vendors Items Bank Accounts Chart of Accounts

HEADLINE

Good morning!

Activities

Intelligent Cloud I

Purchase Invoice

NEW

TELL ME WHAT YOU WANT TO DO

easypost

Go to Pages and Tasks

- > EasyPost Option Defaults Lists
- > EasyPost Predefined Parcels Lists
- > EasyPost Services Connector for Dynamics 365 - Setup Administration

Dynamics 365 Business Central Settings

EASYPPOST SERVICES CONNECTOR FOR DYNAMICS 365 - SETUP

Settings

Process

Operating Mode Test

Test API KEY

Production API KEY

Licensing Status

License State Registered

License Expiry Date 12/31/2019 11:59 PM

Contact accounting@websan.com or 416-499-1235, when you're ready to purchase our app.