



XtensionIT

User guide:

Shipment Connector for Tasklet Factory WMS by XtensionIT

Last updated: 7/27/2023

- 1. Shipment Connector for Tasklet Factory WMS by XtensionIT
 - 1.1. Installation of Shipment Connector for Tasklet Factory Mobile WMS
 - 1.2. Shipment Connector Setup Requirements
 - 1.3. Mobile WMS Setup
 - 1.3.1. Configuration files and Endpoints Setup
 - 1.3.2. Basic Configuration - Mobile Users
 - 1.3.3. Basic Configuration - Mobile Groups
 - 1.4. Pack & Ship Setup
 - 1.4.1. Mobile WMS Package Types
 - 1.4.2. Mobile WMS Package Setup
 - 1.4.3. Mobile WMS Setup
 - 1.4.4. Mobile WMS Packing Stations
 - 1.4.5. License Plate Labels Setup (Printer Per Packing Station)
- 2. Pack & Ship And XtensionIT's Shipment Connectors
 - 2.1. Shipping Orders
 - 2.1.1 Packing
 - 2.1.2 Registering Shipment Information
 - 2.1.3 Registering License Plate(s)
 - 2.1.4 Posting

1. Shipment Connector for Tasklet Factory WMS by XtensionIT

This guide contains information about the installation, setup and use of the extension **Shipment Connector for Tasklet Factory Mobile WMS** by XtensionIT.

The extension is compatible with Microsoft Dynamics 365 Business Central and enables the user to handle shipments with Tasklet Factory's Mobile WMS and their Pack & Ship module and with Dynamics 365 Business Central. The extension works by taking the shipment information that is inputted in the Mobile WMS and sending it to the Shipping Agent via either Shipmondo, Webshipper or nShift's API. Track & Trace information is then returned via either of the three's API and the necessary parcel labels are printed.

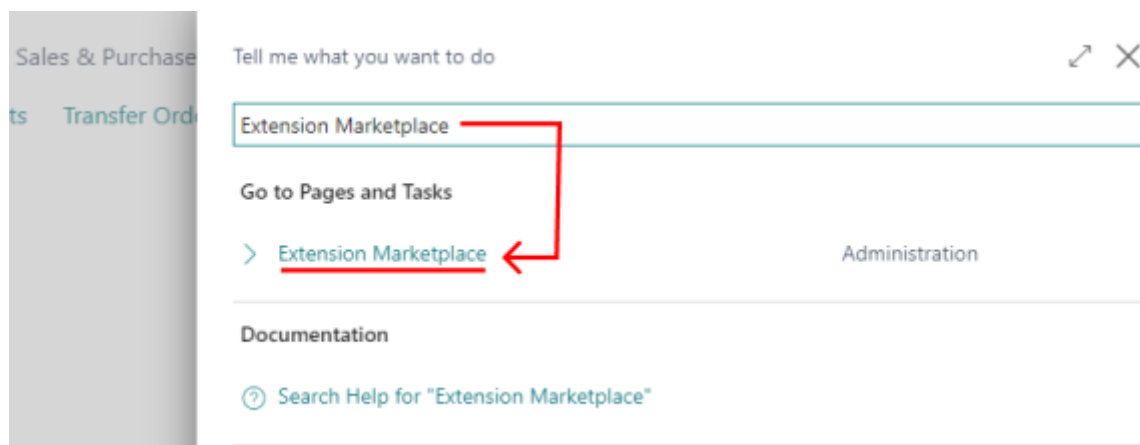
NOTE: It is required to have Mobile WMS by Tasklet Factory installed, as well as one of the following Shipment Connectors installed & correctly setup before continuing with this guide:

- Mobile WMS by Tasklet Factory ([AppSource: Mobile WMS by Tasklet Factory](#))
- Shipmondo Shipment Connector ([AppSource: Shipmondo Shipment Connector](#) & [EN SSC User Guide](#))
- Webshipper Shipment Connector ([AppSource: Webshipper Shipment Connector](#) & [EN WSC User Guide](#))
- nShift Shipment Connector ([AppSource: nShift Shipment Connector](#) & [EN NSC User Guide](#))

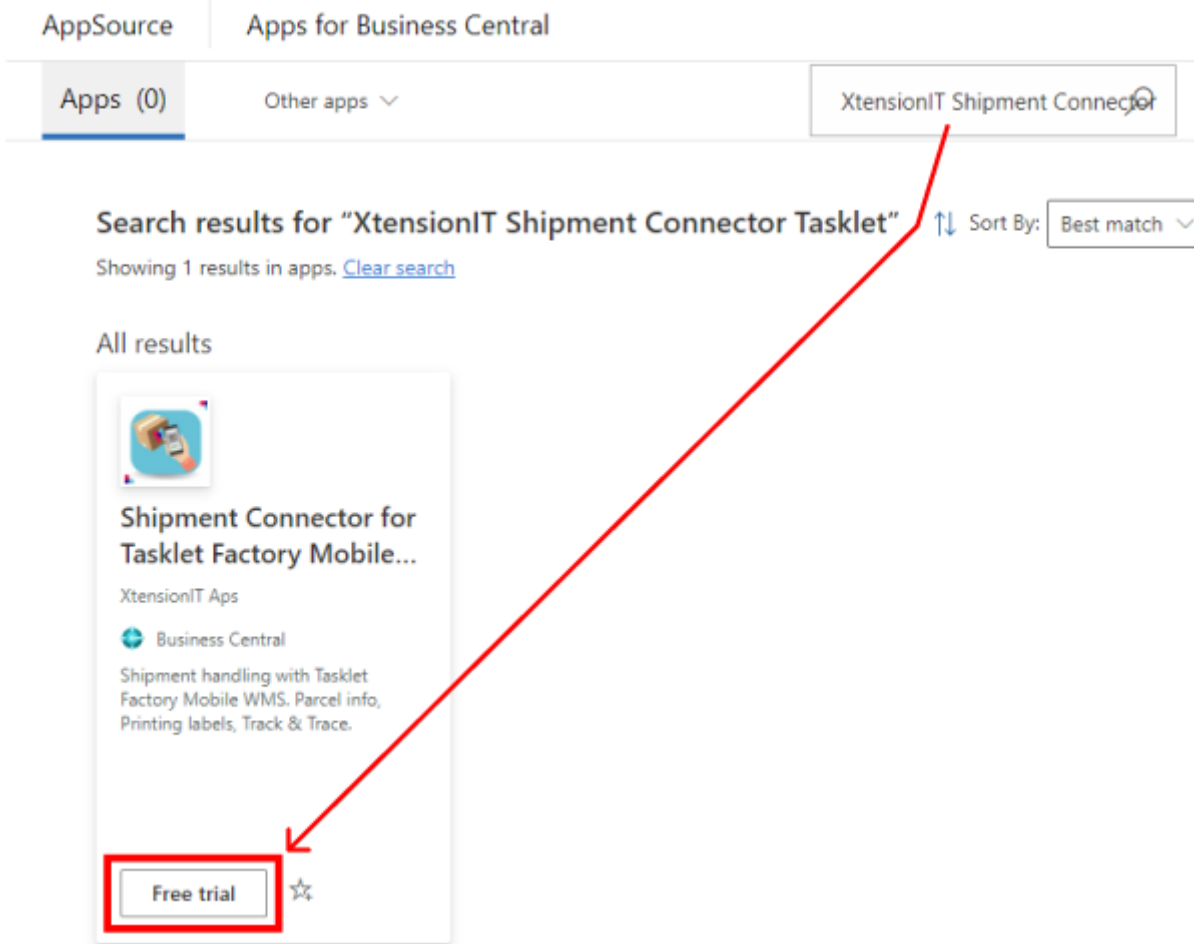
1.1 Installation of Shipment Connector for Tasklet Factory Mobile WMS

We recommend installing the extension in a test environment prior to installing it in production. A test environment can be created in Microsoft's administration center.

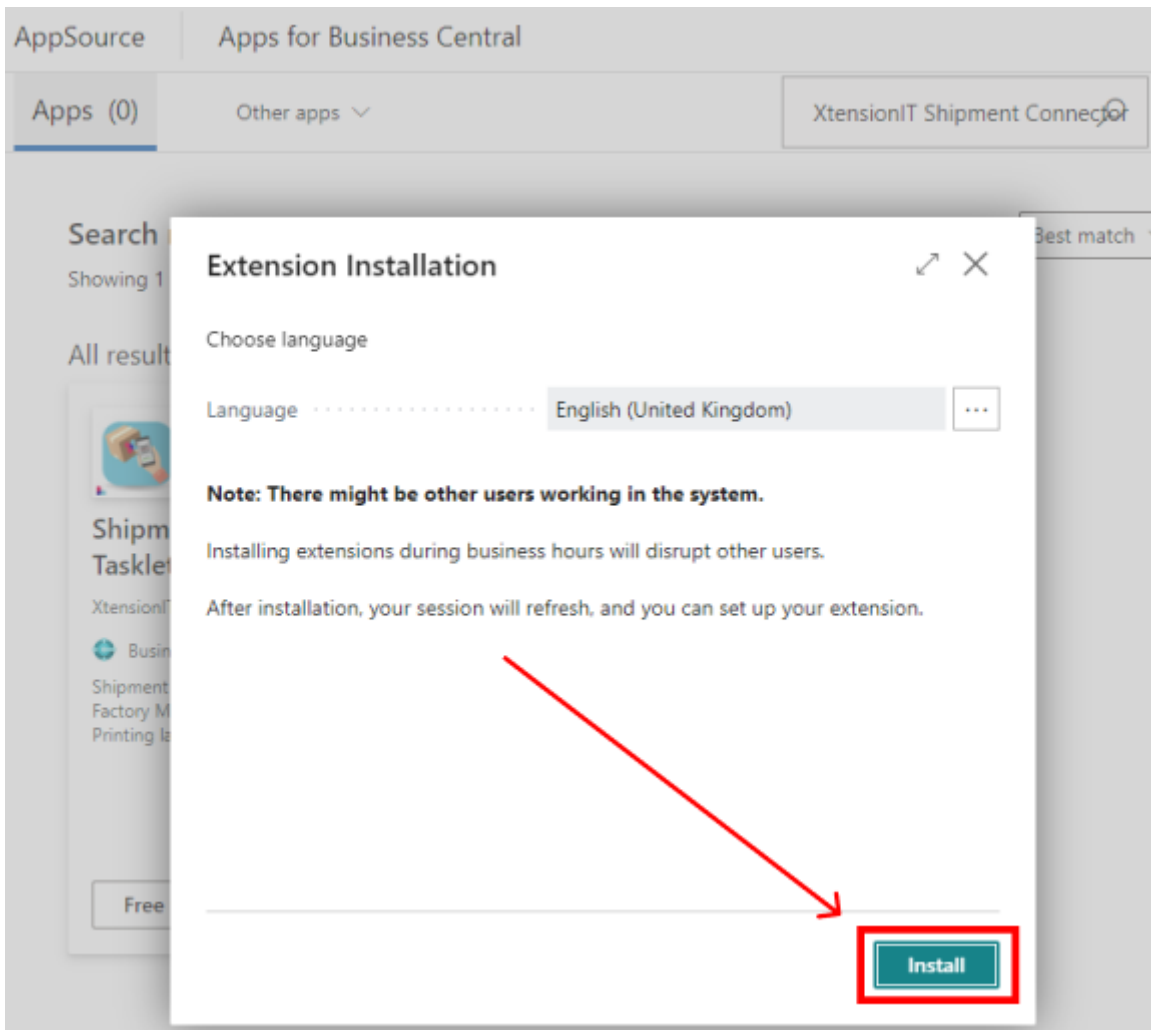
Shipment Connector for Tasklet Factory Mobile WMS can be installed via the Extension Marketplace in Dynamics 365 Business Central. This can be found by searching for Extension Marketplace via the search icon in the top right corner of Business Central or by simply using the shortcut **Alt + Q**



Once you have navigated your way to the Extension Marketplace page, it is possible to search for the desired extension. In order to find the extension you can search for **XtensionIT Shipment Connector For Tasklet Factory Mobile WMS**.



Afterwards, all there is left to do is simply install the extension as illustrated below.



When installed the following extensions are visible in Dynamics 365 Business Central (Use Alt + Q to search for **Extension Management**).

- Shipment Core by XtensionIT.
- Shipment Connector for Tasklet Factory Mobile WMS
- ShippingHub(*) Shipment Connector by XtensionIT.
- Mobile WMS by Tasklet Factory (If not already installed in environment)

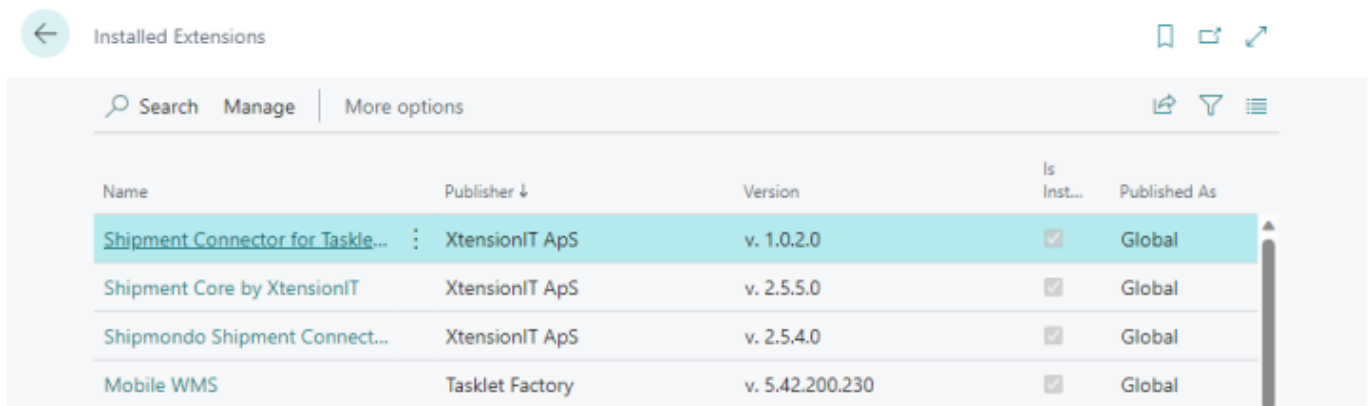
The extension **Shipment Core**, handles the communication between Dynamics 365 Business Central and The Webshipper Web Portal. The communication to Webshipper's API is completed via REST calls from Dynamics 365 Business Central.

The extension **Shipment Connector for Tasklet Factory Mobile WMS** Handles the communication between the Shipment Connector and the Mobile WMS.

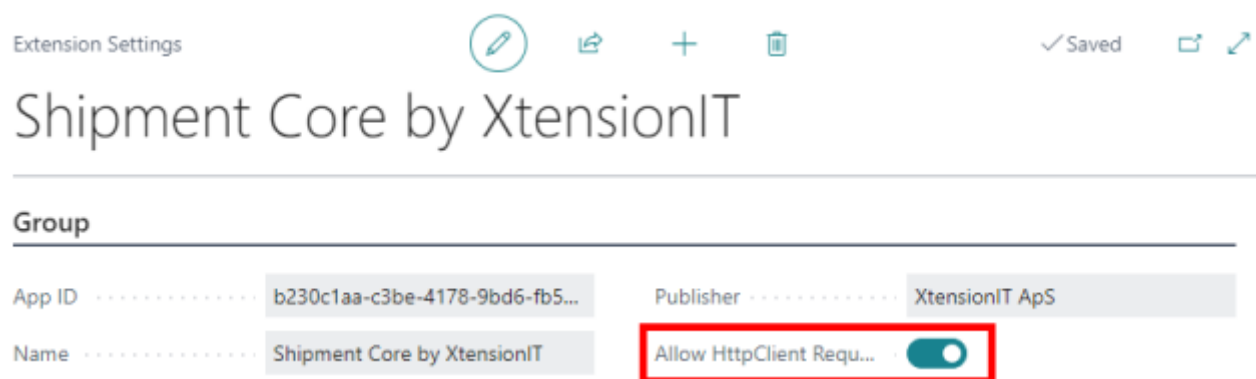
The extension **ShippingHub(*) Shipment Connector**, is utilised in order to handle the processes and logic surrounding shipments in Dynamics 365 Business Central.

(*)Shipmondo, Webshipper or nShift.

It is vital to ensure that **Allow HttpClient Requests** is activated on each extension. This allows for Dynamics 365 Business Central to send the relevant data to Webshipper. This can be accessed via the Extension Management where at the top there is a field called **Publisher**. Filter the field by Descending - afterwards the newly installed extensions will be shown at the top.



Name	Publisher ↓	Version	Is Inst...	Published As
Shipment Connector for Taskle...	XtensionIT ApS	v. 1.0.2.0	<input checked="" type="checkbox"/>	Global
Shipment Core by XtensionIT	XtensionIT ApS	v. 2.5.5.0	<input checked="" type="checkbox"/>	Global
Shipmondo Shipment Connect...	XtensionIT ApS	v. 2.5.4.0	<input checked="" type="checkbox"/>	Global
Mobile WMS	Tasklet Factory	v. 5.42.200.230	<input checked="" type="checkbox"/>	Global



Extension Settings

Shipment Core by XtensionIT

Group

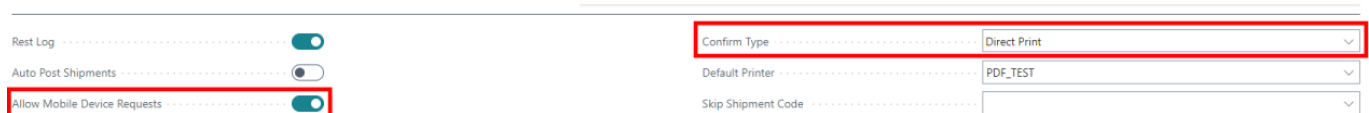
App ID b230c1aa-c3be-4178-9bd6-fb5... Publisher XtensionIT ApS

Name Shipment Core by XtensionIT **Allow HttpClient Requ...**

1.2. Shipment Connector Setup Requirements

After the installation of the extensions is completed, the setup of the Shipment Connector for Tasklet Factory Mobile WMS can commence. Firstly, ensure that a Shipment Connector is installed and setup correctly see [Section 1](#) for more. Once this step is complete you can continue.

Outside the general setup of the Shipment Connectors there are a few required options when utilizing the combination of Tasklet Mobile WMS and XtentionIT's Shipment Connectors. These are found inside Business Central on the **Shipment Settings** page (use **Alt + Q** to search).



Rest Log

Auto Post Shipments

Allow Mobile Device Requests

Confirm Type Direct Print

Default Printer PDF_TEST

Skip Shipment Code

the required options are:

- Allow Mobile Device Requests - Enabled
- Confirm Type - Direct Print

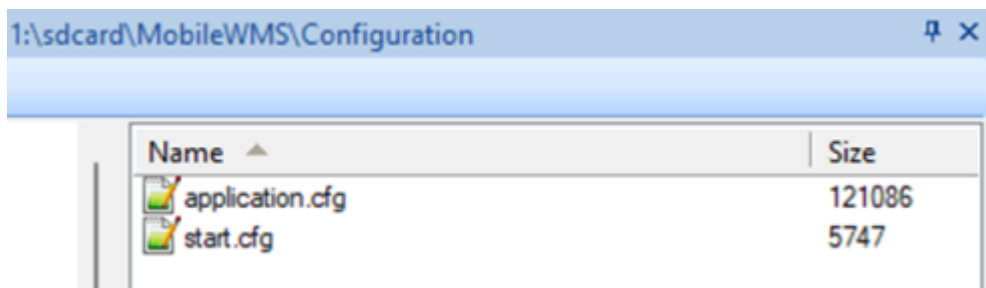
1.3. Mobile WMS Setup

There are a few prerequisites for this setup.

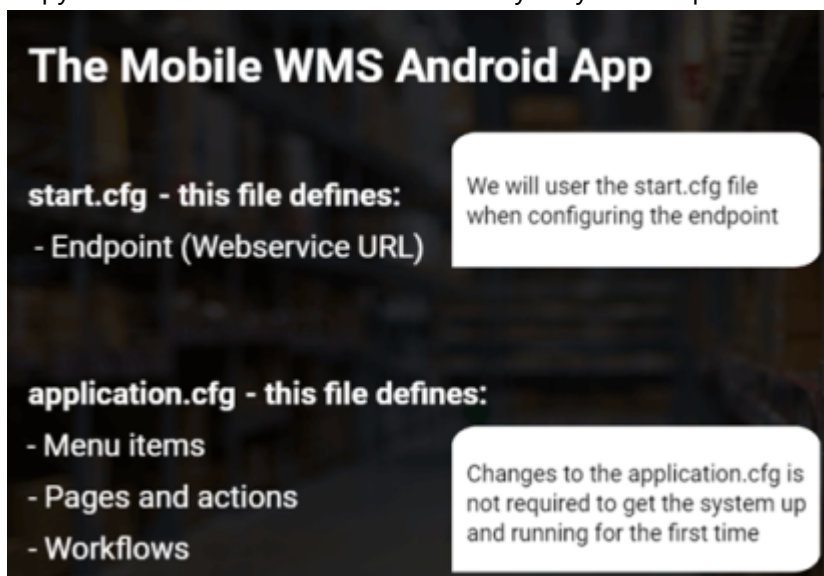
- You have installed and enrolled your device on MobiControl, so you have access to the file structure of the mobile device (if unfulfilled consult Tasklet Factory) Once SOTI MobiControl Agent (installed through PlayStore) is installed on the mobile device you will get the necessary configuration files.
- You have installed the mobile WMS application on your Mobile Device (if unfulfilled consult Tasklet Factory)

1.3.1. Configuration files and Endpoints Setup

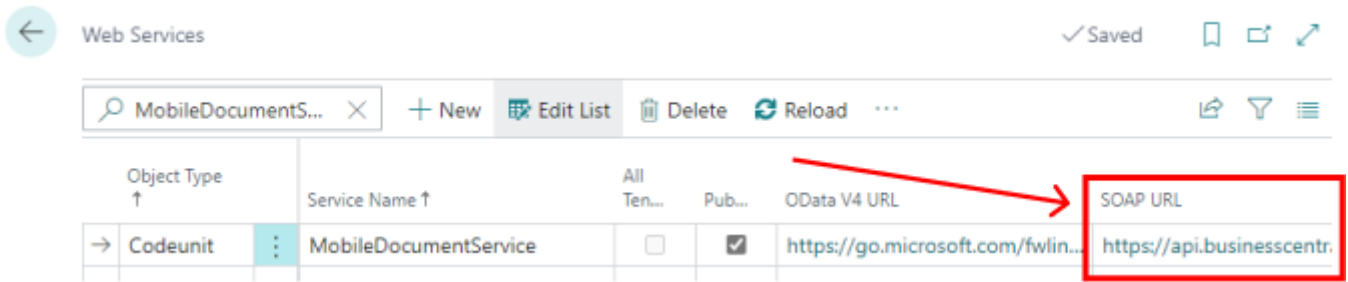
There are two configuration files for the mobile device which can be found through MobiControl.



Copy these two files and save them locally on your computer.



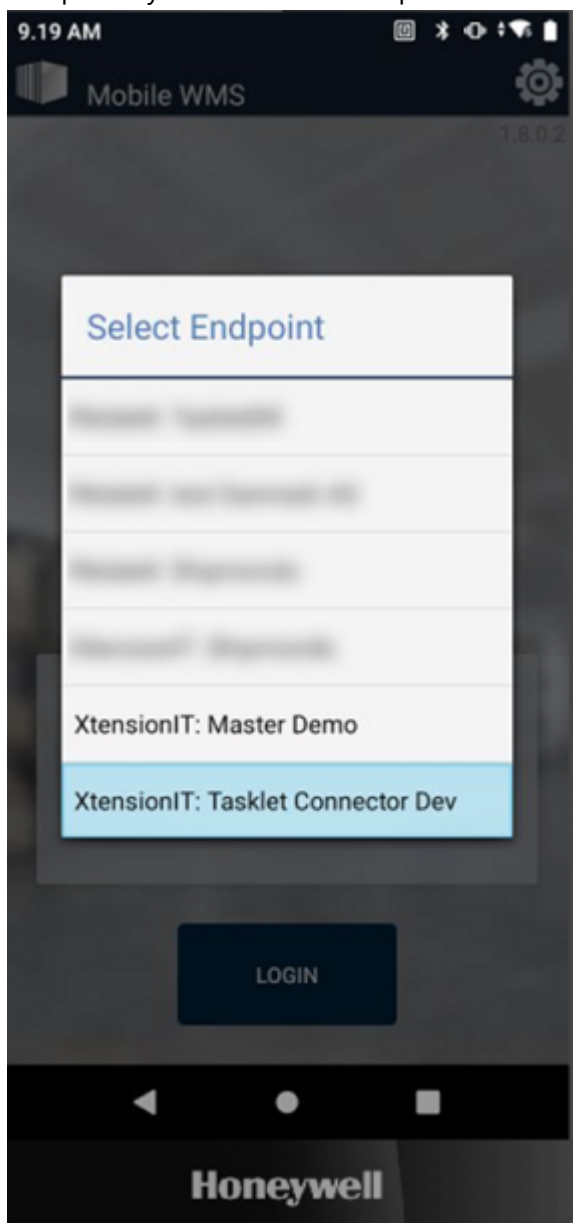
The files can be opened with programs such as Notepad++ or VsCode or alternatively any other cfg compatible program. Firstly, we are going to open the **start.cfg** file to change the Endpoint. Think of the endpoint as the company environment that you want to connect your mobile device to. To add the endpoint, you need to retrieve the SOAP URL which can be found in your Business Central environment. Search for **Web Services**, once the page is opened up use the search field to look for "**MobileDocumentService**". Copy the SOAP URL from here.



Once you have opened up the start.cfg file navigate to the endpoint segment of the file and insert the SOAP URL copied from Business Central in the "address" field.

```
<!-- ENDPOINTS -->
<endpoints>
  <endpoint id="XtensionIT" displayName="XtensionIT: Tasklet Connector Dev" protocol="classic" type="D365BC" address="https://api.businesscentral
  <azureconfiguration authority="https://login.microsoftonline.com/75470521-2817-448e-9c2f-7bc7428f3a27/oauth2/authorize" scopes="https://api.ou
</endpoint>
```

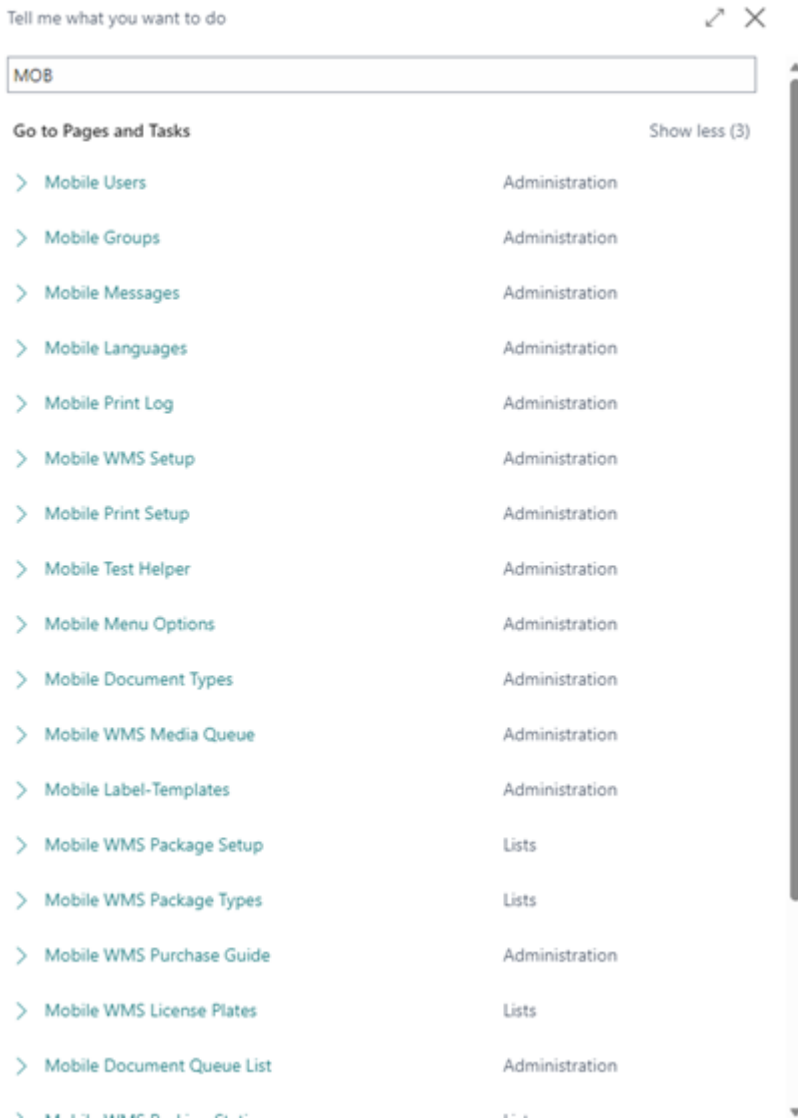
Save the start.cfg file and upload it to device through the file path available via MobiControl. Once this is completed you will find the endpoint available on your Mobile WMS device.



1.3.2. Basic Configuration - Mobile Users

For the next step of the setup, we turn our attention to Business Central. There are several setup pages for the Mobile WMS. And they are all prefixed with "mob". To see them all in Business Central search for "Mob" and

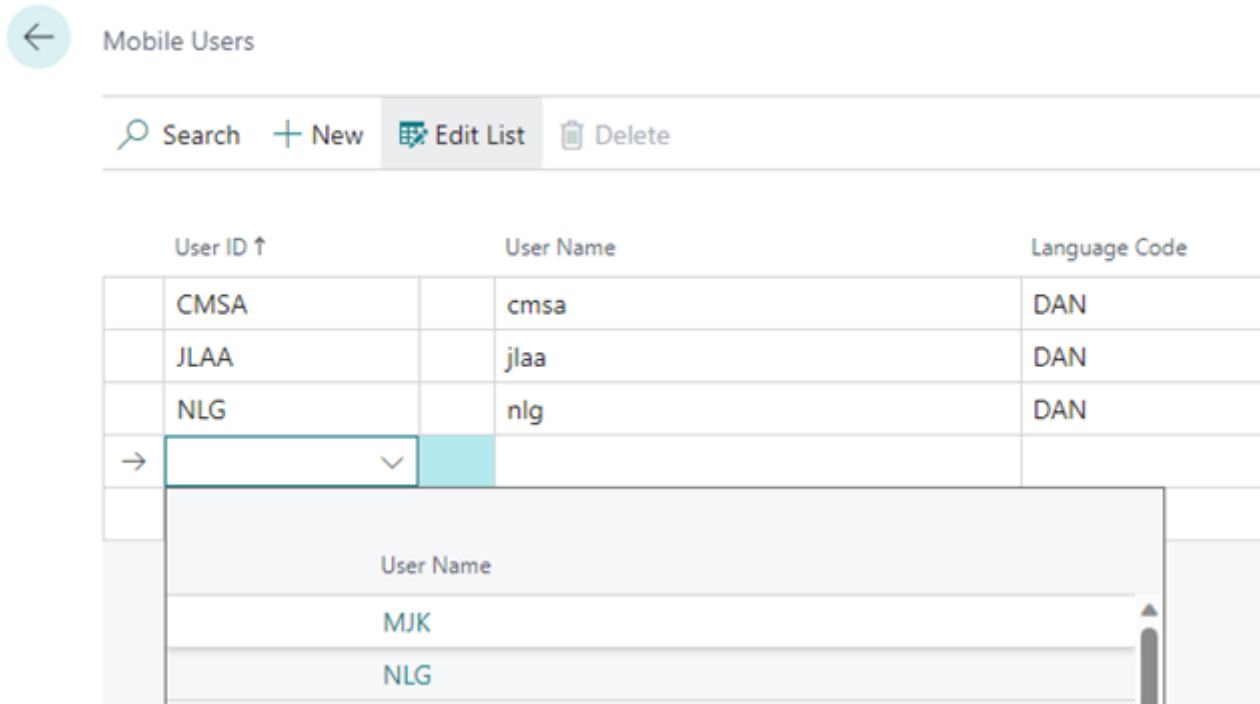
then select "show all".



The first step is to setup the mobile Users. The Warehouse users must be mobile users to gain access to the mobile device. The user must exist as a Business Central user. That task is beyond the scope of this guide, however you can perform that task here:

- Cloud: Users are maintained in Azure CSP (Cloud Solution Provider) portal (named users).
- On-Prem: Users maintained from "Users" page.

Open the "Mobile Users" page use the field-lookup to add users as Mobile Users.



Each Mobile User must also be setup as "Warehouse Employee" for the locations that the given user should be able to handle warehouse processes from the mobile device.

- Navigate to "Warehouse Employees" in Business Central
- Insert each user and select location
 - Repeat for all relevant locations
- Mark the primary working location as default

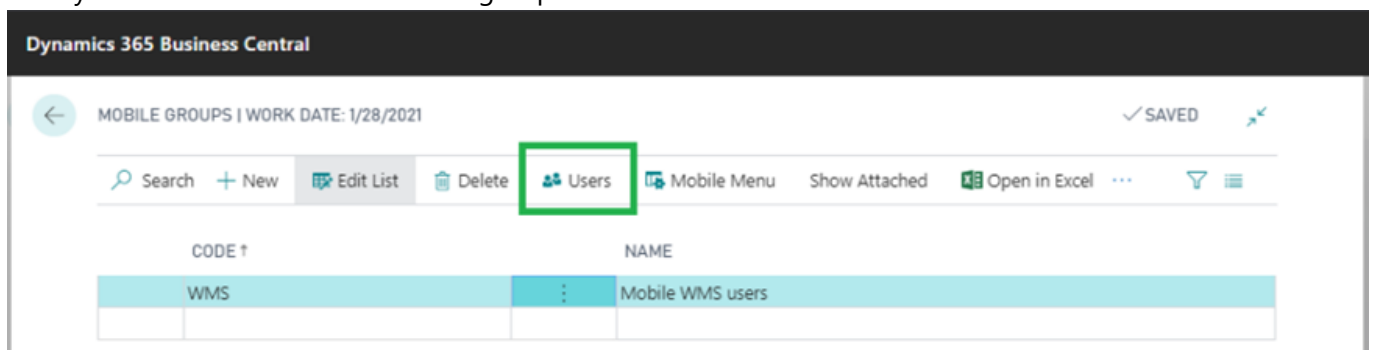
1.3.3. Basic Configuration - Mobile Groups

Mobile users are required to be part of a mobile group.

A default group named "WMS" is automatically generated upon installation, along with a Mobile Menu. The most common scenario is for all relevant users to be added to the default "WMS" group. This ensures that all users have access to the same features.

Step 1 – Navigate to "Mobile Groups" in Business Central

Here you can add users to the mobile groups.



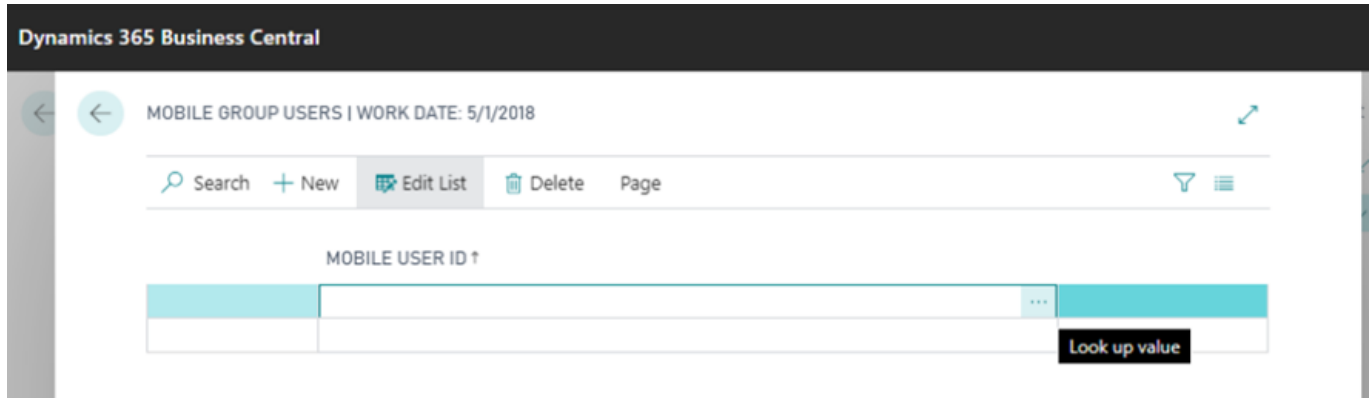
Step 2 – Select or create a new mobile group

From the Mobile Groups page you can select or add new mobile groups

- Tasklet Factory recommends using the default "WMS"-group
- If it is desired new groups can be created
- Select hereafter the "Users" button

Step 3 – Add users to group

Utilize the field-lookup to add users to the preferred group.



Ensure the Mobile WMS users have the necessary permission set. Tasklet Factory Recommends the following permission set:

- MOBWMSUSER Mobile WMS User
- D365 BASIC Dynamics 365 Basic Access
- D365 SETUP Dyn. 365 Company data setup
- D365 INV DOC, POST Dyn. 365 Post inventory doc
- D365 JOURNALS, POST Dynamics 365 Post journals
- D365 PURCH DOC, POST Dyn. 365 Post purchase doc.
- D365 SALES DOC, POST Dyn. 365 Post sales doc.
- D365 WHSE, EDIT Dynamics 365 Create warehouse.
- D365PREM MFG, EDIT Dyn. 365 Create manufacturing ('comma' in BC19 or newer)
- D365PREM MFG. EDIT Dyn. 365 Create manufacturing ('dot' in BC18 or older)

Additional configurations of Tasklet Factory's mobile WMS can be found [here](#).

1.4 Pack & Ship Setup

This section details the mandatory requirements needed to utilize the Pack & Ship module on the Mobile WMS

1.4.1. Mobile WMS Package Types

On the mobile WMS package types page in Business Central, users can setup the various package types that are used to populate License Plates with information. With the "Synchronize Package types" button it is possible for users to synchronize the package types from XtensionIT's Shipment Connector solutions to the Mobile WMS system henceforth making them available for use on the mobile device.

NOTE: if you have already setup the data for your package types in the Shipment Connector that data will accurate be transferred to the Mobile WMS package types. Removing the redundancy of having to repeat data entry.

Mobile Package Types

Code 4	Shipping Provider Id	Shipping Provider Package Type	Description	Unit	Default
→ SCT-57037-2C	SCT	2C	UPS Express Box Large	cm	<input type="checkbox"/>
SCT-57037-2B	SCT	2B	UPS Express Box Medium	cm	<input type="checkbox"/>
SCT-57037-2A	SCT	2A	UPS Express Box Small	cm	<input type="checkbox"/>
SCT-57037-21	SCT	21	UPS Express Box	cm	<input type="checkbox"/>
SCT-57037-04	SCT	04	UPS Express Pak	cm	<input type="checkbox"/>
SCT-57037-03	SCT	03	UPS Express Tube	cm	<input type="checkbox"/>
SCT-57037-02	SCT	02	Own packaging	cm	<input type="checkbox"/>
SCT-57037-01	SCT	01	UPS Express Envelope	cm	<input type="checkbox"/>
SCT-53-PC	SCT	PC	Parcel	cm	<input checked="" type="checkbox"/>
SCT-53-EN	SCT	EN	Envelope	cm	<input type="checkbox"/>
SCT-53-CT	SCT	CT	Carton	cm	<input type="checkbox"/>

1.4.2. Mobile WMS Package Setup

On the Mobile WMS Package Setup page in business Central, users can setup default values that may be required of the Shipping Agents. It is possible to specify which fields should be used and/or specify default values to be used when registering the steps on the mobile device.

The package Types available on the mobile device will be filtered by the selected Shipping Agent on the Warehouse Shipment.

The fields available for customization are the following:

- Package Type
- Weight
- Length
- Height
- Width
- Loading Meter (LDM)

Mobile Package Setup

Shipping Agent Code 1	Package Type 1	Default Package Type	Register Weight	Default Weight	Register Length	Default Length	Register Width	Default Width	Register Height	Default Height	Register Loading Meter (LDM)	Default Loading Meter (LDM)
→ 10	SCT-242-PL1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	120	<input type="checkbox"/>	80	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	2.4
6	SCT-53-PC	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	25	<input type="checkbox"/>	25	<input type="checkbox"/>	25	<input type="checkbox"/>	0

NOTE: The Shipping Agent Codes can be changed to better suit the users.

1.4.3. Mobile WMS Setup

Before the "Pack & Ship" process can be utilized it is required to go to the "Mobile WMS Setup" page. The "Pack & Ship" module requires that Tote Pick is enabled, and setup as seen below in blue. This is necessary due to License Plates being created on the basis of the collected Tote ID's.

There are three different ways of collecting the Tote ID's during the pick process, however, Pack & Ship only supports 1 method.

Tote Per – Setting	Effect	Supported in “Pack & Ship”
Destination No.	Tote ID’s per Recipient Customer	False
Source No.	Tote ID’s per sales Order	False
Whse. Document No.	Tote ID’s per Whse. Shipment doc.	True

To unlock the Pack & Ship segment you must first enable Pack & Ship and then enable Tote Picking (Highlighted in a blue square as seen below). Once this is done the Pack & Ship segment is available.

The screenshot shows the 'Mobile WMS Setup' interface. At the top, there are navigation icons and a 'Saved' status. Below the title, there are dropdown menus for 'Actions', 'Related', and 'Automate'. The 'General' section contains several settings:

- Sort Order Pick: Worksheet
- Sort Order Put-away: Worksheet
- Use Base Unit of Mea...:
- Enable Pack & Ship: (highlighted in blue)
- Enable Tote Picking: (highlighted in blue)
- Tote per: Whse. Document No.
- Skip collection of Deli...:
- Use Mobile TimeZon...:
- Post breakbulk lines ...:
- Allow Blank Variant C...:

The 'Pack & Ship' section is highlighted in a red square and includes:

- License Plate Numbe...: LP
- Weight Unit: KG
- Dimensions Unit: CM
- Collect Staging Hint ...:
- Collect Packing Statio...:

Highlighted in the red square is the Pack & Ship setup segment. Here you can setup the following:

- License Plate Number Series (Optional)
 - The number series to be used to automatically assign new unique License Plate numbers.
 - If the number series is blank, the user will be asked to scan a new License Plate number, when either of the following functions are used: “Add New License Plate”, “Combine All contents to new” or “Move all License Plates to new”.
- Weight Unit
 - Specifies the Unit of Measure used in help messages for steps on the mobile device.
- Dimensions Unit
 - Specifies the Unit of Measure used in help messages for steps on the mobile device.
- Pick Collect Staging Hint
 - If enabled, the user will be prompted for a “Staging hint” when posting a Pick for Whse. Shipments.
- Pick Collect Packing Station
 - If enabled, the user will be prompted for a “Packing Station” when posting a Pick for Whse. Shipments.

1.4.4. Mobile WMS Packing Stations

NOTE: This setup is optional. Depending on the users' warehouse setup some may elect to utilize packing stations as part of their warehouse processes.

If the use of packing stations is enabled in the Mobile WMS Setup and at least one Packing Station has been created the user can choose a packing station from the mobile device during the picking and packing processes. Users can setup the various packing stations to be used as staging information on the Warehouse Shipment and License plates.

Only Packing Stations with or a matching location code with the given Warehouse Document can be selected on the mobile device.

CRONUS International Ltd. | Sales ▾ Purchasing ▾ Inventory ▾ Posted Documents ▾ | ≡

Mobile WMS Packing Stations: All ▾ | 🔍 Search + New 🗑️ Delete 📄 Edit List 🔄 Synchronize Packing Stations 🖨️ Printer Label Template setup 📄 🗑️

Code ↑	Description	Location Code
PACK 1	PACK 1	WHITE
PACK 2	PACK 2	WHITE
PACK 3	PACK 3	WHSEBIN
PACK 4	PACK 4	WHSEBIN

1.4.5. License Plate Labels Setup (Printer Per Packing Station)

This feature requires the **Tasklet Print Cloud Service** more information on that can be found [here](#) and the setup for the Cloud Print Service can be found [here](#).

To use the **"License Plate"** and **"License Plate Content"** label, you must enable and assign a printer to those **"Label-templates"**. License Plate IDs are automatically assigned to license plate labels from the specified Number Series on the label-temple. The Number Series is required and must be populated.

Setup Printer for specific combination of label-template and Packing Station If you have multiple label printers and want to suggest a specific printer for a Packing Station, you can do this from the Packing Station list page: Open the Printer Label Template Setup to specify the specific printer you want to use for each label-template and Packing Station.

CRONUS International Ltd. | Sales ▾ Purchasing ▾ Inventory ▾ Posted Documents ▾ | ≡

Mobile WMS Packing Stations: All ▾ | 🔍 Search + New 🗑️ Delete 📄 Edit List 🔄 Synchronize Packing Stations 🖨️ Printer Label Template setup 📄 🗑️

Code ↑	Description	Location Code
PACK 1	PACK 1	WHITE
PACK 2	PACK 2	WHITE
PACK 3	PACK 3	WHSEBIN
PACK 4	PACK 4	WHSEBIN

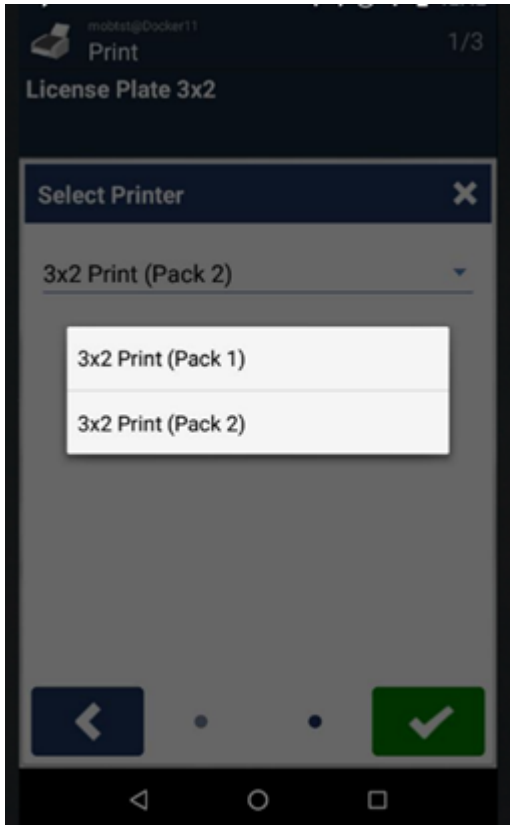
In this example the printer named "3x2 Print (Pack 1)" is setup to be suggested as default printer for label-template "License Plate 3x2" and Packing Station "PACK 1".

Printer/Label-Templates Assignments | Work Date: 1/25/2024 ✓ Saved

Search + New Edit List Delete Assign All Label-Templates Actions

Label-Template Name ↑	Printer Name ↑	Packing Station Code ▼
→ License Plate 3x2	3x2 Print (Pack 1)	PACK 1
License Plate Contents 4x6	4x6 Print (Pack 1)	PACK 1

This setup will result in the following default printer suggestion, but users can manually choose another printer if they so desired. This setup will result in the following:



If you need to share a printer between some Packing Stations (but not all), you will need to make a copy of the Printer name for the extra Packing Station.

2. Pack & Ship And XtensionIT's Shipment Connectors

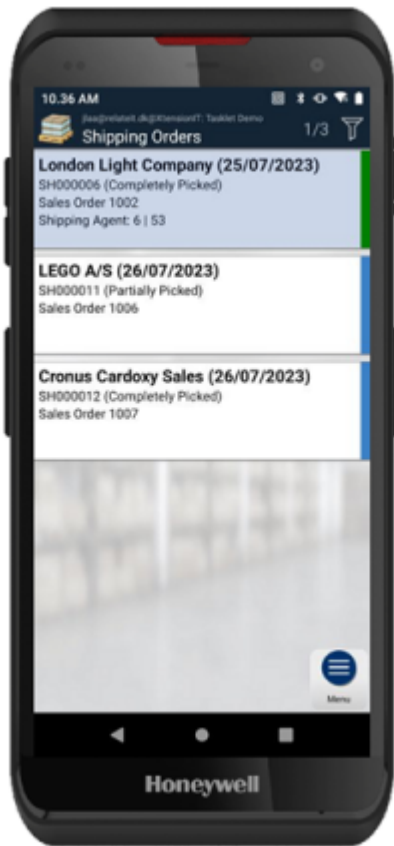
This section details the common practice for Packing and shipping orders.

2.1. Shipping Orders

After having partially or completely picked items for a given Warehouse Shipment – navigate to the main menu and select the “Pack & Ship” module.



Once opened up users will see a list of Warehouse Shipments with associated “License Plates” – These License plates have not been populated with data at this time. The list only consists of Warehouse Shipments that have been partially or completely picked.

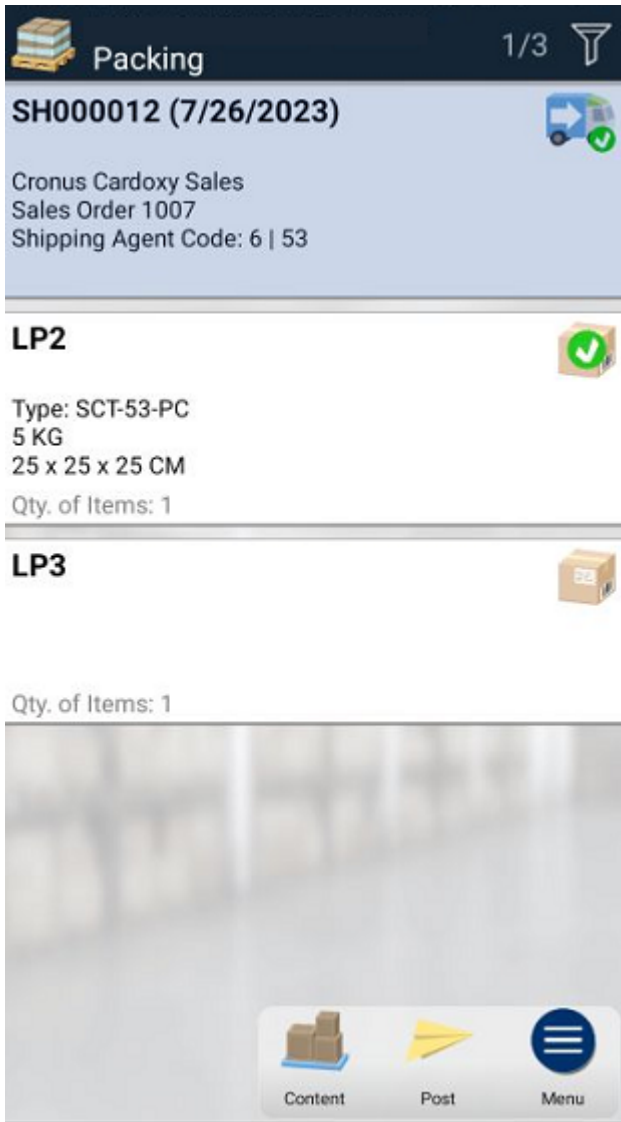


The common work practice is as follows:

- Scan a License Plate (a tote – the box used in the picking process) – once scanned the packing window containing the specified license plate that have been scanned will be shown along with all other related license plates. Alternatively, users can manually select a ship from the list of the mobile device.
- Prepare packages and/or pallets to be shipped based on the picked license plates, including reorganizing and packing goods as needed.

2.1.1. Packing

When the Packing page has been opened for a specific Warehouse Shipment it will show the following information:



← Shipment Information
Shipping Agent &
Service

← License Plate #1

← License Plate #2

Shipment information is the top element.

- Shipment number and Shipment Date
- Customer name
- Source document
- Shipping agent & Shipping agent service information
 - This can be predefined and autofilled from Warehouse Shipment or if the Customer Card has shipping agent & service filled out.
- Information about packing station if enabled and available
 - Specified as part of the pick process (can be changed from the mobile device)
- Status Icon changes
 - When all the necessary shipment information has been detailed the shipping icon will indicate so:



License Plates – Subsequent elements

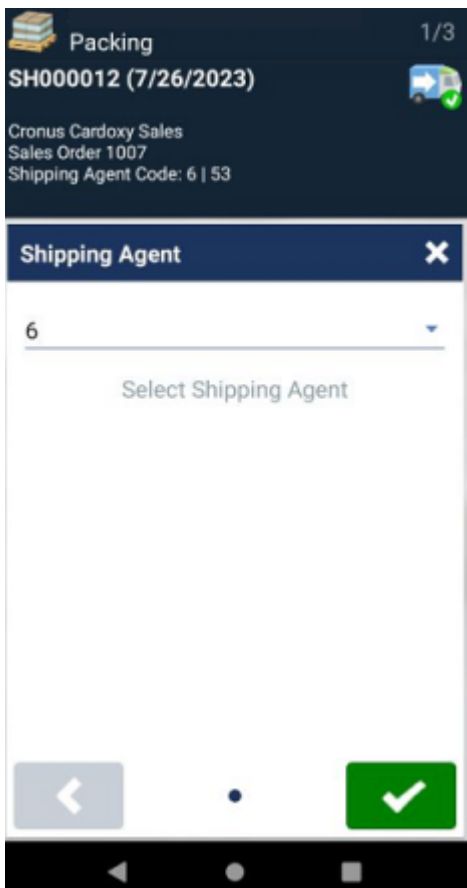
- License Plate no.
- Staging hints (if enabled)

- Package type, Weight, Dimensions etc. (defined by mobile Package Setup)
- Qty. of items (Qty. base) for included items
- Status icon
 - When all the necessary License Plate information has been detailed the packing icon will indicate so:



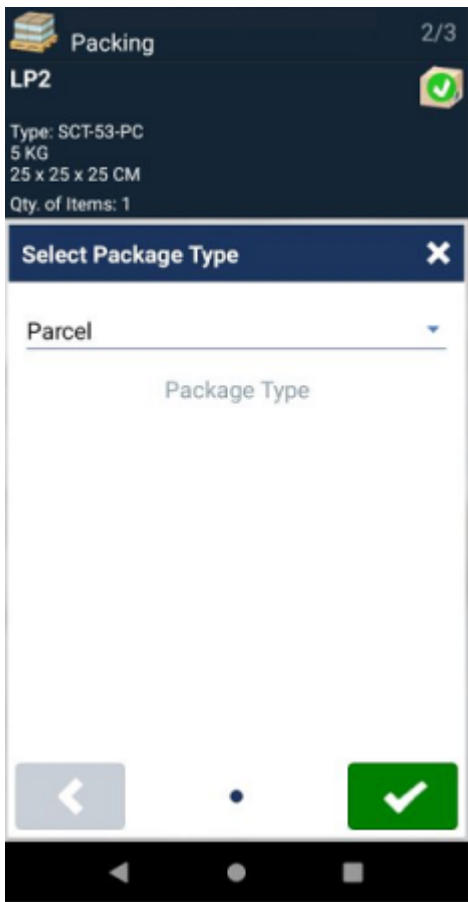
2.1.2. Registering Shipment Information

Register "Shipping Agent and Shipping Agent service" information (as mentioned previously this is commonly predefined in Business Central) – The user can always edit these values. **NOTE:** The Shipping Agent & Shipping Agent Service values can be altered to fit the user's preference e.g. PostNord instead of 6 (see [section 1.2.5 Shipping Agent & Shipping Services in a Shipment Connector User Guide](#)).

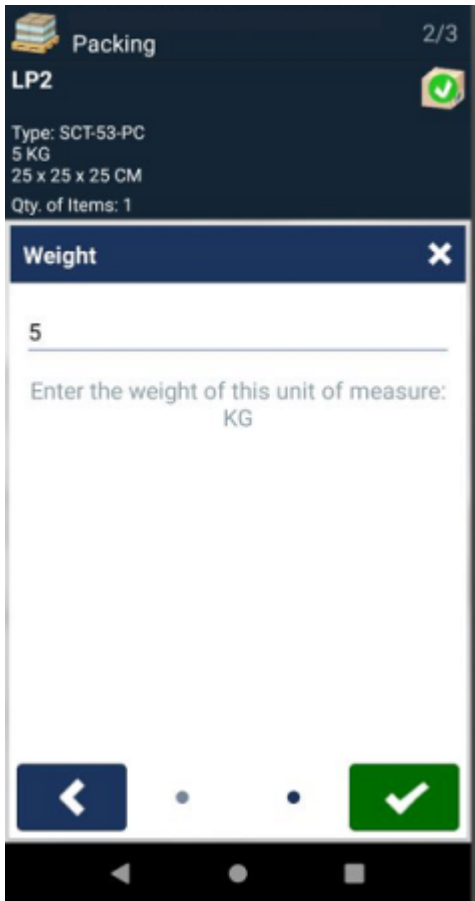


2.1.3. Registering License Plate(s)

Register each individual License Plate



- Scan a License Plate or select from the list
 - Enter the necessary information as defined by the requested steps. E.g. Package type, weight etc. (predefined by [Mobile Package Setup](#))
 - The steps are defined in [Mobile WMS Package Types](#)
- Repeat the process for each License Plate available
 - The user can always change the values by selecting the element
- After the steps are completed, the information is updated for the License Plates in Business Central and the list is refreshed.



2.1.4. Posting

When License Plate(s) has been registered and the icon shows “OK”, the packing is ready to be posted.

Partial Shipments Only the license Plates marked as “OK” will be included in the posting – this means that users can make partial shipments but always with the entire contents from the included license plates.

Users can post multiple times on the same Packing/Shipment.

Posting The Packing will result in the following actions in BC

- The Warehouse Shipment Will be posted with the quantities from the License Plates contents
- The Shipment Connectors will create a Waybill with all the necessary Shipment information from the License Plates and forward the information to the Shipping Agent.
- All included License Plates will be marked as “Transferred to Shipping” and get an updated “Shipping Status” that indicates that they have been handled