User guide:

# Shipmondo Shipment Connector by XtensionIT

Last updated: 07.28.2023

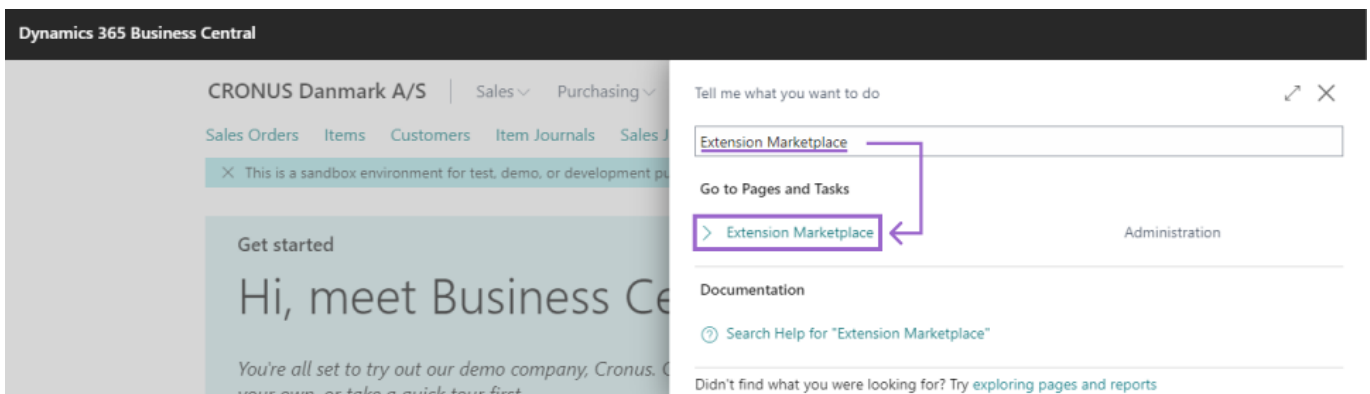# 1 Shipmondo Shipment Connector by XtensionIT

This guide contains information about the installation, setup and use of the extension **Shipmondo Shipment Connector** by XtensionIT.

The extension is compatible with Microsoft Dynamics 365 Business Central and enables the user to handle shipments in Dynamics 365 Business Central. The extension works by taking the shipment information that is inputted in Dynamics 365 Business Central and sending it to the Shipping Agent via Shipmondo's API. Track & Trace information is then returned via Shipmondo's API and the necessary parcel labels are printed.

## 1.1 Installation of Shipmondo Shipment Connector

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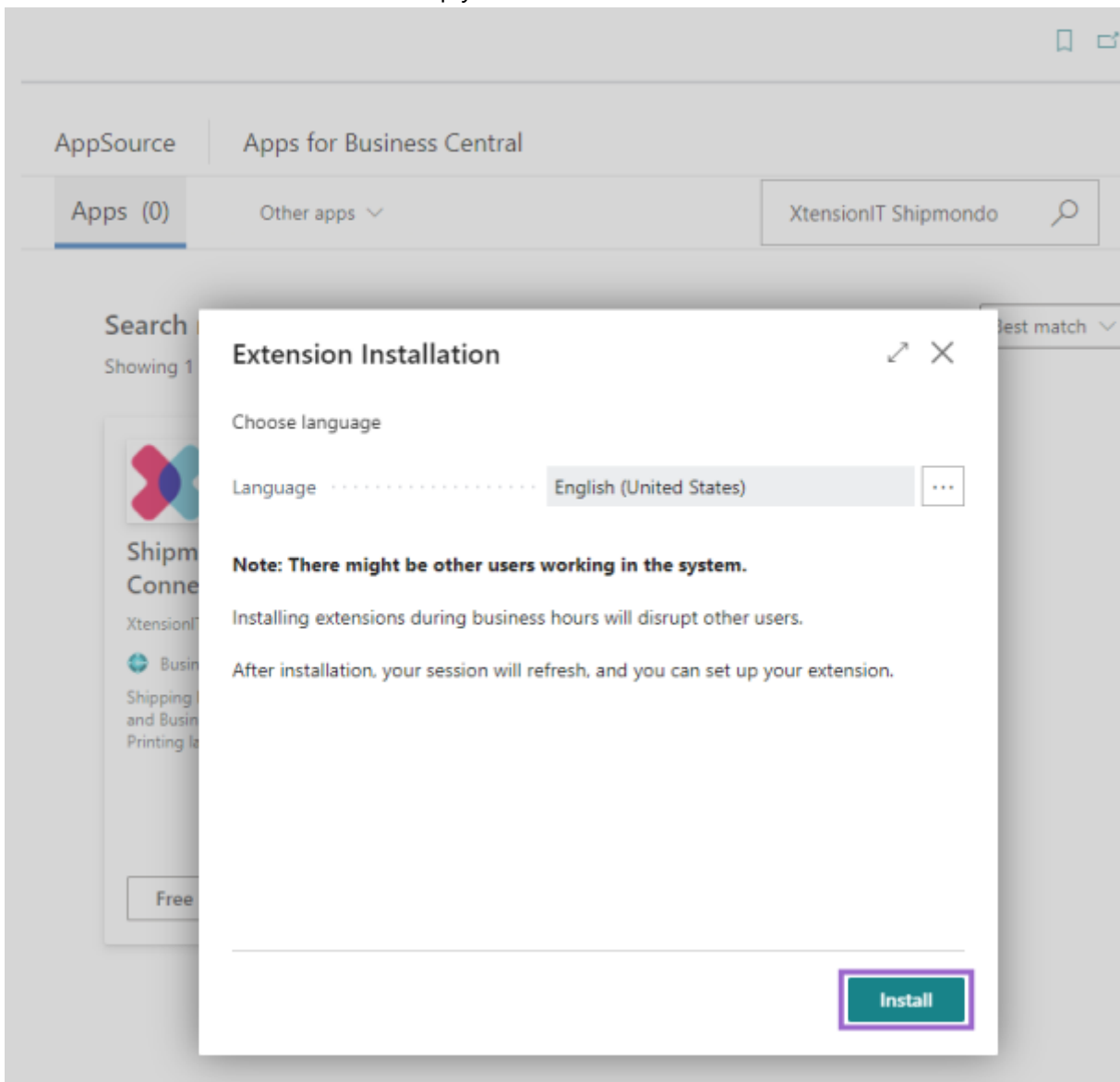
Shipmondo Shipment Connector can be installed via the Extension Marketplace in Dynamics 365 Business Central. This can be found by searching for Extension Marketplace via the search icon in the top right corner of Business Central or by simply using the shortcut **Alt + Q**



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 Shipment Connector extension you can search for **XtensionIT Shipmondo**.
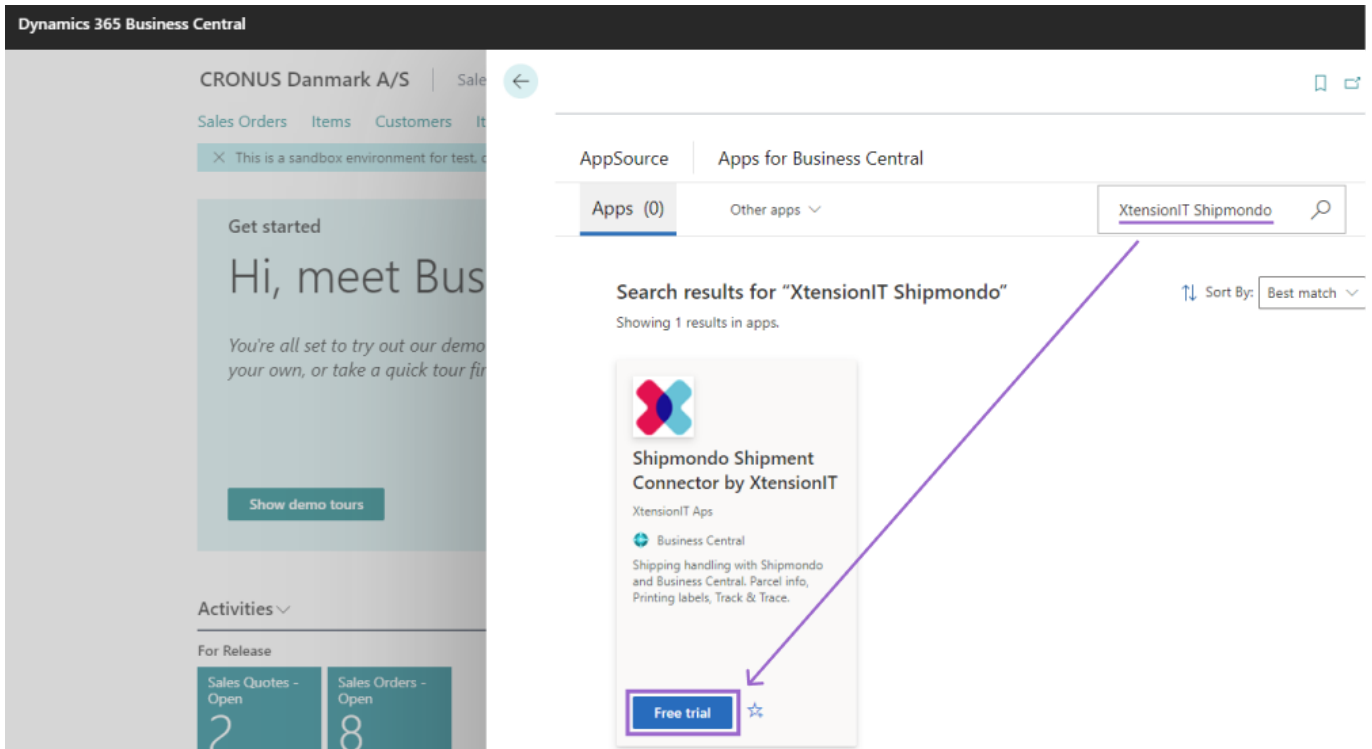
Afterwards, all there is left to do is simply install the extension as illustrated below.

When installed the following extensions are visible in Dynamics 365 Business Central (Use Alt + Q to search for **Extension Management**).
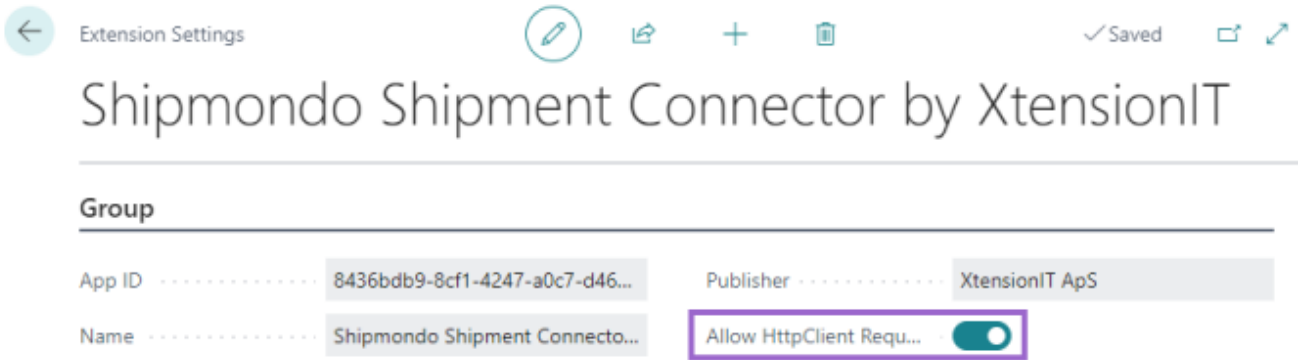
> Shipment Core by XtensionIT.
> Shipmondo Shipment Connector by XtensionIT.

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

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

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 Shipmondo 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.
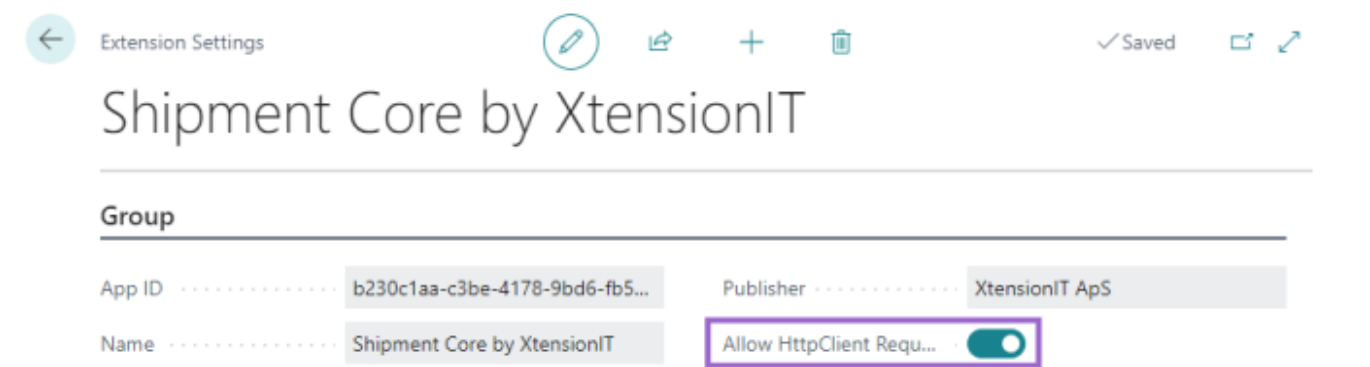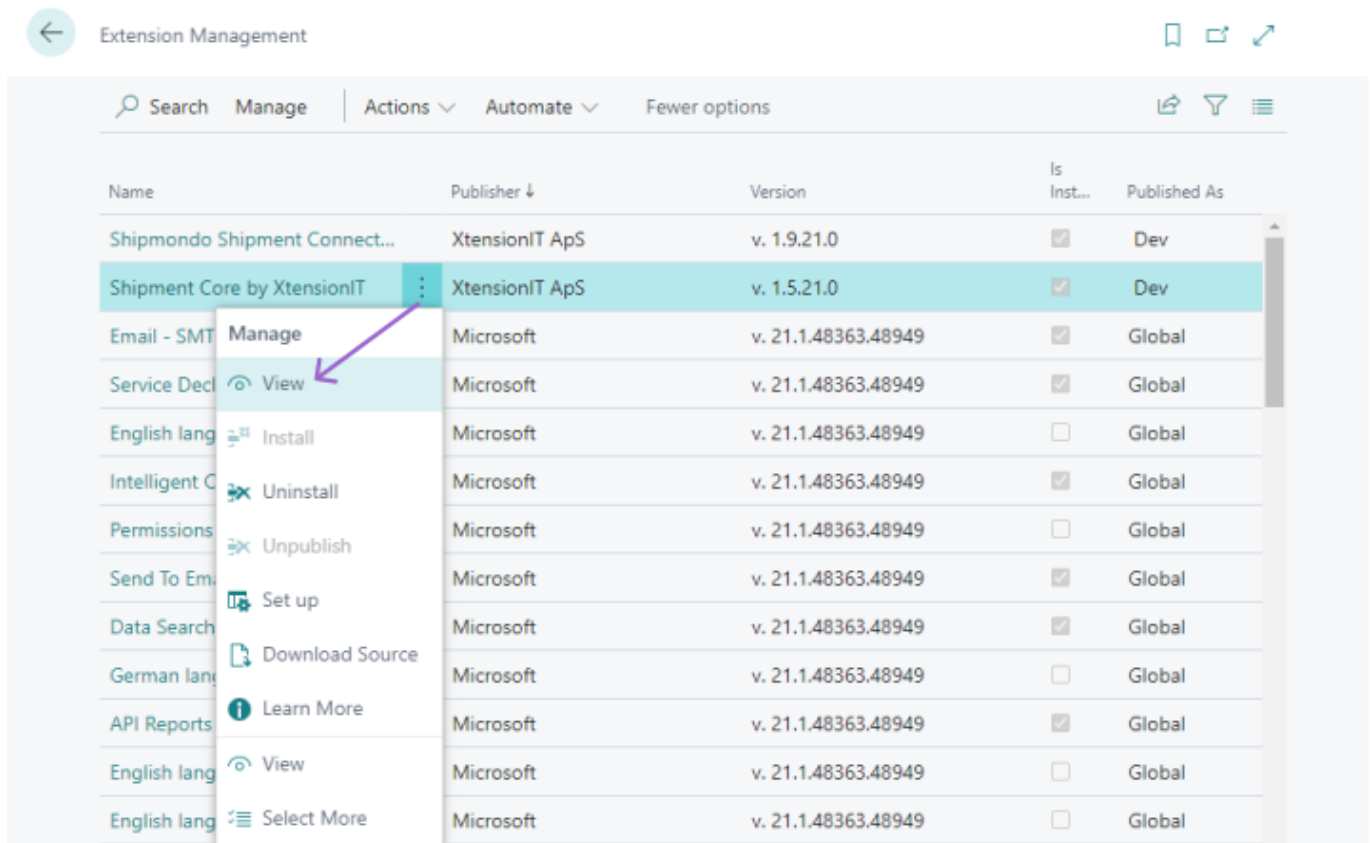
## 1.2. Setup of Shipmondo Shipment Connector

After the installation of the extensions is completed, the setup of the Shipmondo Shipment Connector can commence. Firstly, ensure that connection is established to the Shipmondo Web Portal. Afterwards, setup the integration between The Shipmondo Web Portal and the Shipmondo Shipment Connector.
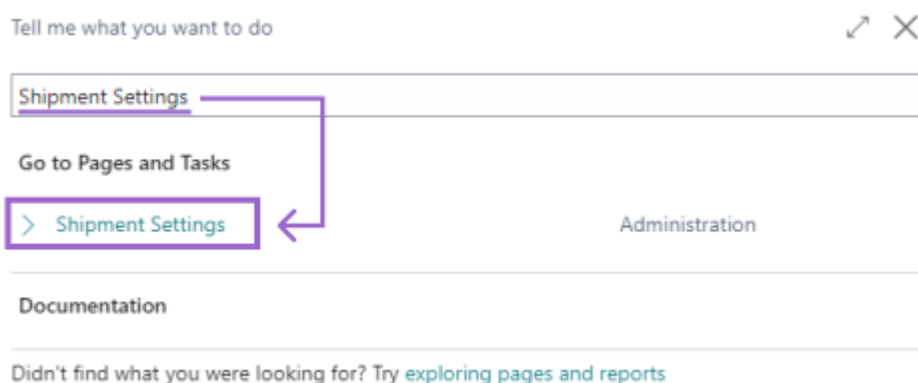
### 1.2.1 Shipmondo Web Portal

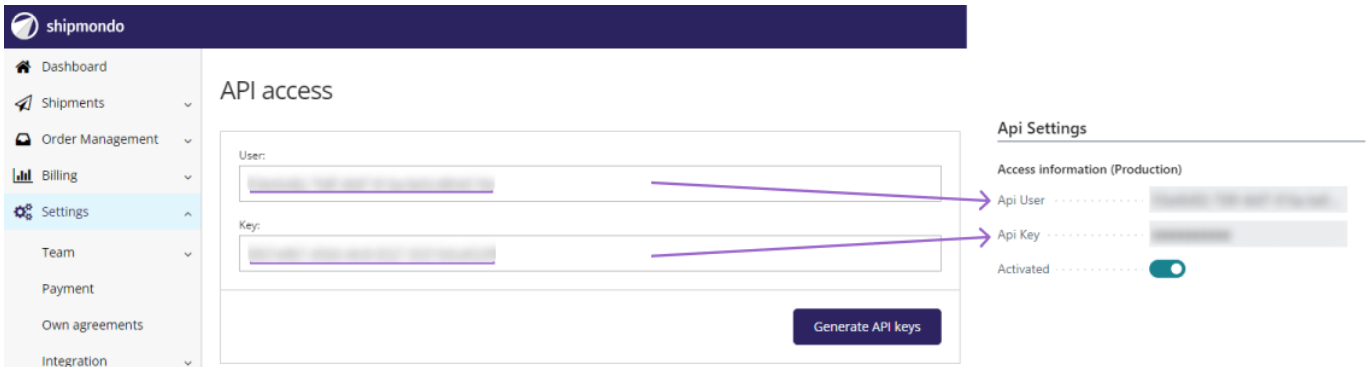Begin the setup with the use of the Shipmondo Web Portal.

> 1. Create a free account at Shipmondo Welcome to Shipmondo
> 2. Create API Access
> 3. Install Shipmondo Print client
> 4. Setup Shipmondo printers

### 1.2.2 Shipmondo Shipment Connector

Utilise the search function (Alt + Q) in order to find **Shipment Settings**.

> 1. Insert **API User**, **API Key** from the Shipmondo Web Portal.



> 2. Secondly, you are going to enable **activate** and **Test Mode**



## 1.2.3 Setup of Recipient Countries

Before the process of retrieving data from Shipmondo begins, it is essential that the recipient countries we would like to ship within is setup correctly. This is done by opening **Shipment Settings** (Search via Alt + Q) and then accessing the following in the ribbon **Related > Recipient Countries**.
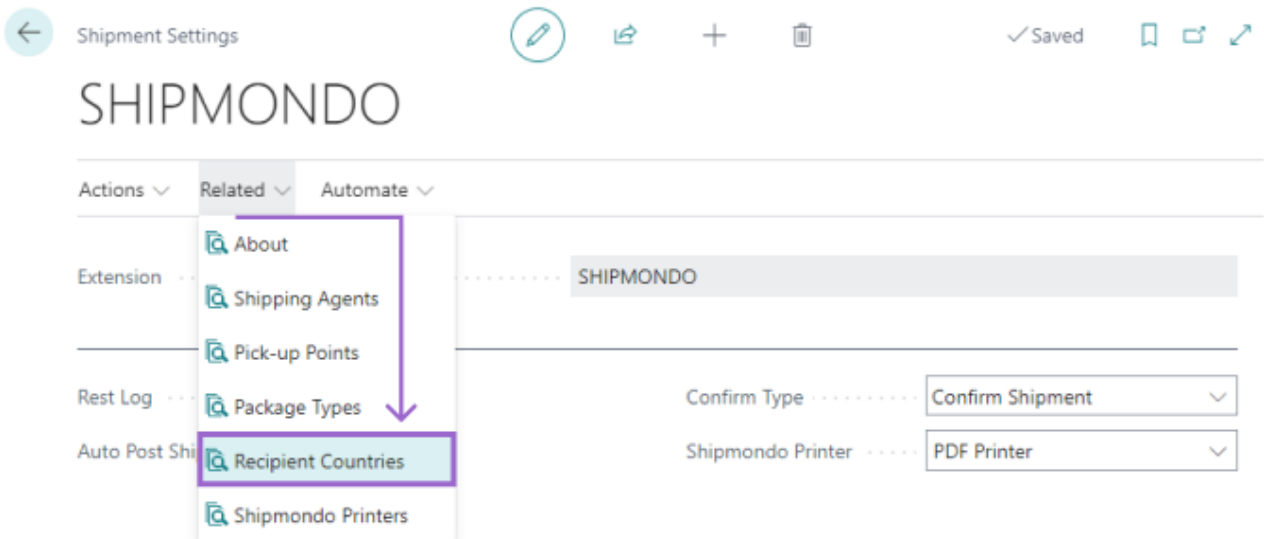


Afterwards, the desired recipient countries are added by pressing the "**+ New**" button in the ribbon and inputting the various Country Codes, such as "DK for Denmark.

## 1.2.4 Download of Data

The next step in the setup is to download the data from Shipmondo. This is done by accessing the **Shipment Settings** page (Search via Alt + Q). In the ribbon of the setup access the following **Actions > Shipmondo > Get Dataset**. This function will download the data that is attributed to Shipmondo. When **Get Dataset** is used the following is retrieved: Shipping Agent, Shipping Agent Services, Package types and Printers. It is also possible under the same tab to download the data step by step.

> We recommend that you start with testing the connection via the **Test Connection** button under the same tab as **Get Dataset**.



You will receive an acknowledgement when the Data is correctly transferred.

When the data has been downloaded you should select the Shipmondo Printer which is going be used as the default label printer.
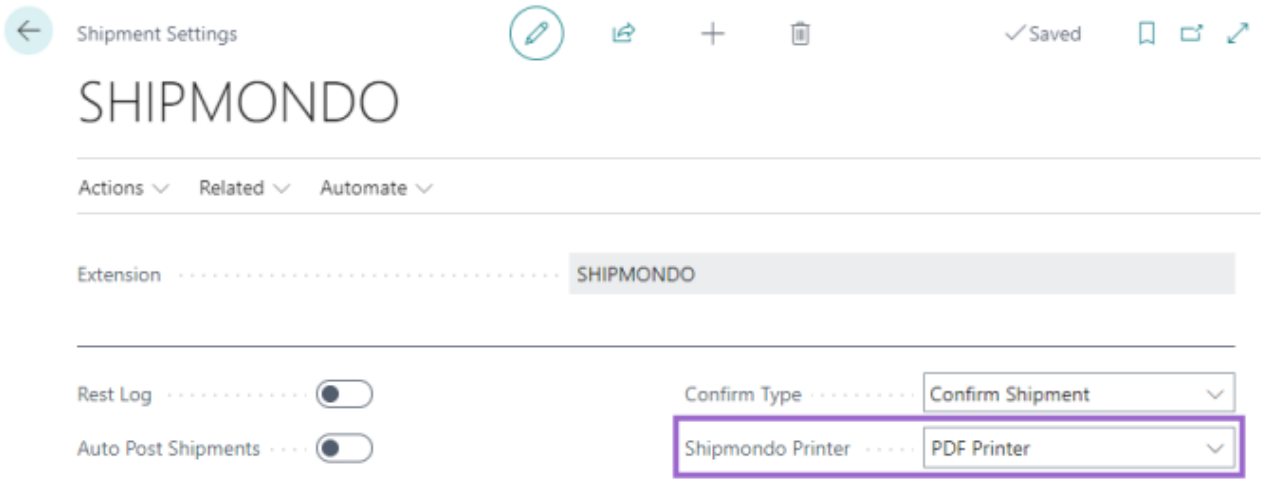
## 1.2.5 Shipping Agent & Shipping Agent Services

Below is shown an overview of the various Shipping Agents that have now been downloaded. The overview can be found by searching for **Shipping Agent** in the search field (Use Alt + Q).



If you have any **Own Agreements** with Shipping Agents in the Shipmondo Web portal then they need to be inputted in the field **Account No.** for the Shipping Agent in question. If it is desired to use Package tracking from Business Central, then the field **Package Tracking URL** must contain a valid url (see ToolTip for instructions)

Every Shipping Agent have various services associated with them. The Shipping Agent Services specify the "Product" which is ordered to the handle the parcel. Note that there can be different Shipping Agent Services depending on which countries you are shipping to. Select a Shipping Agent on the line e.g. "PostNord (DK)" and select the following in the ribbon **Shipping Agent > Shipping Agent Service**.

Illustrated below is what the overview looks like for the associated **Shipping Agent Services** for a given Shipping Agent.



The following fields exist in the Shipping Agent Service overview.

**Code** : This code is used when selecting a Shipping Agent Service in Business Central. Shipping Agent and Shipping Agent Service is specified e.g. on a sales Order or Sales Shipment. It is possible to rename the code to a name for the code that is more descriptive for the user.

**Country Code** : The Country Code is used by the Shipmondo Web Portal to define which Shipping Agent Services that are available for shipping in that particular Country. **(DO NOT DELETE OR RENAME THIS)**

**Default** : Select a default Shipping Agent Service which is automatically inserted onto the waybill line when the Shipping Agent is selected, this can be overruled on the Waybill lines.

**LDM (Loadmeter) Factor** : If you are booking with Loadmeter it is necessary to define an LDM Factor. Normally, this factor is 2.4. If the field is otherwise left blank, Loadmeter will not be enabled on the service. Consult the tooltip for additional information. **Include Customs** : Check this field if you want to include Customs when using the Shipping Agent Service. This is required if you want to ship with customs, however, you can still ship without customs as per usual.

## 1.2.6 Shipping Agent Service - Addons, Additional services & notifications

Every Shipping Agent have various supplementary services associated to them. It is possible to assign optional services to a Shipping Agent Service.

The options available differ from Shipping Agent to Shipping Agent but also from Shipping Agent Service to Shipping Agent Service. However, SMS and E-mail notifications are universally available. It is possible to select multiple addons, services and notification types.

An example of an optional service is **e-mail Notification** where the receiver of the shipment will receive an e-mail notification containing the status of their parcel. There can be multiple optional services added to a Shipping Agent Service.

The optional services for a Shipping Agent Service can be found in the Shipping Agent Service tab. In the tab find **Related > Services**.



> If you select multiple optional services it may require you to insert additional information in Business Central If you e.g. select the optional service **"e-mail Notification"** it is required to specify the receivers e-mail address in Business Central on the related Waybill.

An overview of the selected optional Shipping agent services is also available on the Sales Order. This is found in a fact-box at the bottom right of the sales order.



It is possible to acquire insurance for ones shipment. This is done by choosing the equivalent 'Insurance' addon for a given shipping Agent service. A similar function exists for Cash on Delivery. Once The addons/additional services are activated you can select the a 'Service Type'.



Once these criteria are met, it is possible to specify the insurance or cash on delivery amount in their respective fields on the waybill. Once activated the fields are also editable which enables users to manually insert an amount. At default the insurance amount will be the purchase price excluding VAT whereas the Cash on Delivery amount will be the purchase price including VAT.



Be aware that if you add an addon or an additional service to a shipping agent it will update on every open posts. We recommend that you create a new shipping agent service named appropriately for its purpose.

For instance, the Shipping Agent PostNord (DK) have a shipping agent service named **Parcel** there may be occasions where you would like to add an SMS or Email notification for the receiver of the shipment so they are notified of the status of their order. The best practice we suggest is to copy the current Parcel service and name it appropriately for the context such as in this case where it could be "Parcel with SMS & Email notification".

In order to create/copy a new shipping agent service access the ribbon and select the following: **Actions > Copy shipping agent service**.
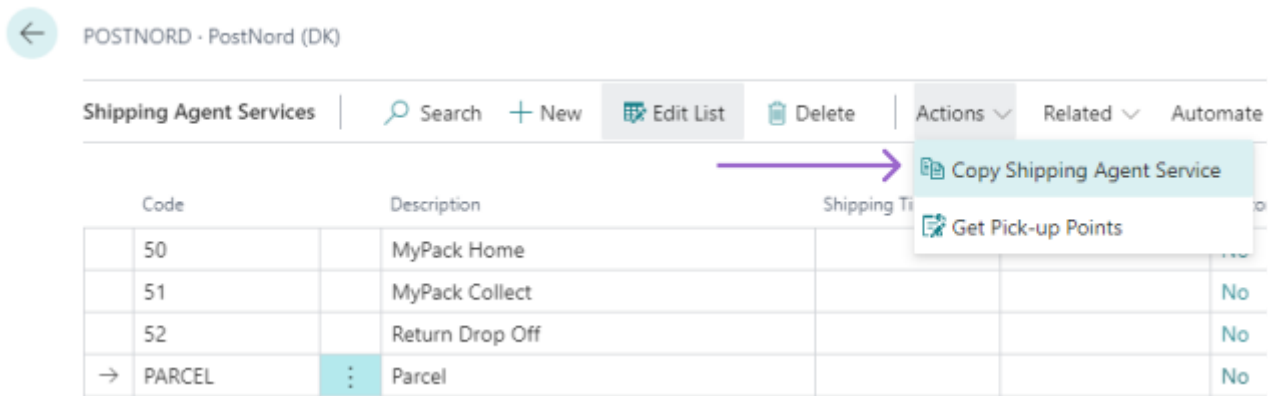


Afterwards you will be prompted with a wizard where you can enter the new Shipping Agent Service code, as well as a name/description for the service e.g. "Parcel with SMS & Email notification"
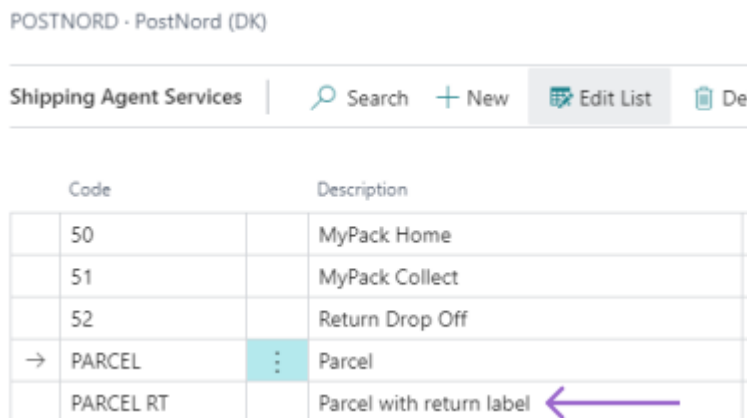


Once finished select the **OK** button and the service will be available in the overview.



Lastly, select the newly created shipping agent service and add the desired addons and extra services.

## 1.2.7 Package Types

Every Shipping Agent Service has one or more related Package Types. The Package Types have a number which can not be altered and a description which may be changed - additionally, it is possible to adjust the dimensions of the package; Length(cm), Width(cm) and height (cm).

The description of the package, as well as the dimensions are automatically inserted onto the waybill lines when the package type is selected. It is also possible to define Pallet Exchange and select a package type as the default package type for the Shipping Agent Service - this in turn will insert the package type automatically when the Shipping Agent Service is selected.

In order to access the overview for a given Shipping Agent's package types you have to navigate onto the given Shipping Agent and afterwards select a Shipping Agent service on the line and then access the following in the ribbon **Related > Package Types**.



<

Afterwards, you will be shown the aforementioned overview.



It is also a possibility to make a new Package type for the Shipping Agent Service. This is done by selecting a package type on the line and access the following in the ribbon **Actions > Copy Package Type**.



Afterwards, you will be prompted by a new window which is where the setup of the new package type takes place. When the new package type has been named and given a unique number then press the **OK** button to

continue.



The new package type is now found in the overview and can henceforth be selected as a package type when shipping.



## 1.2.8 Pick-up Points

It is possible to select a Shipping Agent Services where the parcel is delivered to a Pick-up Point (e.g. Parcel Shop). The Overview of the Pick-up Points is continuously updated - the update occurs each time the page is opened in order to select a Pick-up Point for a shipment. In order to download the Pick-up Points for a Shipping Agent, you must go to the overview for Shipping Agents then select a given Shipping Agent on the line and access the following the ribbon

**Actions > Get Pick-up Points**.

Afterwards, access the overview for the Pick-up Points by selecting a **Shipping Agent Service** on the line and open the following in the ribbon **Related > Pick-up Points**.



Afterwards the image below appears which provides an overview of all of the Pick-up Points available for the given Shipping Agent Service.

In the overview it is possible to see the Name, Country/region Code, Zip code, City and Address for the Pick-up Point. It is also possible to sort the overview to your liking by pressing the sort icon in the top right corner (Highlighted in a purple box).

## 1.3 Shipment Quote Setup

At the bottom of the **Shipment Settings** page there is a setup for the Shipping price.

**Shipping Price Setup**

| | | | | |
|---|---|---|---|---|
| Type | Item | Multiplier | | 1,2 |
| Item No. | 1896-S | Rounding Method | AF | |

In the setup it is possible to change the shipping price of a specific item, G/L account et cetera. You can adjust four parameters:

1. Type: Refers to the type which is affected by the setup e.g. Item or G/L account.
2. Number: Refers to e.g. the item or type of G/L account affected by the setup.
3. Factor: Refers to how much is added or subtracted of the shipping price for the given type and number.
4. Rounding Method: In this field it possible to define Rounding Methods.

# 2. Shipment & Preparation of Waybill

The Webshipper Shipment Connector utilises a Waybill to store the information that is forwarded to the Shipping Agent/Carrier. The relationship between Waybills and orders are 1 to 1. For each order one waybill is created.

It is also on the waybill that the parcel information which is forwarded to the shipping agent is entered.

The Waybill consists of a Shipping Agent/Carrier, an associated Shipping Agent Service, order reference no. and optionally a pick-up point ID, and receiver description.

In Business Central these fields are filled out in the Waybill Header - it is essential that we specify a shipping agent and a shipping agent service that we have set up properly on the order that is being handled otherwise it is not possible to forward the relevant information to Webshipper and the Shipping Agent.

**Waybill**

**Shipping Agent**

| | | | | |
|---|---|---|---|---|
| Shipping Agent Code | * | | Reference | 101050 |
| Shipping Agent Service Code | * | | External Reference | 00012 |
| Outstanding Packages | | 0 | Receiver description | |
| Pick-up Point | | _ | | |

In the Waybill Header the fields **Shipping Agent** & **Shipping Agent Service** are mandatory. The field **Pick-up Point** is left empty by default this causes Webshipper to select the nearest and best suited pick-up point for the given shipment. For non-parcel shop shipments or the like the field is uneditable.

## 2.1 Package & Colli System

An integral part of the Webshipper shipment Connector is the package & Colli System. In the waybill header the **Outstanding Packages** field is found. In this field the user specifies the amount of collis or packages they want shipped to the given order. The amount inserted in the field will also define how many waybill lines are created. It is still possible to manually create a waybill line if this is preferred - this is done by clicking on an empty waybill line and then inserting the necessary information. The weight of the shipment is automatically split out evenly between the amount of collis/waybill lines generated.

Once a colli line has been generated users should ensure to specify a package type (if required by the shipping agent), weight and dimensions of the package (length, width, height (cm)). As mentioned previously in section 1.2.7 Package Types it is possible to automate via the Shipment settings page - regardless of setup it is always a possibility to overwrite the fields with new data if necessary. Be aware that some Shipping Agents, such as Danske Fragtmænd require a package type to be specified whilst others, such as GLS Danmark does not require neither package type nor dimensions to be specified only the weight of shipment.

A Label will be printed for each open waybill line created once the Shipment is sent



## 2.2 Edit Waybill from a Document list

Users can also open a waybill from an order view such as for the Sales Order without having open individual orders up. This allows for the possibility to create or edit existing waybills and when the mandatory fields referenced in the former sections 2. Shipment & preparation of Waybill and 2.1 Package & Colli System are filled then it is possible from the same wizard to send your shipments.

> By using the **Alt + P** short cut key open the waybill and with the same short cut key send the shipment once the waybill is adequately filled out.

## 2.2.1 Posted Documents

In cloud versions of Business Central it is not possible to edit fields on posted documents - so in order to create or edit a waybill and send shipments from a posted document such as a Posted Sales Shipment it is necessary to do so either from the posted documents list or the individual document itself. To create or edit a waybill from a Posted document access the following in the ribbon: **Actions > Shipment > Edit Waybill** or via the shortcut key **Alt + P**.

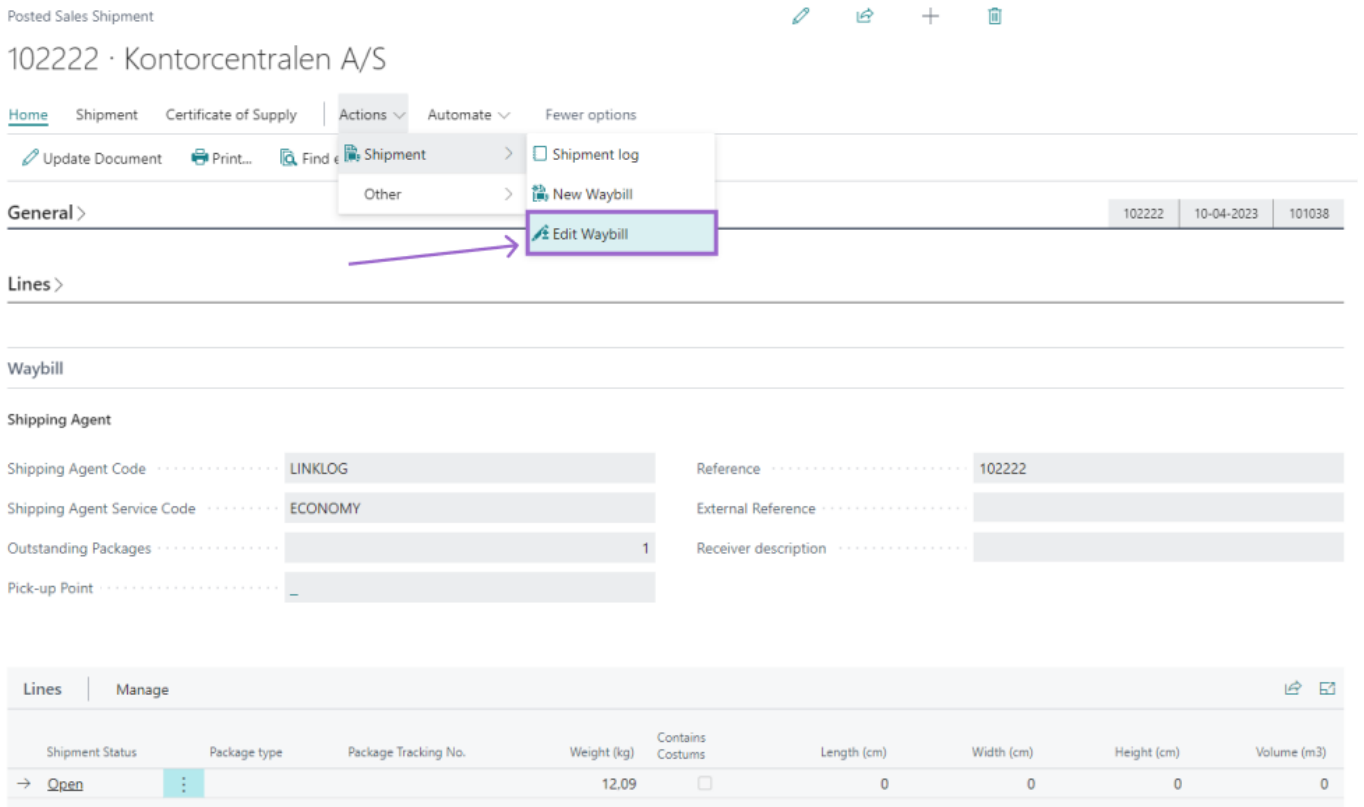Afterwards the Waybill will open where it is possible to fill out or change the Waybill's fields and lines.



Once the user is satisfied with the data entered naviagte to the Send shipment function under **Actions > Shipment > Send Shipments**
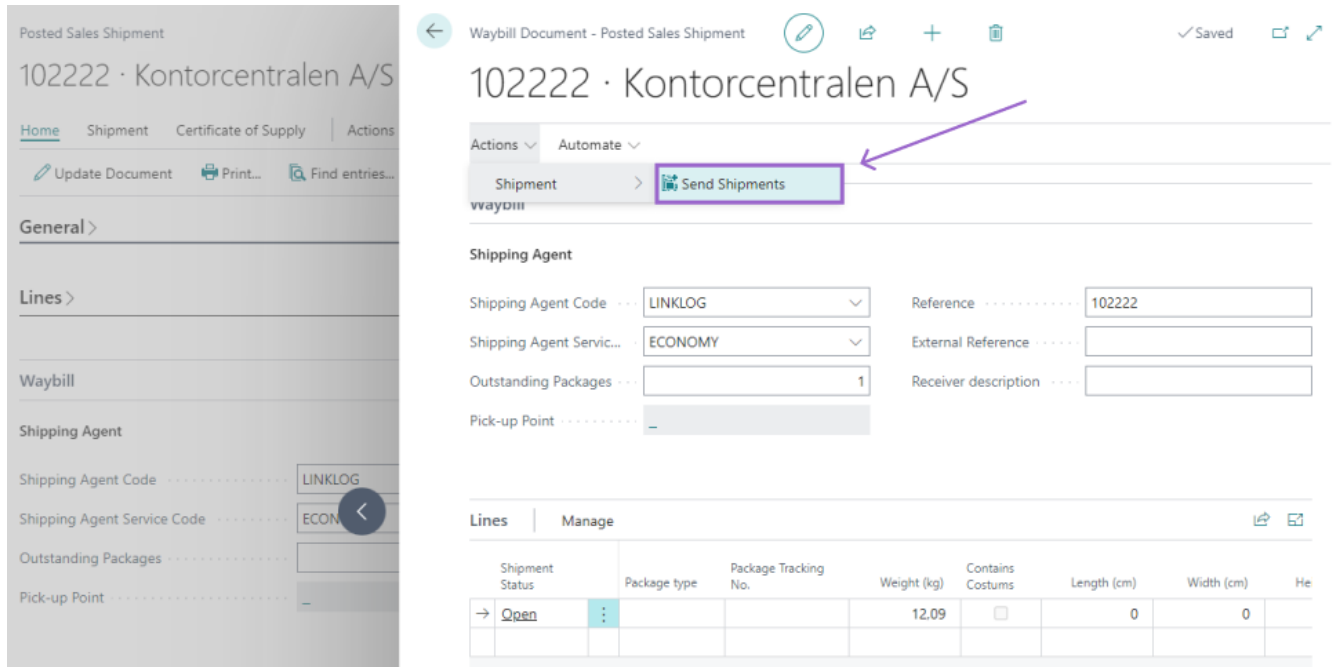


## 2.3 Send Shipment & Sales Order flow

Users can send their shipments from the following order types and pages:

- Sales Order
- Warehouse Shipment
- Transfer Order
- Service Order

- Posted Sales Shipment

The following segment will use Sales Order as an example of how users would typically create and fill out a Waybil and when finished send their shipment.

## 2.3.1 Sales Order Flow

The Sales Order list is opened and a Sales Order is selected or created from scratch. Hereafter the user inputs the sales order data according to their normal procedure.

The user should then access the Waybill segment on the order and proceed to fill out the necessary datails as indicated in section Package & Colli System - fill out Shipping Agent, Shipping Agent Service, number of Colli for shipment, along with the weight and, if applicable, the dimensions of the colli.

When you have finished your order and are ready to send it, access the following in the ribbon: **Actions > Shipment > Send Shipments** or use the shortcut key **Alt + P**. Upon sending the shipment, the status of the shipment changes from open to reserved. Additionally, the corresponding label and delivery note will be printed.

## 2.4 Customs

In order to attach customs to your shipment you must select a waybill line and click the **Customs** button.
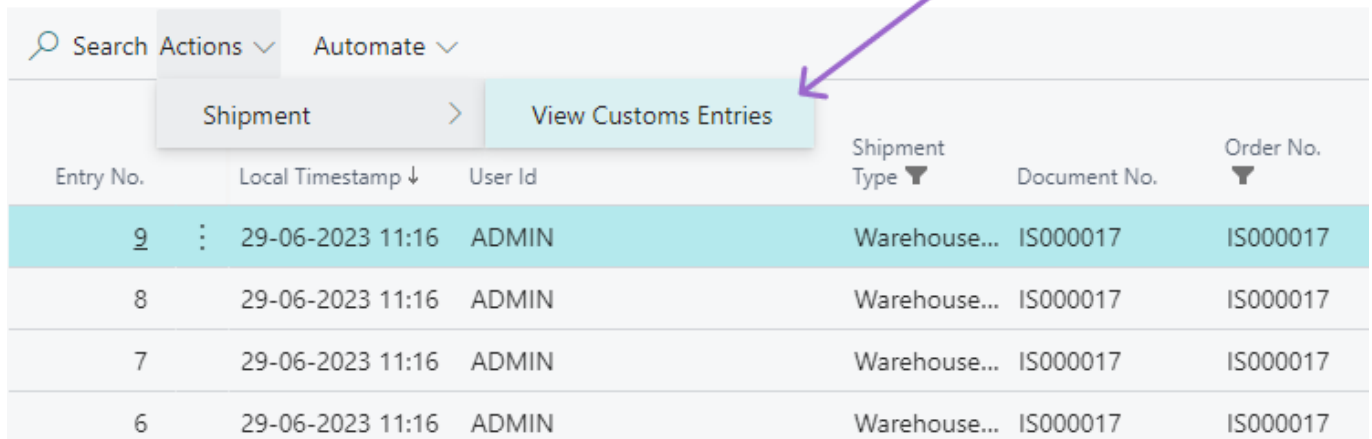


Once the Customs paged has open you can retrieve all of the item lines on the document via the **Create Customs Lines** button.



When the document lines have been retrieved and saved, the waybill line which you have created customs for will have a visible marker for containing customs.



Once the Customs is filled out you can send your shipment and in the shipment log you will be able to find the customs entries created for a given order.

Navigate to the Shipment log page then access the following in the ribbon: **Actions > Shipment > View Customs Entries**.



On this page you will have an overview of all the Customs Entries that have been made for the shipment.



# 3. Confirmation types

In the setup page you have a choice of three different confirmation types for shipments. The three confirmation types will be elaborated and illustrated in this section. Furthermore, the **Auto-Print when posting** function will also be briefly elaborated.

## 3.1. Direct Print

If Direct Print is selected as the confirm type the shipments will be sent directly without any confirmation box.

## 3.2. Confirm Shipment

If Confirm Shipment is selected as the confirm type, you will prior to the shipment being shipped be given a confirmation box with information about the entire shipment. It is possible in the confirmation box to change the choice of printers.

> Confirmation box for "Confirm Shipment":

**Confirm Shipment**                                              ↗ ✕

### GroupName

| | |
|---|---|
| Shipping agent ···················· | GLS Denmark |
| Service code ···················· | Business Parcel |
| No of Packages ···················· | 1 |
| Total Weight ···················· | 50,00 |
| Printer ···················· | PDF Printer ⌄ |

OK   Cancel

## 3.3. Confirm Packages

If Confirm Package is selected as the confirm type, you will prior to the shipment being shipped be given a confirmation box with information about the each Package for the shipment. It is possible in the confirmation box to change the choice of printers and weight of the packages.

Confirmation box for "Confirm Package":

**Confirm Packages**                                              ↗ ✕

### GroupName

| | |
|---|---|
| Shipping agent ···················· | GLS Denmark |
| Service code ···················· | Business Parcel |
| Line No. ···················· | 10000 |
| Total Weight ···················· | 50,00 |
| Printername ···················· | PDF Printer ⌄ |

OK   Cancel

## 3.4. Auto-Print label when Posting Document

Furthermore, it is possible at the setup page to enable a function called **Auto Post Shipments** which enables you to post and ship a document in a singular click. The Shipment will be automatically sent when the document is posted. The system will still provide a confirmation box depending on which of the three aforementioned confirm types that have been selected. If mass-posting is utilised, it is recommended to use Direct Print as your confirm type.



# 4 Request Quote from Shipmondo

If you want a price calculation for the shipment, it is possible to request a quote from Shipmondo - this can be accessed via the ribbon under **Actions > Shipment > Request Quote** or by using the shortcut key **Alt + R**.
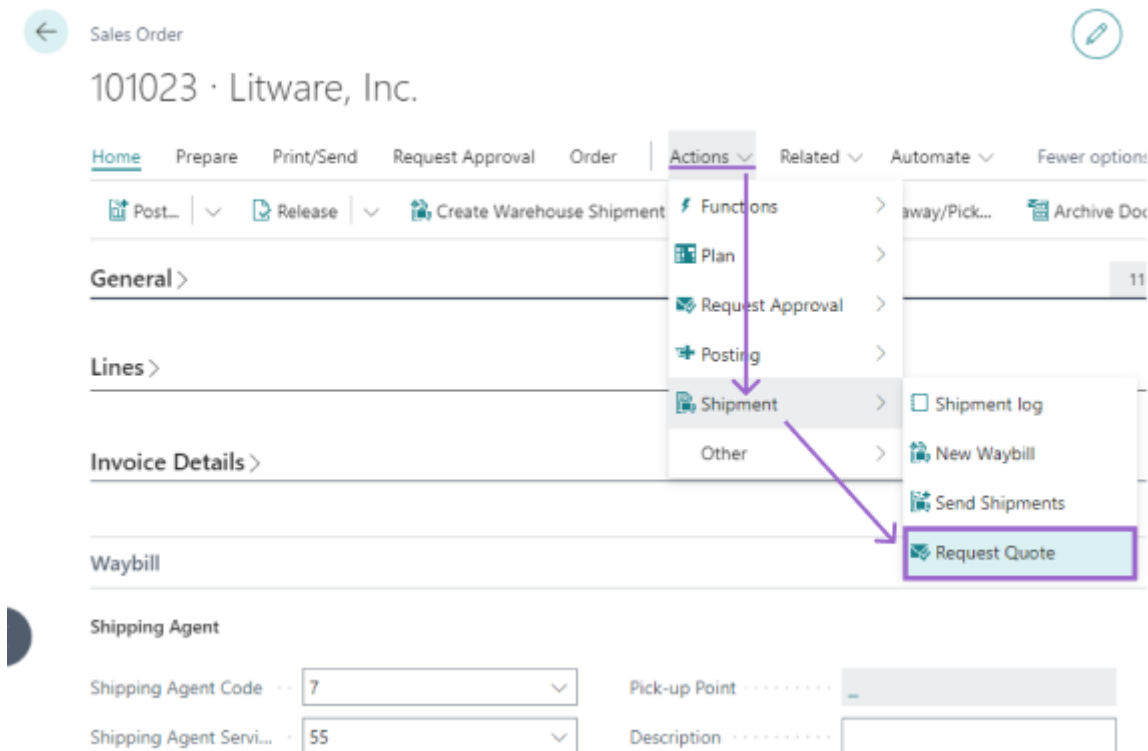


When you have requested a quote from Shipmondo the below informationbox will open.

## Confirm Quote

### Quote for the Shipment

| | |
|---|---|
| Shipping Agent | "gls" |
| Shipping Agent Service | "BusinessParcel" |
| Currency Code | "DKK" |
| Price | 52.2 |
| Price Incl. VAT | 65.25 |
| Rounding Method | |
| Multiply With | 1,20 |
| Shipping Price | 62,64 |

OK    Cancel

# 5. Track & Trace

On the Track & Trace page it is possible to see shipments that have have been sent during the day. It is also possible to see the tracking number of the related orders along with other relevant information about the shipment.

| Local Timestamp ↓ | Track & Trace Number | Shipment Type | Document No. | Order No. | Shipment No. | Invoice No. | External Document No. | Shipping Agent |
|---|---|---|---|---|---|---|---|---|
| 27-07-2023 13:53 | 00357128520166718651 | Sales Order | 101069 | 101069 | | | 321 | POSTNORD |
| 10-07-2023 13:40 | 00357128520165020441 | Sales Order | 101069 | 101069 | | | 321 | 6 |
| 28-06-2023 10:22 | 00357128520163672215 | Sales Order | 101069 | 101069 | | | 321 | 6 |
| 28-06-2023 10:22 | 00357128520163672215 | Warehouse Shipment | IR000006 | IR000006 | | | 321 | 6 |
| 28-06-2023 09:12 | 00357128520163652460 | Sales Order | 101066 | 101066 | | | 123 | 6 |
| 28-06-2023 09:12 | 00357128520163652460 | Sales Order | 101066 | 101066 | | | 123 | 6 |
| 28-06-2023 09:04 | 058060989100 | Sales Order | 101050 | 101050 | | | | 7 |
| 27-06-2023 15:41 | 00357128520163613775 | Sales Order | 101065 | 101065 | | | 123 | 6 |

**Shipment Info**

| | |
|---|---|
| Shipping Agent | PostNord (DK) |
| Shipping Agent Service | PARCEL |
| Weight | 5,00 |
| Length | 25,00 |
| Width | 25,00 |
| Height | 25,00 |

**Shipment Receiver**

| | |
|---|---|
| Pick-up Point | |
| Receiver Name | LEGOLAND ApS |
| Receiver Name 2 | |
| Address | Åstvej 10 |
| Address 2 | |
| Post Code | 7190 |
| City | Billund |
| Country | DK |
| Contact Name | Emmit Brickowski |

It is also possible to follow the shipments progress via the shipping agents tracking page which we reference via the function **Track Package** which can be accessed via the ribbon: **Actions > Track Package**.

The only thing that is required is to insert the tracking page of the shipping agent and follow it up with a **%1** at the end of the url-string. Such as the following for GLS: **https://gls-group.com/DK/da/find-pakke.html? match=%1**. This setup is carried out on the Shipping Agent page.



# 5.1 Reprint of Label

If you wish to reprint a label in case the label is unusable or has gone missing, you can access the **Track & Trace** page. Reprinting can be done by accessing the following in the ribbon: **Actions > Reprint Label**.

Afterwards, you will be presented with an information box where it is possible to change the printer.