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.

7. 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.

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

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

Using the Application
1. You can create an EasyPost Shipment from both the sales order list and from the sales order itself.
2. 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.
3. 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.

4. 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)
5. 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.

6. 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.
7. 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.

8. 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.
1. There are a multitude of shipping options that you can set on your shipment before you request your shipping rates.
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.
Tracking

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

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

Select your choice of Pickup Service and press the “Buy Pickup” option to purchase the service.
2. 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**

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

**ShipFrom**

- **Address**: 220 Yonge St
- **City**: Toronto
- **State**: Ontario
- **Zip Code**: M5E 1G3
- **Country**: CA
- **Phone**: +1 416 555 0100
- **Email**: eq@qmh1.com

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

**Refund Request**

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

   **Shipment: 2**

2. 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.

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