

User Guide for Microsoft Dynamics 365 Business Central

Product: SD Interface Courier

Release: D365 BC V23+

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2 Getting Started

SD Interface Courier communicates with DHL, DPD, GLS and Scurri in real-time using their published APIs. There is also a manual option for non-integrated couriers.

Using SD Interface Courier, you can automatically book a courier against your sales order, direct from your Dynamics 365 Business Central client in as little as one click.

Labels and parcel tracking codes are automatically returned into the linked Dynamics 365 Business Central record from the Couriers APIs.

You can also track costs and notify clients by email during the shipping cycle.

SD Interface Courier is flexible and scalable – you can view all your shipments from a central information hub; easily re-set or cancel your booking; and track your bookings.

Using SD Interface Courier you can manage the cost of courier expenses easily – either adding shipment charges automatically to the order or prompting the user that a courier charge is due.

From the SD Interface Courier Booking Activity page, you can drill through on the cues to process a booking from Booking Pending through to Booking Archived.

SD Interface Courier is configured to book packages through DHL, DPD, GLS and Scurri APIs and you can also use SD Interface Courier to handle manual courier bookings.





3 Installing SD Interface Courier

SD Interface Courier, is available to download from AppSource or you can install the app from within Business Central using Extension Marketplace.

3.1 Security Setup

We have provided the following permission sets for SD Interface Courier: SDY UC ADMIN, SDY UC USER and SDY UC VIEW (*Figure 3-1*).

| | rmission Set Lookup | @ | *sdy uc* X | | |
|---------------|---------------------|---|------------------------------|----------------------|---------|
| | Role ID † | | Name | Extension Name | Scope † |
| \rightarrow | SDY UC ADMIN | ÷ | SD Interface Courier - Admin | SD Interface Courier | System |
| | SDY UC USER | | SD Interface Courier - User | SD Interface Courier | System |
| | SDY UC VIEW | | SD Interface Courier - View | SD Interface Courier | System |
| | | | | | |



We have also created extensions on the following standard Microsoft Dynamics 365 Business Central Permissions:

- Exten. Mgt. Admin includes SDY UC ADMIN permissions.
- D365 BUS FULL ACCESS includes SDY UC USER permissions.
- D365 BASIC includes SDY UC VIEW permissions.

Note: Users creating, releasing, and posting Sales Orders will need to have SDY UC USER permissions as SD Interface Courier subscribes to standard Dynamics 365 events on order creation, release, and post.





3.2 Choosing the SD Interface Courier Role

We have provided a Role Centre for **SD Interface Courier**. To choose the Role Centre follow the steps below:

1. From your Dynamics 365 Business Central Web Client, in the app bar, select the **Settings** icon and then select **My Settings** (*Figure 3-2*).

| | | | | | | ۵ | Q | ٢ | ? | |
|--|----------------------------------|---------------------------------------|---|--|-------|----------------|---------|---|---|------|
| nventory | sions∨ 🛛 🚍 | | | | | Personalise | | | | - 8 |
| ales Journals Cash Receipt Journals Transfer Orc | ers | | | | | Design | | | | |
| | | | | | | My Settings | | | | |
| | ACTIONS | | | | | Company info | rmation | | | |
| | + Sales Quote + Sales Invoice | + Sales Order + Sales Return Order | + Sales Credit Memo | Sales Reports | > His | Assisted setup |) | | | - 82 |
| | | , | , ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,, | , nopono | | Advanced sett | tings | | | - 82 |
| 254 | | | | | | | | | | - 82 |
| | | | | | | | | | | - 10 |
| | | | | | | | | | | |
| | | | | | | | | | | |

Figure 3-2

| Role | Sales Order Processor | ••• |
|--|--|-----|
| Company | CRONUS International Ltd. | |
| Work Date | 30/03/2022 | |
| Region | English (United Kingdom) | |
| Language | English (United Kingdom) | |
| Time Zone | (UTC+00:00) Dublin, Edinburgh, Lisbon, L | |
| Notifications | Change when I receive notifications. | |
| Teaching Tips | | |
| Security | | |
| Your last sign in was on 30/03/22 09:- | 43. | |
| | | |
| | OK Can | - |
| | OK Cane | cel |

2. In the My Settings page, on the Role field, select the AssistEdit icon (Figure 3-3).





3. You should see **SD Interface Courier** in the list of Roles (*Figure 3-4*).

| | Display Name | |
|---------------|--|--------|
| | SD BI Sales Cockpit Manager | A |
| | SD BI Sales Cockpit User | _ |
| | SD Bulk Mailer | |
| \rightarrow | SD Interface Courier | ÷ |
| | Company Hub | |
| | SD Document Pack | |
| | Accountant | |
| | Business Manager | |
| | Business Manager Evaluation | |
| | Service Manager | |
| | Sales Order Processor | |
| | Manufacturing Manager | |
| | Project Manager | |
| | Sales and Relationship Manager | |
| | A destable with a state of the second s | • |
| | OK | Cancel |



4. Choose SD Interface Courier and click OK.

| ole · · · · · · · · · · · · · · · · · · · | SD Interface Courier | |
|---|--|----|
| ompany | CRONUS International Ltd. | |
| Vork Date | 28/06/2022 | Ħ |
| egion · · · · · · · · · · · · · · · · · · · | English (United Kingdom) | |
| anguage | English (United Kingdom) | |
| ime Zone | (UTC+00:00) Dublin, Edinburgh, Lisbon, L | |
| lotifications | Change when I receive notifications. | |
| eaching Tips | | |
| ecurity | | |
| our last sign in was on 28/06/22 14:4 | 40. | |
| | | |
| | OK Cano | ol |

5. The **SD Interface Courier** Role should now be displayed in the **Role** field (*Figure 3-5*).





3.3 Accessing the SD Interface Courier Pages

Use the **Tell Me** to search for SD Interface Courier pages. Begin typing **SD** or **Interface** to see a list of the SD Interface Courier pages (*Figure 3-6*).

| sd inter | | |
|--|----------|-------|
| Go to Pages and Tasks | Show les | 5 (3) |
| > SD Interface Courier | Tasks | |
| > SD Interface Courier Setup | Tasks | |
| > SD Interface Courier Services | Lists | |
| > SD Interface Courier Activities | Tasks | |
| > SD Interface Courier Label List | Lists | |
| > SD Interface Courier Booking Errors | Lists | |
| > SD Interface Courier Booking History | Lists | |

Figure 3-6





3.4 Activating the SD Interface Courier Licence

To use **SD Interface Courier**, you must activate the licence.

1. From the **Tell Me**, search for and select the **SD Interface Courier Setup** card. When the **SD Interface Courier Setup** card opens, you will be prompted that "Your SD Interface Courier license needs to be validated." Choose **Yes** (*Figure 3-7*).

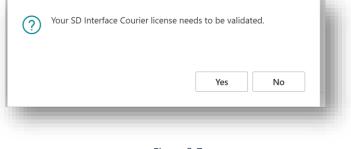


Figure 3-7

2. You will then see the Activate your product page (Figure 3-8).

| Shop | | | | ^ |
|---|------------|----------------------|-----------|----------|
| | | | | _ |
| Company Name | * | | | |
| Email · · · · · · · · · · · · · | * | | | |
| Product Key | | | | |
| | | | | |
| Valid · · · · · · · · · · · · · · · · | | | | |
| License Type | | | | |
| Expiry Date | | | | |
| The Product Key for t | | | | onger |
| be used. Please contac reactivate vour licence | | nics for a new Produ | ct Key to | - |
| | | | | |
| | Free Trial | Request Subscri | ption A | ctivate |

Figure 3-8





3.4.1 Activating the SD Interface Courier Licence with a Product Key

If you have received a Product Key from Simply Dynamics Ltd., in the **Activate your product** page (*Figure 3-9*):

- 1. Enter your company name in **Company Name**
- 2. Enter your company email in Email
- 3. Paste the supplied product key into the **Product Key** field. **Tab off the Product Key field to validate the contents of the field and to enable the Activate key**. Choose **Activate**.

| mpany Name | |
|--|--------|
| nail · · · · · · · · · · · · · · · · · · · | |
| nail · · · · · · · · · · · · · · · · · · · | |
| | |
| | |
| oduct Key | |
| | |
| lid · · · · · · · · · · · · · · · · · · · | |
| | - 1 |
| ense Type | |
| piry Date | |
| | - 1 |
| | |
| Free Trial Request Subscription Ac | tivate |
| Free Inal Request Subscription AC | tivate |
| | |

4. The **Activate your product** page will update to display a message that the activation was successful. The expiry date will depend on the date that you activated your free trial.





3.4.2 Activating the SD Interface Courier Licence with a Free Trial

If you have not received a Product Key from Simply Dynamics Ltd. and want to avail of a free trial, in the **Activate your Product** page (*Figure 3-10*):

- 1. Enter your company name in Company Name
- 2. Enter your company email in Email
- 3. Choose Free Trial

| Dynamics | | | |
|-----------------------------|-------------------------------|-------------------------|------|
| Shop | | | _ |
| | 44 | | _ |
| Company Name | | | _ |
| Email • • • • • • • • • • • | **** | | |
| Product Key | | | |
| | | | |
| | | | _ |
| Valid | | | |
| License Type | | | |
| Expiry Date | | | |
| The Product Key for | this product has expired and | the product can no long | er |
| | act Simply Dynamics for a new | | |
| | Free Trial Request | Subscription Activ | vate |
| | incquest | | |

Figure 3-10

4. You are then prompted to choose **Yes** to activate your free trial. Choose **Yes** (*Figure 3-11*).

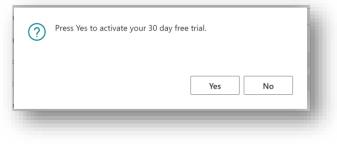


Figure 3-11





5. The **Activate your product page** will update to display a message that the activation was successful. The expiry date will depend on the date that you activated your free trial (*Figure 3-12*).

| Activate your product | : | \mathbb{Z} \times |
|--|--------------------------------|-----------------------|
| Dynamics Shop | | ^ |
| Company Name | - Institution | |
| Email | | |
| Product Key | | |
| | | |
| Valid | | |
| License Type | trial | |
| Expiry Date | 28/07/2022 | |
| Activation successful! Thank y Interface Courier! Your license expires on 7/28/2 | rou for using SAAS-SIMP-SDUTCR | - SD |
| Free | Trial Request Subscription | Activate |
| | | |

Figure 3-12

- 6. Choose **Finish** to exit the page.
- 7. When your Free Trial has expired, choose **Request Subscription** to request a Product Key from Simply Dynamics.





3.5 Allowing HttpClient Requests in SD Interface Courier

Switching on the **Allow HttpClient Requests** option allows SD Interface Courier to call an API that sends and returns licence key information to activate the product licence. The **Allow HttpClient Requests** option is automatically switched-on during installation of SD Interface Courier.

- 1. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management**.
- 2. In the Extension Management list, you should see the SD Interface Courier App installed (*Figure 3-13*).

| 🔎 Search | Manage Actions Few | ver options | | ß ' |
|------------|---------------------------------|----------------------|---------------------|-----------|
| ls Inst | Name † 🗸 🗸 | Publisher | Version | Published |
| Yes | Payment Links to PayPal | Microsoft | v. 20.0.37253.39101 | Global |
| No | Performance Toolkit | Microsoft | v. 20.0.37253.39101 | Global |
| No | Permissions Mock | Microsoft | v. 20.0.37253.39101 | Global |
| Yes | Recommended Apps | Microsoft | v. 20.0.37253.39101 | Global |
| Yes | Sales and Inventory Forecast | Microsoft | v. 20.0.37253.39101 | Global |
| Yes | SD BI Sales Cockpit | Simply Dynamics Ltd | v. 3.3.0.0 | Global |
| Yes | SD Bulk Mailer | Simply Dynamics Ltd | v. 9.1.14.0 | Global |
| Yes | SD Credit Controller | Simply Dynamics Ltd | v. 10.0.0.0 | Global |
| Yes | SD Data Export | Simply Dynamics Ltd. | v. 1.1.0.0 | Global |
| Yes | SD Document Pack | Simply Dynamics Ltd | v. 3.6.0.0 | Global |
| Yes | SD Interface Courier | Simply Dynamics Ltd | v. 4.0.0.0 | Global |
| Yes | Send remittance advice by email | Microsoft | v. 20.0.37253.39101 | Global |
| Yes | Send To Email Printer | Microsoft | v. 20.0.37253.39101 | Global |
| Yes | Simplified Bank Statement Imp | Microsoft | v. 20.0.37253.39101 | Global |
| Yes | System Application | Microsoft | v. 20.0.37253.39101 | Global |

Figure 3-13





3. Select the **SD Interface Courier** record and from the menu, select the **Manage** group, and choose **Configure** (*Figure 3-14*).

| Extension | Management | | | |
|------------|---------------------------------|------------------------|-------------------------------|-------------|
| ✓ Searce | h Manage Actions Few | er options | | E S |
| 🔡 Exter | ision Marketplace 💿 Deploymen | t Status 🛛 🛪 Uninstall | 📌 Configure 🕕 Learn M | Nore |
| 🔓 Uploa | ad Extension 📑 🗮 Install | 😽 Unpublish | 🕒 Download Source 🛛 😂 Refresh | I |
| ls Inst | Name † | Publisher | Version | Published . |
| Yes | Payment Links to PayPal | Microsoft | v. 20.0.37253.39101 | Global |
| No | Performance Toolkit | Microsoft | v. 20.0.37253.39101 | Global |
| No | Permissions Mock | Microsoft | v. 20.0.37253.39101 | Global |
| Yes | Recommended Apps | Microsoft | v. 20.0.37253.39101 | Global |
| Yes | Sales and Inventory Forecast | Microsoft | v. 20.0.37253.39101 | Global |
| Yes | SD BI Sales Cockpit | Simply Dynamics Ltd | v. 3.3.0.0 | Global |
| Yes | SD Bulk Mailer | Simply Dynamics Ltd | v. 9.1.14.0 | Global |
| Yes | SD Credit Controller | Simply Dynamics Ltd | v. 10.0.0.0 | Global |
| Yes | SD Data Export | Simply Dynamics Ltd. | v. 1.1.0.0 | Global |
| Yes | SD Document Pack | Simply Dynamics Ltd | v. 3.6.0.0 | Global |
| Yes | SD Interface Courier | Simply Dynamics Ltd | v. 4.0.0.0 | Global |
| Yes | Send remittance advice by email | Microsoft | v. 20.0.37253.39101 | Global |
| Yes | Send To Email Printer | Microsoft | v. 20.0.37253.39101 | Global |

Figure 3-14

4. Choose to allow the Allow HttpClient Requests option (Figure 3-15).

| Extension Settings | | Ŀ | + | ۱. | | ✓ Saved | ď | 2 |
|--------------------|----------------------|---|-----------|--------------|-------------|----------|---|---|
| SD Interfac | ce Courier | | | | | | | |
| Group | | | | | | | | |
| App ID | 07c19542-5e75 | | Publisher | | Simply Dyna | mics Ltd | | |
| Name ····· | SD Interface Courier | | Allow Htt | pClient Requ | | | | |

Figure 3-15





4 Using SD Interface Courier

4.1 Setup

The SD Interface Courier Setup page is accessed by searching for the SD Interface Courier Setup page in the Tell Me or by drilling through on the Setup action cue in the SD Inventory Courier Manager Role Centre (*Figure 4-1*).

| | r Active Booking Act | | | | irier Historical Booking Activiti | es |
|-------------------|---------------------------------|---|------------|-----------------|-----------------------------------|----|
| ooking Pending | Booking Errors | Booking Shipment | All Active | Booking History | y Booking Archive | |
| | 1 | 3 | 11 | 1 | 32 | |
| | | > | > | > | | |
| | | | | | | |
| | | | , | | | |
| + (| \sim | in the second | | | | |
| | \mathcal{I} | રડ્ડ | | | | |
| New Entries Archi | ive Entries Courier Services | Setup | | | | |

Figure 4-1

In the **SD Interface Courier Setup** page, expand the **General** FastTab. The **General** FastTab contains the following field (*Figure 4-2*):

| SD Interface Courier Setup |
|--|
| Process About <u>Definition File</u> Email |
| General |
| Default Email Account · · · · · Current User · · · · |

Figure 4-2





• **Default Email Account** – Enter the Email Account to use as the default email account for SD Interface Courier to send email notifications of parcels booked and/or shipped with the courier services.

In the **Data Retention** FastTab you define how long to keep API Logs, Labels, Email Logs, and Customs Documents in SD Interface Courier (*Figure 4-3*):

| SD Interface Co | ourier Seti | Jp | | | |
|-------------------------------|-----------------|-------------------------|---------|--------------|--|
| Process About Definition File | tion File Email | | | | |
| | | | | | |
| General > | | | | Current User | |
| General > Data Retention | | | | Current User | |
| | ~ | Delete Email Logs After | 1 Month | Current User | |



- Delete API Logs After Applicable if API logging has been enabled in SD Interface Courier. Select how long you want to retain the obsolete API Logs that are generated in SD Interface Courier. These logs are stored in the database. Choose from an option of 1 Month, 3 Months, 6 Months, 1 Year or Do Not Delete.
- Delete Labels After Select how long you want to retain the obsolete Label records that are stored in SD Interface Courier. Choose from an option of 1 Month, 3 Months, 6 Months, 1 Year or Do Not Delete.
- Delete Email Logs After Select how long you want to retain the Email Logs that are generated in SD Interface Courier. Choose from an option of 1 Month, 3 Months, 6 Months, 1 Year or Do Not Delete.
- Delete Custom Documents After Select how long you want to retain the Paperless Trading Logs for DHL and the Customs Documents for GLS that are stored in SD Interface Courier. Choose from an option of 1 Month, 3 Months, 6 Months, 1 Year or Do Not Delete.





There are several actions available from the **Definition File** menu group (Figure 4-4):

| | Ø Ø Ø Ø | √ Saved | |
|---|---|---------|---|
| (| SD Interface Courier Setup | | |
| _ | Process About Definition File Email | | |
| | 🌐 Update Definition 🛛 🖡 Import Definition File 🛛 🖡 Export Definition File | | Ś |



- Update Definition On install of SD Interface Courier a .json definition file is created. This definition file contains definitions and values of certain SD Interface Courier tables and fields such as the Barcode Types, Courier Services, Live and Test Configuration records for the Courier Services supported by SD Interface Courier. Choose this action to issue a call to load the latest definition file from our servers.
- Import Definition File This action allows you to import a new custom SD Interface Courier Definition file.
- **Export Definition File** This action allows you to export the existing SD Interface Courier Definition file.

From the **Email** menu group choose the following action (*Figure 4-5*):

| \leftarrow | | |
|--------------|--|-----|
| | SD Interface Courier Setup | - 1 |
| | Process About Definition File <u>Email</u> | - 1 |
| | E Email Accounts | Ŕ |
| | | |



• **Email Accounts** – Choose this action to open the standard Dynamics 365 Business Central Email Accounts page.





4.2 Courier Services

The **SD Interface Courier Service** list, is accessed from the **SD Interface Courier Role Centre**, or from the **Tell Me**. To initially populate this list with all available Shipping Agent Code and Shipping Service Code combinations in your database, from the **General** menu group choose **Populate Courier Services.** The **SD Interface Courier Service** list contains the following fields (*Figure 4-6*):

| | ew Manage General | Logs Report | | | | | r 🖉 🗉 |
|-------------|---------------------|-----------------------------|--------------------------------|---------------------------------|---------|--------------------------|--------------|
| Entry No. † | Shipping Agent Code | Shipping Agent Name | Shipping Agent Service Code | Shipping Agent Service Name | Enabled | Courier Service Provider | Service Type |
| 1 | DHL | DHL Systems, Inc. | DOM | Domestic | | TEST DHL DOM | API |
| 2 | OWN LOG. | Own Logistics | NEXT DAY | Next day delivery | | | Manual |
| 3 | GLS | GLS | STD | Standard Courier Service | | TEST GLS DOM | API |
| 4 | DHL | DHL Systems, Inc. | EXP EU | Express EU | | TEST DHL ECX | API |
| 5 | FEDEX | Federal Express Corporation | NEXT DAY | Next day delivery | | | Manual |
| 6 | FEDEX | Federal Express Corporation | STANDARD | Standard delivery | | | Manual |
| 7 | GLS | GLS | INT | International with Customs Docs | | TEST GLS INT | API |
| 8 | FASTWAY | Fastway Couriers | STD | Fastway | | TEST SCURRI FASTWAY | API |
| 9 | DHL | DHL Systems, Inc. | ECON EU | Economy EU | | TEST DHL ESU | API |
| <u>10</u> | DHL | DHL Systems, Inc. | INT | International with Documents | | TEST DHL INT | API |

Figure 4-6

- Shipping Agent Code Displays the shipping agent code used for the courier.
- Shipping Agent Name Displays the name of the shipping agent in Shipping Agent Code.
- Shipping Agent Service Code Displays the shipping agent service code for the shipping agent entered in Shipping Agent Code.
- Shipping Agent Service Name Displays the name of the shipping agent service chosen in Shipping Agent Service Code.
- **Enabled** Indicates if the setup for the courier is enabled.
- **Configuration** Displays the code of the **Service Configuration** that was loaded from the **Load Service Configuration** action in the **Courier Service Card**.
- Service Type Displays API or Manual. Choosing a Service Type of Manual allows you to manually track bookings for a courier.





To access an existing courier service setup from the **SD Interface Courier Service** list, from the **Manage** menu group select **View** or **Edit** (*Figure 4-7*).

| \leftarrow s | SD Interface Courier Services | l |
|----------------|-------------------------------|---|
| | | I |
| [| | I |



To create a new courier service setup, from the menu select New (Figure 4-8).

| \leftarrow | SD Interface Courier Servi | ces | | | |
|--------------|-------------------------------|--------|------------|------------|-----|
| | ✓ Search + New ✓ Edit ⊙ View | | General Lo | ogs Report | - 1 |
| | C Edit '6' View | Delete | - | _ | |

Figure 4-8

The **SD Interface Courier Service** list also contains the following actions on the on the **General** menu group (*Figure 4-9*).

| Q | Search | + New | Manage | General | Logs | Report |
|---|----------|--------------|----------|-------------|-------|---------------------|
| 8 | Populate | e Courier Se | rvices 👔 | Courier Zip | Codes | 1 |
| _ | | | | | | - |
| | Entry | No. 1 | Shipping | Agent Code | | Shipping Agent Name |



- **Populate Courier Services** Choose this option to populate SD Interface Courier Services with all available Shipping Agent Code and Shipping Service Code combinations in your database.
- Courier Zip Codes Choose this action to setup new, or view existing, Courier Zip Codes for the shipping agent. The Courier Zip Codes setup is used for the GLS shipping agent.





The **Logs** menu group contains actions to view email confirmations sent from SD Interface Courier and API request logs (*Figure 4-10*).

| SD Interface Courier Services | |
|--------------------------------------|--|
| | |
| 4 Email Confirmations 🗄 API Requests | |
| | |
| | |



- Email Confirmations Choose this action to view details of the emails sent from SD Interface Courier for the selected Courier Service.
- **API Requests** Select this action to view the details of the API requests made and responses received from the various Courier APIs.

The **SD Courier Service Setup Card** contains the following fields in the **General** FastTab (*Figure 4-11*):

| GLS · STD | | | | |
|---|-------------------|--------|------------------------------|--|
| General Worldwide GLS | Scurri Logs Repor | t | | |
| General | | | | |
| Service Type | API | \sim | Configuration | |
| Shipping Agent Code | GLS | \sim | GLS | |
| Shipping Agent Service Co | STD | \sim | Standard Courier Service | |
| Enabled · · · · · · · · · · · · · · · · · · · | | | Shipment Date Today \cdots 💽 | |
| | | | | |



- Service Type Enter a service type for the courier. Options are API or Manual. For a shipping agent code of DHL, GLS, Scurri or DPD choose a Service Type of API. Choosing a Service Type of Manual allows you to manually track bookings for a courier.
- **Configuration** Displays the code for the loaded courier service configuration. Choose the **Load Service Configuration** action to populate the Courier Service record with the relevant setup values.





- **Shipping Agent Code** Enter the shipping agent code for the courier. Select from a list of existing shipping agent codes in your Dynamics 365 Business Central database.
- Shipping Agent Name Displays the name of the shipping agent chosen in Shipping Agent Code.
- Shipping Agent Service Code Enter the service code for the shipping agent entered in Shipping Agent Code.
- Shipping Agent Service Name Displays the name of the shipping agent service chosen in Shipping Agent Service Code.
- Enabled Select this option to enable the courier setup.
- Shipment Date Today Choose this option if you want to set the Shipment Date on the Booking Card to today's date. This will update the Shipment Date on the associated order.

The **SD Interface Courier Setup Card** contains the following fields in the **Service Setup** FastTab (*Figure 4-12*):

| GLS · STD | | | | | | | | |
|------------------------|--------|------------|----------|---------------------------|---|------------------|-----------------|-----------|
| General Worldwide GLS | Scurri | Logs Repor | t | | | | | |
| General > | | | | | | | API GL | S STE |
| Service Setup | | | | | | | | |
| | GLS | | | Tracking UR | ۲ | https://gls-grou | up.eu/IE/en/par | cel-track |
| | GLS | | 43006865 | Tracking UR Update GLS | | https://gls-grou | up.eu/IE/en/par | cel-track |
| Courier Implementation | | | 43006865 | Update GLS | | | up.eu/IE/en/par | cel-track |

Figure 4-12

• Courier Implementation – Choose the Courier Service to use. Options are Manual, DHL, GLS, Scurri or DPD.

If you choose Scurri as the Courier Implementation you will need to enter a value in the **Location Code** on the **Sales Order** page in the Shipping and Billing FastTab when





booking parcels. This Location Code must be defined as the **ERP Location** in the **SD Interface Courier Scurri Warehouses** list.

• **Tracking URL** – Enter the tracking URL to use to track the booking. This field is populated if you have loaded a service configuration by choosing the **Load Service Configuration** action.

For example, for GLS enter https://gls-group.eu/EU/en/parcel-tracking/%1 and for DHL enter http://www.dhl.com/en/express/tracking.html?AWB=%1&brand=DHL The **/%1** is also used as a placeholder to display the package tracking number in the confirmation emails generated in SD Interface Courier and sent on booking the package.

 Booking Form – This is the page ID to use as the Booking Form for the selected courier service. Select from a list of SD Interface Courier pages. This field is populated if you have loaded a service configuration by choosing the Load Service Configuration action.

For a DHL courier choose Page ID **43006864**, **Update DHL**, for a GLS courier choose Page ID **43006865**, **Update GLS**, for a Scurri courier (such as Fastway or An Post) choose Page ID **43006867**, **Update Scurri**, for a DPD courier choose Page ID **43006889**, **Update DPD**, and for a courier that you've defined as a Service Type of Manual choose Page ID **43006863**, **Update Manual**.

- Booking Form Name Displays the name of the form entered in Booking Form.
- **Print Label After Booking** Choosing this option allows users to print the label directly (without prompting) from the Booking Update page to a printer. The **Label Type** must have a **Label Extension** of .pdf for this option to be enabled.
- **Download Label After Booking** –If chosen, the browser will automatically download the label after successfully booking a parcel.

The various **XML Service** FastTabs are enabled only for those couriers with a **Service Type** of **API**. The fields displayed are dependent on the value chosen in the **Courier Implementation** field.





The following fields are displayed in the **GLS XML Service** FastTab (*Figure 4-13*):

| eneral | API Details |
|--|--|
| abel Type · · · · · · · · one_label_on_a4_lt_pdf | ···· User Id |
| dit Consignor Details | Password |
| | Service URL · · · · · · · https://icontrol-test.gls-ireland.com/adep |
| | Log Requests |



Label Type – This field is populated if you have loaded a service configuration by choosing the Load Service Configuration. The label type chosen will determine the label template to use when creating and printing the label received from the courier. The label is requested from the courier when the package has been booked.

These label types will be provided to you by your courier. You will need to set up labels for each shipping agent code/shipping agent service code combination.

- Edit Consignor Details Choose this action to open the SD Interface Courier Consignor Details page for the shipping agent code/shipping agent service code combination. These details are used for customs documents for the courier service and to determine from where the parcel is being shipped.
- User ID Enter your User ID. This will be provided to you by your Courier Service.
- **Password** Enter your password. This will be provided to you by your Courier Service.
- Service URL Enter the Service URL for the Courier Service. This field is populated if you have loaded a service configuration by choosing the Load Service Configuration.
- Log Requests Select this option to log API requests to and responses from the Courier Services API.





The following fields are displayed in the DHL XML Service FastTab (Figure 4-14):

| General | API Details |
|------------------------|-----------------------------|
| Account No. | API Region ····· EU ···· |
| Global Product | User ID · · · · · · · · |
| Local Product | Password |
| Label Type 6X4_A4_PDF | Service URL |
| Edit DHL Worldwide | Log Requests |
| Edit Consignor Details | |



- Account No. Enter your user account number. This will be provided to you by your courier service.
- Global Product Enter the global product code. The combination of global and local product codes determines which DHL service will be used when booking parcels. This field is populated if you have loaded a service configuration by choosing the Load Service Configuration. Your courier service can advise what value to enter.
- Local Product Enter the local product code. The combination of global and local product codes determines which DHL service will be used when booking parcels. This field is populated if you have loaded a service configuration by choosing the Load Service Configuration. Your courier service can advise what value to enter.
- Label Type This field is populated if you have loaded a service configuration by choosing the Load Service Configuration. The label type chosen will determine the label template to use when creating and printing the label received from the courier service. The label is requested from the courier when the package has been booked. These label types will be provided to you by your courier. You will need to set up labels for each shipping agent code/shipping agent service code combination.
- Edit Consignor Details Choose this action to open the SD Interface Courier Consignor Details page for the shipping agent code/shipping agent service code combination. These details are used for customs documents for the courier service and to determine from where the parcel is being shipped.





- **API Region** Enter the API Region for the DHL API. This field is populated if you have loaded a service configuration by choosing the **Load Service Configuration**. Your courier service can advise what value to enter.
- User ID Enter your User ID. This will be provided to you by your Courier Service.
- **Password** Enter your password. This will be provided to you by your Courier Service.
- **Service URL** Enter the Service URL for the Courier Service. This field is populated if you have loaded a service configuration by choosing the **Load Service Configuration**.
- Log Requests Select this option to log API requests to and responses from the Courier Services API.

The following fields are displayed in the **Scurri Service** FastTab (*Figure 4-15*):

| General | API Details |
|--------------------------------------|--|
| Scurri Company | User Id |
| Label Type | ··· Password · · · · · · · · · · · · · · · · · · · |
| Carriers Supporting ZPL Label Format | Service URL https://sandbox.scurri.co.uk/api/ |
| Edit Consignor Details | Scurri Carrier Service National Parce |
| | Log Requests |



- Scurri Company. Enter your Scurri company. This will be provided to you by your courier service.
- Label Type This field is populated if you have loaded a service configuration by choosing the Load Service Configuration. The label type chosen will determine the label template to use when creating and printing the label received from the courier service. The label is requested from the courier when the package has been booked. These label types will be provided to you by your courier. You will need to set up labels for each shipping agent code/shipping agent service code combination.
- **Carriers Supporting ZPL Label Format** This field is an explanation/information link to display a list of couriers that support the ZPL Label Format.





- Edit Consignor Details Choose this action to open the SD Interface Courier Consignor Details page for the shipping agent code/shipping agent service code combination. These details are used for customs documents for the courier service and to determine from where the parcel is being shipped.
- User ID Enter your User ID. This will be provided to you by your Courier Service.
- **Password** Enter your password. This will be provided to you by your Courier Service.
- **Service URL** Enter the Service URL for the Courier Service. This field is populated if you have loaded a service configuration by choosing the **Load Service Configuration**.
- Scurri Carrier Service Code Select a value for the field from a list populated by running the Get Scurri Services action from the Scurri Courier Services page. Your courier service can advise what value to enter.
- Log Requests Select this option to log API requests to and responses from the Courier Services API.

| General | | API Details |
|--|---|--|
| Service Option · · · · · · 5 - N (normal) | | User ID |
| Service Type · · · · · · · 6 - 2 day service | | Password · · · · · · · · · |
| Label Required | | Basic Token |
| Label Type · · · · · · · .pdf | | Service URL https://pre-prod-papi.dpd.ie |
| Delivery Depot (Opti | 0 | Log Requests |

The following fields are displayed in the **DPD Service** FastTab (*Figure 4-16*):



- Service Option Choose the service option from a list of available DPD service options. Service Options implemented in SD Interface Courier are options 1, 2 and 5.
- Service Type Choose the service type from a list of available DPD service types.
- Label Required You need to contact DPD and ask them to enable labels so that labels can be downloaded from DPD. When labels are enabled by DPD, set the Label Required option to yes.





- **Label Type** The label type chosen will determine the label template to use when creating and printing the label received from the courier service. The label is requested from the courier when the package has been booked.
- User ID Enter your User ID. This will be provided to you by your Courier Service.
- **Password** Enter your password. This will be provided to you by your Courier Service.
- **Basic Token** Enter the basic token provided to you by your Courier Service.
- Service URL Enter the Service URL for the Courier Service. This field is populated if you have loaded a service configuration by choosing the Load Service Configuration.
- Log Requests Select this option to log API requests to and responses from the Courier Services API.

The **Manual Instructions** FastTab is enabled only for those couriers with a **Service Type** of **Manual** and contains the shipping instructions field (*Figure 4-17*):

| anual Courier Label | 43006850 🗸 | SDY UC Label | |
|------------------------------|------------|----------------------|----------------------------|
| arcode Type code1 | 28 | Shipping Instruction | This is a manual shipment. |
| acking No. Mandatony | | | |
| cking No. Mandatory \cdots 💽 | | | |



- Manual Courier Label Choose a label to print for you manual courier. SD Interface Courier comes with a report, Report ID 43006850, SD Courier Label, that you can use to print labels for manual couriers.
- **Barcode Type** Choose the barcode type to print on the label chosen in **Manual Courier Label**.
- **Tracking No Mandatory** Choose this option to force users to enter a Tracking No on the Manual Booking Card.
- Shipping Instructions Enter the Shipping Instructions that you want to display on the Manual Booking Card.





In the **Auto Booking Setup** FastTab (*Figure 4-18*) you can switch on the option to automate the Courier Booking Process. A new procedure, AutoBookEntry, was created to allow booking of a sales order by calling custom code in a PTE App and without having to show the booking entry page.

| Allow Auto Booking | |
|-----------------------------|------|
| Auto Booking Default Values | |
| Default Gross Weight | 1.00 |



- Allow Auto Booking Switch this option on if you want to book a courier for a sales order by calling custom code rather than choosing the Book Package action, from the Booking Pending list, which then calls the booking entry page. When this option is switched on the AutoBookEntry procedure can be called from outside SD Interface Courier. For example, a PTE extension can be created to call the AutoBookEntry procedure when the sales order is shipped.
- **Default Gross Weight** If Allow Auto Booking is switched on, the value entered in the Default Gross Weight is passed to the AutoBookEntry procedure.

In the **Courier Charges** FastTab (*Figure 4-19*) you can specify if additional charges should apply to bookings based on certain criterion.

| Test for Courier Charge \cdots 💽 | | Shipping Charge Value | 5.00 |
|----------------------------------|--------|--------------------------------|--------|
| Free Ship If Late | | Create Sales Charge Li | |
| Free Ship Min Value | 100.00 | Shipping Charge Item S-FREIGHT | \sim |
| | | | |



• **Test for Courier Charge** – Select this option if you want to check if a courier charge should be applied to the sales order.





- Free Ship if Late Select this option if a courier charge should not be applied if the shipment is late. The shipment is determined to be late if the Late Order Shipping checkbox has been set on the Sales Order page.
- Free Ship Min Value Enter an order amount below which a courier charge should be applied.

If the Late Order Shipping option has been selected on the Sales Order page and the Free Ship if Late option is selected on the Courier Setup page, then a charge will not be applied.

- Shipping Charge Value If a courier charge is applicable on the orders, enter the value to auto insert as an extra charge line onto the sales order. The action taken here is determined by the option you have selected in Create Sales Charge Lines.
- **Create Sales Charge Lines** Select this option if you would like SD Interface Courier to create and auto insert a sales charge line for the extra courier charge, if applicable, on the sales order.

If this option is not selected, then SD Interface Courier will display a message to notify the user that a charge should be applied to the order.

• Shipping Charge Item – Select the charge item number to be used when auto inserting the courier charge, if applicable, onto the sales order. Select from a list of existing item charges in your Dynamics 365 Business Central database.

From the **General** menu group choose the following actions (*Figure 4-20*):

| ~ | Courier Service DHL · EXP EU | | + 🛍 |
|---|---------------------------------|------------------------------------|-----|
| | General Worldwide GLS | Scurri Logs Report | - 1 |
| | Load Service Configuration | E Consignor Details Email Settings | |
| | | | |



• Load Service Configuration – Select this action to populate certain fields in the Courier Services card with pre-defined values based on the chosen Courier Service Configuration. You are prompted to select Live Services or Test Services.





- **Consignor Details** Choose this action to open the Consignor Details for the Courier Service. These fields are used for customs declaration documents and to determine from where the parcel is being shipped.
- **Email Settings** Choose this action to open the Email Settings page. Here you can choose to use SD Interface Courier email functionality in addition to any email notifications that may be sent by the individual courier services (*Figure 4-21*):

| Email Settings | Ø | Ŀ | + 🛍 | ✓ Saved | Ľ |
|-------------------------------|--------|--------|-------------------------|---------|--------|
| GLS · STD | | | | | |
| III Email Templates | | | | | |
| Confirmation Email | | | | | |
| Use SD Interface Cou | | | Send-From Email Add | | |
| Email Account | | | | | |
| Recipients | | | | | |
| Recipient Email Document & Sp | ecific | \sim | Specific Email | | |
| Booking Confirmed E 🔹 🦲 | | | Booking Confirmed T GLS | BOOKED | \sim |
| Order Shipped Event | | | Order Shipped Templ GLS | SHIPPED | \sim |

Figure 4-21

In the Confirmation Email FastTab:

- Use SD Interface Courier Email Choose this option to generate an email from within SD Interface Courier. Note: when switched on, this option will not turn off the email notifications from the individual courier services.
- Email Account Choose the Email Account from which to send the emails.
- Send From Email Address Enter the email address from which to send the email.

In the **Recipients** FastTab:

• **Recipient Email** – Choose the email to send a notification of package booking and/or shipping to. Options are **Document, Specific, Document & Specific**.

If the **Recipient Email** is set to **Document**, then the email address on the Ship-to Address of the Sales Order is used. If a Ship-to Address email is not found, then the Sell-to Email on the Sales Order is used.





If the **Recipient Email** is set to **Specific** or then email address in **Specific Email** is used.

If the **Recipient Email** is set to **Document & Specific,** then the email address on the Ship-to Address of the Sales Order and the email address in **Specific Email** is used. If a Ship-to Address email is not found, then the Sell-to Email on the Sales Order is used.

- **Specific Email** If the Recipient Email is set to **Specific** or to **Document & Specific**, enter a specific email address.
- Booking Confirmed Event Choose this option to send an email from SD Interface Courier when the booking entry has been confirmed by the Courier Service or in the case of a Manual Service Type when the booking entry moves from Booking Pending to Booking Shipment.
- Booking Confirmed Template Choose the Email Template to use for the email sent from SD Interface Courier when the booking entry has been confirmed by the Courier Service or in the case of a Manual Service Type when the booking entry moves from Booking Pending to Booking Shipment.
- **Order Shipped Event** Choose this option to send an email from SD Interface Courier when the sales order linked to a booking entry has been shipped.
- Order Shipped Template Choose the Email Template to use for the email sent from SD Interface Courier when the sales order linked to a booking entry has been shipped.

| \leftarrow | Courier Service | | | | | Ŕ | + | Ŵ | |
|--------------|--------------------------|-----|--------|------|--------|---|---|---|--|
| | $DHL\cdotEXP\;EU$ | | | | | | | | |
| | General <u>Worldwide</u> | GLS | Scurri | Logs | Report | | | | |
| | Worldwide Options | | | | | | | | |

From the **Worldwide** menu group choose the following action (Figure 4-22):



• Worldwide Options – Chose this option to set the various options for the courier service if sending parcels internationally. These fields are populated if you have loaded





a service configuration by choosing the **Load Service Configuration**. For GLS you can choose to use an invoice report from your reports in Dynamics 365 Business Central to use for customs declarations documentation. For DHL you can specify various options and fields that are passed from SD Interface Courier to the DHL API such as whether to add insurance to the booking and the invoice report to use for paperless trading. You can also choose to use DHL's own invoice layout with options to upload your logo and signature.

From the **GLS** menu group choose the following actions (*Figure 4-23*):

| GLS | · STD | | | | | |
|---------|--------------|--------------|-------------|-------|-----------------|--|
| Genera | l Worldwid | e <u>GLS</u> | Scurri | Logs | Report | |
| 🖻 All (| Capabilities | 🌡 Your Ca | apabilities | () Mo | ore Information | |

Figure 4-23

- All Capabilities Select this action to view the services/capabilities available for GLS.
- Your Capabilities Select this action to view the services/capabilities available for your GLS account.

From the **Scurri** menu group choose the following actions (*Figure 4-24*):

| Courier Service |
|---|
| FASTWAY · STD |
| General Worldwide GLS <u>Scurri</u> Logs Report |
| 📑 Courier Services 🛛 🚥 Courier Warehouse |



• **Courier Services** - Choose this action to view records in the **Scurri Carriers and Services** list. These Scurri Carriers and Services actions are populated by choosing the **Get Scurri Services** action (*Figure 4-25*).





| - | Scurri Carr | iers and Services | |
|---|-------------|-----------------------|--|
| | Manage | 📮 Get Scurri Services | |
| | | | |
| | | | |

 Courier Warehouse – Choose this action to define the Scurri Warehouse Code and Scurri Warehouse Name. Your courier will provide you with these details. If you are using Scurri as the Courier Implementation you need to enter a value in the Location Code on the Sales Order page in the Shipping and Billing FastTab. This Location Code must be defined as the ERP Location in the SD Interface Courier Scurri Warehouses list (Figure 4-26).

| | Scurri Warehouses Manage | | | | √Saved ⊑', ⊯ ` | 7 |
|---------------|---------------------------------|---|----------------|-----------------------|-----------------------|---|
| | Service Entry No. ↑ ▼ | | ERP Location 1 | Scurri Warehouse Code | Scurri Warehouse Name | |
| \rightarrow | 11 | : | EAST | | | |



From the **Logs** menu group choose the following actions (*Figure 4-27*):

| ← courier Service FASTWAY · STD | + 🖻 |
|--|------|
| General Worldwide GLS Scurri Logs Report | - 1 |
| Email Confirmations API Requests | |



• **Email Confirmations** – Choose this action to view the Email Confirmations that have been generated by the SD Interface Courier emailing functionality.





• **API Requests** - – Choose this action to view the requests and responses that have been sent to and received from the Courier's API. This is useful when investigating if an error is raised when booking a courier.





4.3 Booking Pending

Drilling through on the Booking Pending cue or searching for **Booking Pending** in the Tell Me brings you to the **Booking Pending** list (*Figure 4-28*).

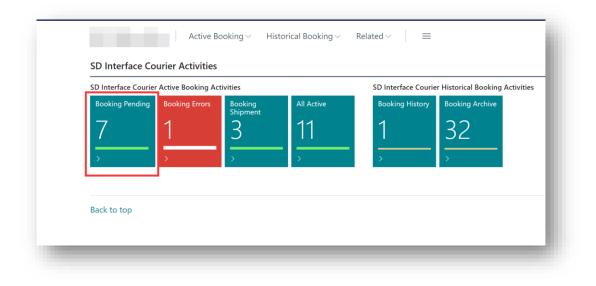


Figure 4-28

The **Booking Pending** list checks, on every open of the page, for new entries to insert into the Booking Entry table. Released sales orders that have a shipping agent code enabled on the **Courier Services Setup**, which have a blank package tracking no., and that are not completely shipped, are inserted into the **SD Interface Courier Booking Entry** table with an initial **Booking Status** of **Pending**. If the Booking Status is that of Pending, then the style of the record is set to Ambiguous.

| \leftarrow | BOOKING PENDING | | | | | | | | | | 7 ⁴ |
|--------------|-------------------|---------|----------------------------|------------------------|--------------------------------|--------------------|----------------------|-------------------|-------------------|--------------|---------------------|
| | | General | Open in Excel | Actions Fewer | options | | | | | | |
| | BOOKING STATUS | NO. | SELL-TO CUSTOMER NO. | SHIPPING AGENT CODE | SHIPPING AGENT SERVICE CODE | SHIPMENT DATE † | SHIP-TO NAME | COMPLE SHIPPED | NO. OF PARCELS | GROSS WEIGHT | POSTED SHIPMENTS |
| | Booking Pending | 104010 | 60000 | DHL | W | 4/16/2020 | Blanemark Hifi Shop | No | 1 | 0.00 | 0 |
| | Booking Pending | 104011 | 10000 | DHL | OVERNIGHT | 4/16/2020 | The Cannon Group PLC | No | 0 | 0.00 | 0 |
| | Booking Pending | 104021 | 60000 | DHL | W | 4/16/2020 | Blanemark Hifi Shop | No | 0 | 0.00 | 0 |
| | Booking Pending | 104016 | 60000 | GLS | BP | 4/16/2020 | Blanemark Hifi Shop | No | 0 | 0.00 | 0 |
| | Booking Pending | 104017 | 61000 | OWN LOG. | NEXT DAY | 4/16/2020 | Fairway Sound | No | 0 | 0.00 | 0 |
| | Booking Pending | 104015 | 61000 | OWN LOG. | NEXT DAY | 4/16/2020 | Fairway Sound | No | 0 | 0.00 | 0 |

The Booking Pending list contains the following fields (Figure 4-29):





- Booking Status Displays the Booking Status as Booking Pending.
- No. Displays the Sales Order No.
- External Document No. Displays the External Document No. from the sales order.
- Sell-To Customer No. Displays the sell-to customer from the sales order.
- Shipping Agent Code Displays the shipping agent code from the sales order.
- Shipping Agent Service Code Displays the shipping agent service code for the booking entry as entered on the sales order.
- Shipment Date Displays the shipment date for the booking entry. Defaults to the shipment date from the sales header but can be amended on the Booking Update page.
- Ship-to Name Displays the ship-to name from the sales order.
- **Completely Shipped** Displays the value of the Completely Shipped field from the Sales Header.
- No. of Parcels Displays the number of parcels on the sales order. The no. of parcels for the booking entry is manually entered when the package is booked using the Booking Update page.
- **Gross Weight** Displays the gross weight of the booking. The gross weight of the parcels is calculated from the lines on the sales order taking the gross weight of the item from the item card times the quantity (base) on the sales line. You can overtype this field when booking the package.
- **Posted Shipments** Displays a flowfield count of the shipments for the sales order. Drilling down on this flowfield allows you to view the courier tracking number for the shipments linked to the sales order.
- Attached Documents Displays a flowfield count of the documents that have been attached to the booking request. This is the Invoice Report that you specified in the Worldwide options for GLS and DHL for customs documents and paperless trading.





The **Booking Pending list** contains the following actions on the **Booking** menu group (*Figure 4-30*):

| Search Booking | Navigate Logs | | |
|----------------------|-----------------------------|-----------------------------|-------------------------|
| 📲 Book Package 🛛 🗙 🗘 | Cancel 🛛 🔨 Skip and Archive | e 🛛 🐻 Attach Sales Document | 🏹 Check for New Entries |



- Book Package Choose this action to book the sales order package with a courier. The
 page displayed when the Book Package action is selected is dependent on the courier
 on the sales order DHL, DPD, GLS, Scurri or Manual. See below in this section for
 details of the fields displayed when the Book Package action is selected for the
 different courier implementations.
- Cancel Choose this action to clear all SD Interface Courier related information (labels and package tracking number if it exists) for the order. The booking entry is removed from the Booking Pending list but can be added again by choosing the Check for New Entries action.
- Skip and Archive Choose this action if you do not want to book the sales order package with a courier. The booking entry for the order is set to a status of cancelled and moved to the Booking Archive table.
- Attach Sales Document Choose this action to upload any documents you want to submit to the Couriers API.
- **Check for New Entries** Choose this action to check for any newly entered sales orders and to insert the records into the Booking Entry table.

The **Booking Pending list** also contains the following action on the **Navigate** menu group (*Figure 4-31*):

| \leftarrow | Booking Pending | ŧ. |
|--------------|---|----|
| | Search Booking <u>Navigate</u> Logs View Sales Order | l |
| - | | ť. |





• View Sales Order – Choose this Action to view the sales order.

The **Booking Pending list** contains the following actions on the **Logs** menu group (*Figure 4-32*):

| 🔎 Search | Booking | g Navigate | Logs | | |
|------------|---------|---------------|----------|--------------------|--|
| 🔠 Requests | Log | 🕙 Email Confi | rmations | Attached Documents | |

- Requests Log - Choose this action to view the requests and responses that have been sent to and received from the Courier's API. This is useful when investigating if an error is raised when booking a courier. In the SD Interface Courier API Request Log page, click on the Request File Name or the Response File Name to download the log file. View the contents of the file using a text editor such as Notepad or Notepad++.
- **Email Confirmations** Choose this action to view the Email Confirmations that have been generated by the SD Interface Courier emailing functionality.
- Attached Documents Choose this action to view the documents attached to the booking entry.





Choosing the **Book Package** action for a **Manual** booking displays the **Update Manual** page with the following fields (*Figure 4-33*):

| Edit - Update Manual | | 2 × |
|-----------------------|----------------------------|--------|
| Shipping Instruction | This is a manual shipment. | Î |
| Package Tracking No. | 101050 04/07/22 | |
| Order No. | 101050 | |
| Sell-To Customer No. | 50000 | |
| Sell-to Customer Name | Relectoud | |
| Shipping Agent Code | OWN LOG. | ~ |
| Shipment Date | 04/07/2022 | |
| No. of Parcels | | 1 |
| Gross Weight | | 15.99 |
| Confirmation Email | | |
| Ship-to Name | Relectoud | |
| Ship-to Address | Occam Court, 1 | |
| Ship-to Address 2 | Surrey | |
| Ship-to City | Guildford | ~ - |
| | ОК | Cancel |



- Shipping Instruction Displays the shipping instructions as specified in the setup for the courier with a Service Type of Manual.
- **Package Tracking No.** Enter the package tracking no. for the manual booking.
- **Order No.** Displays the sales order no. of the package being booked.
- Sell-to Customer No. Displays the customer on the sales order.
- Sell-to Customer Name Displays the sell-to customer name on the sales order.
- Shipping Agent Code Displays the shipping agent code on the Sales Order.





- **Shipment Date** Displays the shipment date on the sales order. This field can be updated.
- **No. of Parcels** Enter the number of parcels to book.
- **Gross Weight** The gross weight of the parcel is calculated from the lines on the sales order taking the gross weight of the item from the item card times the quantity (base) on the sales line. You can overtype this field.
- Confirmation Email Defaults to the Confirmation Email as specified in the Courier Services Setup. In standard Dynamics 365 Business Central, when the default sell-to address is chosen as the ship-to address, the ship-to code is not populated on the order and therefore the email address on the ship-to code field on the sales header is not populated. In this instance, the Document email address is displayed on the Booking Update page.
- Ship-to Name Defaults to the ship-to name on the sales order. This field is editable.
- Ship-to Address Defaults to the ship-to address on the sales order. This field is editable.
- Ship-to Address 2 Defaults to the ship-to address 2 on the sales order. This field is editable.
- Ship-to City Defaults to the ship-to city on the sales order. This field is editable.
- Ship-to Post Code Defaults to the ship-to post code on the sales order. This field is editable.
- Ship-to Country/Region Code Defaults to the ship-to country/region code on the sales order. This field is editable.
- Ship-to Contact Defaults to the ship-to contact on the sales order. This field is editable.
- Ship-to Phone No. Defaults to the ship-to phone no. on the sales order. This field is editable.
- **Special Instructions** Enter any special instructions that you have for the delivery. These instructions will print on the courier label.





Choose **OK** to book the package. If the booking is successful, the booking entry moves to a status of **Booking Shipment**. If you have chosen the option to **Use SD Interface Courier Mail** in the **Courier Service Setup** for this manual courier, then an email is generated and sent from within Microsoft Dynamics NAV when the package is successfully booked. If the booking is unsuccessful, the booking entry moves to a status of **Booking Errors**.

Choosing the **Book Package** action for a **DHL** booking displays the **Update DHL** page with the following fields in the **General** FastTab (*Figure 4-34*).

| General | | | |
|----------------------------|--------------------|--|---------------------|
| Order No. | 101049 | Ship-to Name | School of Fine Art |
| ell-To Customer No. | 30000 | Ship-to Address | 10 High Tower Green |
| ell-to Customer Name | School of Fine Art | Ship-to Address 2 | |
| hipping Agent Code | DHL 🗸 | Ship-to City · · · · · · · · · · · · · · · · · · · | ~ |
| hipping Agent Service Code | INT | Ship-to Post Code | US-FL 37125 🗸 |
| hipment Date | 01/07/2022 | Ship-to County | FL |
| Confirmation Email | | Ship-to Country/Region Code | US 🗸 |
| xtra Insurance | | Ship-to Contact | Meagan Bond |
| mount | 221.80 | Ship-to Phone No. | 555 123 |
| erms of Trade | DDP | Special Instructions | Leave at reception. |
| Declared Currency | | | |
| | | | |
| OHL Worldwide | | | |



- Order No. Displays the sales order no. of the package being booked.
- **Customer No.** Displays the customer on the sales order.
- Sell-to Customer Name Displays the Sell-to Customer Name on the sales order.
- Shipping Agent Code Displays the Shipping Agent Code on the sales order.
- Shipping Agent Service Code Displays the Shipping Agent Service Code on the sales order.
- Shipment Date Displays the Shipment Date on the sales order. This field can be updated.
- Confirmation Email Defaults to the Confirmation Email as specified in the Courier Services Setup. In standard Dynamics 365 Business Central, when the default sell-to address is chosen as the ship-to address, the ship-to code is not populated on the





order and therefore the email address on the ship-to code field on the sales header is not populated. In this instance, the contact email address is displayed on the Booking Update page.

- **Extra Insurance** Select this option to indicate to the courier that this parcel needs extra insurance.
- **Insured Amount** Enter the amount that the parcel is insured for.
- **Terms of Trade** Displays the Terms of Trade as specified on the Courier Service card.
- **Declared Currency** Displays the Declared Currency as specified on the Courier Service card.
- Ship-to Name Defaults to the ship-to name on the sales order. This field is editable.
- Ship-to Address Defaults to the ship-to address on the sales order. This field is editable.
- Ship-to Address 2 Defaults to the ship-to address 2 on the sales order. This field is editable.
- Ship-to City Defaults to the ship-to city on the sales order. This field is editable.
- **Ship-to Post Code** Defaults to the ship-to post code on the sales order. This field is editable.
- Ship-to County Defaults to the ship-to county on the sales order. This field is editable.
- Ship-to Country/Region Code Defaults to the ship-to country/region code on the sales order. This field is editable.
- **Ship-to Contact** Defaults to the ship-to contact on the sales order. This field is editable.
- Ship-to Phone No. Defaults to the ship-to phone no. on the sales order. This field is editable.
- **Special Instructions** Enter any special instructions needed when delivering or handling the parcel. These instructions are printed on the courier label.





The following fields are displayed in the **Line Items** FastTab and the **Parcels** FastTab (*Figure 4-35*):

| inc | Items | Manage | | | | | | | | | | e e |
|------|-------------|------------------------|------------------------|--------------------|------------|---------------|--------|-------------|--------------|----------------------|-------------------|-----------------------------|
| | tem No. | Description | Content Description | Amount Inc. VAT | Quantity | Quantity Unit | Weight | Weight Unit | Gross Weight | Gross Weight Unit | Commodity Code | Manufacture Country Code |
| → . | 1969-W | : Conference Package 1 | FURNITURE | 221.8 | 1 | BOX | 5 | К | 5 | К | 1234567 | - |
| | 1925-W | Conference Bundle 1-6 | FURNITURE | 122.5 | 1 | BOX | 0 | К | 0 | к | - | - |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| arco | els M | lanage | | | | | | | | | | ය ව |
| arco | els N | lanage | | | Line No. † | | | | | | | 년 E Weight |
| arco | els In → | lanage | | | Line No. 1 | ÷ | | | | | | |

Figure 4-35

- **Content Description** Enter a value for the Line Items.
- **Gross Weight** The gross weight of the parcels is calculated from the lines on the sales order taking the gross weight of the item from the item card times the quantity (base) on the sales line. You can overtype this field.

In the **Parcels** FastTab you can enter additional parcels to book by creating a new parcel line.

Choose **OK** to book the package. If the booking is successful, the booking entry moves to a status of **Booking Shipment**, a courier tracking number and labels are received back from DHL. If the booking is unsuccessful the booking entry moves to a status of **Booking Errors**.

Note: For DHL labels, the reference field on the label is populated from the Sales Order Document Number.





Choosing the **Book Package** action for a **GLS** booking displays the **Update GLS** page, choosing the action for a **DPD** booking displays the **Update DPD** page, and choosing the **Book Package** action for a **Scurri** booking displays the **Update Scurri** page. All three pages have the following fields (*Figure 4-36*):

| Order No. | 101057 | |
|-----------------------------|---|---|
| Sell-To Customer No. | 10000 | |
| Sell-to Customer Name | Adatum Corporation | |
| Shipping Agent Code | GLS | ^ |
| Shipment Date | 07/07/2022 | ŧ |
| No. of Parcels | | 1 |
| Gross Weight | 15.5 | 9 |
| Courier Post Code | | / |
| Confirmation Email | | - |
| Ship-to Name | Adatum Corporation | |
| Ship-to Address | Station Road, 21 | |
| Ship-to Address 2 | | |
| Ship-to City | Dublin | / |
| Ship-to Post Code | and the second se | |
| Ship-to Country/Region Code | IE | / |
| Ship-to Contact | Robert Townes | |
| Ship-to Phone No. | | |
| Special Instructions | Fragile. Handle with care. | |
| | | |
| | | |
| | OK Cancel | |



- **Order No.** Displays the sales order no. of the package being booked.
- Sell-to Customer No. Displays the customer on the sales order.
- Sell-to Customer Name Displays the Sell-to Customer Name on the sales order.
- Shipping Agent Code Displays the Shipping Agent Code on the sales order.
- Shipment Date Displays the Shipment Date on the sales order.





- No. of Parcels Enter the number of parcels to book.
- **Gross Weight** The gross weight of the parcels is calculated from the lines on the sales order taking the gross weight of the item from the item card times the quantity (base) on the sales line. You can overtype this field.
- Confirmation Email Defaults to the Confirmation Email as specified in the Courier Service Setup. In standard Dynamics 365 Business Central, when the default sell-to address is chosen as the ship-to address, the ship-to code is not populated on the order and therefore the email address on the ship-to code field on the sales header is not populated. In this instance, the contact email address is displayed on the Booking Update page.
- Ship-to Name Defaults to the Ship-to Name on the sales order. This field is editable.
- Ship-to Address Defaults to the Ship-to Address on the sales order. This field is editable.
- Ship-to Address 2 Defaults to the Ship-to Address 2 on the sales order. This field is editable.
- Ship-to City Defaults to the Ship-to City on the sales order. This field is editable.
- Ship-to Post Code Defaults to the Ship-to Post Code on the sales order. This field is editable.
- Ship-to Country/Region Code Defaults to the Ship-to Country/Region Code on the sales order. This field is editable.
- Ship-to Contact Defaults to the Ship-to Contact on the sales order. This field is editable.
- Ship-to Phone No. Defaults to the Ship-to Phone No. on the sales order. This field is editable.
- **Special Instructions** Enter any special instructions needed when delivering or handling the parcel. These instructions are printed on the courier label.

Choose **OK** to book the package. If the booking is successful, the booking entry moves to a status of **Booking Shipment**, courier tracking numbers and labels are received back from GLS,





DPD or Scurri. If the booking is unsuccessful the booking entry moves to a status of **Booking Errors**.

For orders that have **multiple shipments**, you can:

- 1. **Book** the courier in the **Booking Pending List** using the **Book Package** action for the shipment. The package tracking number is stamped on the sales order header and the booking entry table.
- 2. From the **Booking Shipment** list, partially **ship** the order (the package tracking number is stamped on the sales shipment as per standard Microsoft Dynamics 365 Business Central) and then choose the **Reset to Awaiting Booking** action in the **Booking Shipment List** to reset the order to **Booking Pending**.
- 3. From the **Booking Pending** list, book the courier for the subsequent shipment. The new package tracking number is stamped on the sales order header and the booking entry table.
- 4. From the **Booking Shipment** list, ship another part of the order. The new package tracking number is stamped on the sales shipment as per standard Microsoft Dynamics 365 Business Central.





4.4 Booking Errors

Drilling through on the Booking Errors cue or searching for **Booking Errors** in the Tell Me brings you to the **Booking Errors** list (*Figure 4-37*).

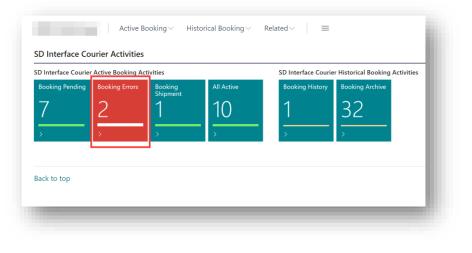


Figure 4-37

The **Booking Errors** list displays unsuccessful bookings and allows you to review and fix the error, reset the error, and book the package again. If the Booking Status is Error, then the style of the record is set to Attention. The Booking Errors list contains the following fields *(Figure 4-38)*:

| 🔎 Search | Correct | tion Naviga | te <u>Logs</u> | | | | | | | | Ŀ |
|------------|-----------|----------------------------|----------------|-----------------------------|----------------------|------------------------|-----------------------------------|--------------|---------------------------------|---------------------|-----------------------|
| 🔠 Requests | Log | 🕙 Email Conf | irmations | 🦫 Attached Do | cuments | | | | | | |
| Entry | √o. | Booking Status T | No. | External Document No. | Sell-To Customer No. | Shipping Agent Code | Shipping Agent Service Code | Gross Weight | Booking Error | Posted Shipments | Attached Documents |
| | <u>50</u> | Error | 101046 | | 10000 | DHL. | DOW | 0.00 | The system could not verify you | 0 | 0 |

Figure 4-38

- Booking Status Displays the Booking Status as Error.
- No. Displays the sales order no.
- External Document No. Displays the External Document No. on the Sales Header.
- Sell-To Customer No. Displays the sell-to customer from the sales order.





- Shipping Agent Code Displays the shipping agent code from the sales order.
- Shipping Agent Service Code Displays the shipping agent service code as entered on the Booking Update page.
- Shipment Date Displays the shipment date as entered on the Booking Update page.
- Ship-to Name Displays the ship-to name as entered on the Booking Update page.
- **Completely Shipped** Displays the value of the Completely Shipped field from the Sales Header.
- No. of Parcels Displays the number of parcels as entered on the Booking Update page.
- **Gross Weight** Displays the gross weight as entered on the Booking Update page.
- **Booking Error** Displays the error that was raised when attempting to book the package.
- **Posted Shipments** Displays a flowfield count of the shipments for the sales order. Drilling down on this flowfield allows you to view the courier tracking number for the shipments linked to the Sales Order.
- Attached Documents Displays a flowfield count of the documents that have been attached to the booking request. This is the Invoice Report that you specified in the Worldwide options for GLS and DHL for customs documents and paperless trading.

The **Booking Errors** list contains the following action in the **Correction** menu group (*Figure 4-39*):

| Booking Errors | |
|---------------------------------|--|
| Search Correction Navigate Logs | |
| S Reset Error | |
| | |

Figure 4-39





• **Reset Error** – Choose this action to reset the booking entry from a status of error back to a status of booking pending. The booking entry moves back to the **Booking Pending** list and you can choose to book the package again.

You can also choose the following action in Navigate menu group (Figure 4-40):

| ← Bookin | ng Errors | | | | |
|----------|------------------|-----------------|------|----------|--|
| | earch Correction | <u>Navigate</u> | Logs | | |
| - | | - | - | Evternal | |



• View Sales Order – Choose this action to view the Sales Order that the booking is for.

The Booking Errors list contains the following actions on the Logs menu group (Figure 4-41):

| Search Correction Navigate Logs | ng Errors | | |
|---|---------------------|------------------|---------------------------|
| | Search Correction | Navigate L | ogs |
| 🔠 Requests Log 🛛 🕙 Email Confirmations 🛛 🦻 Attached Documen | Requests Log 🛛 🔨 Er | nail Confirmatio | ns 🛛 🖗 Attached Documents |



- Requests Log - Choose this action to view the requests and responses that have been sent to and received from the Courier's API. This is useful when investigating if an error is raised when booking a courier. In the SD Interface Courier API Request Log page, click on the Request File Name or the Response File Name to download the log file. View the contents of the file using a text editor such as Notepad or Notepad++.
- Email Confirmations Choose this action to view the Email Confirmations that have been generated by the SD Interface Courier emailing functionality.
- Attached Documents Choose this action to view the documents attached to the booking entry.





4.5 Booking Shipment

Drilling through on the Booking Shipment cue or searching for **Booking Errors** in the Tell Me brings you to the **Booking Shipment** list (*Figure 4-42*).

| O Interface Courie | r Active Booking Act | tivities | - | SD Interface Courie | r Historical Booking Activities |
|--------------------|----------------------|--|------------|---------------------|---------------------------------|
| Booking Pending | Booking Errors | Booking Shipment | All Active | Booking History | Booking Archive |
| 8 | 1 | 2 | 11 | 1 | 32 |
| > | > | > | > | > | > |
| | | | - | | |
| | \sim | in the second se | | | |
| | | Sec. | | | |

Figure 4-42

The **Booking Shipment** list displays details of successful bookings and enables you to view and print the booking labels and track the booking. You can also view the sales order. If the Booking Status is Booking Shipment, then the style of the record is set to Favourable. The Booking Shipment list contains the following fields (*Figure 4-43*):

| Search Booking | Tracking Navigat | e Logs | | | | | |
|-----------------------|------------------|----------|----------------------|----------------------|------------|---------------------------|------------|
| | | | | | | | |
| S Reset To Awaiting I | Booking | | | | | | |
| | | | External Document | | Shipping | Shipping Agent Service | Shipment |
| | Booking Status 🝸 | No. | No. 🗸 | Sell-To Customer No. | Agent Code | Code | Date ↓ |
| Entry No. | booking status . | | | | | | |
| Entry No. | Booking Shipment | TCSO0005 | | C00010 | FASTWAY | STD | 01/07/2022 |

Figure 4-43

• Booking Status – Displays the Booking Status as Booking Shipment.





- No. Displays the sales order no.
- External Document No. Displays the External Document No. on the Sales Header.
- Sell-To Customer No. Displays the sell-to customer from the sales order.
- Shipping Agent Code Displays the shipping agent code from the sales order.
- Shipping Agent Service Code Displays the shipping agent service code from the sales order.
- Shipment Date Displays the shipment date from the sales order or as entered on the Booking Update page.
- Ship-to Name Displays the ship-to name from the sales order or as entered on the Booking Update page.
- **Courier Tracking Number** Displays the courier tracking number for the booked package. For couriers with a **Service Type** of **API** the courier returns the tracking number back to SD Interface Courier.
- **Completely Shipped** Displays the value of the Completely Shipped field from the Sales Header.
- No. of Parcels Displays the number of parcels as entered on the Booking Update page.
- **Gross Weight** Displays the gross weight of the Booking. The gross weight of the parcels is calculated from the lines on the sales order taking the gross weight of the item from the item card times the quantity (base) on the sales line. You can overtype this field when booking the package.
- **Delivery Depot** Shows the number of the DPD Delivery Depot.
- **Posted Shipments** Displays a flowfield count of the Shipments for the Sales Order. Drilling down on this flowfield allows you to view the courier tracking number for the shipments linked to the Sales Order.
- Attached Documents Displays a flowfield count of the documents that have been attached to the booking request. This is the Invoice Report that you specified in the Worldwide options for GLS and DHL for customs documents and paperless trading.





The **Booking Shipment** list contains the following action in the **Booking** menu group (*Figure* 4-44):

| ~ | Booking Shipr | nent | | | |
|---|--|-------------|----------|----------|------|
| | 🔎 Search | Booking | Tracking | Navigate | Logs |
| | <table-cell-rows> Reset To</table-cell-rows> | Awaiting Bo | ooking | | |
| | - | | | | - |
| | | Fig | ure 4-44 | | |

• Reset to Awaiting Booking – Choose this action to reset the booking entry from a Status of Booking Shipment back to a Status of Booking Pending.

Note: For orders that have multiple shipments, you can:

- 1. **Book** the courier in the **Booking Pending** list using the **Book Package** action for the shipment. The package tracking number is stamped on the sales order header and the booking entry table.
- 2. From the **Booking Shipment** list, partially **ship** the order (the package tracking number is stamped on the sales shipment as per standard Microsoft Dynamics 365 Business Central) and then choose the **Reset to Awaiting Booking** action in the **Booking Shipment** list to reset the order to **Booking Pending**.
- 3. From the **Booking Pending** list, book the courier for the subsequent shipment. The new package tracking number is stamped on the sales order header and the booking entry table.
- 4. From the **Booking Shipment** list, ship another part of the order. The new package tracking number is stamped on the sales shipment as per standard Microsoft Dynamics 365 Business Central.





The **Booking Shipment** list contains the following actions on the **Tracking** menu group (*Figure* 4-45):

| 🔎 Search | Booking | g <u>Tracking</u> | Navigate | Logs | | |
|----------|---------|-------------------|----------|------------|----------|---------------------|
| Track B | ooking | 🖶 Print Label | O Down | load Label | 🔟 Labels | ⊥ Download DHL Invo |



- **Track Booking** Choose this action to track the booking. A **Tracking URL Root** must be specified on the **Courier Service** card.
- Print Label Choose this action to view and/or print the booking labels. For couriers with a Service Type of API the courier API returns the labels for the booking back to SD Interface Courier. For couriers with a Service Type of Manual SD Interface Courier generates the label.
- Download Label Choose this action to download the booking labels. For couriers with a Service Type of API the courier API returns the labels for the booking back to SD Interface Courier. For couriers with a Service Type of Manual SD Interface Courier generates the label.
- Labels Choose this action to view and/or print the booking labels associated with the order. For couriers with a Service Type of API the courier API returns the labels for the booking back to SD Interface Courier. For couriers with a Service Type of Manual SD Interface Courier generates the label.
- Download DHL Invoice If you have chosen to use the DHL Invoice in the Worldwide options in the Courier Service Card, you can download the invoice that has been generated by DHL.



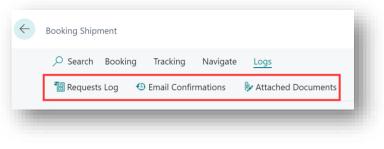


The **Booking Shipment List** contains the following action in the **General** menu group (*Figure 4-46*):

| 🔎 Search | Booking | Tracking | Navigate | Logs | |
|-------------|----------|----------|----------|------|--|
| 🛅 Ship Sale | es Order | | | | |

• Ship Sales Order – Choose this Action to view the Sales Order.

The **Booking Shipment** list contains the following actions on the **Logs** menu group (*Figure 4-47*):





- Requests Log - Choose this action to view the requests and responses that have been sent to and received from the Courier's API. This is useful when investigating if an error is raised when booking a courier. In the SD Interface Courier API Request Log page, click on the Request File Name or the Response File Name to download the log file. View the contents of the file using a text editor such as Notepad or Notepad++.
- Email Confirmations Choose this action to view the Email Confirmations that have been generated by the SD Interface Courier emailing functionality.
- Attached Documents Choose this action to view the documents attached to the booking entry.





4.6 Booking History

Drilling through on the **Booking History** cue or searching for **Booking History** in the Tell Me brings you to the **Booking History List** (*Figure 4-48*).

| 5D Interface Courie | r Active Booking Ac | tivities | | SD Interface Courie | r Historical Booking Activitie |
|---------------------|---------------------|---------------------|------------|---------------------------------------|--------------------------------|
| Booking Pending | Booking Errors | Booking Shipment | All Active | Booking History | Booking Archive |
| 8 | 1 | 2 | 11 | 1 | 32 |
| | <u> </u> | | | · · · · · · · · · · · · · · · · · · · | |
| | > | > | > | > | > |

Figure 4-48

The **Booking History List** displays details of successful bookings for orders that have been completely shipped and contains the following fields (*Figure 4-49*):

| | anage | Tracking | Navigate | Logs | | | | | | |
|----------------------|--------|----------------------------|----------|-----------------------------|----------------------|------------------------|-----------------------------------|-------------------|------------------|------------------|
| 4 Archive Processing | cessec | Lines | | | | | | | | |
| Entry No. | | Booking Status T | No. | External Document No. | Sell-To Customer No. | Shipping Agent Code | Shipping Agent Service Code | Shipment Date↓ | Ship-to Name | Compl Shipped |
| 33 | 3 | Completed | 101045 | | 40000 | GLS | STD | 27/06/2022 | Alpine Ski House | Yes |



- **Booking Status** Displays the Booking Status as **Booking Completed**.
- No. Displays the sales order no.
- External Document No. Displays the External Document No. on the Sales Header.
- Sell-To Customer No. Displays the sell-to customer from the sales order.
- Shipping Agent Code Displays the shipping agent code from the sales order.





- **Shipping Agent Service Code** Displays the shipping agent service code from the sales order or as entered on the Booking Update page.
- Shipment Date Displays the shipment date from the sales order or as entered on the Booking Update page.
- **Ship-to Name** Displays the ship-to name from the sales order or as entered on the Booking Update page.
- **Completely Shipped** Displays the value of the Completely Shipped field from the Sales Header.
- No. of Parcels Displays the number of parcels as entered on the Booking Update page.
- **Gross Weight** Displays the gross weight or as entered on the Booking Update page.
- **Courier Tracking Number** Displays the courier tracking number for the booked package. For couriers with a service type of API the courier returns the tracking number back to SD Interface Courier.
- **Posted Shipments** Displays a flowfield count of the Shipments for the Sales Order. Drilling down on this flowfield allows you to view the courier tracking number for the shipments linked to the Sales Order.
- Attached Documents Displays a flowfield count of the documents that have been attached to the booking request. This is the Invoice Report that you specified in the Worldwide options for GLS and DHL for customs documents and paperless trading.

The **Booking History** list contains the following action on the **Manage** menu group (*Figure 4-50*):

| Booking History |
|--------------------------------------|
| Search Manage Tracking Navigate Logs |
| Archive Processed Lines |
| |

Figure 4-50





• Archive Processed Lines – Choose this Action to move completed booking entries to the booking archive table.

The **Booking History** list contains the following actions on the **Tracking** menu group (*Figure* 4-51):

| 🔎 Sear | rch Bool | king <u>Tr</u> | acking | Navigate | Logs | | | |
|--------|-----------|----------------|----------|----------|------------|------------|-----------------------------|------------|
| 🚰 Trac | k Booking | 🖶 Pri | nt Label | ⊙ Downl | load Label | III Labels | $ m rac{1}{2}$ Download DH | IL Invoice |



- **Track Booking** Choose this action to track the booking. A **Tracking URL Root** must be specified on the **Courier Service** card.
- Print Label Choose this action to view and/or print the booking labels. For couriers with a Service Type of API the courier API returns the labels for the booking back to SD Interface Courier. For couriers with a Service Type of Manual SD Interface Courier generate the label.
- Download Label Choose this action to download the booking labels. For couriers with a Service Type of API the courier API returns the labels for the booking back to SD Interface Courier. For couriers with a Service Type of Manual SD Interface Courier generates the label.
- Labels Choose this action to view and/or print the booking labels associated with the order. For couriers with a Service Type of API the courier API returns the labels for the booking back to SD Interface Courier. For couriers with a Service Type of Manual SD Interface Courier generates the label.
- **Download DHL Invoice** If you have chosen to use the DHL Invoice in the Worldwide options in the Courier Service Card, you can download the invoice that has been generated by DHL.





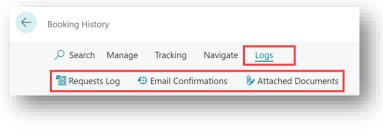
The **Booking History** list contains the following actions on the **Navigate** menu group (*Figure* 4-52):

| \leftarrow | Booking Shipment |
|--------------|---------------------------------------|
| | Search Booking Tracking Navigate Logs |
| | 🛅 Ship Sales Order |
| | |



• Ship Sales Order – Choose this action to view the Sales Order.

The **Booking Shipment** list contains the following actions on the **Logs** menu group (*Figure 4-53*):





- Requests Log - Choose this action to view the requests and responses that have been sent to and received from the Courier's API. This is useful when investigating if an error is raised when booking a courier. In the SD Interface Courier API Request Log page, click on the Request File Name or the Response File Name to download the log file. View the contents of the file using a text editor such as Notepad or Notepad++.
- **Email Confirmations** Choose this action to view the Email Confirmations that have been generated by the SD Interface Courier emailing functionality.
- Attached Documents Choose this action to view the documents attached to the booking entry.





4.7 Booking Archive

Drilling through on the **Booking Archive** cue or searching for **Booking Archive** in the Tell Me brings you to the **Booking Archive** list (*Figure 4-54*).

| | g Activities | | SD | Interface Courie | r Historical Booking | Activities |
|---|------------------------|------------|----|------------------|----------------------|------------|
| | rs Booking Shipment | All Active | Во | ooking History | Booking Archive | |
| | 2 | 11 | 1 | | 32 | |
| | > | > | > | | > | |
| | | | | | | 1 |
| | ~ | | | | | |
| J | j s | | | | | |

Figure 4-54

The **Booking Archive List** displays details of archived bookings for orders and contains the following fields (*Figure 4-55*):

| 2 | Search Track | ing | Labels | Logs | | | | | | | | | |
|---|--------------|-----|-------------------|--------|------------------------|-----------------------------------|----------------------|------------------------|-------------------------------|------------------|-----------------|--------------------|--------|
| | Entry No. | | Booking Status | No. | Shipping Agent Code | Shipping Agent Service Code | Service Entry No. | | Confirmation Email | Shipment Date | Ship-to Code | Ship-to Name | Ship-t |
| | <u>26</u> | 3 | Completed | 101040 | QWN LQG. | NEXT, DAY | 2 | ABC2 | meagan.bond@contoso.com;a | 23/06/2022 | | School of Fine Art | |
| | 23 | | Completed | 101039 | OWN LOG. | NEXT DAY | 2 | ABC | jesse.homer@contoso.com;agr | 23/06/2022 | | Relectoud | |
| | 4 | | Completed | 101029 | OWN LOG. | NEXT DAY | 2 | 3 | | 08/06/2022 | | Alpine Ski House | |
| | 43 | | Completed | 101045 | GLS | INT | 3 | 21560026428 | ian.deberry@contoso.com;agra. | . 05/07/2022 | | Alpine Ski House | |
| | 31 | | Completed | 101043 | GLS | STD | з | 21560026425 | robert.townes@contoso.com;a | 27/06/2022 | | Adatum Corporati. | |
| | 29 | | Completed | 101038 | GLS | INT | 7 | 2156002642321560026424 | ian.deberry@contoso.com;agra. | . 24/06/2022 | | Alpine Ski House | |
| | 27 | | Completed | 101041 | GLS | STD | 3 | 21560026422 | robert.townes@contoso.com;a | 23/06/2022 | | Adatum Corporati. | |



- Booking Status Displays the Booking Status as Completed or Cancelled.
- No. Displays the no. of the sales order.





- Shipping Agent Code Displays the shipping agent code from the sales order.
- **Shipping Agent Service Code** Displays the shipping agent service code from the sales order or as entered on the Booking Update page.
- Service Entry No. The entry number of the Courier Service on the SD Interface Courier Services table.
- **Courier Tracking Number** Displays the courier tracking number for the booked package. For couriers with a service type of API the courier returns the tracking number back to SD Interface Courier.
- **Confirmation Email** Displays the confirmation email for the booking.
- Shipment Date Displays the shipment date from the sales order or as entered on the Booking Update page.
- **Ship-to Code** Displays the ship-to code from the sales order or as entered on the Booking Update page.
- Ship-to Name Displays the ship-to name from the sales order or as entered on the Booking Update page.
- Ship-To Name 2 Displays the ship-to name 2 from the sales order.
- Ship-to Address Displays the ship-to address from the sales order or as entered on the Booking Update page.
- Ship-to Address 2 Displays the ship-to address 2 from the sales order.
- Ship-to City Displays the ship-to city from the sales order or as entered on the Booking Update page.
- Ship-to Contact Displays the ship-to contact from the sales order or as entered on the Booking Update page.
- Ship-to Post Code Displays the ship-to post code from the sales order or as entered on the Booking Update page.
- Ship-to County Displays the ship-to county from the sales order or as entered on the Booking Update page.





- Ship-to Country/Region Code Displays the ship-to country/region code from the sales order or as entered on the Booking Update page.
- Shipment Method Code Displays the shipment method code from the sales order.
- **External Document No.** Displays the external document no. from the sales order.
- **Courier Confirmed Date** Displays the date on which the courier confirmed the booking.
- **Courier Confirmed Time** Displays the time at which the courier confirmed the booking.
- **Courier Post Code** Displays the courier's post code.
- No. of Parcels Displays the number of parcels as entered on the Booking Update page.
- **Gross Weight** Displays the gross weight of the booking.
- Late Order Shipping Displays as checked if the late order shipping field on the sales header was selected at the time of booking the package.
- **Booking Cancelled** Displays if the booking was cancelled.
- Booking Cancelled User Displays the user who cancelled the booking.
- **Booking Cancelled Date** Displays the date the booking was cancelled.
- **Booking Cancelled Time** Displays the time the booking was cancelled.
- **Tracking URL** Displays the tracking URL for the booking.
- **Booking Charge** Displays the booking charge if any.
- **Posted Shipments** Displays a flowfield count of the Shipments for the Sales Order.





The **Booking Archive** list contains the following action in the **Tracking** menu group (*Figure 4-56*):

| \leftarrow | Booking Archive |
|--------------|-------------------------------|
| | ♀ Search Tracking Labels Logs |
| | 🚰 Track Booking |
| | |
| | |
| | Figure 4-56 |

• **Track Booking** – Choose this Action to track the booking. A **Tracking URL Root** must be specified on the **Courier Setup**.

The **Booking Archive** list contains the following action in the **Labels** menu group (*Figure 4-57*):

| \leftarrow | Booking Archive |
|--------------|--------------------------|
| | View/Print Booking Label |
| | |
| | Figure 4-57 |

• View/Print Booking Labels – Choose this Action to view and/or print the booking labels. For couriers with a Service Type of API the courier API returns the labels for the booking back to SD Interface Courier.

The **Booking Archive** list contains the following action in the **Logs** menu group (*Figure 4-58*):

| 🔎 Search | Tracking | Labels | Logs | | |
|-----------|----------|-----------|---------|--------------------|------------------------|
| 🐻 API Log | 🕚 Email | Confirmat | ion Log | Attached Documents | ⊥ Download DHL Invoice |



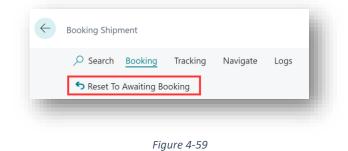




- API Log - Choose this action to view the requests and responses that have been sent to and received from the Courier's API. This is useful when investigating if an error is raised when booking a courier. In the SD Interface Courier API Request Log page, click on the Request File Name or the Response File Name to download the log file. View the contents of the file using a text editor such as Notepad or Notepad++.
- **Email Confirmation Log** Choose this action to view the Email Confirmations that have been generated by the SD Interface Courier emailing functionality.
- Attached Documents Choose this action to view the documents attached to the booking entry.
- **Download DHL Invoice** If you have chosen to use the DHL Invoice in the Worldwide options in the Courier Service Card, you can download the invoice that has been generated by DHL.

4.8 Cancelling a Booking

To cancel a booking, from the **Booking Shipment** list choose the **Reset to Awaiting Booking** action from the Booking menu group (*Figure 4-59*).



• Reset to Awaiting Booking – Choose this action to reset the booking entry from a Status of Booking Shipment back to a Status of Booking Pending.





5 SD Interface Courier and Zebra Printers

For sites that use Zebra printers we can provide you with a PowerShell script that will detect if a file is created in a folder and then executes logic to print or to copy the file to the Zebra printer.

6 SD Interface Courier and Exposed Events for Scurri

We have published the following events before json is written to the payload to allow for modifications, if needed, to book parcels with Couriers through the Scurri API (*Figure 6-1*):

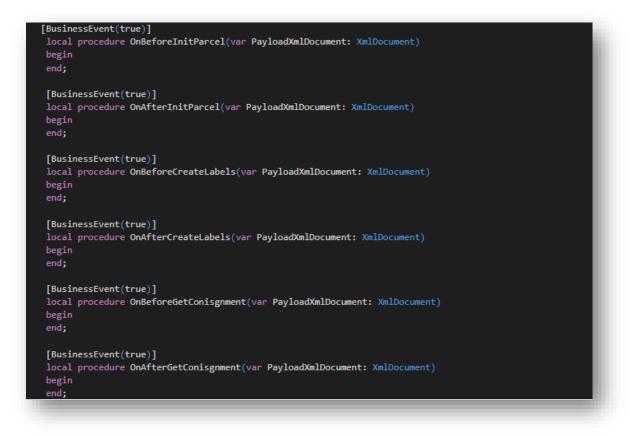


Figure 6-1





7 Uninstalling SD Interface Courier

To uninstall SD Interface Courier:

1. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management** (*Figure 7-1*).

| | | | | | | | | ٩ | Q | Ø | ? | |
|-----|--|----------------|---|----------|--------------------------------|---|-----------|---|---|---|---|--|
| nt | TELL ME WHAT YOU WANT TO DO | | 2 | \times | | | | | | | | |
| ł | extension | | | × | | | | 2 | | | | |
| L | Go to Pages and Tasks | | | | | | | | | | | |
| L | > Extension Management | Administration | | П | + Sales Credit Memo ≻ Tasks | SalesReports | > History | | | | | |
| | Didn't find what you were looking for? Try exploring | | | _ | 7 10585 | > Reports | | | | | | |
|) Z | + | | | | | | | | | | | |
| | | | _ | - | | _ | _ | _ | - | _ | | |
| | | | | | | | | | | | | |

Figure 7-1

- 2. In Extension Management, you should see the SD Interface Courier App installed.
- 3. Select the **SD Interface Courier** App and choose the **Uninstall** Action (*Figure 7-2*).

| ✓ Search Details | Manage III Open in Exce | el Actions Fewer | r options | ∇ | ≣ |
|---------------------|-------------------------|-------------------------|---------------------|----------|---|
| 📲 Install 🔭 Uninsta | ill 🔹 Configure 🛛 🗋 D | ownload Source 🛛 🕕 Lear | rn More 🛛 🔀 Refresh | | 珍 |
| Description | Nam | | Version | | |

Figure 7-2



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