

Sendcloud

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idyn BV

Table of Contents

- 1. Introduction 1
 - 1.1. Key features..... 2
 - 1.2. About Sendcloud 3
 - 1.3. License Key 4
 - 1.4. Free Trial 5
- 2. Installation 6
 - 2.1. Business Central SaaS 7
 - 2.2. Business Central On-Premises..... 8
- 3. Configuration 9
 - 3.1. Sendcloud Account 10
 - 3.2. Permissions 12
 - 3.3. Sendcloud Manager role 13
 - 3.4. Setup Wizard 14
 - 3.4.1. Step 1 15
 - 3.4.2. Step 2 16
 - 3.4.3. Step 3 17
 - 3.4.4. Step 4a 19
 - 3.4.5. Step 4b 20
- 4. Transport Orders 21
 - 4.1. Creation 22
 - 4.2. Sending to Sendcloud 23
 - 4.3. Cancel..... 25

1. Introduction

Sendcloud – The all-in-one shipping platform

Linking DHL, DPD, UPS, GLS, PostNL, RoyalMail, Budbee and many more to Microsoft Dynamics 365 Business Central.

Sendcloud helps your business save time, effort and money on the shipping process. Do you want to easily ship parcels to your customers with multiple carriers directly from Dynamics 365 Business Central via one platform? Check out Sendcloud!

With this extension, you can book your transport orders directly from your Business Central environment. Transport labels are printed and tracking information is available in real-time for you and your customers.

Sendcloud is usable for all your domestic or international parcels, even if you need local, last-mile, evening or sustainable delivery services. When a sales order is made in Business Central, you can book & print your labels with one click. The carrier will then do what they always did: pick up and deliver your packages. Track & trace links and status updates will automatically be updated in Business Central.

The online onboarding process makes it easy to almost immediately start automating your shipping operations. You can instantly see the results of using Sendcloud:

- No double data input
- Reducing errors
- Improved productivity
- Shipping cost reduction
- Real-time insight into transport costs
- No risk of outdated carrier interfaces

1.1. Key features

Key features and benefits

Carrier-connectivity with large package carriers such as DHL, FedEx, UPS, Royal Mail, PostNL, BPost and DPD

- Local, sustainable and evening delivery options available
- Your top choice for colly or package shipping
- Select carrier depending on best rates and/or delivery times directly in Business Central
- Control and optimize all handling and transport costs from order entry until delivery
- Transport labels printed directly from your order
- Real-time track & trace information
- Use Sendcloud discount for shipping rates
- Online onboarding, easy to use and get started right away

1.2. About Sendcloud

Sendcloud is the all-in-one shipping platform that accelerates international growth. Shipping should be easy, no matter what, where, and how much you ship. That's our promise!

Sendcloud helps online retailers to save time on shipping and at the same time increase conversion by optimizing their checkout, offering branded tracking and a seamless return process for both businesses and consumers.

Everyone should be able to scale internationally, it's not a privilege to huge enterprises. That's why we are on a mission to make shipping as easy as possible and to turn it into a competitive advantage!

1.3. License Key

Sendcloud – The all-in-one shipping platform needs an active license key and Sendcloud account to operate.

If you don't have an active Sendcloud account, please visit [this link](#) to create one.

1.4. Free Trial

When you install **Sendcloud – The all-in-one shipping platform** in your **Microsoft Dynamics 365 Business Central** production or sandbox environment, you will receive a 14-day free trial license key via email.

If you haven't received your free trial key or if you want to extend your trial period, please contact us at **sales@idyn.nl**.

2. Installation

2.1. Business Central SaaS

If you are running the cloud/online version of **Microsoft Dynamics 365 Business Central**, you can find and install the **Sendcloud – The all-in-one shipping platform** app in [Microsoft AppSource](#).

2.2. Business Central On-Premises

If you are running the On-Premises version of **Microsoft Dynamics 365 Business Central**, you can install the **Sendcloud – The all-in-one shipping platform** app using PowerShell and the app runtime package provided by your implementation partner.

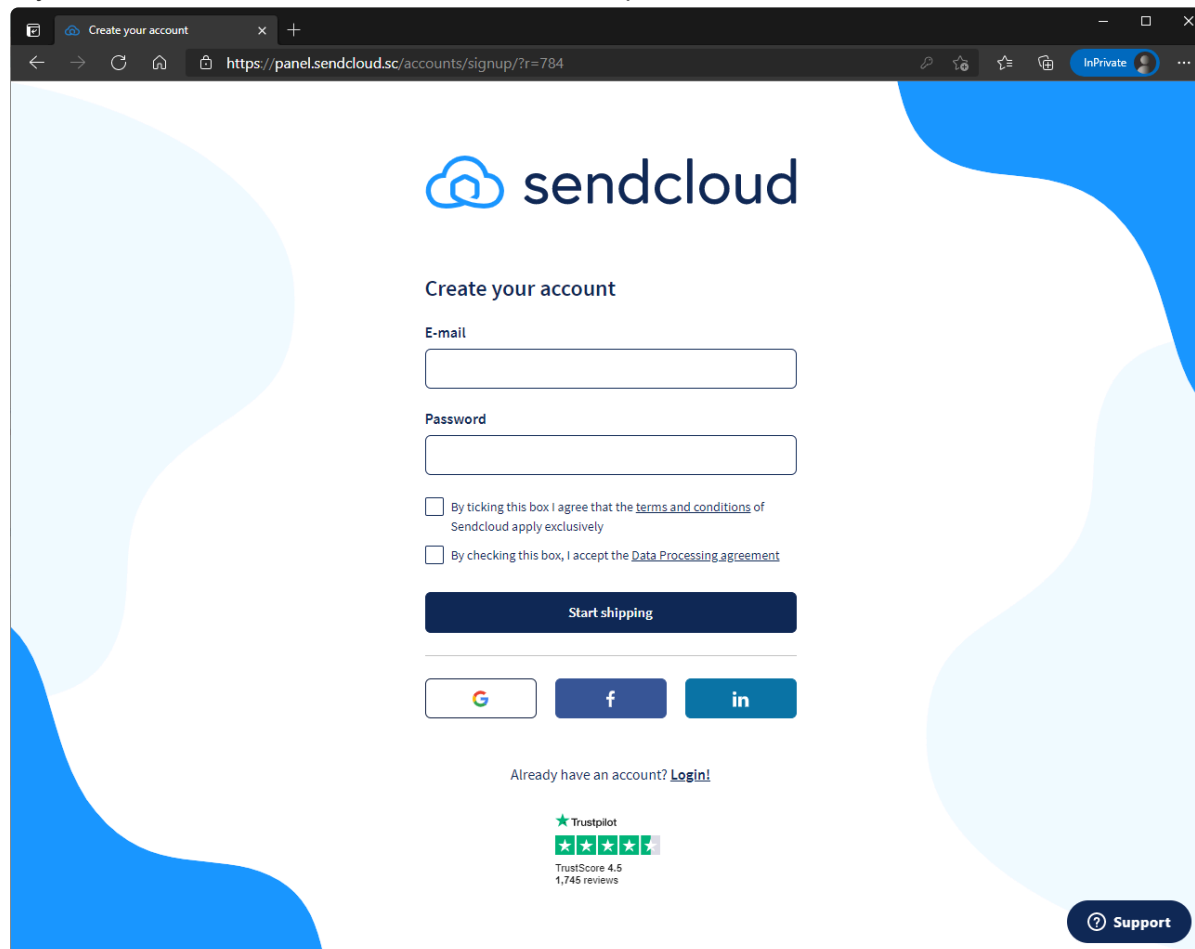
The on-premises runtime packages can be downloaded from our [website](#).

3. Configuration

3.1. Sendcloud Account

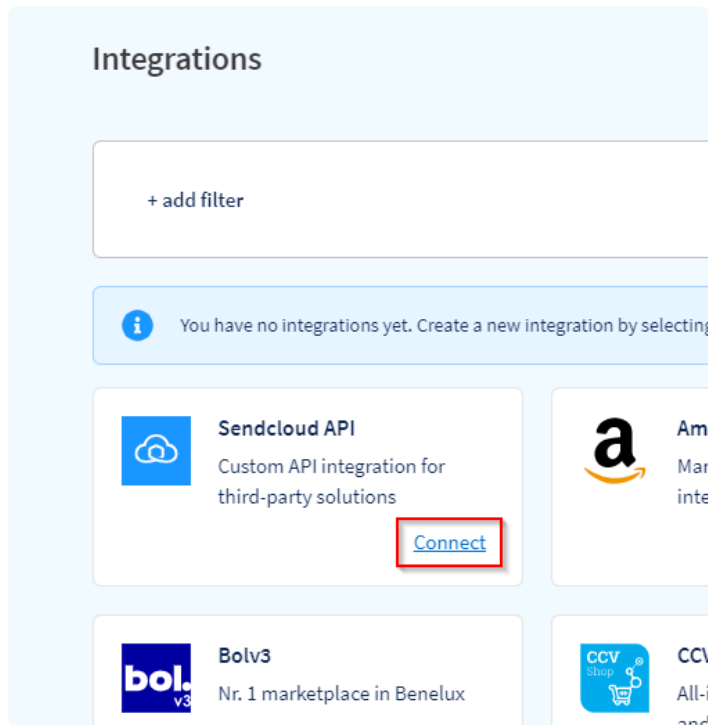
Sendcloud – The all-in-one shipping platform needs an active Sendcloud account to operate.

If you don't have an active Sendcloud account, please visit [this link](#) to create one.

A screenshot of a web browser showing the Sendcloud account creation page. The browser's address bar displays the URL 'https://panel.sendcloud.sc/accounts/signup/?r=784'. The page features the Sendcloud logo at the top, followed by the heading 'Create your account'. Below this, there are input fields for 'E-mail' and 'Password'. Two checkboxes are present: 'By ticking this box I agree that the terms and conditions of Sendcloud apply exclusively' and 'By checking this box, I accept the Data Processing agreement'. A dark blue button labeled 'Start shipping' is positioned below the checkboxes. At the bottom of the form, there are three social media login buttons for Google, Facebook, and LinkedIn. Below these buttons, a link says 'Already have an account? Login!'. A Trustpilot widget is visible, showing a 4.5 star rating from 1,745 reviews. In the bottom right corner, there is a 'Support' button with a question mark icon.

After creating your account, please log in to the Sendcloud portal.

- Click on the 'Settings' icon in the top-right navigation menu.
- Click on the 'Integrations' menu item in the settings navigation menu.
- Find the 'Sendcloud API' integration and click on 'Connect'.



- Enter a 'Name' for the new integration and click on 'Save'.
- After saving the integration, your new public and secret keys will become visible.

Business Central settings

[Return to integrations](#) [Get help with this integration](#)

Name ⓘ
Business Central

Public Key
ead9bb74708142b1bfc5893b4c6b8537

Secret Key
a4e5d729fb514d26b19a72d2ad4c7384

☐ Webhook feedback enabled ⓘ

Webhook url

☐ Service Points ⓘ

[Disconnect](#) [Save](#) [Test API webhook](#) [Manual](#)

The keys shown above will be needed in the **Sendcloud – The all-in-one shipping platform** setup process.

3.2. Permissions

Make sure that all users who need to access the app have the **SENDCLOUD** permission set assigned.

Permission Set Lookup				
Role ID ↓	Name	Extension Name	Scope	
TROUBLESHOOT T...	Troubleshoot Tools	System Application	System	
TEST TOOL	Test Tool	Base Application	System	
SYSTEM APP - BA...	System App - Basic	System Application	System	
SYSTEM APP - AD...	System App - Admin	System Application	System	
SUPER (DATA)	Superuser of data	System Application	System	
SUPER	This role has all permissi...	System Application	System	
SMARTLIST DESIG...	SmartList Designer	System Application	System	
→ SENDCLOUD	Sendcloud - The all-in-o...	Sendcloud - The all-in-one shipping platform	Tenant	
SECURITY	Assign permissions to us...	System Application	System	

3.3. Sendcloud Manager role

After installing the **Sendcloud – The all-in-one shipping platform** app, you will be able to select the **Sendcloud Manager** role.

Click the **Run Wizard** action on your role center and complete the steps.

Dynamics 365 Business Central

CRONUS NL | Source Documents | Transport Orders | Master Data |

Customers | Vendors | Countries/Regions | Currencies | Shipping Agents | Shipment Methods

Actions

- > Sendcloud Setup Wizard
- > Sendcloud Setup

Insights

Sendcloud Insights

Transport Orders

Transport Order... - New 8 >	Transport Order... - In Progress 8 >	Transport Order... - Delivered 1 >
Transport ...rtly) On Hold 0 >	Transport ...rtly) Cancelled 0 >	Transport ... Delivery Issue 0 >
Transport Order... - Error 0 >		

3.4. Setup Wizard

To finish setting up the **Sendcloud – The all-in-one shipping platform** app, please run the ‘Sendcloud Setup Wizard’ from the role center.

3.4.1. Step 1

Step 1: license key

Enter your **Sendcloud – The all-in-one shipping platform** license key.

After entering your key, the status field should show a 'Valid' status.

Sendcloud Setup Wizard

Welcome to the Sendcloud setup.

Step 1 - License Information.

License Key

Please enter your license key. If you have installed Sendcloud through Microsoft's AppSource, a free key should have been emailed to you (this can take upto an hour). If you haven't received your key, please contact sales@idyn.nl.

License Key

Status

Valid

Back

Next


Finish

3.4.2. Step 2

Step 2: Sendcloud registration

To use the app, you first need an active Sendcloud account.
Click on the link to go to the registration page.

Sendcloud Setup Wizard



In order to use Sendcloud with Business Central you will need a Sendcloud account and a Sendcloud API integration.
Follow [link](#) to create an account or to login if you already have one.

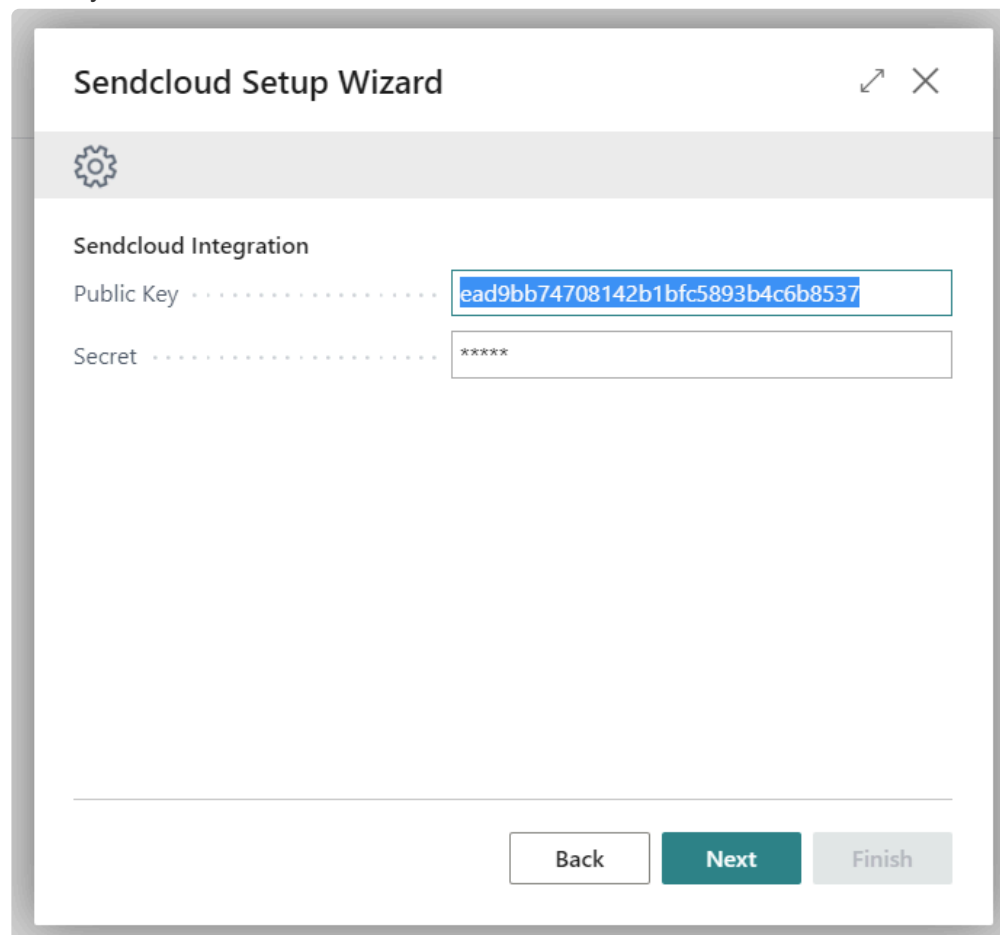
- **Sign up** (or Sign if you already have an account)
- Select **Login** if you already have an account, provide you credentials
- If you do not have an account yet, click **Sign up for free!** and follow the steps to create an account.
- Select **Setting** and in the menu, below **General** click **Integrations**.
- Pick **Sendcloud API** and give your integration a name. You may leave "Webhook feedback enabled" unchecked.
- Save your integration and use the provided **Public Key** and **Secret Key** in the next step.
- For further setup of your Sendcloud account (plan, carriers etc.) please refer to the Sendcloud support pages and/or sales@idyn.nl.

BackNextFinish

3.4.3. Step 3

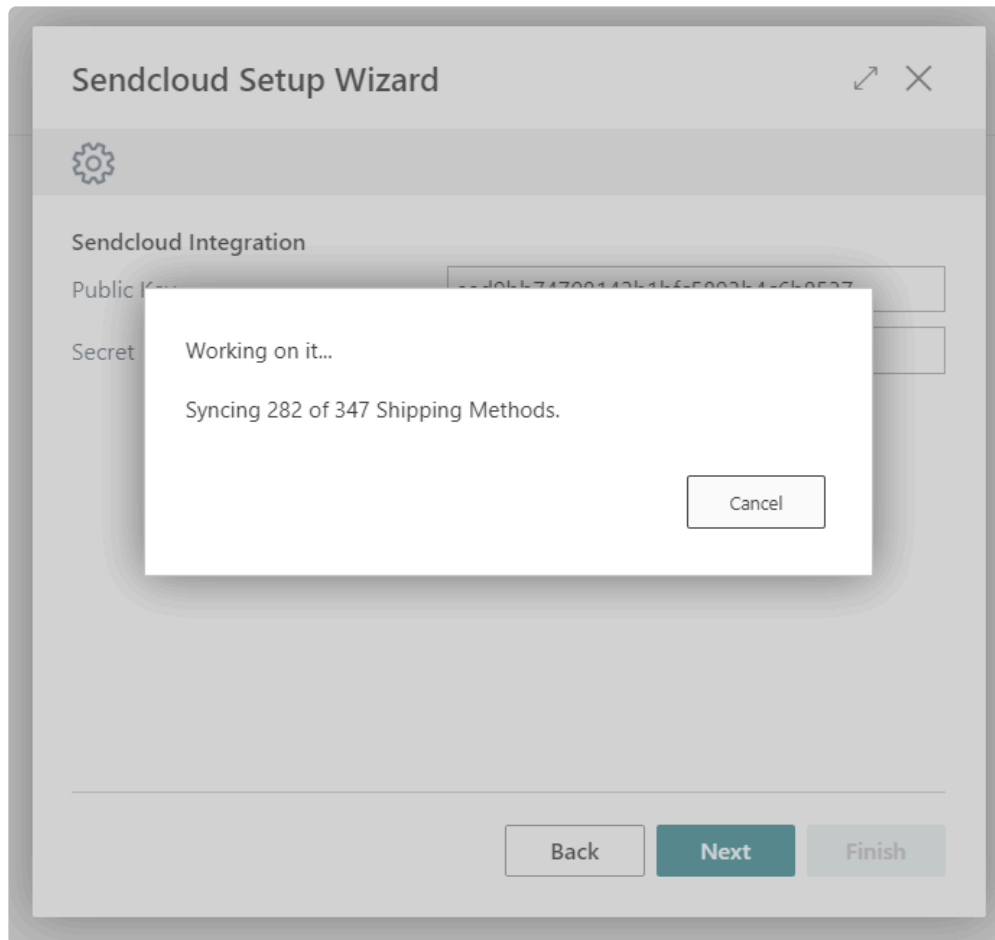
Step 3: Sendcloud registration

Enter your Sendcloud API details.



The screenshot shows a 'Sendcloud Setup Wizard' dialog box. It has a title bar with a close button (X) and a maximize button. Below the title bar is a gear icon. The main content area is titled 'Sendcloud Integration'. It contains two input fields: 'Public Key' and 'Secret'. The 'Public Key' field is filled with the text 'ead9bb74708142b1bfc5893b4c6b8537'. The 'Secret' field is filled with six asterisks '*****'. At the bottom of the dialog box, there are three buttons: 'Back', 'Next', and 'Finish'. The 'Next' button is highlighted in a teal color, while 'Back' and 'Finish' are in a light gray color.

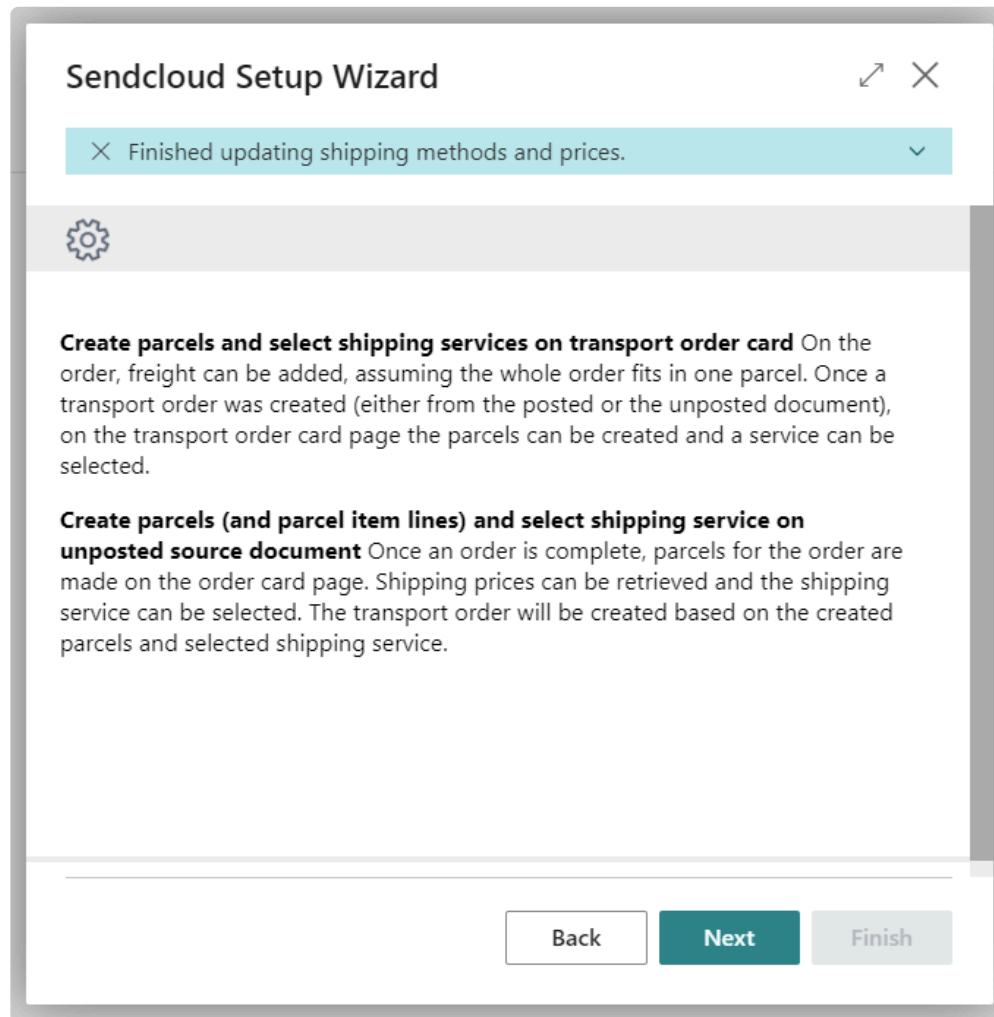
When you click Next, the app will download all available shipping addresses and carriers.



3.4.4. Step 4a

Step 4a: profiles

Read the profiles explanation and click **Next**.



3.4.5. Step 4b

Step 4a: profiles

- Select a profile.
- Create and select a new number series for your transport orders.
- Select if a location should be mandatory.
- Chose if you want to create transport orders automatically.

Sendcloud Setup Wizard

✕ Finished updating shipping methods and prices.

Profile

Create parcels and select shipping services c

Transport Order No.-Series

T-ORD

Location Mandatory

☒

Create orders manually or auto...

Automatically

Back

Next

Finish

4. Transport Orders

Transport orders are documents based on **sales shipments**.

A **transport order** represents a package or multiple packages that can be sent to **Sendcloud**.

Dynamics 365 Business Central

Transport Order

1006

Send Parcels Update Status Cancel/Delete Parcels Source Document

General Show more

No. 1006

Preferred Shipping Agent OWN LOG

Recipient

Company Adatum Corporation

Contact Robert Townes

Service Point 0

City Veldhoven

Country/Region NL

Contact

E-mail robert.townes@contoso.com

Phone No.

Sender

Sender Address 102061

Sender Location MAIN

Parcels Manage

Add Parcel Select Shipping Service Cancel Parcel Open Tracking Link Delete Line

On Hold	Parcel Identifier	Status	Package Type	Calculated Weight	Actual Weight	Volume Weight	Parcel Value	Insured Value	Total Insured Value	Service	Req. Label	Sent to Sendcloud	Tracking No.
<input type="checkbox"/>	1006 - 1	Ready to send	BOX	5.70	0.50	0.00	649.40	0	0	sendcloud - Unstamped letter	<input checked="" type="checkbox"/>	22-06-2021 08:40:41	SCCWF279GJFB

Items Manage

Item No.	Description	Quantity	Parcel Identifier	Line Value	Line Weight	HS Code	Country of Origin
1806-S	ATHENS Desk	1.00	1006 - 1	649.40	5.20		

Errors

Parcel Identifier Error Message

(There is nothing to show in this view)

Parcel Documents

File Name

label:1006-1.pdf

Delivery Route

The map shows a route starting from Veldhoven (near Smaken Veldhoven 5509BL) and ending at Schijndel (near Koninginnelaan 5491 JX). The route is marked with a blue line and includes a red location pin at the destination. The map also shows surrounding areas like Gisterwijk, Borssele, and Helmond.

4.1. Creation

The **Sendcloud – The all-in-one shipping platform** app automatically creates new **transport orders** when a **sales order** is shipped.

Transport orders are based on posted **sales shipments**.

Dynamics 365 Business Central

← Sales Order ✎ + 🗑

101010 · Adatum Corporation

✕ Transport order 1007 was created succesfully. [Click here to open the Transport Order.](#)

Process Release Posting Prepare Order Request Approval Print/Send Navigate | More options

General Show more

Customer Name	Adatum Corporation	Order Date	6/22/2021	External Document ...	
Contact	Robert Townes	Due Date	7/22/2021	Status	Released
Posting Date	6/22/2021	Requested Delivery ...			

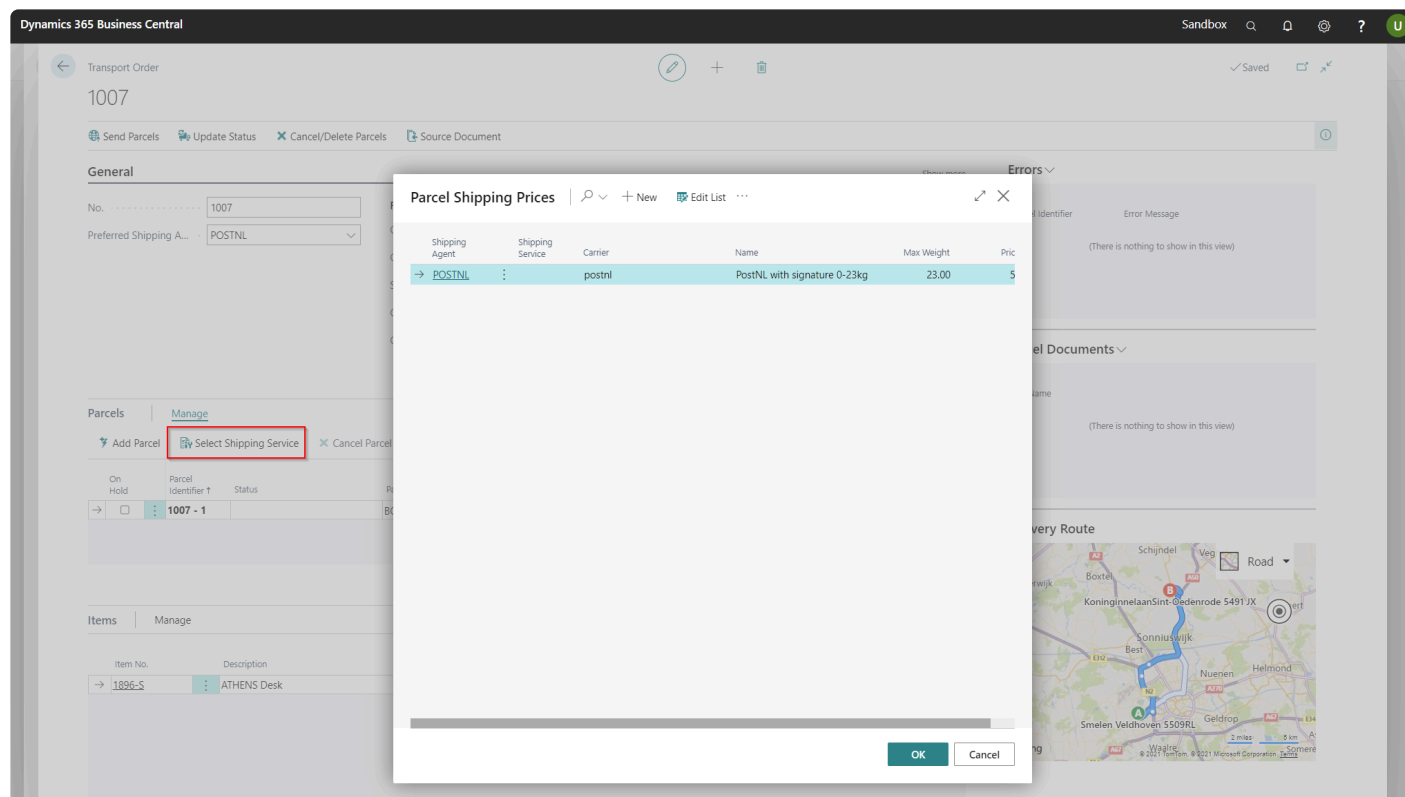
Lines | Manage Line Order Fewer options 🔗

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line
→ Item	1896-S	ATHENS Desk	MAIN	1		—	PCS	649.40	

4.2. Sending to Sendcloud

After a **transport order** is created, open the **transport order card** to start the process of sending the order to the **Sendcloud platform**.

On the card, add at least one parcel and select a shipping service per parcel.



After selecting a **shipping service**, the **transport order** is ready to be sent to **Sendcloud**. Use the **Send Parcels** action to send all parcels to the **Sendcloud platform**.

Dynamics 365 Business Central

← Transport Order

1007



Send Parcels



Update Status



Cancel/Delete Parcels



Source Document

General

No. 1007

Preferred Shipping A... POSTNL

Recipient

Company Adatum Co

Contact Robert Tow

Service Point

When the parcels are sent, each parcel has its own **tracking number** and **url**.
Labels can be downloaded per package line.

Dynamics 365 Business Central

Transport Order 1007

Finished sending parcel(s).

Send Parcels Update Status Cancel/Delete Parcels Source Document

General

No. 1007

Preferred Shipping Agent POSTNL

Recipient

Company Adatum Corporation

Contact Robert Townes

Service Point 0

City Veldhoven

Country/Region NL

Contact

E-mail robert.townes@contoso.com

Phone No.

Sender

Sender Address 102061

Sender Location MAIN

Errors

Parcel identifier Error Message
(There is nothing to show in this view)

Parcel Documents

File Name
label-1007 - 1.pdf

Delivery Route

Parcels

Manage

Add Parcel Select Shipping Service Cancel Parcel Open Tracking Link Delete Line

On Hold	Parcel Identifier #	Status	Package Type	Calculated Weight	Actual Weight	Volume Weight	Parcel Value	Insured Value	Total Insured Value	Service	Req. Label	Sent to Sendcloud	Tracking No.
→	1007 - 1	Ready to send	BOX	5.70	0.00	0.00	649.40	0	0	postnl - PostNL with signature ...	☑	22-06-2021 08:55:55	3SYZKG129829608

Items

Manage

Item No.	Description	Quantity	Parcel Identifier	Line Value	Line Weight	HS Code	Country of Origin
→ 1896-S	ATHENS Desk	1.00	1007 - 1	649.40	5.20		

4.3. Cancel

To cancel packages that have already been sent to the **Sendcloud portal**, use the '**Cancel/Delete Parcels**' on the **Transport Order card**.

Dynamics 365 Business Central

Transport Order

1007

✕ Finished deleting parcel.

[Send Parcels](#)
[Update Status](#)
[✕ Cancel/Delete Parcels](#)
[Source Document](#)

General

No. 1007

Preferred Shipping Agent POSTNL

Recipient

Company Adatum Corporation

Contact Robert Townes

Service Point 0

City Veldhoven

Country/Region NL

Contact

E-mail

Phone No.

Sender

Sender Address

Sender Location

Parcels | [Manage](#)

[Add Parcel](#)
[Select Shipping Service](#)
[✕ Cancel Parcel](#)
[Open Tracking Link](#)
[✕ Delete Line](#)

On Hold	Parcel Identifier ↑	Status	Package Type	Calculated Weight	Actual Weight	Volume Weight	Parcel Value	Insured Value	Total Insured Value	Service	Req... Label	Sent to
→	1007 - 1	Cancelled	BOX	5.70	0.00	0.00	649.40	0	0	postnl - PostNL with signature ...	<input checked="" type="checkbox"/>	