

ShiplT

4 — Last update: 2019/09/27

idyn BV

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1. Introduction

This chapter provides an overview of the document and introduces you to the **ShipIT** add-on for **Microsoft Dynamics NAV**.

1.1. About ShipIT

ShipIT is an add-on for **Microsoft Dynamics NAV** that offers 1 simple solution to deal with carriers worldwide. For your transport orders you can choose the carriers like **DHL, UPS, FEDEX, TNT, PostNL**, to name just a few. Each of them have their own interface, way of labelling, information and notification, and that is difficult to manage. That's why **idyn** developed **ShipIT**, the easy way to manage your international transport orders from within your **Microsoft Dynamics NAV**.

Whether you work with just a sales order or the warehouse shipments, a single click takes you to **ShipIT**. Optionally you can select your preferred carrier or browse through the rates and delivery times. As soon as your transport order is ready, just click 'Book & Print' to have it shipped. The only thing you have to do is to put the label on the box. Track & trace links and status updates will automatically appear in **Microsoft Dynamics NAV**.

ShipIT is developed together with our partner **Transsmart**, the leading logistics data provider, and they focus on streamlining communications between carriers and ERP systems. **Transsmart** operates with hundreds of carrier interfaces, and provides **idyn** a seamless way to work within **Microsoft Dynamics NAV**. This makes switching between, or adding new carriers, very easy.

The functionality of the add-on includes the following key features:

- Carrier-connectivity with almost every carrier worldwide
- Select carrier depending on best rates and/delivery times
- Real-time connection through web services
- Label printing directly from within **Microsoft Dynamics NAV**
- Print on any printer within your organization
- Customized e-mail notifications
- Real-time status information of shipments
- Real-time track & trace information within **Microsoft Dynamics NAV**
- Freight audit services
- BI-reporting
- Extensive Service Level Agreements
- Offer pickup points depending on customer location
- Shipping rates based on shopping cart contents
- Track & Trace info directly available for customers
- Use track & trace and other shipment info in notifications

1.2. About the Document

This document is a user manual, with the guide to setting up the **ShipIT** add-on for **Microsoft Dynamics NAV**. It contains specific instructions on configuring the add-on. The guide also covers the installation procedure.

1.3. About idyn

idyn BV

Castle Dussen

Binnen 1-3

4271 BV

Dussen

The Netherlands

2. What's New in Version 4.0

Main Topics

1. Use of **API V2** instead of **API V1**.

Please note that **API V1** is no longer supported.

ShipIT Setup - General

Base Transport Orders on: **Unposted documents**

After Posting Sales Orders: **Do nothing**

After Posting Purch. Ret. Ord.: **Do nothing**

After Posting Service Orders: **Do nothing**

After Posting Transfer Orders: **Do nothing**

Always New Trns. Order: ☒

Transsmart Urls

API Base Url: **https://accept-api.transsmart.com**

Dashboard Url: **https://accept-my.transsmart.com/dashboard/shipments/overview**

Shipment Url: **https://accept-my.transsmart.com/dashboard/shipments/edit/%1**

2. **Factbox** with **Transport Order** information on all source documents.

1090 - Van Terp Kantoorinrichting edit

General

Customer: **Geplantsoen 2**

Address: **1705 RE**

City: **Amhem**

Contact No.: **CT000006**

Contact: **Dhr. Kevin Verbeert**

No. of Archived Versions: **0**

Document Date: **24-1-2019**

Posting Date: **24-1-2019**

Order Date: **24-1-2019**

Due Date: **24-2-2019**

Requested Delivery Date: **6-8-2018**

Promised Delivery Date: **15-8-2018**

External Document No.: **KS**

Campaign No.: **OUDEWATER**

Opportunity No.: **Open**

Responsibility Center: **Open**

Assigned User ID: **Open**

Status: **Open**

Work Description: **Open**

Transport Order Details

Transport Order No.: **TRN4000019**

Order Header Status: **Booked**

Shipment Value: **5,00**

Shipment Tax: **5,20**

Spot Price: **0,00**

Tracking No.: **AVGL053847205234193**

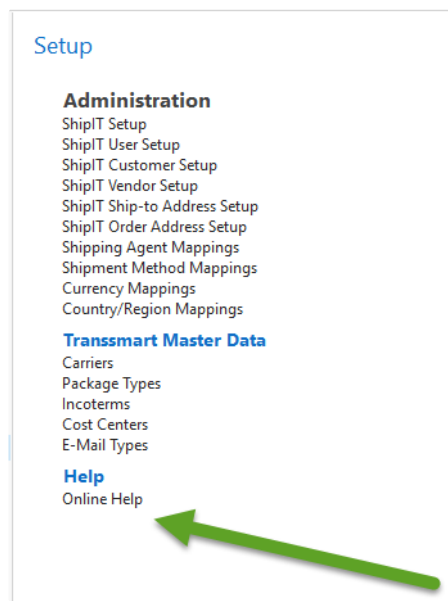
Tracking Url: **http://www.dhl-tracknet.nl/cgi-bin/at/100741...**

3. Improved **Carrier Select**, to show possible/impossible **Carrier/Service Level** combinations, dates and prices.

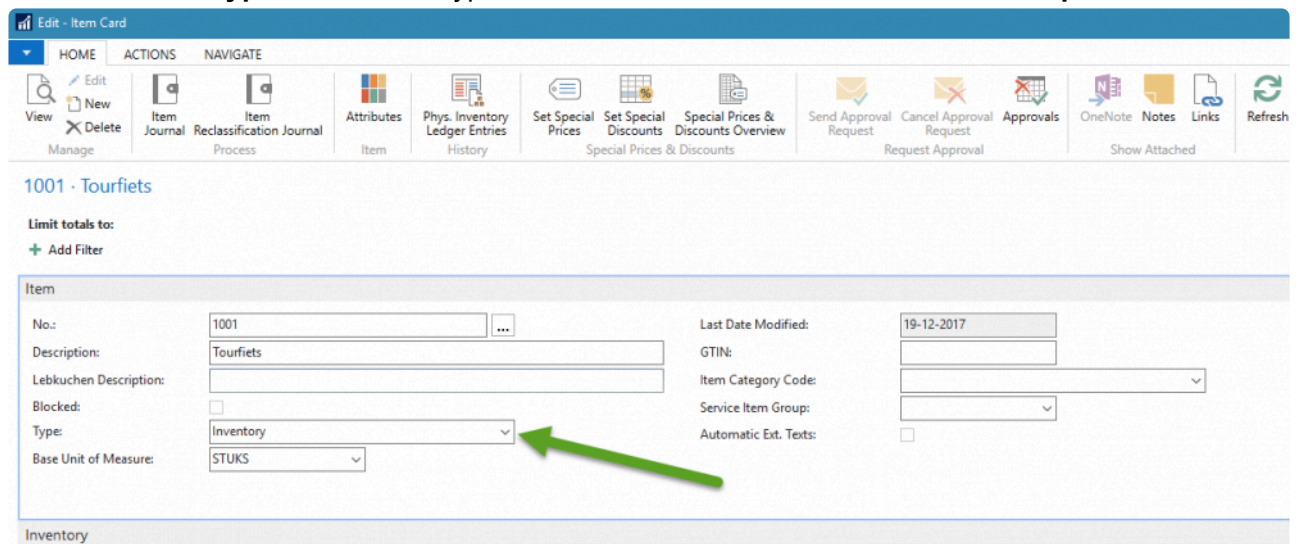
Carrier Select

Carrier Code	Carrier Name	Description	Pickup Date	Delivery Date	Delivery Time	Price	Service Level Code (Time)	Service Level Code (Other)	Mapped	Transit Time (Hours)	Transit Time Description
EEX	DHL Europlus	DHL Europlus EUROPLUS (account: 05238472)	6-8-2018	15-8-2018	17:00:00	5,2	EUROPLUS		Yes	17	1 day (expected deliverydate : 2018-08-15 17:00:00)
EEX	DHL Europlus	DHL Europlus EUROPLUS COD (account: 05238472)	6-8-2018	15-8-2018	17:00:00	5,2	EUROPLUS		No	17	1 day (expected deliverydate : 2018-08-15 17:00:00)
EEX	DHL Europlus	DHL Europlus EUROPLUS CODSAT (account: 05238472)	6-8-2018	15-8-2018	17:00:00	5,2	EUROPLUS	CODSAT	No	17	1 day (expected deliverydate : 2018-08-15 17:00:00)
UPS	United Parcel Service	United Parcel Service SAVER (account: E9691A)	6-8-2018	7-8-2018	23:30:00	7,03	SAVER		No	31	1 day (expected deliverydate : 2018-08-07 23:30:00)
UPS	United Parcel Service	United Parcel Service SAVER COD (account: E9691A)	6-8-2018	7-8-2018	23:30:00	7,03	SAVER	COD	No	31	1 day (expected deliverydate : 2018-08-07 23:30:00)
EEX	DHL Europlus	DHL Europlus EUROPLUS SAT (account: 05238472)	6-8-2018	15-8-2018	17:00:00	7,95	EUROPLUS	SAT	No	17	1 day (expected deliverydate : 2018-08-15 17:00:00)
EEX	DHL Europlus	DHL Europlus EXPRESSER (account: 05238472)	6-8-2018	15-8-2018	11:00:00	10,2	EXPRESSER		No	11	0 days (expected deliverydate : 2018-08-15 11:00:00)
EEX	DHL Europlus	DHL Europlus EXPRESSER SAT (account: 05238472)	6-8-2018	15-8-2018	11:00:00	10,2	EXPRESSER	SAT	No	11	0 days (expected deliverydate : 2018-08-15 11:00:00)

4. Integration of manual and **Online Help** directly from the application.



5. Check on **Item Type**, so Items of type **SERVICE** will not be included in the **Transport Order**.



6. Better Error representation.

Preferred Delivery

Between: 7-8-2018 09:00

And: 7-8-2018 17:00

Microsoft Dynamics NAV

TRN4000019: Shipment addresses[0].city may not be empty

OK

Description 2

1

Quantity	Length	Width	Height	Weight
1	30	30	30	1

City (Pick-up):

County (Pick-up):

Country/Region Code (Pick-up): NL

7. Debug mechanism added to the product, so it becomes possible to log all request/response messages.

ShipIT Setup

General

Base Transport Orders on: Unposted documents

After Posting Sales Orders: Do nothing

After Posting Purch. Ret. Ord.: Do nothing

After Posting Service Orders: Do nothing

After Posting Transfer Orders: Do nothing

Book Automatically: ☐

Read All Package Lines: ☒

Always New Trns. Order: ☒

Transsmart Urls

API Base Url: https://accept-api.transsmart.com

Dashboard Url: https://accept-my.transsmart.com/dashboard/shipments/overview

Shipment Url: https://accept-my.transsmart.com/dashboard/shipments/edit/%1

Transsmart Account Code: IDYN

Enable Debug Mode: ☒

Defaults

Default Package Type: 2

Pick-up Time From: 09:00:00

Pick-up Time To: 17:00:00

Delivery Time From: 09:00:00

Delivery Time To: 17:00:00

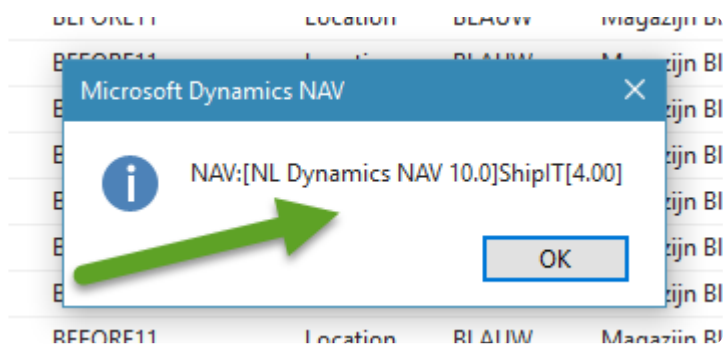
Default E-Mail Type (TS): 1

Default Cost Center (TS): 1

Numbering

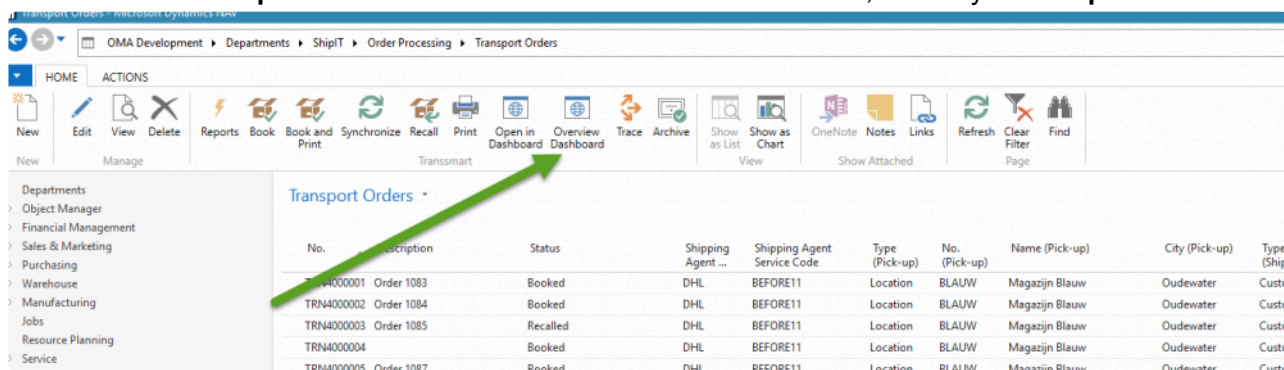
Transport Order Nos.: TRNS

8. Filling of field **Origin** so **Transsmart** can see which **NAV/SI** version is responsible for creating a **Transport Order**.



9. Additional fields (**Route ID**, **Driver ID**) added to the **Transport Order**.

10. Access from **Transport Order** to the **Transsmart Portal** overview, not only the **Shipment** itself.



11. Improved handling of **Transport Orders** in case of errors, for example the ability to re-book an existing **Transport Order** after fixing the mistake.

The Usual Housekeeping

1. Implementation of all existing hot fixes from all **SI3.X.X** version
2. Several small fixes (wrong or missing captions etc)

Documentation

New manual added to the product. Available from within the **NAV** add-on as well.

You are looking at it right now! :) Feedback is welcome!

3. How to Upgrade to ShipIT V4

Upgrade the ShipIT NAV add-on from 3.00 to 4.00:

1. Upgrade the application
2. Update your **Transsmart** service URLs *https://xyz.api.transwise.eu* to *https://accept-api.transsmart.com* or *https://api.transsmart.com* for the production environment.
3. Enter your credentials
4. Update **Master Data** via the menu – This fetches all (new) **Master Data** from **Transsmart**
5. Check/update mapping of **NAV** data to new **Transsmart Master Data**

Label printing

1. De-install your current **QZ** print utility.
2. Install the newest **QZ** tray version and **Smart Print** utility according to the *<https://www.transsmart.com/en/manuals/microsoft-dynamics-nav-shipit>*
3. Configure your printer paths and names in the **MyTranssmart** portal using your email and password credentials.

4. Installation and Setup

This chapter provides guidance on installation and setup of the **ShipIT** add-on.

4.1. Installation

Prior to starting the **ShipIT** setup in a **Microsoft Dynamics NAV** environment, a **Transsmart** account should be obtained in order to communicate with the **Transsmart** webservices for Transport order processing.

More info at www.transsmart.com or through support@transsmart.com. Also, the **ShipIT** granules should be available in your **Microsoft Dynamics NAV** license.

4.1.1. Install Components

Copy the required ddl's to the **\\Add-ins\\TranssmartV2** folder within the **NAV** service folder on the **NAV service tier** machine(s).

If you run multiple service tiers, then have to repeat this task for all service tiers.





Program Files ▶ Microsoft Dynamics NAV ▶ 100 ▶ Service ▶ Add-ins ▶ TranssmartV2		
Name	Type	Size
 Newtonsoft.Json.dll	Application extension	647 KB
 Newtonsoft.Json.xml	XML File	669 KB
 TranssmartV2.ApiWrapper.dll	Application extension	43 KB
 TranssmartV2.ApiWrapper.pdb	Program Debug Database	18 KB

Figure 2-1: ShipIT and Transsmart Installation Components

These components are shipped together with the objects.

4.1.2. Import or Merge NAV Objects

Use the FOB file corresponding with your **NAV** target version and import or merge objects if applicable.









 NAVNL2016RTM_SI3.00.fob	FOB File
 NAVNL2016RTM_SI3.00.txt	TXT File
 NAVNL2017CU7_SI3.00.fob	FOB File
 NAVNL2017CU7_SI3.00.txt	TXT File
 NAVW12016RTM_SI3.00.fob	FOB File
 NAVW12016RTM_SI3.00.txt	TXT File
 NAVW12017CU7_SI3.00.fob	FOB File
 NAVW12017CU7_SI3.00.txt	TXT File

Figure 2-2: Identify NAV Target Version

























	Type	ID	Name	Modified	Version List
+		36	Sales Header		NAVW 110.0.00.16585,IDYN-SI3.00
+		37	Sales Line		NAVW 110.0.00.16996,IDYN-SI3.00
+		38	Purchase Header		NAVW 110.0.00.16996,IDYN-SI3.00
+		39	Purchase Line		NAVW 110.0.00.16996,IDYN-SI3.00
+		5900	Service Header		NAVW 110.0.00.16996,IDYN-SI3.00
+		5902	Service Line		NAVW 110.0.00.16585,IDYN-SI2.00
+		7321	Warehouse Shipment Line		NAVW 110.0.00.14199,IDYN-SI2.00
+		1	ApplicationManagement		NAVW 110.0.00.16996,IDYN-SI2.00
+		80	Sales-Post		NAVW 110.0.00.16585,IDYN-SI3.00
+		90	Purch.-Post		NAVW 110.0.00.16585,IDYN-SI2.00
+		5988	Serv-Documents Mgt.		NAVW 110.0,IDYN-SI2.00
+		7324	Whse.-Activity-Post		NAVW 110.0.00.15052,IDYN-SI2.00
+		42	Sales Order		NAVW 110.0.00.16585,IDYN-SI2.00
+		46	Sales Order Subform		NAVW 110.0.00.16177,IDYN-SI2.00
+		130	Posted Sales Shipment		NAVW 110.0.00.16585,IDYN-SI2.00
+		131	Posted Sales Shpt. Subform		NAVW 110.0,IDYN-SI2.00
+		142	Posted Sales Shipments		NAVW 110.0.00.16585,IDYN-SI2.00
+		5900	Service Order		NAVW 110.0,IDYN-SI2.00
+		5905	Service Lines		NAVW 110.0.00.16177,IDYN-SI2.00
+		5970	Posted Service Shipment Lines		NAVW 110.0,IDYN-SI2.00
+		5974	Posted Service Shipments		NAVW 110.0,IDYN-SI2.00
+		5975	Posted Service Shipment		NAVW 110.0,IDYN-SI2.00
+		6630	Sales Return Order		NAVW 110.0.00.16585,IDYN-SI3.00
+		6631	Sales Return Order Subform		NAVW 110.0,IDYN-SI3.00

Figure 2-3: Import or Merge NAV Objects

Recompile all objects and also all **MenuSuite** objects and restart the **Dynamics NAV** client.

4.2. Upgrading Earlier Versions

If you are upgrading an older version of **ShipIT** it is important to remove the old components first. Please find the following files in the **NAV** service folder, and delete them. You might find these files under:

C:\Program Files\Microsoft Dynamics NAV\90\Service or **C:\Program Files\Microsoft Dynamics NAV\100\Service**.

[Please see this topic for ShipIT V4 upgrade](#)

4.3. Setup

Setup menu of the **ShipIT** add-on lists numerous sections allowing quite flexible application configuration possibilities both within **Microsoft Dynamics NAV** and with **Transsmart**. This chapter describes general **ShipIT** setup, the user setup, as well as how to setup mappings for the shipping agent, shipment method, currency, and country or region. This chapter also describes **Transsmart** specific settings used by **ShipIT** application.

4.3.1. Administration Setup

To access the **Administration Setup**, in **Microsoft Dynamics NAV** go to **Departments > ShipIT > Setup**. Setup menu lists the following items:

Setup

Administration

- ShipIT Setup
- ShipIT User Setup
- ShipIT Customer Setup
- ShipIT Vendor Setup
- ShipIT Ship-to Address Setup
- ShipIT Order Address Setup
- Shipping Agent Mappings
- Shipment Method Mappings
- Currency Mappings
- Country/Region Mappings

Transsmart Master Data

- Carriers
- Package Types
- Incoterms
- Cost Centers
- E-Mail Types

Figure 2-4: ShipIT Setup Menu Items

4.3.2. ShipIT User Setup

Choose **ShipIT User Setup** and enter all relevant **Dynamics NAV** users and their respective **Transsmart** credentials.

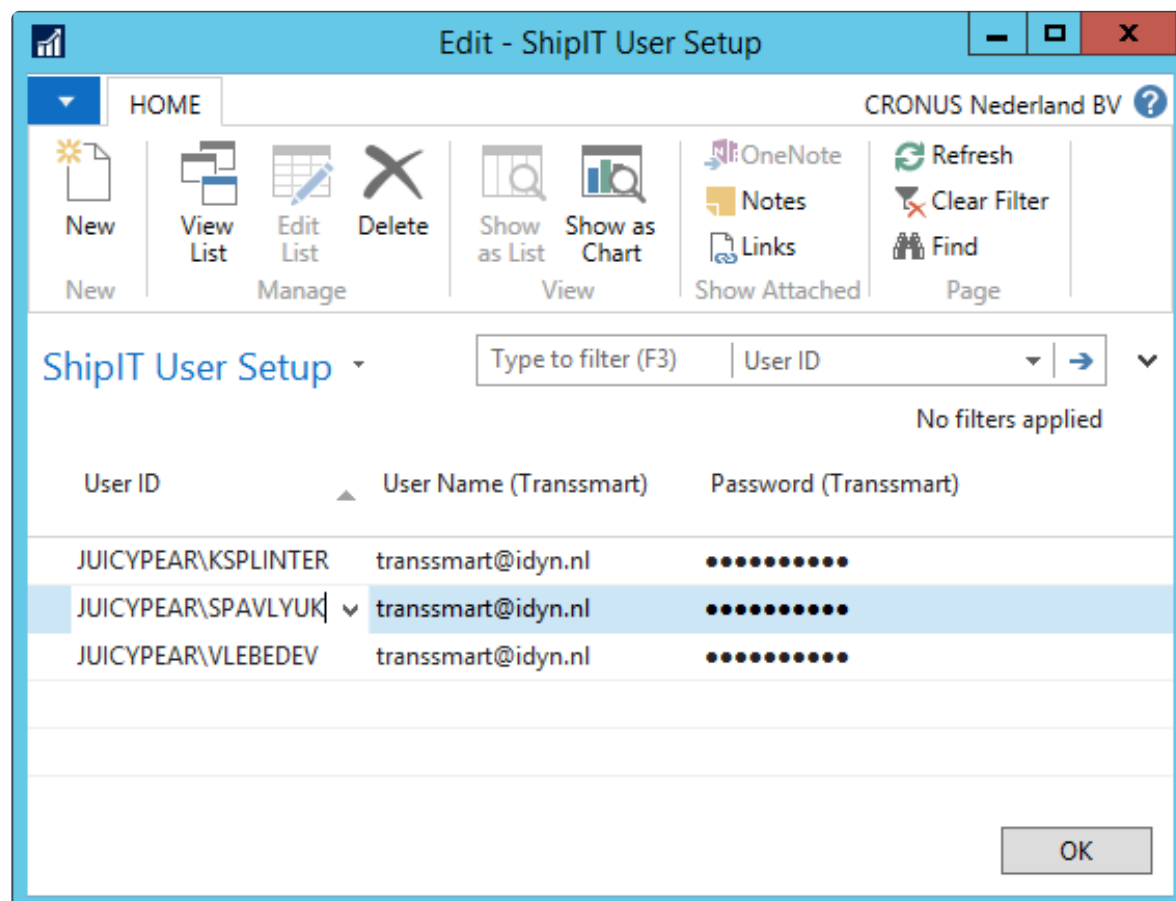


Figure 2-5: ShipIT User Setup

All users can have their own personal account or share the same **Transsmart** account company wide, depending on the variety of user specific printer settings.

4.3.3. ShipIT Setup

From **Departments > ShipIT > Setup** choose **ShipIT Setup** and fill in all necessary fields.

The screenshot shows the 'Edit - ShipIT Setup' window. The 'General' tab is active, displaying various configuration options. The 'Defaults' tab is also visible, showing time and cost center settings. The 'Numbering' tab shows the 'Transport Order Nos.' set to 'TRNX'.

Field	Value
Base Transport Orders on:	Unposted documents
After Posting Sales Orders:	Do nothing
After Posting Purch. Ret. Ord.:	Do nothing
After Posting Service Orders:	Do nothing
After Posting Transfer Orders:	Do nothing
Book Automatically:	<input type="checkbox"/>
Read All Package Lines:	<input checked="" type="checkbox"/>
Always New Trns. Order:	<input checked="" type="checkbox"/>
Transsmart Urls	
API Base Url:	https://accept-api.transsmart.com
Dashboard Url:	https://accept-api.transsmart.com
Shipment Url:	https://accept-api.transsmart.com/Shipment/Index/%1
Transsmart Account Code:	IDYN
Enable Debug Mode:	<input checked="" type="checkbox"/>
Default Package Type:	2
Pick-up Time From:	09:00:00
Pick-up Time To:	17:00:00
Delivery Time From:	09:00:00
Delivery Time To:	17:00:00
Default E-Mail Type (TS):	1
Default Cost Center (TS):	1
Transport Order Nos.:	TRNX

Figure 2-6: ShipIT Setup

The **ShipIT Setup Fields Description** table below lists all available fields, values options and description of use for the **ShipIT Setup** page.

Table 2-1: ShipIT Setup Fields Description

Field	Description
General FastTab	
Base Transport Orders on	<ul style="list-style-type: none"> Unposted documents Posted documents <p>When selecting the posted documents option, please note that the transport orders with unposted source documents may exist. Be careful not to create Transport Orders for the same lines once they are posted</p>

After Posting Sales Orders, After Posting Purch.Ret. Ord., After Posting Service Orders, After Posting Transfer Orders	<ul style="list-style-type: none"> • <i>Do nothing (default)</i> <i>Auto-Create Transport Order(s)</i>
Book Automatically	<ul style="list-style-type: none"> • <i>False (default)</i> • <i>True</i> All bookings require packaging, therefore the default package type needs to be setup (please see below)
Read All Package Lines	<ul style="list-style-type: none"> • <i>False</i> • <i>True (default)</i> When several package items are one package, the application will define every item as a separate package line. For example, if you specify 5 boxes as a package, the application will inject 5 times 1 box as a package line in your Transport Order , instead of just 1 line with the quantity of 5
Always New Trns. Order	<ul style="list-style-type: none"> • <i>False</i> • <i>True (default)</i> All orders will be linked to a separate Transport Order if this field is enabled. If the field is disabled, the orders will be combined into one Transport Order , based on the fact that <i>pick-up location/delivery location and date/time</i> parameters are equal for all orders.
Transsmart URLs <i>API Base URL,</i> <i>Dashboard URL,</i> <i>Shipment URL</i> <i>Transsmart Account Code</i>	Specify URLs and Transsmart account code to connect to Transsmart webservices. Even though Transsmart do not utilize Account Code any more, we'd want the account code to be unique across all Transsmart databases, therefore ShipIT setup continues using the code. For setup, please login with Transsmart credentials (login and password) and add the Account Code .
Enable Debug Mode	<ul style="list-style-type: none"> • <i>False (default)</i> • <i>True</i> Debug mode allows additional logging (Windows Event Log) of the activity of ShipIT application, it can be useful for advanced users when tuning the configuration or analysing processing of the orders
Defaults FastTab	
Default Package Type	ID of the default package type. Configure the default package type selecting one of the predefined package types (for example <i>Box</i> , <i>EUROPallet</i> and so on) or creating new.
Pick-up Time From,	These defaults must be defined in order to pre-calculate possible

Pick-up Time To, Delivery Time From, Delivery Time To	shipment methods
Default E-Mail Type (TS) Default Cost Center (TS)	Enter the code of the default email type and cost center, used by Transsmart
Numbering FastTab	
Transport Order Nos.	Define number series list code (for example <i>TRNX</i>)

4.3.4. Update Transsmart Master Data

In **ShipIT Setup** start with entering the **API Base URL** (in this example a test URL)

Transsmart Urls




API Base Url:	<input type="text" value="https://accept-api.transsmart.com"/>	
Dashboard Url:	<input type="text" value="https://accept-api.transsmart.com"/>	
Shipment Url:	<input type="text" value="https://accept-api.transsmart.com/Shipment/Index/%1"/>	
Transsmart Account Code:	<input type="text" value="IDYN"/>	

Figure 2-7: ShipIT Setup General FastTab Transsmart URLs



Click **Update Master Data** to connect to **Transsmart** webservices and download all available **Transsmart** master data:

Transsmart Master Data

- Carriers
- Package Types
- Incoterms
- Cost Centers
- E-Mail Types

Figure 2-8: ShipIT Setup Transsmart Master Data

In the example below, two available **Carrier ID's** have been downloaded. In the next steps these ID's need to be **mapped** to you **Microsoft Dynamics NAV Shipping Agents, Shipment Methods, Currencies**, and **Country/Region** codes.

In **ShipIT > Setup > Transsmart Master Data** click **Carriers**

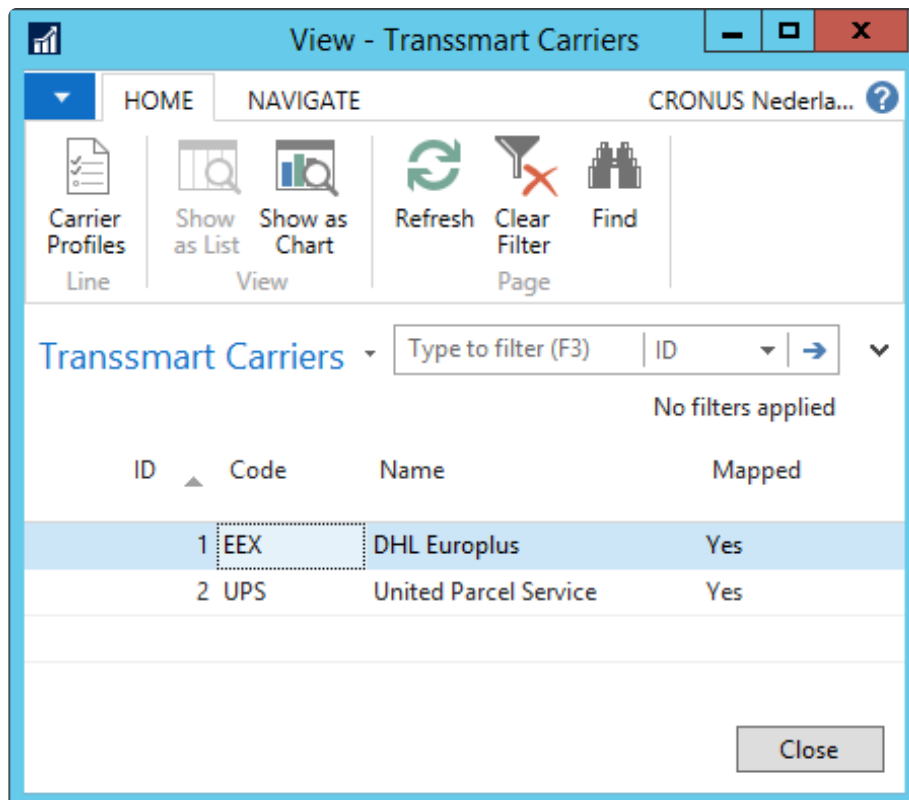


Figure 2-9: ShipIT Setup Transsmart Master Data, Carriers



Select a line and click **Carrier Profiles** to view details on certain shipment methods available from this shipping agent and which methods are 'mapped' with your **Dynamics NAV**.

View - Carrier Profiles - 1 · DHL Europlus

CRONUS Nederland BV

Carrier Profiles

Type to filter (F3) | ID

Filter: 1

ID	Service Level ID (Time)	Service Level Code (Time)	Service Level ID (Other)	Service Level Code (Other)	Mapped
1	1	EUROPLUS	0		Yes
2	2	EXPRESSER	0		No
3	2	EXPRESSER	2	COD	No
4	2	EXPRESSER	1	SAT	No
5	1	EUROPLUS	2	COD	Yes
6	1	EUROPLUS	1	SAT	No

Close

Figure 2-10: ShipIT Setup Transsmart Master Data, Carrier Profiles

Another example below demonstrates the list of **Shipment Method*s**, referred as ***Incoterms**, available from **Transsmart**:

ID	Code	Name	Mapped
1	EXW	Ex Works	Yes
2	FCA	Free Carrier	Yes
3	CPT	Carriage Paid To	No
4	CIP	Carriage and Insurance Paid...	No
5	DAT	Delivered At Terminal	No
6	DAP	Delivered At Place	No
7	DDP	Delivered Duty Paid	No
8	FAS	Free Alongside Ship	Yes
9	FOB	Free On Board	Yes
10	CFR	Cost and Freight	Yes
11	CIF	Cost, Insurance and Freight	Yes

Figure 2-11: ShipIT Setup Transsmart Master Data, Incoterms

Next step is to 'map' the downloaded codes to your **Dynamics NAV** codes.

4.3.5. Mapping Dynamics NAV Codes to Transsmart Codes

From **Departments > ShipIT > Setup > Administration** 'map' the codes downloaded from **Transsmart** to your **Dynamics NAV** codes following the example below. At least one Dynamics NAV code needs to be 'mapped' to a **Transsmart** code for all listed topics:

- Shipping Agent Mappings
- Shipment Method Mappings
- Currency Mappings
- Country/Region Mappings

4.3.6. Shipping Agent Service Mappings

Go to **Shipping Agent Mappings** and select a line:

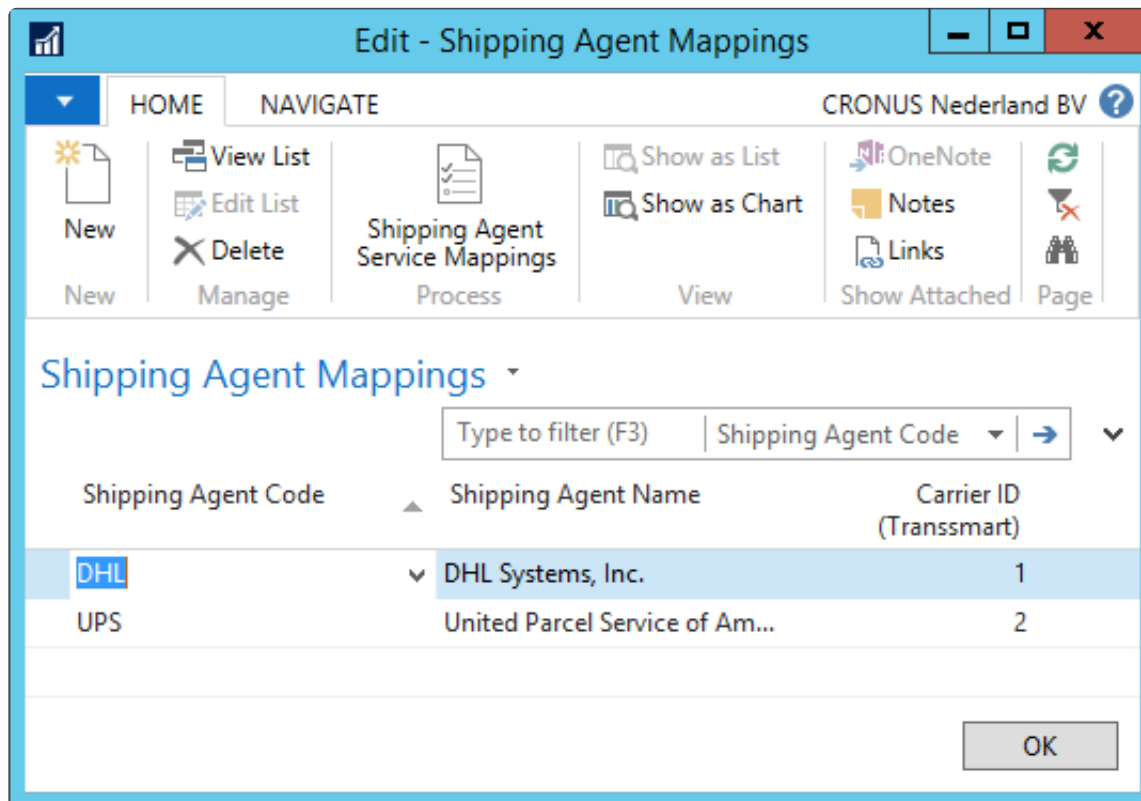
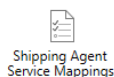


Figure 2-12: ShipIT Setup, Shipping Agent Mappings



Click **Shipping Agent Service Mappings**, and enter the values describing **Shipping Agent Service Code**, **Description** and **Transsmart** code that will refer to your selection.

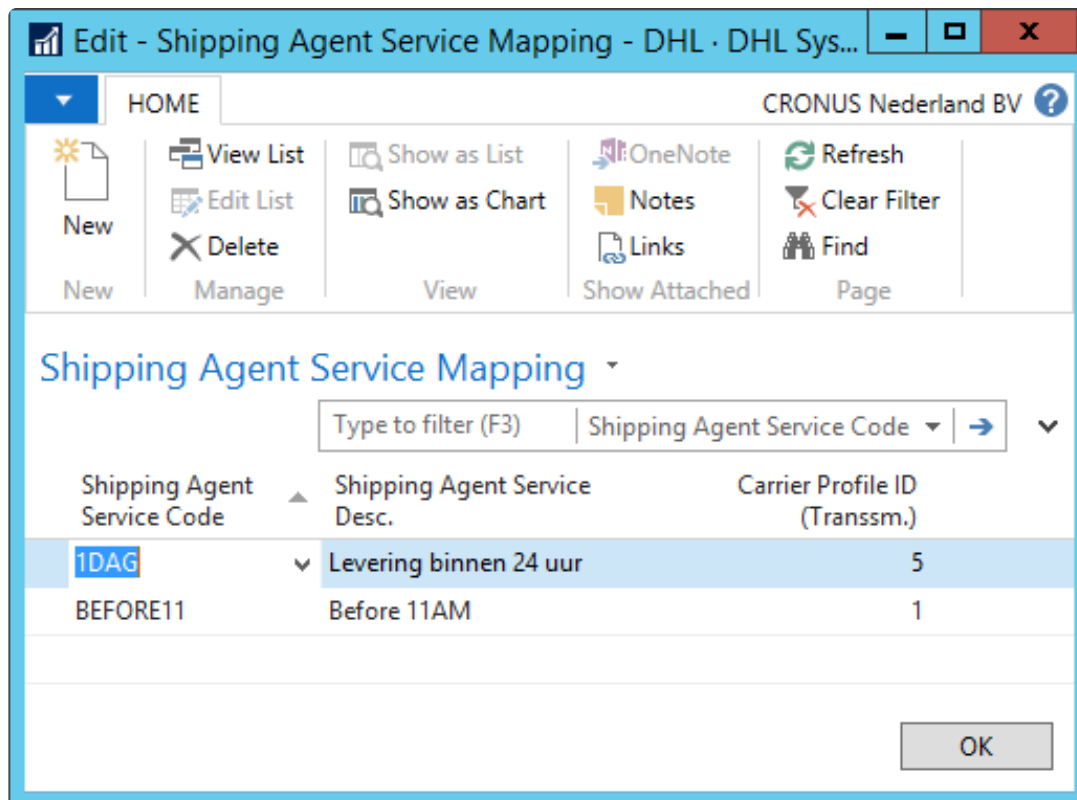


Figure 2-13: ShipIT Setup, Shipping Agent Service Mappings

In the example, the **Dynamics NAV Shipping Agent** code *DHL* has been 'mapped' to **Transsmart Carrier ID 5**, with a service level *1DAY*.

4.3.7. Verify the Setup

To verify **ShipIT** setup, go to **Departments > ShipIT > Setup > ShipIT Setup**.



From the **ShipIT Setup** page click **Verify Setup**, and verify your setup using the **Setup Verification Result** page:

View - Setup Verification Result	
CRONUS Nederland BV	
<div> <div> <div>Show as List</div> <div>Show as Chart</div> </div> <div> <div>Refresh</div> <div>Clear Filter</div> <div>Find</div> </div> </div>	
OK	Description
<input type="checkbox"/>	Table ShipIT Setup
<input checked="" type="checkbox"/>	Record must exist
<input checked="" type="checkbox"/>	Field "API Base Url" must have a value
<input checked="" type="checkbox"/>	Field "Transport Order Nos." must have a value
<input checked="" type="checkbox"/>	Field "Pick-up Time From" must have a value
<input checked="" type="checkbox"/>	Field "Pick-up Time To" must have a value
<input checked="" type="checkbox"/>	Field "Delivery Time From" must have a value
<input checked="" type="checkbox"/>	Field "Delivery Time To" must have a value
<input type="checkbox"/>	Table ShipIT User Setup
<input checked="" type="checkbox"/>	Fields "User Name (Transsmart)" and "Password (Transsmart)" must have a value for at least one user
<input type="checkbox"/>	Transsmart Master Data Tables
<input checked="" type="checkbox"/>	Synchronized
<input type="checkbox"/>	Table Shipping Agent Mapping
<input checked="" type="checkbox"/>	Field "Carrier ID (Transsmart)" must have a value for at least one shipping agent mapping
<input checked="" type="checkbox"/>	Shipping Agent Mapping "DHL" has at least one shipping agent service mapping with a value in field "Carrier Profile ID (Transsm.)"
<input type="checkbox"/>	Shipping Agent Mapping "UPS" has at least one shipping agent service mapping with a value in field "Carrier Profile ID (Transsm.)"
<input type="checkbox"/>	Table Shipment Method Mapping
<input checked="" type="checkbox"/>	Field "Incoterms ID" must have a value for at least one shipment method mapping
<input type="checkbox"/>	Table Currency Mapping
<input checked="" type="checkbox"/>	Field "Currency Code (Transsmart)" must have a value for at least one currency mapping
<input type="checkbox"/>	Table Country/Region Mapping
<input checked="" type="checkbox"/>	Field "Country/Region Code (Transsm.)" must have a value for at least one country/region mapping
Close	

Figure 2-14: Verify ShipIT Setup, Result

Check if all necessary fields and tables have been configured correctly. Return to complete the mapping or data synchronization and re-run the setup verification again to ensure successful setup completion. Refer to the table in **ShipIT Setup** chapter to complete the setup of all other necessary values and settings to configure how **ShipIT** will behave in your **Dynamics NAV** application.

5. Running the Functionality

This chapter provides an overview of the **ShipIT** add-on functionality available within **Microsoft Dynamics NAV** and some common use cases.

5.1. Test Transport Order

After the setup of **ShipIT** add-on is complete, you can test your application and start creating Transport Orders.

For example, go to **Sales Orders**, click **New** and create a normal **Sales Order**.

Figure 3-1: Using ShipIT, Creating Sales Order

Shipping and Billing

Ship-to:

Shipment Method

Code:

Agent:

Agent Service:

Please make sure to select the values that are 'mapped' to **Transsmart** values in the fields **Shipment Method**, **Shipping Agent** and **Agent Service**, otherwise a **Transport Order** will not be created based

on this **Sales Order**.

After this, enter the Item lines on your **Sales Order** and click **Create Transport Order** on the **Actions** Tab in the ribbon.



If a **Transport Order** has been created, you will see this dialog that allows you to go to the **Transport Order** immediately.

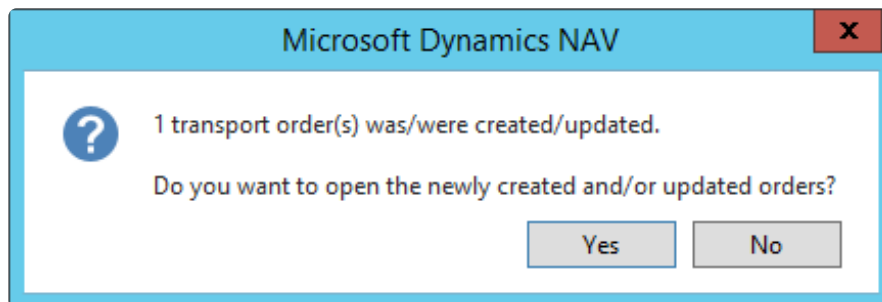


Figure 3-2: Using ShipIT, Notification on Successfully Created Transport Order

Click Yes and see the resulting **Transport Order**:

View - Transport Order Card - TRNL90000018 · Order 1021

HOME ACTIONS CRONUS Nederland BV

View Edit New Carrier Select Reports Book Book and Print Synchronize Recall Print Open in Dashboard Trace Archive OneNote Notes Links Show Attached Refresh Clear Filter Go to Previous Next

Manage Transsmart

TRNL90000018 · Order 1021

General

No.: TRNL90000... Shipment Error:

Description: Order 1021 Accepted By:

Status: New E-Mail Type (Transsmart):

Shipping Agent Code: DHL Cost Center (Transsmart): 1

Shipping Agent Servic... 1DAG

Shipment Method Co... DAP

Service Type: DOCS

Tracking No.:

Tracking Url:

Preferred Pick-up

Between: 2-8-2019 09:00

And: 2-8-2019 17:00

Preferred Delivery

Between: 3-8-2019 09:00

And: 3-8-2019 17:00

Transsmart

Status (Transsmart):

Carrier ID (Transsmart): 1

Carrier Profile ID (Transs.): 5

Service Level ID (Time): 1

Service Level ID (Other): 2

Incoterms ID (Transs.): 1

Log

Date/Time	User ID	Description
31-7-2018 04:25	JUICYPEAR\SPAVLYUK	Modified
31-7-2018 04:21	JUICYPEAR\SPAVLYUK	Modified
31-7-2018 04:21	JUICYPEAR\SPAVLYUK	Modified
31-7-2018 04:20	JUICYPEAR\SPAVLYUK	Modified
31-7-2018 04:20	JUICYPEAR\SPAVLYUK	Modified
31-7-2018 04:20	JUICYPEAR\SPAVLYUK	Modified
31-7-2018 04:19	JUICYPEAR\SPAVLYUK	Modified
31-7-2018 04:16	JUICYPEAR\SPAVLYUK	Created

Source Lines

Line Find Filter Clear Filter

Source Docume...	Source Docume...	Source Docume...	Item No.	Description
Sales Order	1021	10000	1000	Fiets

Packages

Find Filter Clear Filter

Package Type ID	Package Type	Package Type Name	Description
1	EUROPALLET	Europallet	

Close

Figure 3-3: Using ShipIT, Resulting Transport Order

The **Factbox** with **Transsmart** details indicates codes that refer to the selected **Shipping Agent**, **Shipment Method** and **Shipment Service**.

Please return to the posted **Sales Order** and note the **Transport Order Details** Factbox got populated with the available logistics information:

View - Sales Order - 1021 · Spotsmeyer's Furnishings

HOME ACTIONS NAVIGATE

View Manage Release Reopen Create Inventory Put-away/Pick... Email Confirmation... Print Confirmation... Statistics Post... Post and New... Post and Send... Send Approval Request Cancel Approval Request Approvals OneNote Notes Links Refresh Clear Filter Go to Previous Next

1021 · Spotsmeyer's Furnishings

General

No.: 1021 Order Date: 24-1-2019

Customer: Spotsmeyer's Fur... Due Date: 31-1-2019

Contact: Mr. Mike Nash Requested Delivery Date: 3-8-2019

Posting Date: 24-1-2019 External Document No.: Status: Open

▼ Show more fields

Lines

Type	No.	Description	Location Code	Quantity
Item	1000	Fiets	GEEL	3

Subtotal Excl. VAT (USD): 11.941,49 Total Excl. VAT (US... 11.941,49

Inv. Discount Amount Excl. VAT (US... 0,00 Total VAT (USD): 0,00

Invoice Discount %: 0 Total Incl. VAT (US... 11.941,49

Transport Order Details

Transport Order No.: TRNL90000018

Order Header Status: New

Shipment Value: 11.941,49

Shipment Tariff: 10,00

Spot Price: 0,00

Tracking No.: Tracking Url:

Sell-to Customer Sales History

Ongoing Sales Quotes: 0

Ongoing Sales Blanket Orders: 0

Ongoing Sales Orders: 1

Ongoing Sales Invoices: 0

Ongoing Sales Return Orders: 0

Ongoing Sales Credit Memos: 0

Posted Sales Shipments: 0

Posted Sales Invoices: 0

Posted Sales Return Receipts: 0

Posted Sales Credit Memos: 0

Customer Details

Close

Figure 3-4: Using ShipIT, Transport Order Factbox on the Sales Order

The Transport Order is ready to be booked and printed!

5.2. Transport Orders

To open the **Transport Orders** list go to **Departments > ShipIT > Order Processing > Lists** and click **Transport Orders**:

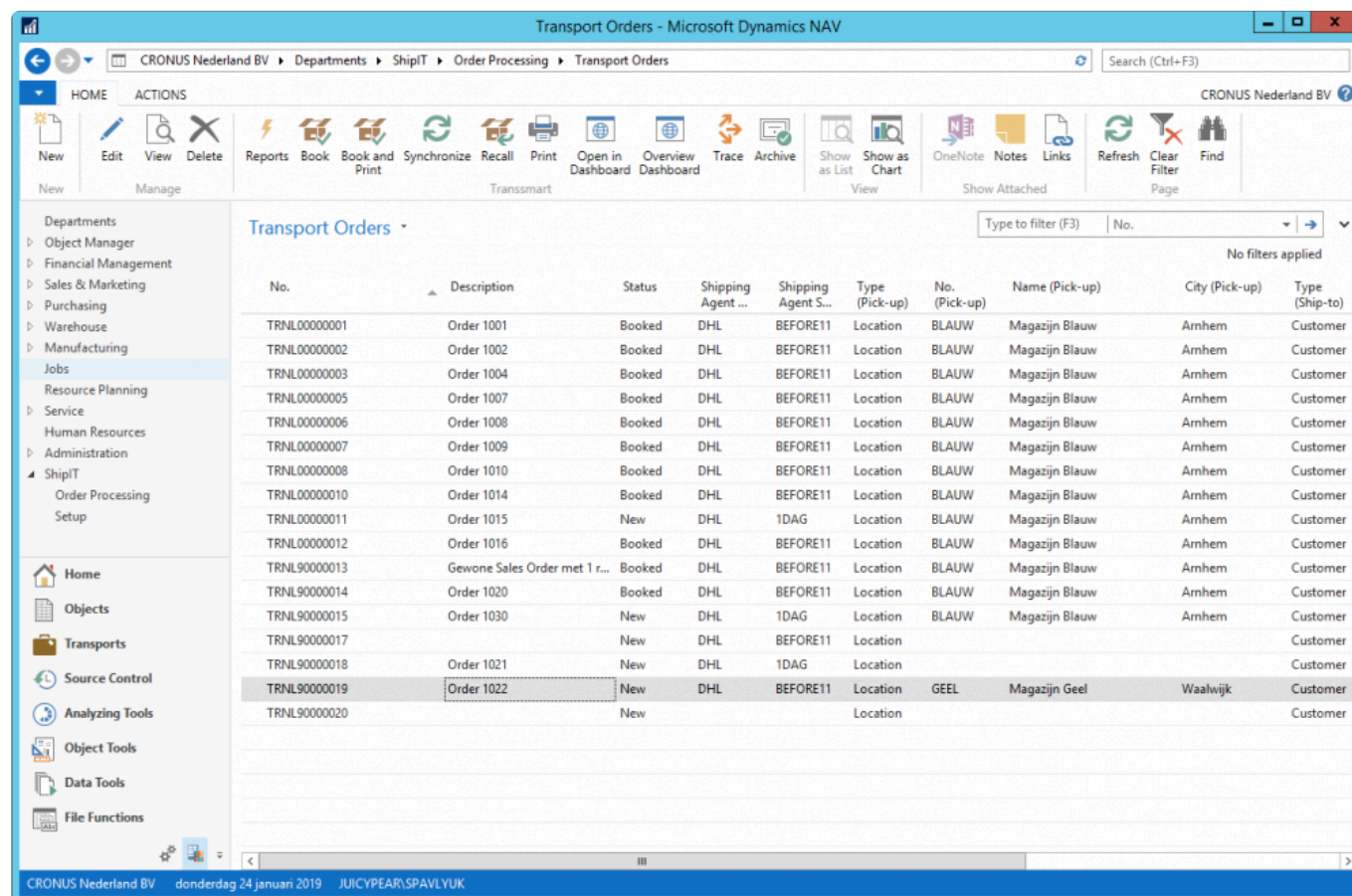


Figure 3-5: Using ShipIT, Transport Orders List

The list of actions available for the **Transport Orders** is shown on the image below:

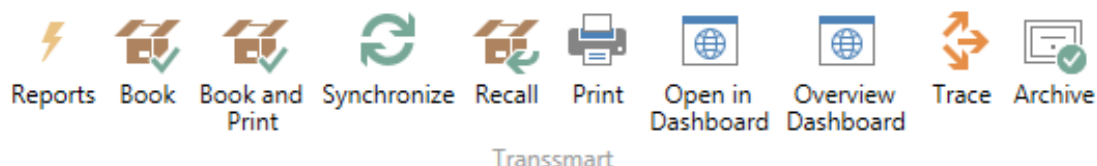


Figure 3-6: Using ShipIT, Transport Orders Actions List

Select any **Transport Order** line in the list and click **View** or **Edit** to open the **Transport Order Card**.

Edit - Transport Order Card - TRNL00000012 - Order 1016

HOME ACTIONS

Manage View New Delete Carrier Select Reports Book Book and Print Synchronize Recall Print Open in Dashboard Trace Archive OneNote Notes Links Refresh Clear Filter Go to Previous Next

Transsmart

TRNL00000012 - Order 1016

General

No.: TRNL00000012
 Description: Order 1016
 Status: Booked
 Shipping Agent Code: DHL
 Shipping Agent Service Code: BEFORE11
 Shipment Method Code: DAP
 Service Type: NON-DOCS
 Tracking No.: JVL0523847203263497
 Tracking Url: <http://www.dhl-tracknet.nl/cgi-bin-al/UFA100/NL/?ty...>

Shipment Error:
 Accepted By:
 E-Mail Type (Transsmart):
 Cost Center (Transsmart):

Preferred Pick-up
 Between: 13-7-2018 00:00
 And: 13-7-2018 17:00

Preferred Delivery
 Between: 15-7-2018 09:00
 And: 15-7-2018 17:00

Source Lines
 Packages
 Delivery Notes
 Pick-up Address Location: BLAUW
 Ship-to Address Customer: 10000
 Invoice Address Customer: 10000

Additional References

Invoice (Ref): 102043
 Customer Order (Ref):
 Order No. (Ref):
 Delivery Note (Ref):
 Delivery Id (Ref):
 Other (Ref):
 Service Point (Ref):
 Project (Ref): PR0001

Your Reference (Ref): My ref #123
 Engineer (Ref):
 Customer (Ref):
 Agent (Ref):
 Driver ID (Ref):
 Route ID (Ref):
 Instruction:

Totals 0.00

Transsmart

Status (Transsmart): NEW
 Carrier ID (Transsmart): 1
 Carrier Profile ID (Tra...): 3
 Service Level ID (Time...): 2
 Service Level ID (Oth...): 2
 Incoterms ID (Transs...): 6

Log

OK

Figure 3-7: Using ShipIT, Transport Order Card, Actions List

The fields on the **Transport Order** card are self-explanatory. It is worth mentioning that the **Additional References FastTab** is not present in **NAV** database and is meant to provide a way to store useful information, for example *Driver ID* or *Route ID*. **Transsmart** is going to use some values in this field for more precise costs calculations and better logistics.

The list of actions available on the **Transport Order Card** is very similar to Transport Orders List and is shown on the image below:

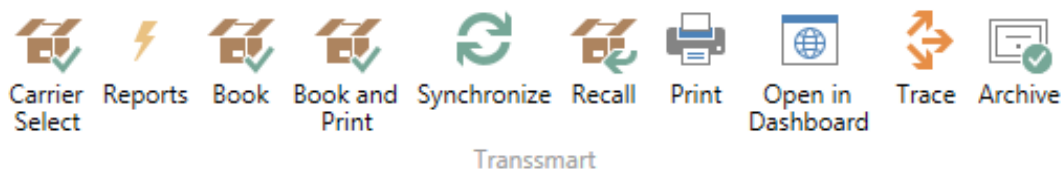


Figure 3-8: Using ShipIT, Transport Orders Actions List

In order to automatically calculate the possible and available **Shipping Agent**, **Shipment Method** and **Shipment Service** combinations, click **Carrier Select** in the ribbon.

Carrier Code	Carrier Name	Description	Pickup Date	Delivery Date	Delivery Time	Price	Service Level Cod...	Service Level Cod...	M...	Transit Time ...	Transit Time Description
EEX	DHL Europlus	DHL Europlus EUROPLUS COD (a...	13-7-2018	25-7-2018	17:00:00	5,2	EUROPLUS	COD	Yes	17	1 day (expected deliverydate : 2018-07-25 1...
UPS	United Parcel Service	United Parcel Service SAVER COD ...	13-7-2018	16-7-2018	23:30:00	7,03	SAVER	COD	No	78	3 days (expected deliverydate : 2018-07-16 ...

Figure 3-9: Using ShipIT, Carrier Select List

The sufficient lines will be marked with **green** color while the failing combinations will be marked in **red**.

Transport Order processing is supported by user-friendly error handling. If you forgot to add a **Shipping Agent** and tried to click **Book**, you can come back, fix the error and book the **Transport Order** again.

Figure 3-10: Using ShipIT, Booking Transport Order with Errors

In the example above the error clearly states that a **Shipping Agent Code** must have a value, and this streamlines a lot finding the reason of a failing processing.

As there are no reports in **Dynamics NAV** containing **ShipIT** information, it is possible to create a list of



reports per **Transport Order** using the add-on. To create the list of reports click **Reports** in the **Transsmart** tab on the ribbon.

These reports will be used (printed) at a specific moment during the handling of a **Transport Order** (for example before or after booking).

The **NAV** partner and end customer should decide at which moment the reports will be printed. Also, they will need to make a decision about linking a default set of reports to a **Transport Order**

automatically.

5.3. Transport Worksheet

Go to **Departments > ShipIT > Order Processing > Tasks** and click **Transport Worksheet**.

Use the filter to get the source documents (for example by *Shipping Agent*), and create multiple T*ransport Orders* from the source document lines.

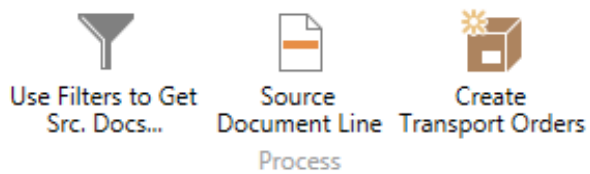


Figure 3-11: Using ShipIT, Transport Worksheet Processing

5.4. Archiving Transport Orders

It is sometimes necessary to archive a **Transport Order**, but not make an actual transport booking. With **ShipIT** it is possible to archive a **Transport Order** without doing a booking to **Transsmart**. To see the archived **Transport Orders** go to **Departments > ShipIT > Order Processing > Archive** and click **Archived Transport Orders**

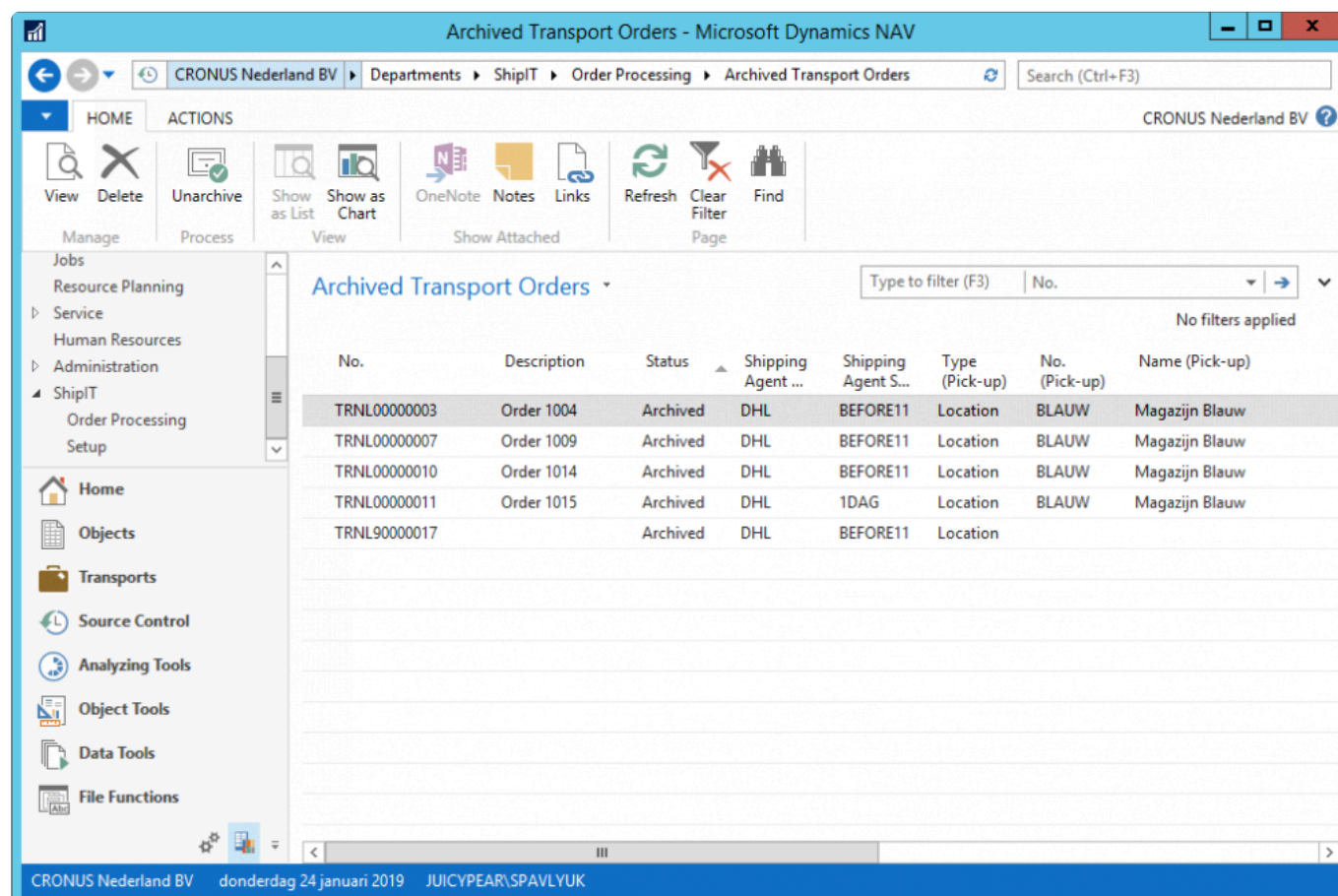


Figure 3-12: Using ShipIT, Archiving Transport Orders