

## System Solutions LLC ShipRush Integration for D365 Business Central User Guide

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### System Requirements

- Microsoft Dynamics 365 Business Central (cloud) Version 25.0 or newer.
- To use with LS Express, the additional "ShipRush and LSE Integration" extension must be installed.
- Required Descartes ShipRush account and can be created here: [Shipping Software for Growing Businesses](#)
  - Business must have a ShipRush "Speedy" level plan.
  - Business must have a "Warehouse" level plan if LTL Freight is also required.
- Dynamics 365 Business Central user must have access to either Sales Order Document page or LS Express POS page.

### Extension Setup

- ***In ShipRush***
  - ShipRush Knowledge base is here: <https://docs.shiprush.com/>
  - To Add Shipping Accounts (UPS example)
    - Accounts > Add Account > UPS and get an option to use your own existing UPS account, or setup a new UPS account through ShipRush.
      - ShipRush offers discounts when setting up accounts through them, it is worth comparing.
    - When using your own shipping account during setup you are redirected to login to UPS to authenticate, and provide UPS account number, name, address, e-mail.
    - You will be asked to choose how to print labels:
      - To download labels as PDF, select "Print to Laser/Inkjet" and check the "Download" option.
      - For no-click label printing, select ShipRush Cloud Print. Install the toolkit, and print to laser, inkjet and Zebra thermal printers.
    - At End "You Have Successfully Set-up Your UPS Account"
- ***In Business Central***
  - Search > ShipRush Setup
    - Note: You **do not need to** enter an API key or ShipRush account credentials as part of setup.
      - While using the extension, it will automatically open the ShipRush website, where you will login to your account.
    - **Use ShipRush Sandbox Account:** Specifies that the ShipRush account used to make new shipments is a sandbox account for testing.

- **Autofill Declared Value:** Specifies that the declared value field on the ShipRush package will be automatically calculated from the total amount of the package lines excluding tax.
- **View Full Shipment Text for Testing:** Only enable while testing to see all data that is provided by ShipRush about the shipment. After the shipment is shipped through the Package Card using the Ship With ShipRush action, an additional message box will show all data received from the shipment.
- **Send Ext. Doc. No. As Reference:** Specifies that the external document number is used in the package's Reference 1 field.
- **Enable Customer Carrier Accounts:** Specifies that customers' carrier account numbers can be used with the ShipRush shipment. These accounts can be set on the Customer Card.
- **Charge Customer Freight:** Specifies how to charge the customers for shipping the package.
  - No Charge: Shipping charge defaults to 0 and cannot be changed.
  - From Shipment: The shipping cost according to ShipRush will be charged to the customer.
  - From Carrier Rate: The amount charged by the carrier will be charged to the customer.
  - Fixed Amount: The same fixed amount for every shipment.
- **Freight GL Account No.:** Specifies the General Ledger account for Freight. This account must be in the Chart of Accounts.
- **Fixed Freight Amount:** Specifies the fixed amount to charge the customer for shipping the package when "Charge Customer Freight" is set to "Fixed Amount".
- **Mark Up Freight Amount By Agent:** Specifies that the shipping cost returned from ShipRush will be marked up according to the markup percentage set on the shipping agent used for the shipment.
- **Free Shipping Threshold:** Specifies that customers won't be charged to ship the package by default when the total of the order is greater than or equal to this amount.
- **Default Carrier:** Specifies the shipping agent to use for the default shipping carrier, which is used to add a "ship all with carrier" action.
- **Default Carrier Service:** Specifies the shipping agent service to use with the same default carrier.
- **Default Carrier Ship Action Caption:** Specifies the name of the action that will be used with the default carrier. For example, "FedEx." Two default carriers can be set up. Contact System Solutions if more are needed.
- **Update Posted Shipment Address From Shipped Package:** Specifies that when a sales shipment is posted, if the package has

been shipped with ShipRush, the shipping address of the shipment will be updated from the package address.

- **Update Posted Invoice Address From Shipped Package:** Specifies that when a sales invoice is posted, if the package has been shipped with ShipRush, the shipping address of the invoice will be updated from the package address.
- **Update Unshipped Package Address From Posted Shipment:** Specifies that when a sales shipment is posted, if there are packages associated with the shipment that have not yet been shipped with ShipRush, the shipping address of the packages will be updated from the shipment address.
- **Update Unshipped Package Address From Posted Invoice:** Specifies that when a sales invoice is posted, if there are packages associated with the invoice that have not yet been shipped with ShipRush, the shipping address of the packages will be updated from the invoice address.
- **Automate Shipping for Posted Sales Shipment Inventory Pick:** Specifies that when a sales shipment is posted, if it contains inventory pick lines, the shipping process will be automatically started according to the selected option. "Start Package" opens a new package, while "Send to ShipRush" also starts the shipment by opening the ShipRush website.
- Select > **Shipping Agents** button
  - Add each ShipRush carrier that will be used for shipments.
    - **Ship with ShipRush:** Check the box to enable the use of the shipping agent with ShipRUsh.
    - **ShipRush Carrier Name:** Enter name of the ShipRush carrier. The spelling must match the spelling of the carrier in the ShipRush account.
    - **ShipRush Freight Markup %:** Specifies the markup percentage to be applied to ShipRush shipping costs. Input 0 to disable freight markup. This will only be enabled if Mark Up Freight is enabled on the ShipRush Setup page.
  - For each ShipRush shipping agent, select > Shipping Agent > **Shipping Agent Services** button
    - Add the carrier-specific services for each of the Carriers
      - **ShipRush Carrier Service Name:** Enter the carrier service name. The spelling must match the spelling of the carrier service in the ShipRush account. Create a new row with the same carrier, for each service that will be used.

## Personalization Options in Business Central

- For Sales Orders

- Personalize Sales Order action bar to move most-used actions to main menu.
- Personalize Sales Order Line fast tab with Shipping Agent, Shipping Service, and Is Ship Rush Shipment.
- **For LS Express POS**
  - Move most-used actions to main menu line.
  - Personalize LS Express POS Line with Shipping Agent, Shipping Service, and Is Ship Rush Shipment.

## Operation Instructions

- **Creating a Sale and a Shipment**
  - **For a Sales Order**
    - Add Sales Line(s) with a Qty. to Ship greater than 0
    - Set Shipping Agent Code to ship for each line that you'd like to ship
      - Shipping Agent Code must have a ShipRush Carrier assigned to it
      - This will toggle the Sales Line > ShipRush Shipment = Yes
      - This enables the Create ShipRush Shipment button
      - Select > **New ShipRush Package**
        - If a ShipRush Shipment is already in process, error "There is already an open ShipRush Package for this Sales Order."
    - OR
    - Select one of the **Ship All With** actions to automatically assign a shipping agent to all lines with a quantity to ship
    - OR
    - Select **New ShipRush Package** without any items in the sale. It will ask if you'd like to create a package without any lines. The items can be added later or after the sale is posted.
    - Complete the **ShipRush Package Card** that opens
      - General fast tab
        - Fill required fields
      - Package Lines fast tab
        - A line will be displayed for each Item to be shipped
    - Shipping Address
      - A complete Shipping Address is required including Country
    - Select > **Print Packing List** to print a packing list
    - Select > **Ship with ShipRush** to ship and print a shipping label
      - ShipRush App will open
        - A Username / Password will be required, as might be an Authenticator or e-mail verification code the 1<sup>st</sup> time in



- With the "**Automate Shipping for Posted Sales Shipment Inventory Pick**" setting enabled on the ShipRush Setup page, a new package will be created **automatically** after the Inventory Pick is posted for the Posted Sales Shipment.
  - Complete the ShipRush Package card and the shipment on the ShipRush website.
- **For a Warehouse Shipment or Posted Warehouse Shipment**
  - Open an existing Warehouse Shipment or Posted Warehouse Shipment and select the **Ship All** action to create a new package for any applicable lines on the shipment. It must contain lines that came from a sales order and have a Qty. to Ship greater than 0. The carrier will default to the warehouse shipment's selected shipping agent.
  - If the warehouse shipment contains multiple sales orders, a dialog will prompt to ask which one to use for the shipment's address.
  - Complete the ShipRush Package card and the shipment on the ShipRush website.
  - If a shipping charge is calculated, it cannot be added as a new line to the warehouse shipment, but a message will show the amount.
- **For an LS Express POS Sales Invoice**
  - Set a Customer at POS
  - Add Item(s) to the POS sale
  - Set Shipping Agent Code to ship
    - Shipping Agent Code must have a ShipRush Carrier assigned to it
    - Select > **New ShipRush Package**
  - OR
  - Select one of the **Ship All With** actions to automatically assign a shipping agent to all lines
  - OR
  - Select **New ShipRush Package** without any items in the sale. It will ask if you'd like to create a package without any lines. The items can be added later or after the sale is posted.
  - A new package will open for the sale
    - Fill out required fields such as address
    - Click **Ship Later** to add the shipping cost to the sale and close the package page
    - OR
    - Click **Ship with ShipRush** to ship right away
  - Select > Pay to tender the sale
  - If Ship Later was used, when ready to ship the package search > ShipRush Packages, Package Type = Point of Sale > Select Package
  - Complete the ShipRush Package card
    - General fast tab
      - Fill required fields

- Package Lines fast tab
    - A line will be displayed for each Item to be shipped
  - Shipping Address
    - A complete Shipping Address is required including Country
  - Select > Ship with ShipRush to ship and print a shipping label
- **Tracking ShipRush Shipments in Business Central**
  - Search Posted Sales Shipments > Open Posted Sales Shipment > Shipping Fast Tab > Shipment Method panel:
    - Code
    - Agent
    - Agent Service
    - Package Tracking No.
    - Shipment Date
  - OR Search > Posted Sales Invoices > Open Posted Sales Invoice
    - Select Track Package button
    - OR Go To > Shipping and Billing Fast Tab
    - Method
    - Agent
    - Agent Service
    - Package Tracking No.
- **To Rate Shop in ShipRush**
  - You can login to ShipRush in another Tab if you wish to rate Shop from within ShipRush only, however using the actual Customer, Ship to Address, and Item information automatically populated from Business Central, saves time.
  - From Business Central > Ship with ShipRush > Inside ShipRush on the Shipment Page > Select Service dropdown > Estimate Cost and Delivery Date
    - From here, select the desired shipper and service and the shipment will be updated
- **If not ready to ship yet and you are in ShipRush on a Shipment page**
  - Select More > Mark as Not Shipped and this will move the Shipment in the "Draft Shipments" category.

#### **Extension Pages Created or Modified**

- **Created ShipRush Setup Page:**
  - Configuration for managing freight charges and default carrier settings. See the setup section above for a detailed description of each field.
  - You are required to have this page setup immediately after installation of the extension for it to work as intended.
- **Created ShipRush Packages list page**
  - Displays all ShipRush shipments completed, or in-process for Sales Orders or Point of Sale Orders.
  - Accessible by searching for "ShipRush Packages" in Business Central.
  - Accessible from the "ShipRush Shipments" page from the Sales Orders page and LS Express page if a shipment(s) exists for the respective order.

- Fields:
  - **Package No.:** Shows the package number of each ShipRush package line.
  - **Package Type:** Shows the package name of each ShipRush package line.
  - **Document No.:** Shows the document number of each ShipRush package line.
  - **Customer Name:** Shows the customer's name of each ShipRush package line.
  - **ShipRush Shipment Id:** Shows the shipment Id of each ShipRush package line, associated with the relevant ShipRush package.
  - **Tracking No.:** Shows the tracking number of each ShipRush package line, associated with the relevant ShipRush package.
  - **Quantity:** Shows the quantity of each ShipRush package line package.
  - **Quantity to Ship:** Shows the quantity to ship of each ShipRush package line package.
  - **Quantity Shipped:** Shows the quantity shipped of each ShipRush package line package.
  - **Weight:** Shows the weight of each ShipRush package line package.
  - **Status:** Shows the status of each ShipRush package line.
- **Created ShipRush Package card page**
  - Provides detailed information about a single package:
    - Fields
      - **Entry No.:** Shows the package number of ShipRush package.
      - **Package Type:** Shows the package name of ShipRush package.
      - **Document No.:** Shows the document number of ShipRush package.
      - **Customer No.:** Shows the customer's number of ShipRush package.
      - **Customer Name:** Shows the customer's name of ShipRush package.
      - **ShipRush Package/Shipping No.:** Shows the shipment Id of ShipRush package line, associated with the relevant ShipRush package.
      - **Tracking No.:** Shows the tracking number of ShipRush package, associated with the relevant ShipRush package.
      - **Quantity:** Shows the quantity of ShipRush package line package.
      - **Quantity to Ship:** Shows the quantity to ship of ShipRush package.
      - **Quantity Shipped:** Shows the quantity shipped of ShipRush package.

- **Weight:** Shows the weight of ShipRush package. The default value comes from the total weight of the items from the gross weight on the item card (or net weight if it's blank).
- **Posted Sales Shipment No.:** Shows the Sales Shipment number of the posted sale.
- **Posted Sales Invoice No.:** Shows the Sales Invoice number of the posted sale.
- **Weight:** Shows the weight of the package that will be added to ShipRush.
- **Width:** Shows the width of the package that will be added to ShipRush.
- **Height:** Shows the height of the package that will be added to ShipRush.
- **Length:** Shows the length of the package that will be added to ShipRush.
- **Declared Value:** Shows the declared value of the package that will be added to ShipRush, and will be used in case if the package is misplaced.
- **Shipping Charge:** Shows the shipping amount that will be charged to the customer, based on the settings on the setup page.
- **ShipRush Freight Cost:** Shows the shipping cost to ship the package through ShipRush. Hidden by default.
- **ShipRush Carrier Rate:** The amount charged by the carrier. Hidden by default.
- **Reference 1:** Shows the original document's External Document No., which is used for ShipRush's Reference 1 field.
- **Carrier:** Shows the shipping agent code to be used, which contains the ShipRush carrier name.
- **Carrier Service:** Shows the shipping agent service to be used, which contains the ShipRush carrier service name.
- **Customer Carrier Account:** Shows the third party carrier account to specify for the shipment. Selected from the customer's list of carrier accounts.
- **Status:** Shows the status of ShipRush package
- Package Lines fields:
  - **Sales Line No.:** The sales line number of ShipRush package.
  - **Description:** The Description of the item.
  - **Quantity:** The Quantity of the item selected.
  - **Qty. to Ship:** Quantity to ship for the selected item.
  - **Est. Weight:** The weight from the item card multiplied by the quantity to ship, which is used for the default value in the package's weight field. Hidden by default.

- **Quantity Shipped:** The Quantity that is already shipped of the selected item.
  - **Freight:** Specifies that the line is used to charge freight on the sale. Hidden by default.
  - **Status:** Shows the status of the line.
- Shipping Address fields:
  - **Ship-To:** Specifies the Ship To address field of the ShipRush package.
  - **Company Name:** Specifies the Company name (ship to name) of the ShipRush package.
  - **Contact Name:** Specifies the Contact Name of the ShipRush package.
  - **Address:** Specifies the address field of the ShipRush package.
  - **Address 2:** Specifies the address 2 field of the ShipRush package.
  - **City:** Specifies the City address field of the ShipRush package.
  - **State:** Specifies the State address field of the ShipRush package.
  - **Zip Code:** Specifies the Zip Code address field of the ShipRush package.
  - **Country:** Specifies the Country address field of the ShipRush package.
- Actions:
  - **Ship with ShipRush:** Opens the ShipRush UI in a new browser tab, pre-populated with data from the Business Central package page.
    - After shipment, the UI updates the shipment ID and package number in Business Central.
  - **Ship Later:** Adds or updates the freight cost on the sale and closes the package. Only for packages created in POS.
  - **Post - Shipment:** Enabled only for shipped packages; post the shipment lines in Business Central. Not used with packages created in POS.
  - **Post- Invoice:** Enabled after the shipment is posted; invoices the shipment in Business Central. Not used with packages created in POS.
  - **Print Packing List:** Prints the packing list. Not used with packages created in POS.
  - **Add Items From Sale:** Deletes any existing items in the package and adds the sale's items to it based on the following logic:
    - If a Posted Sales Shipment exists for the package, add all items from it.

- If a Posted Sales Invoice exists for the package, add all items from it.
    - If the sale hasn't been posted yet, add items from it that have the selected shipping agent. If some of the sale's items have no or a different shipping agent, it will ask if you'd like to change them before continuing.
    - **Resend With ShipRush:** After the shipping label has already been created, this can be used if a mistake was made with the package and it needs to be shipped with ShipRush again. By clicking this button, it enabled the package fields and allows you to click Ship With ShipRush.
- **Modified Shipping Agents page**
  - **ShipRush Carrier Name:** Shows the carrier for ShipRush.
  - **Ship with ShipRush:** Shows whether the agent can be used with ShipRush or not.
- **Modified Shipping Agent Services page**
  - **ShipRush Carrier Service Name:** Shows the carrier service for ShipRush.
- **Modified Sales Order Page page**
  - **Is ShipRush Shipment:** Shows whether the shipment can be shipped with ShipRush or not. Hidden by default.
- **Modified Sales Order page**
  - **Shipping Agent Code:** Validates the “Is ShipRush Shipment” field after each change.
  - **ShipRush Shipments:** Shows any existing ShipRush packages for the current sale.
  - **New ShipRush Shipments:** Creates a new shipment in ShipRush Packages if no valid shipment already exists based on the lines' quantities to ship and shipping agents. If a package already exists for the order, it will ask if you want to open it instead. If no items have a quantity to ship, it will ask if you'd like to create a package with no lines.
  - **Ship All With USPS:** If USPS is set up as a default carrier on the ShipRush Setup page, this action will apply the predetermined shipping agent and service to all lines with a quantity to ship and create a new package for them.
  - **Ship All With FedEx:** Same as above for FedEx.
  - **Ship All With UPS:** Same as above for UPS.
- **Modified Sales Order Lines page**
  - **Is ShipRush Shipment:** Shows whether the shipment can be shipped with ShipRush or not based on the selected shipping agent and service.
- **Modified Posted Sales Shipment page**
  - **ShipRush Shipments:** Shows any existing ShipRush packages for the current sale.
  - **Ship All:** Creates a new shipment in ShipRush Packages for all items on the posted sales shipment.

- **Ship Inventory Pick:** Creates a new shipment in ShipRush Packages for all items of the posted sales shipment that exist on a posted inventory pick.
- **Modified LS Express POS page**
  - **Shipping Agent Code:** Shows the selected shipping agent for the selected order to determine whether the shipping agent can be used with ShipRush shipment or not. Hidden by default.
  - **Shipping Agent Service Code:** Shows the selected shipping agent service for the selected order. Hidden by default.
  - **ShipRush Shipments:** Shows any existing ShipRush packages for the current sale.
  - **New ShipRush Package:** Creates a new shipment in ShipRush Packages if no valid shipment already exists based on the lines' quantities and shipping agents. If a package already exists for the order, it will ask if you want to open it instead. If no items have a quantity to ship, it will ask if you'd like to create a package with no lines.
  - **Ship All With USPS:** If USPS is set up as a default carrier on the ShipRush Setup page, this action will apply the predetermined shipping agent and service to all lines and create a new package for them.
  - **Ship All With FedEx:** Same as above for FedEx.
  - **Ship All With UPS:** Same as above for UPS.
- **Modified LS Express POS subpage:**
  - **Is ShipRush Shipment:** Shows the selected shipment is valid to be shipped with ShipRush based on the selected carrier agent and service. Hidden by default.
  - **Shipping Agent Code:** Updates the agent in ShipRush Package Lines, accordingly. Hidden by default.
  - **Shipping Agent Service Code:** Updates the agent in ShipRush Package Lines, accordingly. Hidden by default.
- **Modified Customer Card page:**
  - **ShipRush Packages:** Opens the ShipRush packages list page, filtered to only the customer's packages.
  - **ShipRush Customer Carrier Accounts:** Opens a page to input the customer's carrier accounts to use as third party accounts with the shipment. This field is hidden if Customer Carrier Accounts is not enabled on the Setup page.