

Couriers integration

Entersoft Business Suite® R0 v5

Doc. Ver.1.1 (2024-03-03)

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1. Intro

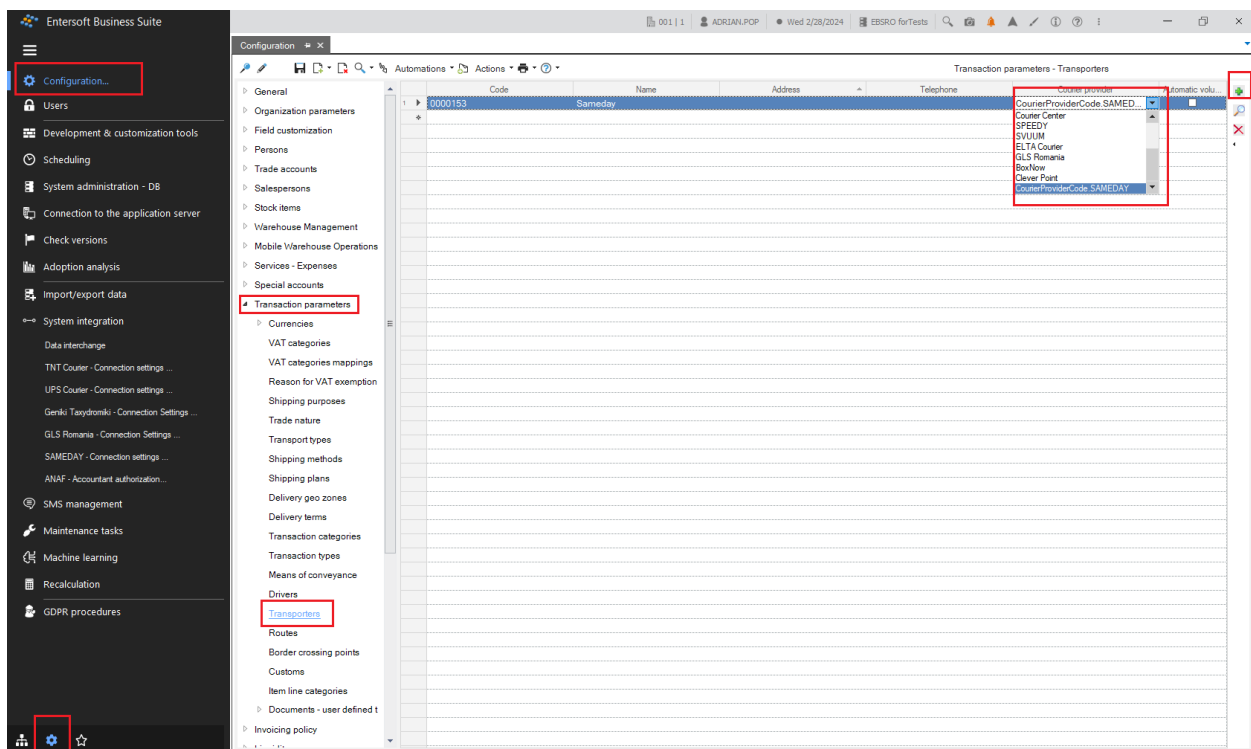
The integration of a courier in EBS-RO encompasses several configurations, both on code and data. If the code is already created, a set of files dealing with the courier's API calls are already present in the software package. There is a standard set of automations for each of these integrations:

- Create shipment,
and:
- Print shipment,
- Update shipment,
- Cancel shipment,
- View shipment information.

These automations are present in the menus of documents or scrollers that deal with shipments via couriers. These couriers are called **Transporters**, and a list of *all the couriers that are integrated in any country specific EBS package* is available if you open the menu **Configuration and Tools > Configuration... > Transaction parameters > Transporters** to add (+) a courier with which you want to work with.

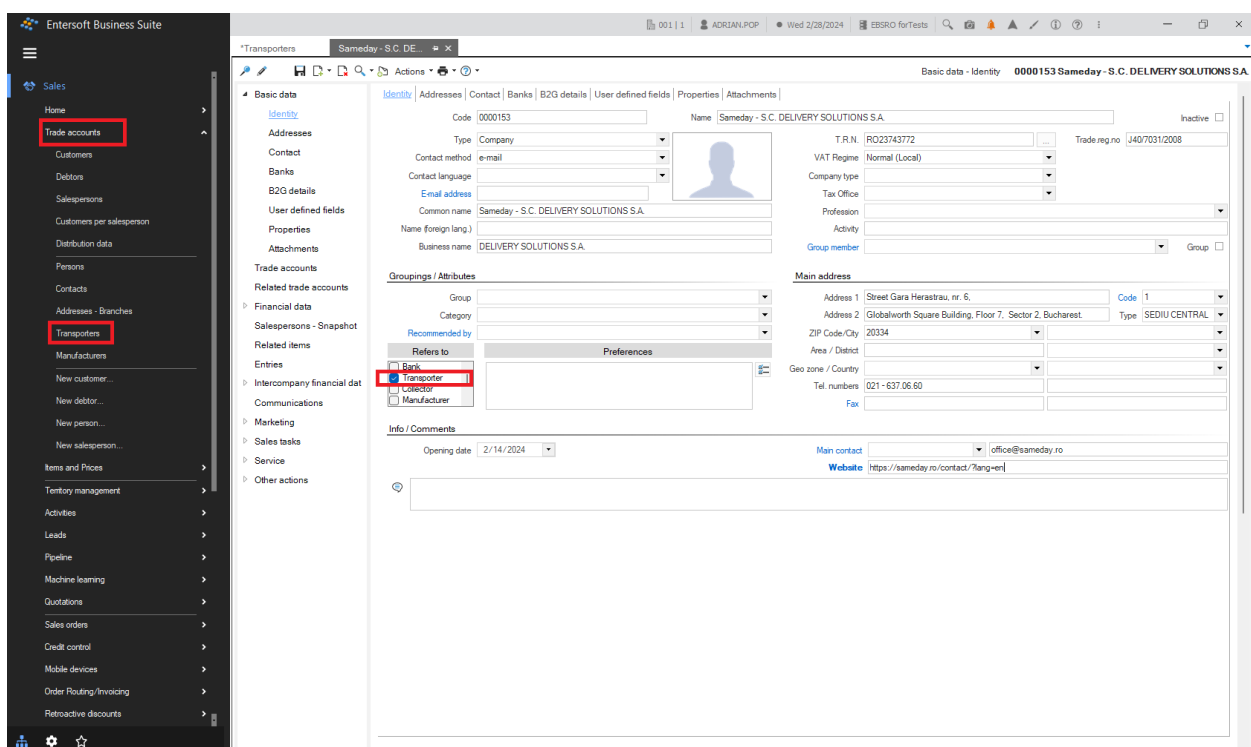
2. Configure the courier

In the transporters list available in menu **Configuration and Tools > Configuration > Transaction parameters > Transporters**, you should add (+) the new courier, if it is not present in the scroller, by selecting it from a list of available couriers. On the line entry you can add some specific info such as Name, Address, Telephone and then Save it.



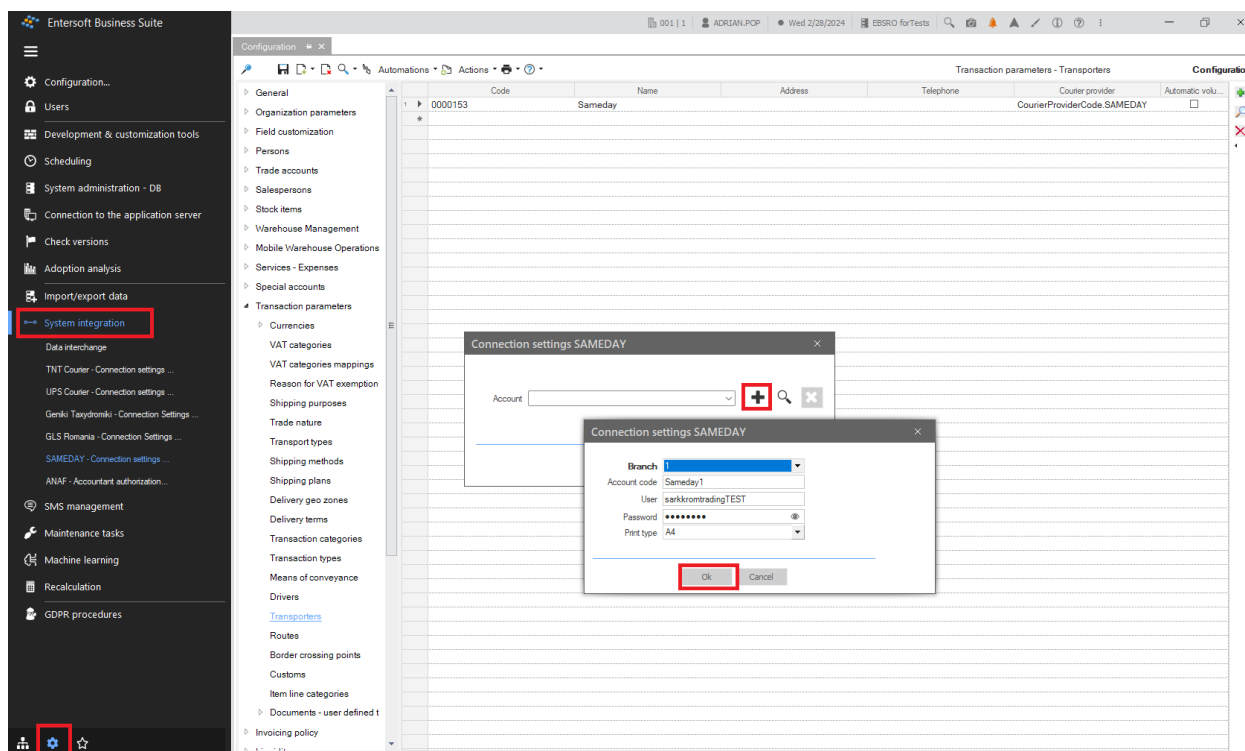
A complete data card for the transporter can be found in the **Main Menu > Sales > Trade Accounts > Transporters**.

Here you can edit all the information regarding the courier specific trade account partner, by double-clicking the transporter's line to open its card form.



After filling all the necessary info for it, all that remains to configure is the **actual account** on behalf of which the courier will operate the shipments.

From the contract that you have to have with the courier you will have the account(s)' credentials that you have to fill in the Connection setting menu here **Configuration and Tools menu > System Integrations for Connection settings**.



If there are multiple accounts contracted with the courier, each of them should be added here.

3. Shipments via courier

3.1 Create shipment

In order to create a shipment, first create a new Invoice or a Shipment Note document. Then on its second tab - **Miscellaneous**, select the courier in the *Transporter* field. After saving the document, in the **Automations** menu list you will see the **Create shipment** automation.

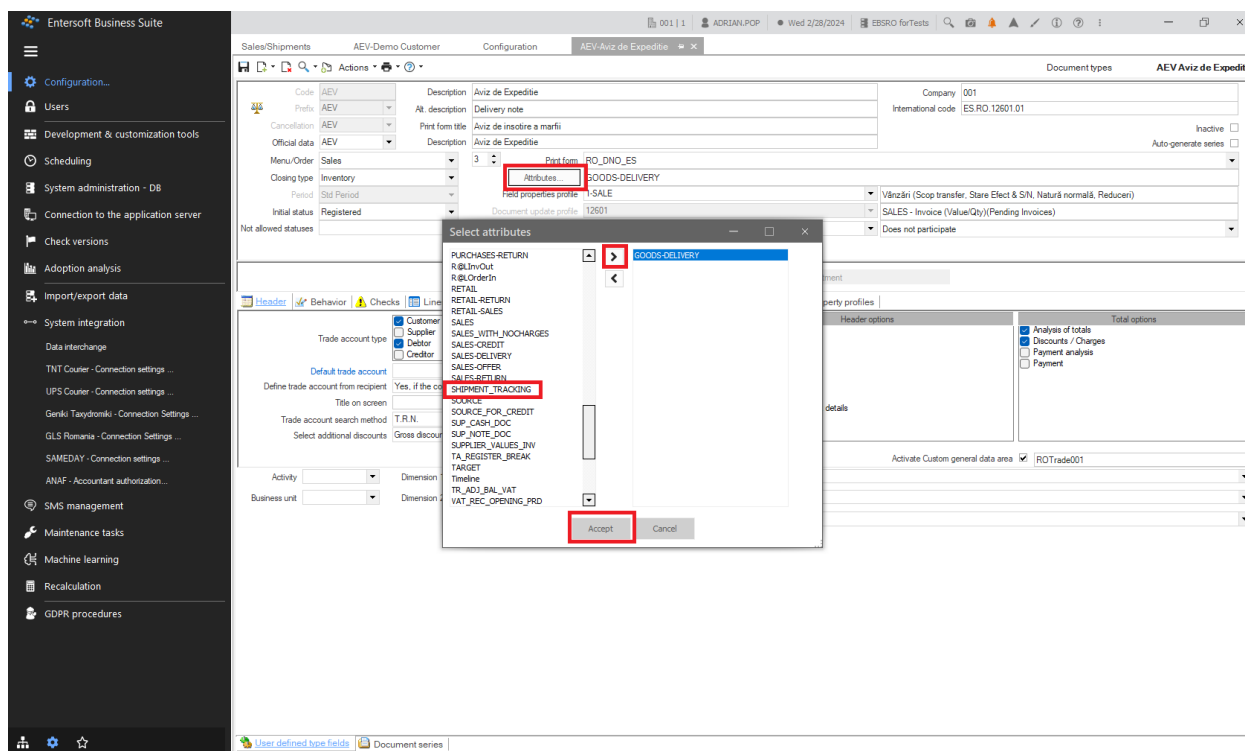
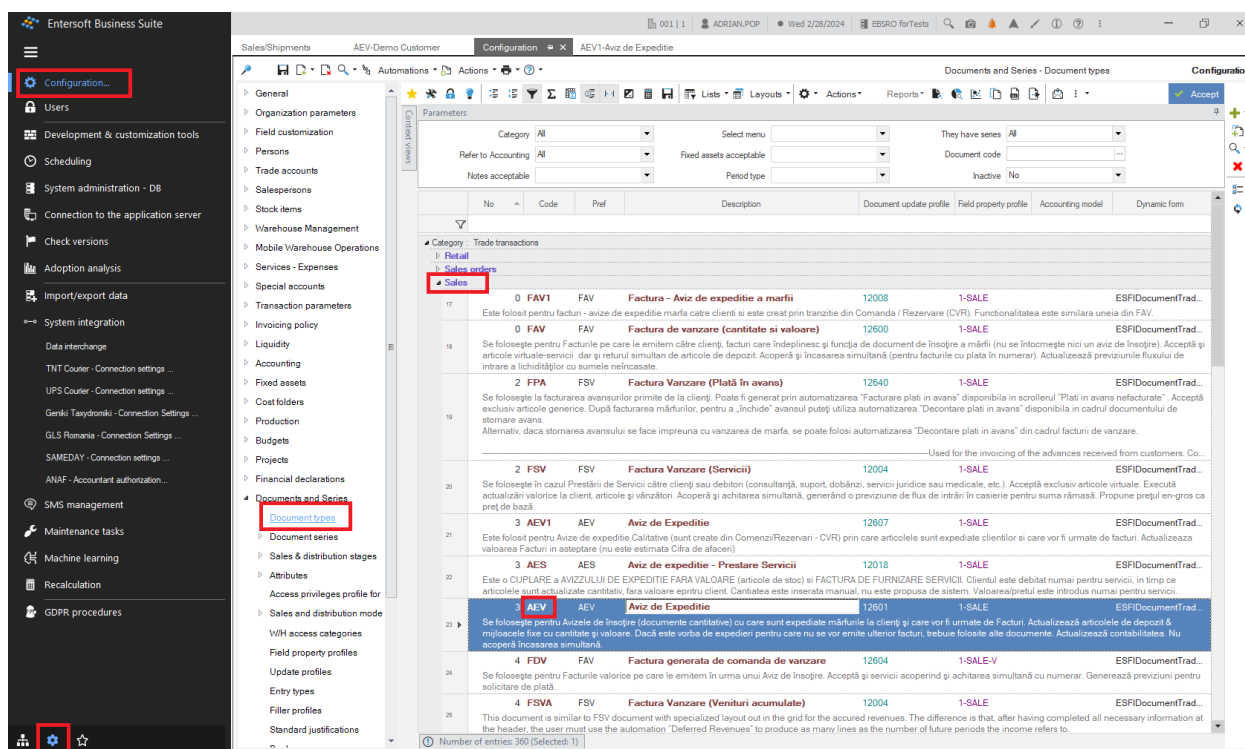
The screenshot displays the 'Miscellaneous' tab of a document in the Entersoft Business Suite. The 'Transporter' field is highlighted in red. The 'Order Routing/Invoicing' and 'Sales/Shipments' menu items are also highlighted in red. The main table shows a single item 'DEMO_001' with a quantity of 1.000 and a price of 100.00. The bottom summary shows a total of 100.00 RON.

SEQ IN	Item	Description	IMU	Quantity	Price	Weight	Volume	Temporary net value (for invoicing)	Invoiced Quantity (MMU)
1	DEMO_001	DEMO_001	BUC	1.000	100.00	1.000	1.000	100.00	0.000
Σ				1.000	100.00000	1.000	1.000	100.00	0.000

Totals - Special Accounts

Quantity	1.000000000	Net value	RON100.00	VAT	RON19.00	Total	RON119.00	Amount payable	RON119.00	Discount
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Note: For a document to have the **Create shipment** automation it must have had set the attribute **SHIPMENT TRACKING**.



After such a parameterization the **cache has to be cleared** in order for this to be taken into account. Go to the menu **Configuration and tools > Connection to the application server** and select **Cache administration**. In the popup press the button **Server cash OFF/ON** to clear it and then **Publish changes**.

The screenshot displays the 'Entersoft Business Suite' interface. On the left, a sidebar menu includes options like 'Configuration...', 'Users', 'Development & customization tools', 'Scheduling', 'System administration - DB', 'Connection to the application server', 'Workstation performance counters...', 'Network metrics', 'Online users', 'HandShake...', 'ES Cloud connection verification', 'Create ES Cloud subscription', 'File Synchronization with Server', 'Synchronize workstation files', 'Cache administration...', 'Restart Application Server', 'Offline (ES00)', 'Check versions', 'Adoption analysis', 'Import/export data', 'System integration', 'SMS management', 'Maintenance tasks', 'Machine learning', 'Recalculation', and 'GDPR procedures'. The 'Cache administration...' option is highlighted with a red box.

The main window shows the 'Sales/Shipment' configuration for 'AEV-Aviz de Expediție'. The 'System Cache' dialog is open, with 'Server Cache OFF' selected. The main window displays various configuration fields for the shipping document, including 'Code', 'Description', 'Delivery note', 'Company', 'International code', 'Print form', 'Menu/Order', 'Closing type', 'Period', 'Initial status', 'Not allowed statuses', 'Attributes', 'Field properties profile', 'Document update profile', 'Sales distribution stage', 'Header options', 'Total options', 'Business unit', 'Dimension 1', 'Dimension 2', 'Auto-focus on mandatory fields', 'Minimize header', 'Minimize totals', 'Exclude from Copy', and 'Activate Custom general data area'.

Now, going back to our shipping document we can select **Create shipment** from the Automation menu of our document.

The screenshot displays the 'Entersoft Business Suite' interface. On the left, a sidebar menu includes options like 'Configuration...', 'Users', 'Development & customization tools', 'Scheduling', 'System administration - DB', 'Connection to the application server', 'Workstation performance counters...', 'Network metrics', 'Online users', 'HandShake...', 'ES Cloud connection verification', 'Create ES Cloud subscription', 'File Synchronization with Server', 'Synchronize workstation files', 'Cache administration...', 'Restart Application Server', 'Offline (ES00)', 'Check versions', 'Adoption analysis', 'Import/export data', 'System integration', 'SMS management', 'Maintenance tasks', 'Machine learning', 'Recalculation', and 'GDPR procedures'. The 'Connection to the application server' option is highlighted with a red box.

The main window shows the 'Sales/Shipment' configuration for 'Aviz de Expediție AEV-C-A-00001: 119.00 RON'. The 'Automation' menu is open, with 'Create shipment' highlighted. The main window displays various configuration fields for the shipping document, including 'Main data', 'Miscellaneous', 'Create shipment', 'Shipment details', 'Administration', 'Business dimensions', 'Persons involved', 'Notes', and 'Attributes'.

When launching the **Create shipment** automation You will have to fill in some **parameters** regarding the specifics of it.

Quantity	Net value	VAT	Total	Amount payable
1.000000000	RON100.00	RON19.00	RON119.00	RON119.00

After Accepting, the shipment is actually created, by calling the courier's API for that specific account used to create the shipment order (AWB).

After this was successfully created, there are several automations available for the created shipment:

- Print shipment
- Update shipment status
- Cancel shipment
- View shipment Info.

The first of them is used to print the shipment label for the package.

Sales/Shipments | AEV-Demo Customer

Transition (highlighted):

- Print shipment
- Update shipment status
- Cancel shipment
- View shipment info

Main data: Main data | Miscellaneous

Shipment details:

- Recipient: Sameday - S.C. DELIVERY SOLUTIONS S.A.
- Delivery address: 1 | MUNICIPIUL BUCUREȘTI, SECTOR 2, STR. GARA HERĂSTR
- Transporter: Sameday - S.C. DELIVERY SOLUTIONS S.A.
- Transporter address: 1 | MUNICIPIUL BUCUREȘTI, SECTOR 2, STR. GARA HERĂSTR
- Route: 1
- Mean of conveyance: Standard

Administration:

- Commercial date: 2/28/2024
- Discount: 0
- Pricelist: 1
- Invoicing policy: 1
- Contract: 1
- Online Publication Number (Diavgeia): 1
- Alt. document: 1

Attributes:

- Transaction type: 11 / Achiziție/Vânzare directă
- Nature of transaction: 11 / Achiziție/Vânzare directă
- Origin/Status: Typing
- Cancellation indicator: Standard

Persons involved:

- Supervisor: Demo Customer
- Contact: Demo Customer
- Assignor: Demo Customer
- Counterparty: Demo Customer
- Counterparty address: 1 | str. Strada, nr. 1.
- Mediator: Demo Customer

Business dimensions:

- Project: 1
- Business unit: Demo Customer
- Activity: Demo Customer
- Dimension 1: Demo Customer
- Dimension 2: Demo Customer

Notes:

- Intercompany transactions: ☐
- Available for transition: ☒
- Reason for VAT exemption: 1
- Alt. reason: 1

Summary:

Quantity	Net value	VAT	Total	Amount payable
1.00000000	RON100.00	RON19.00	RON119.00	RON119.00

3.2 Print shipment

After selecting the print device it will generate the shipment label for the package.

 DELIVERY SOLUTIONS S.A. Tel/Fax +40 21 637 0660 Operator de date cu caracter personal cu nr. 19983			Expediere: NextDay 24H Ramburs: 119.00 Ron Data AWB: 28.02.2024 Greutate: 1.00 kg Val asig.: 119.00 Ron Zona: Resedinta Agentia: BC_BACAU_A01--1/8--	1 din 1
 1ZVP241197040001				
EXPEDITOR SRL Telefon: [Redacted] Judet: Bucuresti Localitate: Sectorul 2 Adresa: [Redacted] Punct de ridicare: Adresa implicita	DESTINATAR Demo Customer Contact: Demo Customer Telefon: 123456789 Judet: Bacau Localitate: Bacau Adresa: str. Strada, nr. 1, (Bacau), 605600	Observatii: Nicio observatie		
OPțiuni livrare -		Data si ora preluarii: Data si ora livrării: zz ll aaaa oo mm zz ll aaaa oo mm Semnatura de primire:		

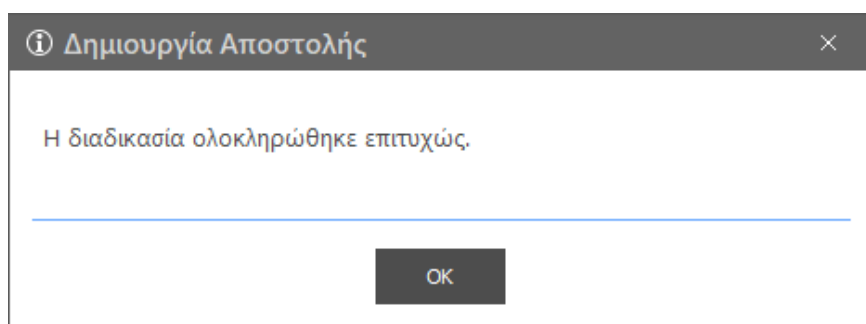
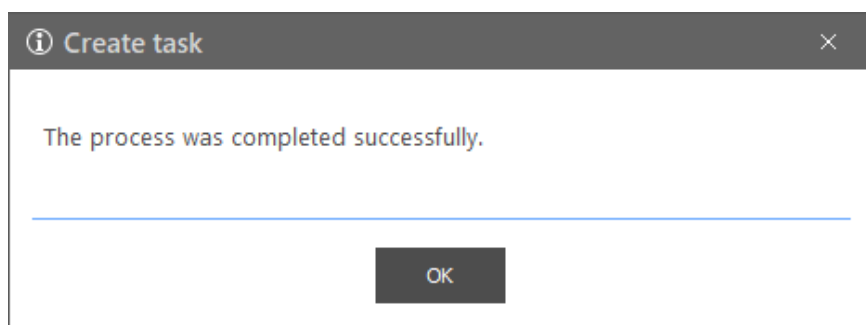
Responsabilitatea continutului revine in intregime in sarcina expeditorului. Expeditorul a luat la cunostinta si a acceptat "Conditile generale privind furnizarea serviciilor postale."

If there are errors, a popup will display the error.

If there are errors regarding the API call on creating the shipping order, the API response is in the latest xml file in the **\\ESNoSync\SamedayClient** folder.

3.3 Update shipment status

This automation is not allowed for newly created shipments. Relates to already finalized shipments.



Δημιουργία Αποστολής -> Create shipment

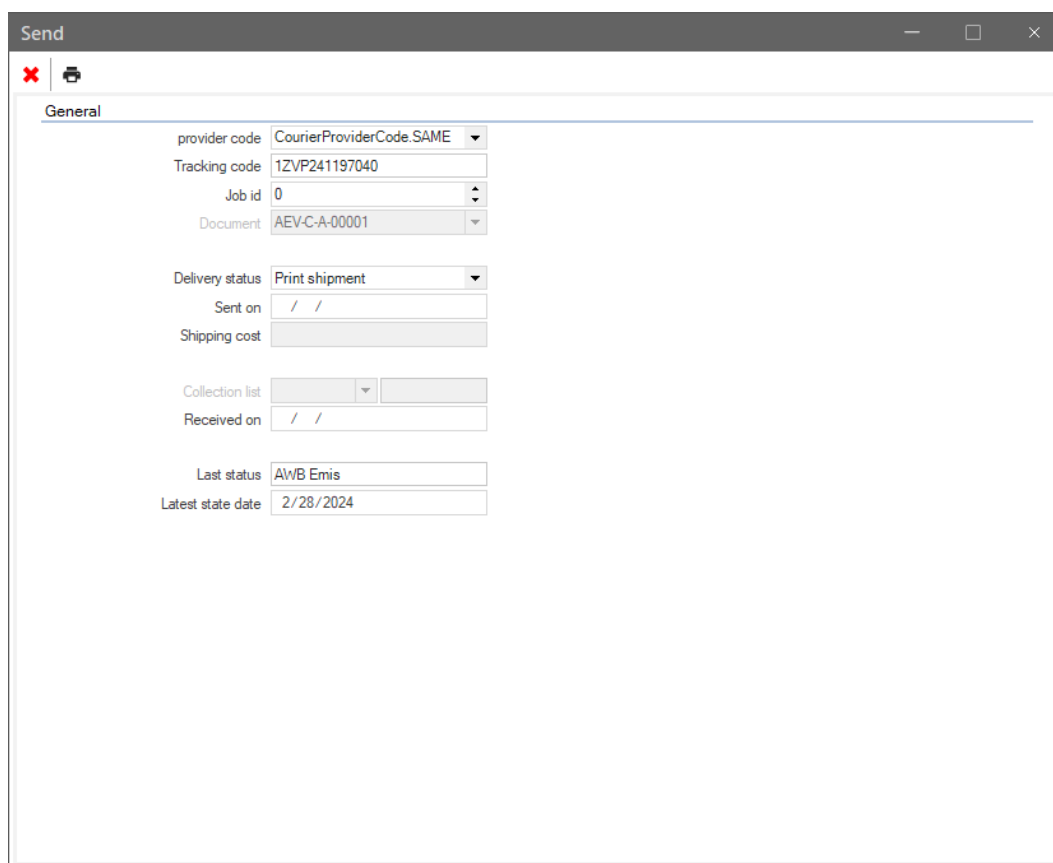
Η διαδικασία ολοκληρώθηκε επιτυχώς. -> The process completed successfully.

3.4 Cancel shipment

This automation deletes the associated shipment to the document.

3.5 View shipment Info

This automation presents the associated shipment information related to the document.



The screenshot shows a window titled "Send" with a standard Windows interface (minimize, maximize, close buttons). Inside the window, there is a "General" tab. The form contains the following fields:

- provider code: CourierProviderCode.SAME (dropdown)
- Tracking code: 1ZVP241197040 (text)
- Job id: 0 (text)
- Document: AEV-C-A-00001 (dropdown)
- Delivery status: Print shipment (dropdown)
- Sent on: / / (text)
- Shipping cost: (text)
- Collection list: (dropdown)
- Received on: / / (text)
- Last status: AWB Emis (text)
- Latest state date: 2/28/2024 (text)

4. Shipments management

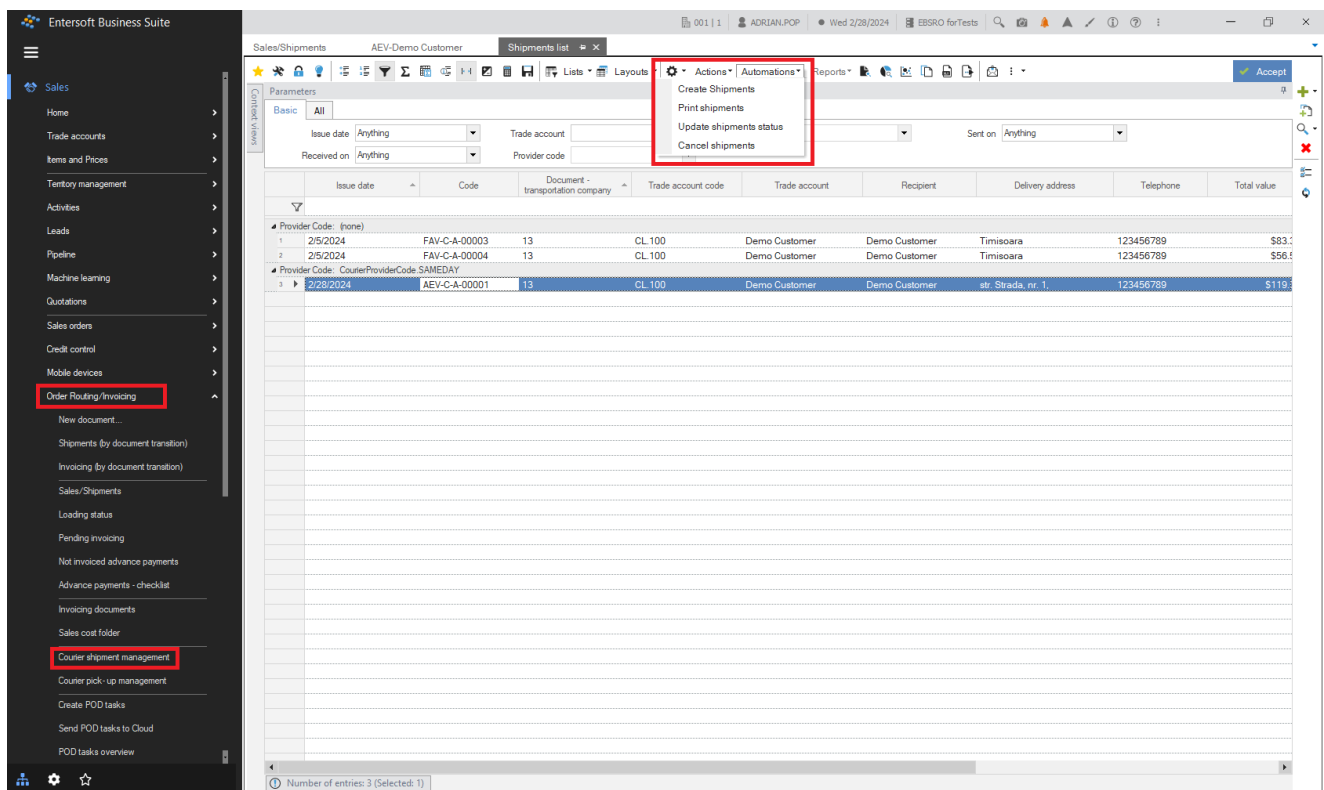
Shipments can be managed via two scrollers under the menu

Sales > Order Routing/Invoicing:

- **Courier shipment management** - is a scroller that presents all the shipments via courier.
- **Courier pick-up management** - this is a scroller for managing the pick-ups.

In this scrollers for the selected lines (documents with shipments) we can apply the shipments' automatizations:

- Create shipments
- Print shipments,
- Update shipments status,
- Clear shipments.



5. Field mapping

A complete shipment field mapping is presented in the following file,

[EBS-RO Courier's Integration - Field Mapping for Create Shipment automation](#),

for all the couriers integrated in the EBS-RO - Geniki, TNT, GLS, UPS and Sameday - each on a separate sheet.