



METAPACK SHIPPING

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BUSINESS CENTRAL EXTENSION

This software is an extension to Microsoft Business Central and is called "Metapack Essential". It provides seamless integration with the Metapack Delivery Manager for packaged shipments.

When a customer sets up a Metapack account then this software, and its dependencies, is made accessible to them – it is included as part of the "Delivery Manager" package.

INSTALL

This extension has dependencies on other extensions, some of which have their own dependencies. The sequence of installation, where none of the following extensions has been installed, is:

Extension Name	Publisher
Customer Licensing	iDyam Solutions
Remote Printing	Navengers
Packing Shipments	Navengers
Webservice Interfacing	Navengers
Metapack Essential	Metapack

ADDITIONAL DEVELOPMENT

This extension does not directly add any fields to the orders/shipments; however, it does include an event which can be used to provide the "Delivery/Special Instructions" during the call to Metapack.

Minor additional development would be required, by the solution center, to extract the instructions text(s) for each specified order/shipment within the following event subscriber function:

```
[EventSubscriber(ObjectType::Codeunit, Codeunit:"mpk Essentials Setup", 'OnGetSpecialInstructions', "", false, false)]
local procedure OnGetSpecialInstruct(WhseShipDoc: Code[20]; SourceTable: Integer; Subtype: Integer; SourceNum: Code[20];
var Instruct1: Text; var Instruct2: Text)
begin
    // Populate the Instruct1 and Instruct2 texts from the specified warehouse shipment / order (line) document.
end;
```



CONFIGURATION

After installation and before any configuration has been done, a notification will be shown on the role center in the business central web client:

- "Metapack Essential has been installed. Would you like to activate it?" with options ...
 - "Activate now" – will show the below setup page.
 - "Remind me tomorrow"
 - "Don't show this again"

It is not necessary to activate any other extension before this extension.

MODULE ACTIVATION

Until this module is activated the setup page looks as follows:

Metapack Setup

 Activate | More options



Welcome to the Metapack setup ...

This module requires the "Packing Shipments" extension, so this will be automatically activated.

When you click on "Activate" you will need the following from Metapack:

1. Customer license key that is active for this extension.
2. Account login credentials for use on the Metapack site and for web-services.

(These can be changed later, using the above menu ribbon)



PREREQUISITE

Configuration of your Metapack account and the "Delivery Manager" system is required:

- "Service Groups" ...
 - Each has a unique "Code", which must not be longer than 10 characters.
- "Warehouse(s)" ...
 - The location(s) that you will ship from.
- "Carriers, Services and Allocation Rules" ...
 - The carriers/services that can be used and the rules of how these are chosen.

ACTIVATION STEPS

When you have received both the "Customer license key (including the Access address or the License file)" and the "API login credentials" from Metapack, then click on the "Activate" button to begin:

- The "Licensing Setup" page will be shown ...

A screenshot of a software dialog box titled "Edit - Licensing Setup - Metapack Essential". The dialog box has a white background and a thin gray border. At the top right, there are icons for a pencil and a close button (X). Below the title bar, there are three icons: a colorful geometric shape, a green leaf-like shape, and a gold padlock with a key. The main area contains five input fields, each with a label and a dotted line separator:

- "Customer License Key" followed by a text input field.
- "License Access" followed by a text input field with a dropdown arrow on the right.
- "License Service Certificate" followed by a toggle switch that is currently turned on.
- "Certificate Password" followed by a text input field.
- "Has License Data" followed by a toggle switch that is currently turned on.

At the bottom right of the dialog box, there is a "Close" button.

- Enter the "Customer License Key" as provided.
- Enter the "License Access" as provided, so either:
 - Specify the license service address (an on-premises installation must allow this web service traffic through the firewall).
 - Do the lookup and upload the license file.
- Close this page.



- The “Web Interface Setups” list will be shown, which you must “Edit” ...

View - Web Interface Setups

Search + New Manage Page More options

Code ↑ ▼	Description	Authorization	Definitions Webpage
METAPACK	Metapack SOAP	Username/Pass...	https://dm-delta.metapack.com/dm/servi...

METAPACK requires Authorization configuration

OK

METAPACK

Actions Related

General

Code	<input type="text" value="METAPACK"/>	Authorization	<input type="text" value="Username/Password"/>
Description	<input type="text" value="Metapack SOAP"/>	Definitions Webpage	<input type="text" value="https://dm-delta.metapack.com/d"/>

Credentials

Username *	<input type="text"/>	Password *	<input type="text"/>
------------	----------------------	------------	----------------------

- Update the “Definitions Webpage” with your prefix (instead of “dm-delta”), e.g.:
 - <https://example.metapack.com/dm/services>
- Enter the “Username” and “Password” –these are your API login credentials.
- Close this page to go onto to the “Metapack Setup” page.



METAPACK SETUP

Notifications will be shown on the role center if any mandatory configuration is missing.

To manually access this page, you must search for "Metapack Setup" (administration).

RIBBON

Buttons:

- "Packing Shipments" ...
 - This module relies on the "Packing Shipments" extension, and that setup must also be completed:
 - Please refer to the separate "Packing Shipments" extension documentation for those instructions.
 - Ensure that the "Length Unit" and "Weight Unit" are what you need to use, because the units will be automatically converted for Metapack if necessary.
- "Shipment Methods" ...
 - Shows the "Shipment Methods" list page:
 - This has a "Trade Term" column which is ticked when a code is valid for use with Metapack.
- "Job Queue" ...
 - To setup the job queue "Metapack Essential - Synchronize" task:
 - This should run once a day when your warehouse is not operating.

Actions:

- "Shipping Agent" ...
 - Shows the "Metapack" shipping agent, which has been automatically created:
 - "Shipping Agent Services" have also been automatically added from the "Metapack Service Groups" ...
 - If your service groups are changed on the Metapack system, then you must come into the "Metapack Setup" page to refresh them.
- "Web Interface" ...
 - If the "API login credentials" need to be changed.
- "License Key" ...
 - If the "Customer License Key" and/or the "License Access/File" need to be changed.



FIELDS

Editable:

- "Activated Module" ...
 - Set this to "None" to de-activate the module.
- "Default Shipment Content Type" ...
 - This should normally be set to "Merchandise", unless advised otherwise by Metapack.
- "Default Trade Terms" ...
 - If no "Shipment Method" is specified on the order, then this will be used.
- "Fabric Content Attribute" ...
 - Optionally the "Item Attribute" which will contain any material details.
- "Group Batch Size" ...
 - The batch size used when assigning consignments to the collection/manifest group:
 - Default 12 – only to be changed if asked for by Metapack.

Information:

- "Interface Code" ...
 - The code of the "Web Interface Setups" record for the Metapack integration.
- "Shipping Agent Code" ...
 - The code which defines the "Shipping Agent" to be initially set onto orders to identify them as needing the Metapack integration, along with a "Shipping Agent Service":
 - These can also be defaulted on the "Customer" record.
- "Groups Mapped" ...
 - The number of "Shipping Agent Services" automatically created against the above shipping agent for the Metapack groups.
- "Warehouses Mapped" ...
 - The number of Metapack warehouses mapped to Locations (see below).
- "Carriers Mapped" ...
 - The number of Metapack carriers mapped to Shipping Agents (see below).



TABLE TABS

Metapack Setup

[Packing Shipments](#) |
 [Shipment Methods](#) |
 [Job Queue](#) |
 Actions |
 Fewer options

Warehouse Mapping | Related

Warehouse Code ↑	Warehouse Name	Location Code	Location Name	Req... Doc... Print	Packing Station
FR	France			<input checked="" type="checkbox"/>	None
→ UK	UK	WEST	West Warehouse	<input type="checkbox"/>	None
US	USA			<input checked="" type="checkbox"/>	None

Carrier Mapping

Carrier Code ↑	Carrier Name	Shipping Agent Code	Shipping Agent Name
→ CPR01	Colis Prive		
DPD	DPD		
HERMESPOS	Hermes		
LPS	Coliposte		
UPS04	UPS Ready	UPS	United Parcel Service of America, L...

“Warehouse Mapping”:

- This shows all the “Warehouse” codes/names which are defined on the Metapack account.
- Each of the Metapack warehouses must be mapped to a “Location Code” ...
 - This can be an inventory location, like a store, or a BC warehousing location with bins and picking.
- “Require Document Print” column, default is “ticked” ...
 - This should only be “unticked” if only labels will be printed, and no customs documents are ever required to be printed.
- “Packing Station” status column ...
 - This must show “Valid” before the location can be used.
- “Related” ribbon button -> “Packing Stations” (Ctrl+F9) menu item ...
 - Shows the list of packing stations defined for the specific “Location”:
 - Please refer to the “PackingShipments” extension documentation.



"Carrier Mapping":

- This shows all the "Carrier" codes/names which are defined on the Metapack account.
- Where there is already an existing shipping agent record then the "Shipping Agent Code" must be set, otherwise whenever a carrier is selected by Metapack to be used on an order then the shipping agent record will be automatically created ...
 - There is no need to manually create any "Shipping Agent Services", as these will be automatically created.

"Defined Operations":

- Information only – list of the SOAP operations which are being used.

STANDARD SYSTEM

The setups required within standard business central pages to facilitate the Metapack integration.

USERS

To have the right permissions, relevant users should have the "METAPACK" user group.

ITEMS

"Item" required fields:

- "Item Category Code"
- "Commodity Code"
- "Country/Region of Origin"

"Item Units of Measure" must be configured against all items:

- "Length", "Width" and "Height" should be specified, as agreed with Metapack.
- "Weight" is required, however ...
 - If the "Item" has the "Net Weight" specified, for base UOM, then the "Item Unit of Measure" records will be automatically updated with their relevant weight.



"Item Attributes" depending on the configuration:

- "Item Packing Attribute" from the "Packing Shipments Setup".
- "Fabric Content Attribute" from the "Metapack Setup".

LOCATIONS

The standard "Location List" page will also show a "Metapack Warehouse" (mapped) column:

- A location must have a valid "Packing Station" defined before packing can be done.

CUSTOMERS AND ORDERS

10000 · Adatum Corporation

New Document Approve Request Approval Prices & Discounts Navigate Customer More options ⓘ

Shipping Show less

Ship-to Code	<input type="text"/>	Shipment Method	
Location Code	<input type="text"/>	Code	EXW
Combine Shipments ...	<input checked="" type="checkbox"/>	Agent	METAPACK
Reserve	Optional	Agent Service	STANDARD
Shipping Advice	Partial	Shipping Time	<input type="text"/>
		Base Calendar Code ...	<input type="text"/>
		Customised Calendar ...	No

Orders going through the packing procedure will only be processed through the Metapack system if:

- "Customer" record has the shipping "Agent" specified as "METAPACK" and the relevant "Agent Service" selected (or both must be blank so there is no default) before an order is created.
- "Orders" must have the shipping "Agent" specified as "METAPACK" and the relevant "Agent Service" selected.
- Note: if the "Shipping Method Code" is not a valid Metapack trade term then this will cause an error during the Metapack consignment creation process (see below).



INTEGRATION

Integration with the Metapack system automatically occurs during the packing/collection procedures:

- Please refer to the "Packing Shipments" extension documentation for details of how to handle each of the processes.

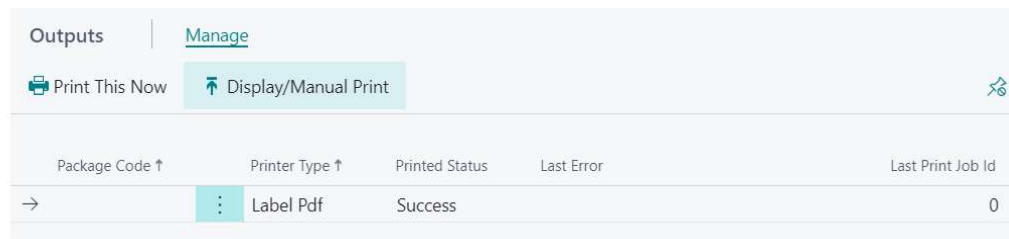
PACK BENCH

After an order is released and picked (manually for an inventory location or using the system to specify the warehouse bins) then the items must be packed into containers.



When all the picked items for an order have been packed then click the  button:

- When an order has the original "Agent" as "METAPACK" then the consignment will be created in the Metapack system ...
 - If there is any error returned from the Metapack system, then the user must:
 - "Modify" the order to fix the data issue ...
 - Verify that Items have valid data, and the shipping address is valid.
 - Go back to the "Pack Bench" and select "Close Order" to try again.



Package Code ↑	Printer Type ↑	Printed Status	Last Error	Last Print Job Id
→	Label Pdf	Success		0

- When successful:
 - The order will be assigned the actual "Shipping Agent" and "Agent Service" ...
 - As determined by the rules within the Metapack system.
 - Each package will be assigned a "Tracking Number".
 - PDF Label(s) and any Customs Document(s) will be listed in the "Outputs" ...
 - If the packing station is configured for remote printing, then these will be automatically printed.
 - To view a PDF file (in a new tab, where it can be manually printed):
 - Click on "Manage" -> "Display/Manual Print".
 - After having printed everything for the order, and attached to the package(s), then it is ready for collection.



CARRIER COLLECTION




When ready then click the “Collected” button:

- When the “Location” being collected from is mapped to a “Metapack Warehouse”, then the included packages which have a “Metapack Reference” will be automatically added to a newly created “Metapack Carrier Manifest”. These packages will then have the “Collection Reference” which was received from Metapack ...
 - This will fail if it is after the defined Metapack manifest cut-off time.

VIEW CONSIGNMENT

Whenever viewing a Consignment document header, in the dashboard/collection list part or on the consignment card, there are Metapack specific details.

Manage/Ribbon button:

-  ...
 - Opens a new browser tab to the Metapack Delivery Manager for the consignment:
 - The weight and sizes shown on the Metapack system might be in a different unit from those specified in Business Central.

Fields/Columns:

- “Metapack Reference” is the delivery manager consignment number.
- “Collection Reference” is the carrier manifest collection number.

JOB QUEUE TASK

The status of the “Metapack Job” is shown on the “Consignment Dashboard”.

This job runs to synchronize any deleted packages with the Metapack system.