Introduction

The core functionality of the Business Central to ShipServ connector (BC2SS Connector) is to create a connection between the Microsoft Dynamics 365 Business Central environment and ShipServ. To be specific, quotes and payment orders (and changes) get synchronized.

Important features

- The ability to use your preferred or existing Business Central environment without the need to switch to and back from the ShipServ environment.
- Link your preferred way of reference to your quotations and orders with ShipServ.

In this document

You will find:

- **Getting started:** a detailed description with printscreens on how to start with the ShipServ connector and what to expect where.
- **A look inside the black box:** An explanation of what happens outside Business Central to get an understanding of the role ShipServ has.
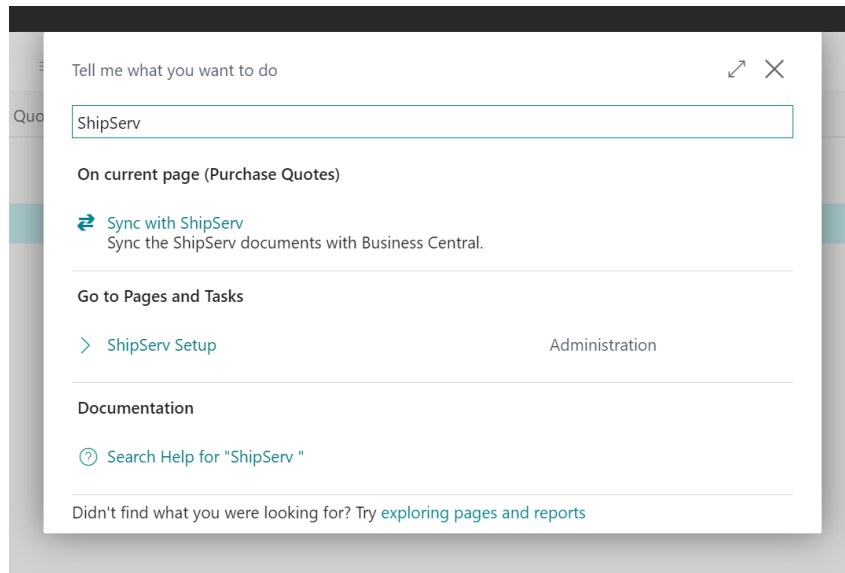
Please note

In Business Central, there is no such thing as an RFQ officially. This is covered by the status of the 'regular' quote. A RFQ is just a quote that hasn't been returned by ShipServ (yet).
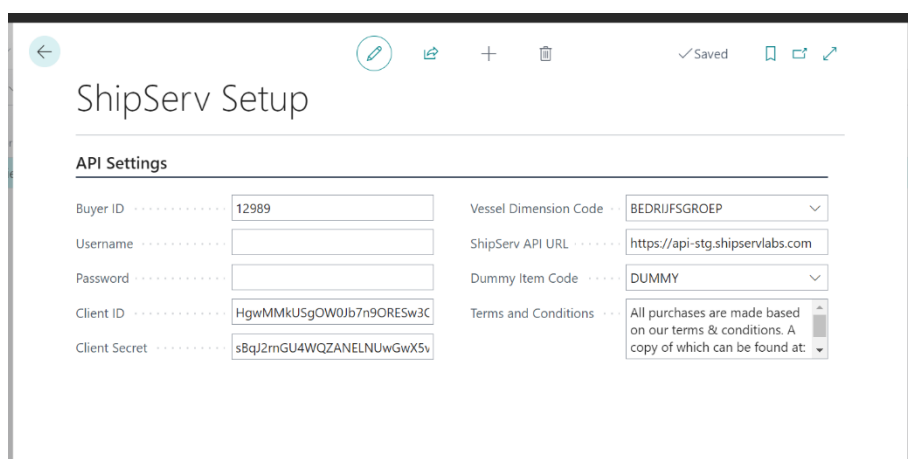
Getting started

Step 1: basic setup

First, you will need to go to the ShipServ Setup menu.

Fill in the details as provided by ShipServ. Without these settings, it will not be possible to actually make the connection with ShipServ.

Step 2: ShipServ Vendors

Next, we need to add a **ShipServ supplier ID** to a vendor. It doesn't matter whether a new vendor is created for this purpose, or whether an existing vendor is edited.

This step will make the additional ShipServ UI appear.
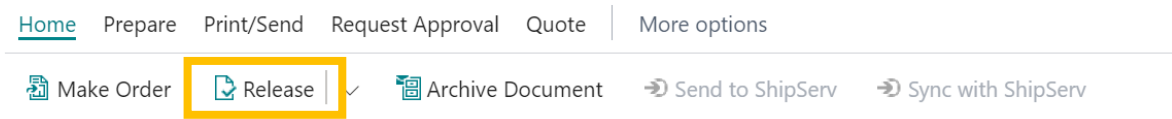
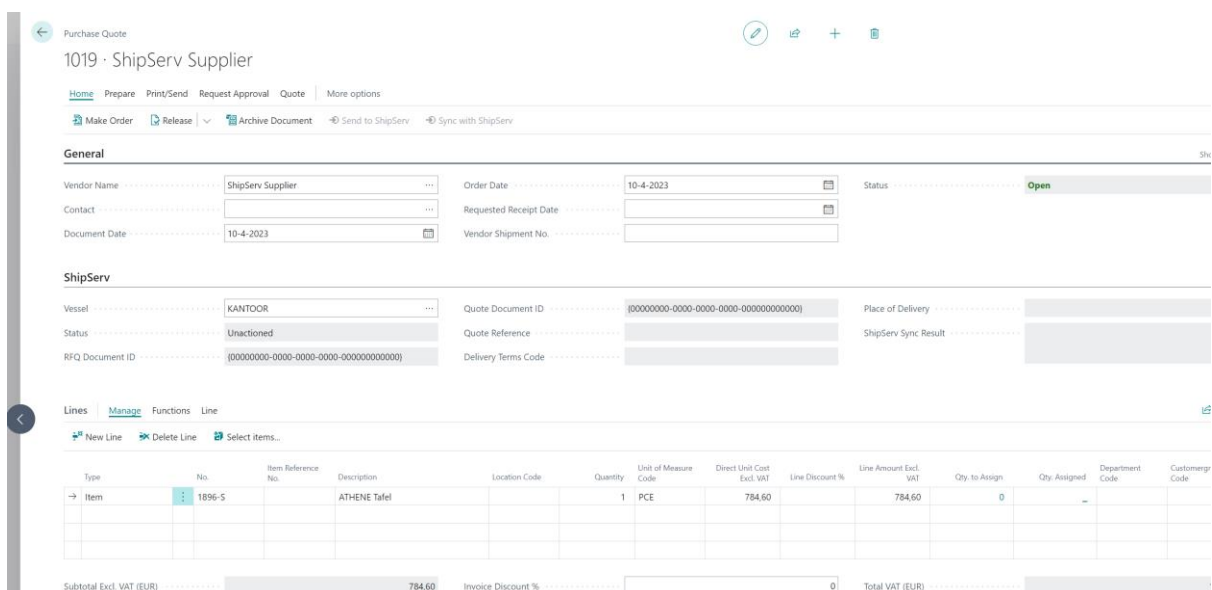## Step 3: ShipServ and the Purchase Quote

Select a vendor with a ShipServ supplier ID.
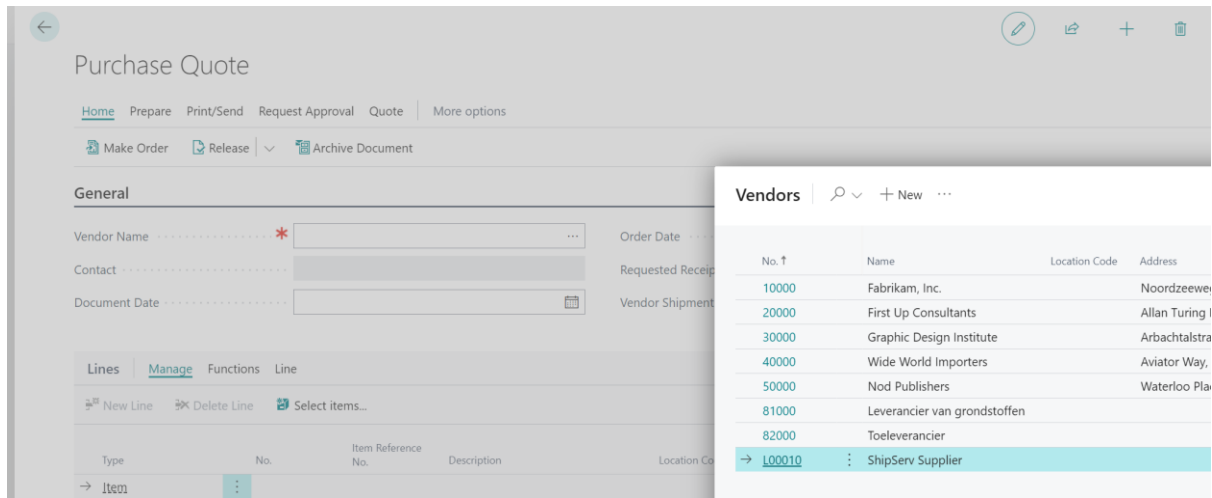
Notice that new options have appeared.

The grayed out options in the top bar will be enabled when the relevant information has been provided. Currently, [1] the vessel, [2] an item and [3] the quantity of that item are required. Note that the price will be overwritten by the information from ShipServ.

Click on **Release** to enable the next steps.

When the purchase quote has been released, you'll be able to click **Send to ShipServ**.
Notice that this will not work if the ShipServ API settings have not been configured correctly.

After the information has been send to ShipServ, it is possible to sync with ShipServ. From a Business Central point of view without access to the ShipServ environment, this is a black box.

When the processed information is returned to the Business Central environment, it is possible to make an order and to export as pdf.

Step 4: ShipServ and the Purchase Order

At some point you will have a Purchase Order, based on the Purchase Quote. Provide a Vendor invoice number and release the Purchase Order.

Now you have the minimum required info to send the Purchase Order to ShipServ.

After the order is processed, one can synchronize the information with the ShipServ Sync button (and export a PDF).

Also note that on sync, this field gets input:

A look inside the black box

The connection between the Microsoft Dynamics 365 Business Central environment and ShipServ is dependent on actions from the side of ShipServ.

ShipServ comes into play when a Business Central sends an RFQ (and thus syncs it with ShipServ). From the ShipServ environment, the received RFQ can be matched with relevant data (price, vendor, discounts and such). Within the ShipServ environment.

ShipServ then sends the correctly filled in Quotation back to the Business Central environment. When A RFO is made and synced with ShipServ, the same process as with a received RFQ follows, but then of course for the order instead.

Note: Whenever there is a mismatch of information, a dummy item with the correct description is instead added to the line items. This enables the user to select the corresponding item so that both systems have a match with their own item data. This mismatch only happens when ShipServ can't recognize the line items received from Business Central. For a BC user, this is not interesting as the BC user always receives correct information.