

# 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.

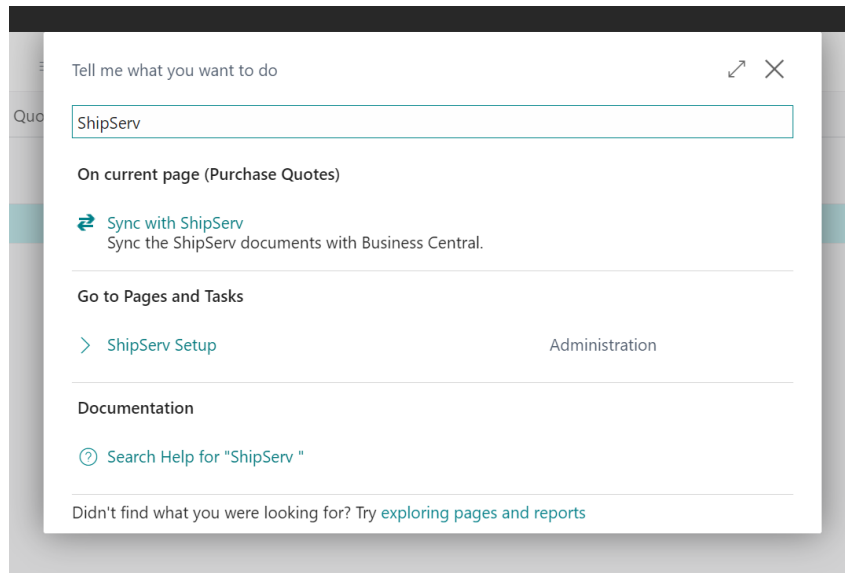
## Please note

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).

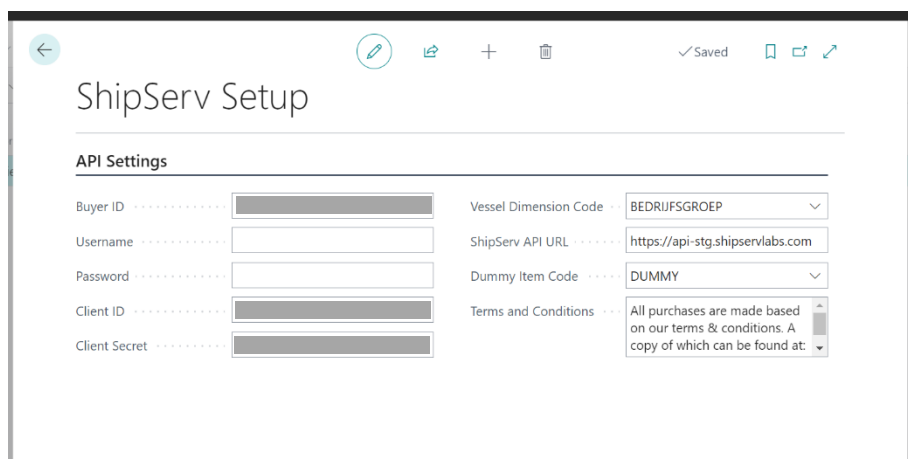
# Getting started

## 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.

Vendor Card

L00010 · ShipServ Supplier

[Home](#) [Request Approval](#) [New Document](#) [Vendor](#) [Prices & Discounts](#) [Report](#) | [More options](#)

[Contact](#) [Merge With...](#) [Apply Template](#) [Send Email](#) [Pay Vendor](#)

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### General

No. ....	<input type="text" value="L00010"/>	...	Blocked .....	<input type="text"/>	Balance
Name .....	<input type="text" value="ShipServ Supplier"/>		Balance (LCY) .....	<input type="text" value="0,00"/>	Balance

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### Address & Contact

<b>Address</b>		Phone No. ....	<input type="text"/>	<b>Contact</b>
Address .....	<input type="text"/>	Mobile Phone No. ....	<input type="text" value="+31 123 456 789"/>	Primary
Address 2 .....	<input type="text"/>	Email .....	<input type="text" value="test@test.com"/>	Contact
Country/Region Code .....	<input type="text" value="NL"/>	Home Page .....	<input type="text" value="https://test.com"/>	
City .....	<input type="text"/>	Our Account No. ....	<input type="text"/>	
Post Code .....	<input type="text"/>	ShipServ Supplier ID .....	<input type="text" value="301907"/>	

[Show on Map](#)

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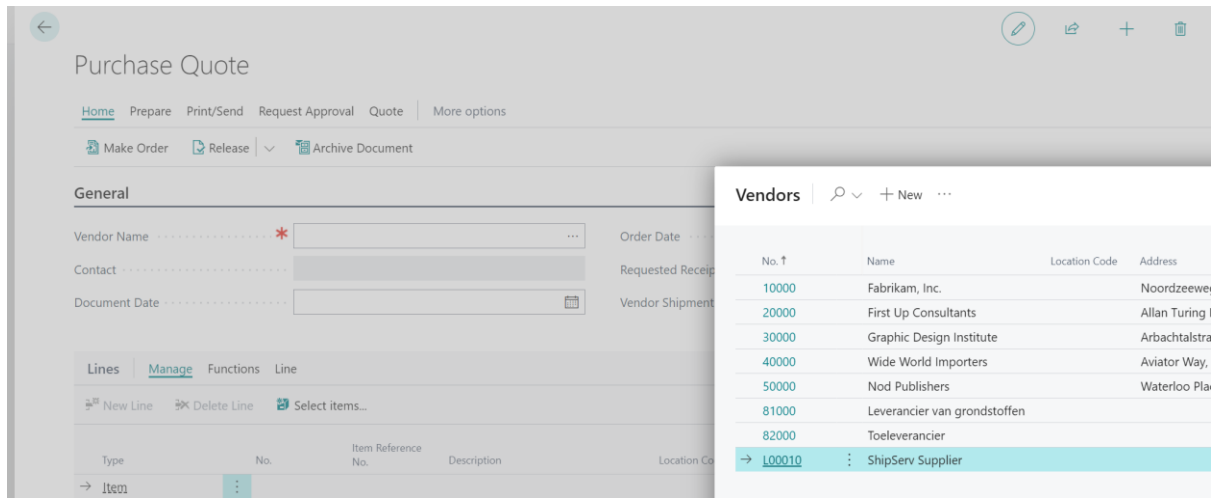
### Invoicing >

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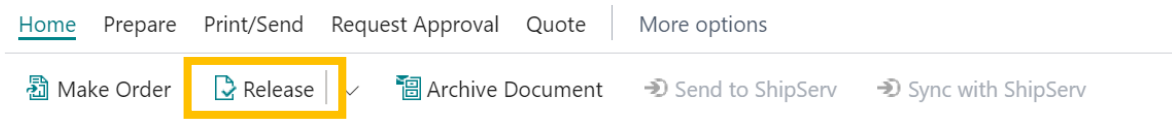
### Payments >

### Step 3: ShipServ and the Purchase Quote

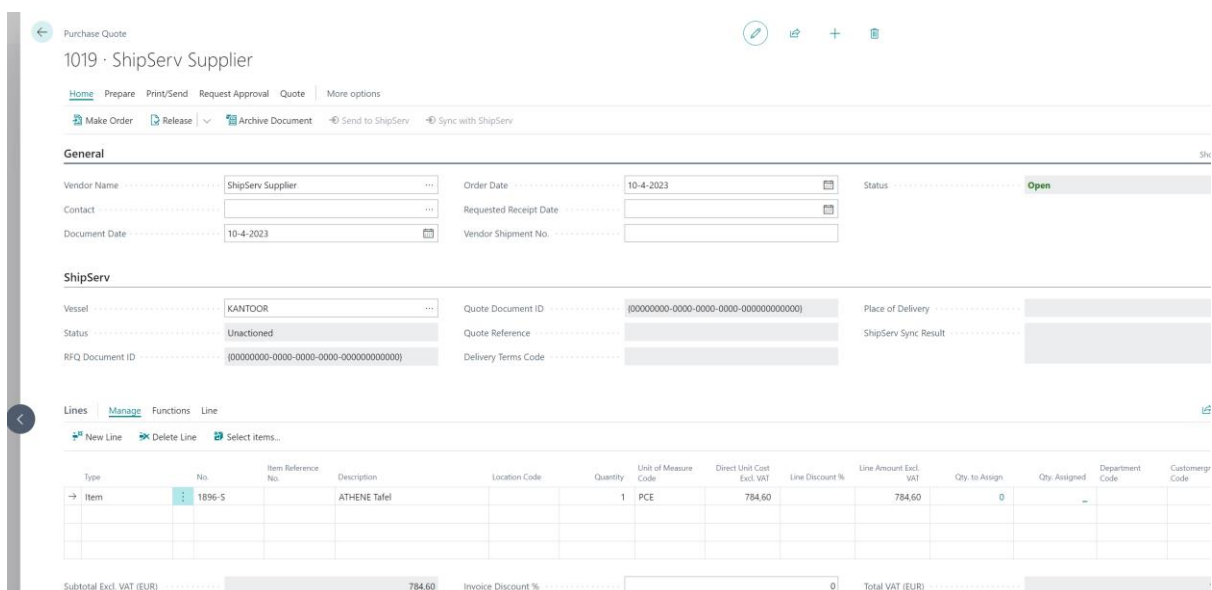
Select a vendor with a ShipServ supplier ID.



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.

General

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

1019 · ShipServ Supplier

Home Prepare Print/Send Request Approval Quote | More options

Make Order Release | Archive Document Send to ShipServ Sync with ShipServ ShipServ PDF

**General** Show more

Vendor Name ..... ShipServ Supplier ..... Order Date ..... 10-4-2023 ..... Status ..... Released

Contact ..... Requested Receipt Date .....

Document Date ..... 10-4-2023 ..... Vendor Shipment No. ....

**ShipServ**

Vessel ..... KANTOOR ..... Quote Document ID ..... (773a32ab-7377-442f-85b6-4309b4342bd6) ..... Place of Delivery .....

Status ..... Quoted ..... Quote Reference ..... QO-1019-001 ..... ShipServ Sync Result ..... 1896-S: DUC changed to 50.

RFQ Document ID ..... (018512d5-d5ec-43c5-9914-bd5ba42c72a) ..... Delivery Terms Code .....

**Lines** Manage Functions Line

New Line Delete Line Select items...

Type	No.	Item Reference No.	Description	Location Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. VAT	Line Discount %	Line Amount Excl. VAT	Qty. to Assign	Qty. Assigned	Department Code	Customergroup Code
Item	1896-S		ATHENE Tafel		1	PCE	50,00		50,00	0	-		
Subtotal Excl. VAT (EUR) ..... 50,00									Invoice Discount % ..... 0		Total VAT (EUR) ..... 10,50		
Inv. Discount Amount (EUR) ..... 0,00									Total Excl. VAT (EUR) ..... 50,00		Total Incl. VAT (EUR) ..... 60,50		

## 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.

Purchase Order ✎ 📄 +

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[Home](#) [Prepare](#) [Print/Send](#) [Request Approval](#) [Order](#) | [More options](#)

[Post...](#) [Release](#) [Create Whse. Receipt](#) [Create Inventory Put-away/Pick...](#) [Send Intercompany Purchase Order](#) [Archive Document](#) [Send to ShipServ](#)

**General**

Vendor Name ..... ShipServ Supplier ..... Document Date ..... 10-4-2023 📅

Contact ..... Vendor Invoice No. .... PO-1019-001

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

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[Post...](#) [Release](#) [Create Whse. Receipt](#) [Create Inventory Put-away/Pick...](#) [Send Intercompany Purchase Order](#) [Archive Document](#) [Send to ShipServ](#)

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

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[Post...](#) [Release](#) [Create Whse. Receipt](#) [Create Inventory Put-away/Pick...](#) [Send Intercompany Purchase Order](#) [Archive Document](#) [Send to ShipServ](#) [ShipServ Sync](#) [ShipServ PDF](#)

Also note that on sync, this field gets input:

ShipServ Sync Result ..... 1896-S: DUC changed to 50.

# 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.

