Large plan users



QUICK GUIDE to using the bpost ECWID STORE plug-in

Summary

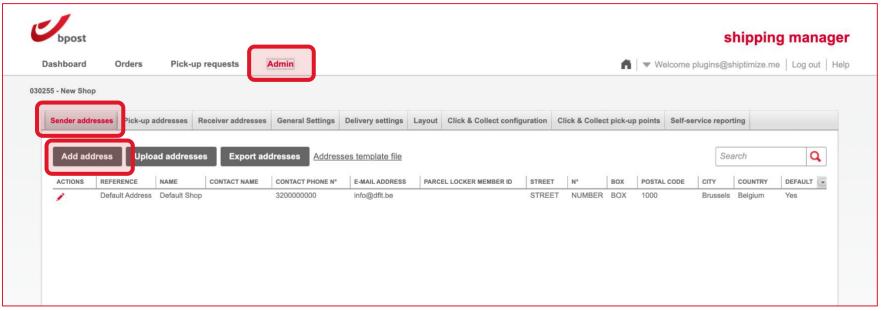
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1. Prerequisite: add a sender address in your Shipping Manager account

To install a bpost plug-in in your online store, you need to have a sender address in your Shipping Manager account.

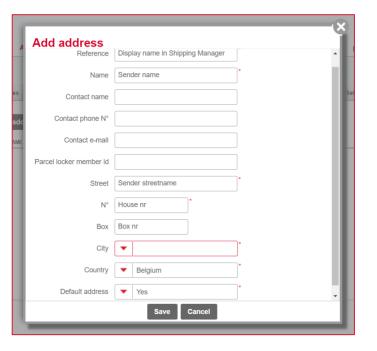
If you are yet to add an address, follow these three steps:

- 1. Log into your Shipping Manager account and click the "Admin" button at the top of the page.
- 2. On the "Sender addresses" tab, **select "Add address"**. If you have already added an address, you can click the pencil icon in the "Actions" column to edit it.





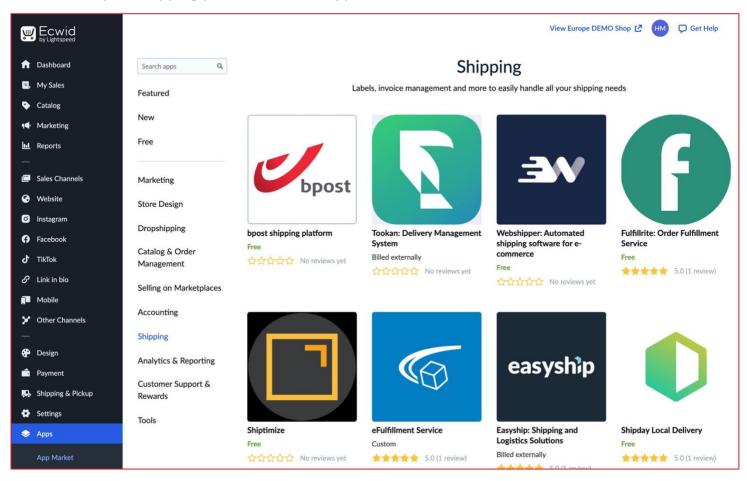
- 3. Enter the address details. These fields are mandatory:
 - a. Reference: the name that is displayed in the tool
 - b. Name: the sender name used with your address on your labels
 - c. Your address
 - d. **Default address**: this must be **set to "Yes"** for at least one of your addresses or the plug-in will not work.
- 4. Save. Click to add your address.





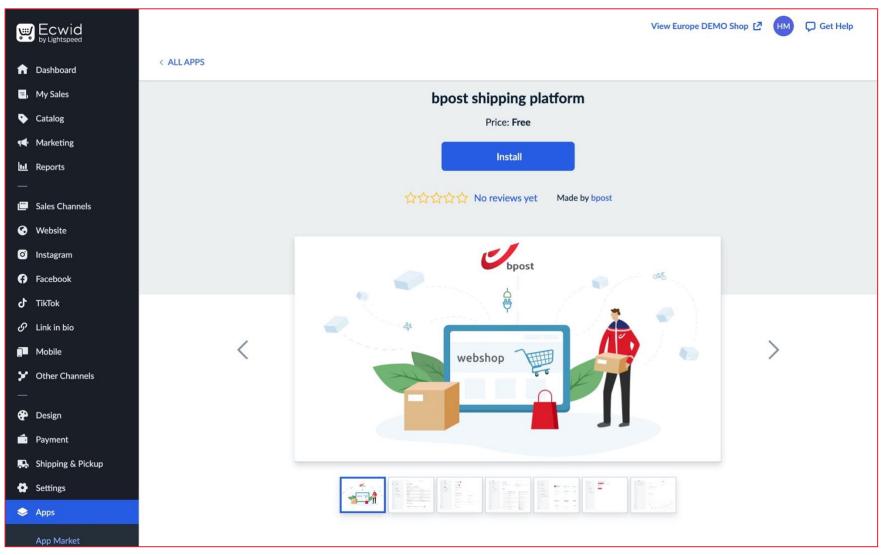
2. Install the plug-in in your Ecwid store

1. Search for "bpost shipping platform" in the "Apps" tab (Shipping category) in your Ecwid account.





2. Run the plug-in installer and accept all permissions to finish.





- 3. If necessary, sign into your bpost account
- 4. When install is finished you should review the default settings.

The plug-in can now be used to create labels. (These will not be invoiced until they are used.)

To help you get started, the plug-in is installed with the following <u>default</u> and <u>advanced settings</u>:

- Your **online store** is activated and the **tracking links** for the labels you create are automatically sent to your Ecwid platform.
- A standard label is automatically created when an order is paid for.
- The **following statuses are pushed to your Ecwid store**: "Awaiting Processing" when the label is created and "Processing" when the label is downloaded.
- It's easy to open and update your settings at plugins.bpost.be under Settings > Plug-ins > Connected webshops

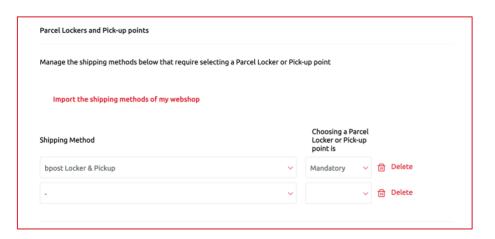


3. Quick setup for Pick-up Points and Parcel Lockers

You need to update your plug-in settings to display Pick-up Points and Parcel Lockers at the checkout in your store. At plugins.bpost.be, click Settings > Plugs-ins > Connected webshops > Parcel Lockers and Pick-up Points.

You can change your settings based on your needs and your selected shipping methods. To do so, follow these steps.

- 1. On your plug-in settings tab, click **import the shipping methods from your webshop**.
- 2. Once this is done you'll be able to select one of these methods in the "Shipping method" dropdown.
- 3. For each shipping method, you need to **select** either:
 - "Optional": the customer is free to choose delivery to a Pick-up Point/Locker or home delivery. That means there are no separate shipping methods for bpost home deliveries and bpost Pick-up Points deliveries.
 - "Mandatory": the customer must select a Pick-up Point/Locker in order to go ahead with their order. That means there is a separate shipping method for bpost Pick-up Points deliveries.



Your customers can select both bpost Pick-up Points and bpost Parcel Lockers by default. You can change this to impose a single given shipping method in Settings > Configurations > Parcel Lockers & Pick-up Points.



4. Configure your settings at plugins.bpost.be

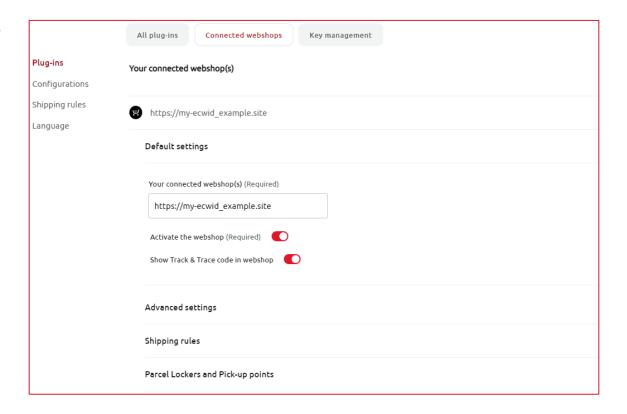
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Default settings

The default settings are shown in **Settings > Plug-ins > Connected webshops**. The following settings can be configured here

- Your connected webshop(s): this is the name of your online store.
- Activate the webshop: this must be toggled on to enable communication between your store and your bpost accounts.
- Show Track & Trace code in webshop: toggle this on to permit your online store to retrieve the tracking link of automatically created shipments.
- ① Remember to save your changes.



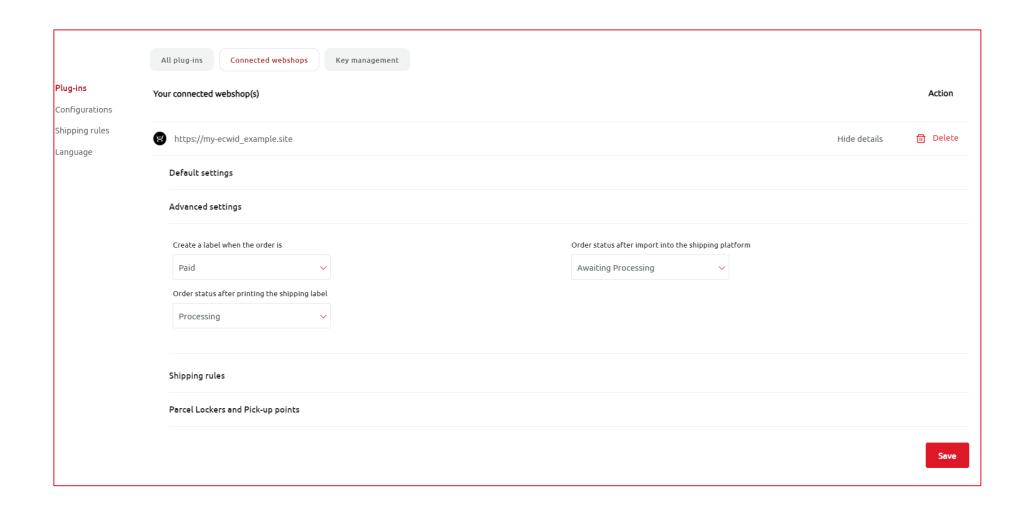


Advanced settings

The advanced settings are shown in **Settings > Plug-ins > Connected webshops**. The following settings can be configured here (See screenshot on the next page).

- Create a label when the order is: set the status in the ordering process in your store when a label is automatically created.
 - o Paid (default status) your customer has paid for their order in full online.
 - o Accept any order as soon as the order is placed, even if payment is due later
- Order status after import into the shipping platform: set the new order status in your Ecwid store after a label is automatically created.
 - o Awaiting Processing (default status)
 - Processing
- Order status after printing the shipping label: set the new order status in your Ecwid store after a label is downloaded and displayed on the "Printed today" tab.
 - o Processing (default status)
 - Shipped
- Remember to save your changes.







Shipping rules

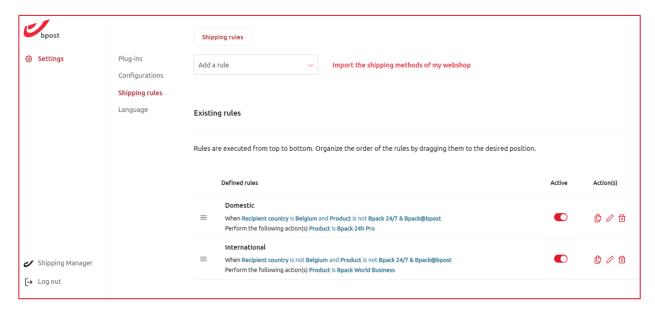
You can create and manage rules in Settings > Shipping rules at plugins.bpost.be.

a. What are shipping rules for?

bpost now automatically retrieves information about orders placed in your Ecwid store. A standard shipping label is automatically created by default. *That's certainly helpful* but not all orders placed in your store may require the same type of delivery. What about larger or smaller items? Or maybe you require "Warranty" option for this shipment when a given order amount is exceeded?

You need a label for all these options. That's what shipping rules are for. They function as a filter between receipt of the order information and creation of the label.

Note: the shipping rules in your bpost account do not affect the types of delivery offered at the checkout in your Ecwid store. If you want to give your customer a choice of delivery type, you must set the shipping methods in your Ecwid store. You will then be able to add a rule to ensure the right label is created for a given shipping method.





b. Logic

Our shipping rule editor applies commonly used **Boolean expressions**, also known as logical expressions, coupled with conditional statement(s). A rule could look like this:

"When {attribute} is or is not {=operator} equal to {specific value}, {action}".

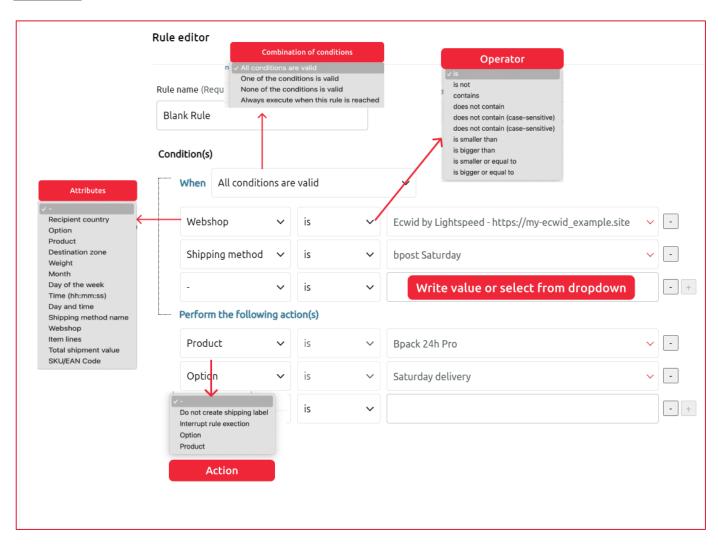
Example: "When 'Shipping method' is 'bpost warranty': 'Option' is 'With warranty'."

- ① Take account of the following when creating and managing rules.
 - All rules are checked when an order is placed and applied where relevant.
 - Rules are always checked and **applied in the same order** (top to bottom in your Shipping Rules tab). Take care to put your rules in the right order to ensure they are all applied correctly.
 - It's important to ensure that you have no conflicting rules. You can prevent this by adding attributes to make them more restrictive or using the 'interrupt rule execution' action.



c. Available fields

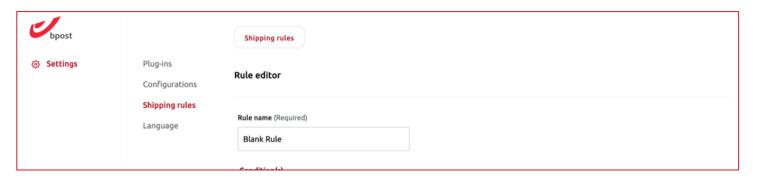
<u>Overview</u>





Rule name

You can give a rule any name you like, but it's important to be able to manage your rules, so choose a name that is easy to understand and sufficiently different from the name you give to other rules.

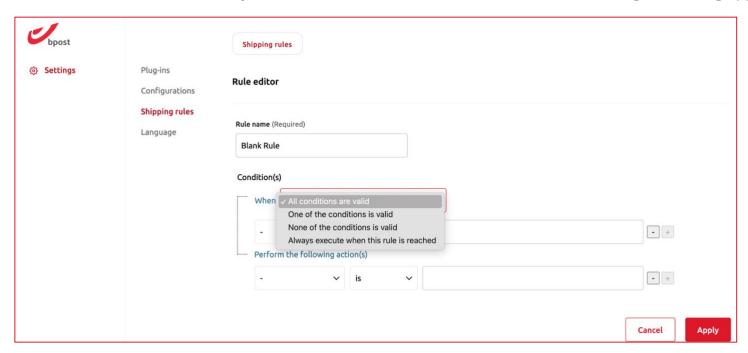




Combination of conditions

You can set multiple conditions in the same rule. Following the Boolean expressions, you must decide whether the rule should be applied:

- If all conditions are met (AND logic)
- If at least one condition is met (OR logic)
- If none of these conditions are met (NOR logic)
- You can also select "Always execute when this rule is reached" to avoid conflicting rules being applied.



You can add and remove conditions by clicking the plus and minus signs on the right of the input fields.



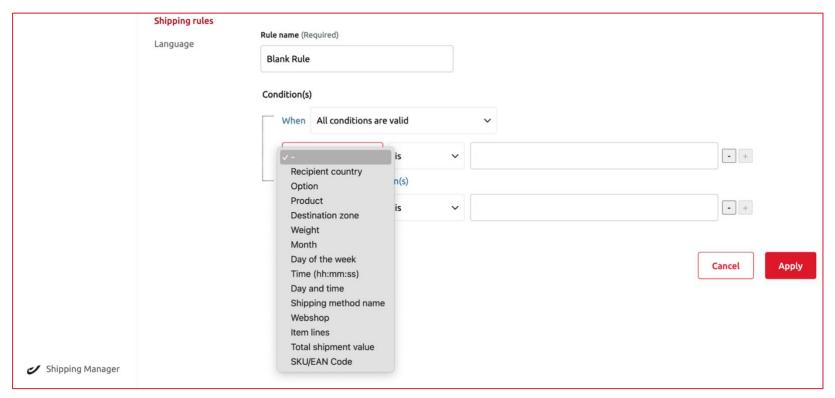
Attribute

A conditional statement requires an attribute, just like a sentence requires a subject.

Above we stated that rules are applied in a given order: "When {attribute} is or is not {=operator} equal to {specific value}, {action}".

But what are attributes? What information received from Ecwid is used to set a condition?

Attributes are pieces of information, such as time, recipient country, shipping method, product or option. A selection of attributes is shown in the screenshot below.

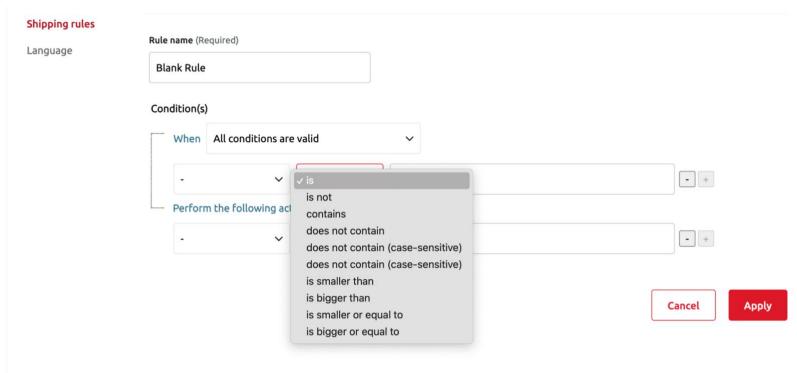




Operator

After selecting the attribute for your conditional statement, you'll need to select an operator. It's like choosing a verb to go with the subject in your sentence.

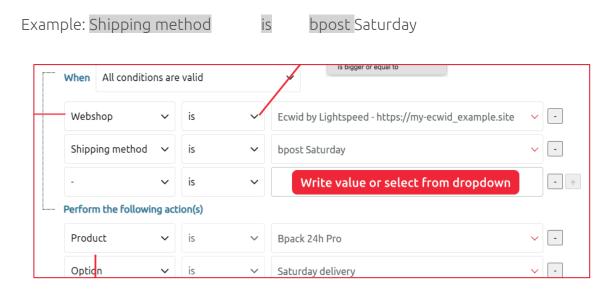
The most common operators are "is/is not" and "contains/does not contain". Clearly, the operator depends on your attribute. So you can only use "is smaller than" for quantities.





Specific value to be verified in the conditional statement

Your conditional statement now has an attribute and an operator, just like a sentence has a subject and a verb. However, in this "sentence" the verb requires an object. You must enter the value to be checked.



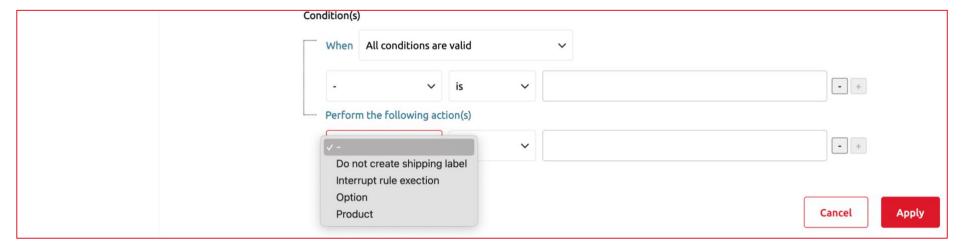


<u>Action</u>

You now have one or more conditions. "When X is/is not Y" ("When Shipping Method is bpost warranty", say). You now need to say what should happen when the statement is true.

Example: When Shipping Method is boost warranty, take this action: Option is With warranty

The available actions are shown in the screenshot below.

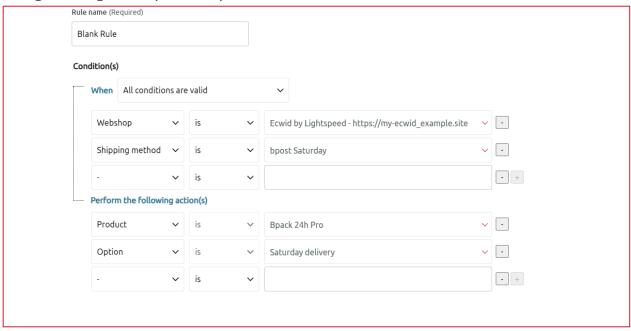


- **Do not create shipping label:** can be selected when parcels do not require shipping ("Pick-up in store", say) or a given product cannot be shipped by bpost (parcels weighing more than 30kg, say)
- Interrupt rule execution: can be selected in the event of conflicting rules to prevent the system entering an endless loop.
- Option or Product: can be selected individually or jointly to create the right label for your scenario/condition.
- You can add and remove actions by clicking the plus and minus signs on the right of the input fields.



d. An example of a shipping rule

Let's go through a simple example.



In the 'my-ecwid' shop, you offer your customers the option of Saturday delivery.

- As you already offer this at checkout, there is a "Shipping method" in your Ecwid shop with the name "bpost Saturday".
- You must set your rule as shown to be able to create the right labels for these Saturday deliveries.
- Conditions that must be met: the right Ecwid store AND the right shipping method name. (AND = all conditions must be met)
- Actions that must be taken: create a label for which the Product is 'bpack24 Pro' and the Option is 'Saturday delivery'.

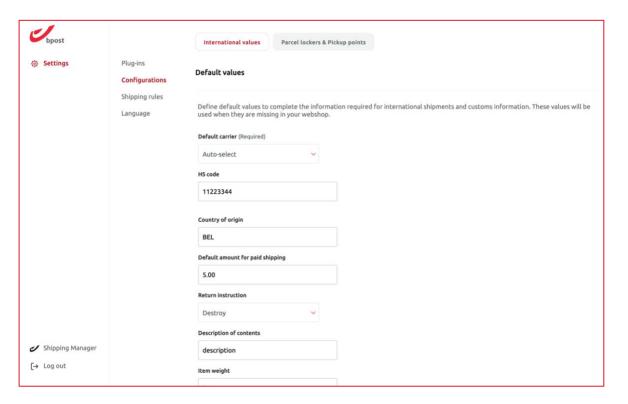


Customs forms for non-EU shipments

International shipments can be trickier, as additional content details are required for all shipments to be delivered outside of the EU. Learn more about customs formalities.

You should be able to preset some customs details in your Ecwid store, but some may be missing and others cannot be preset. Happily you can set a default value for missing details, which are then entered on the customs form to be affixed to the shipment.

Set these default international shipment values at <u>plugins.bpost.be</u>. in Settings > Configurations > International values.

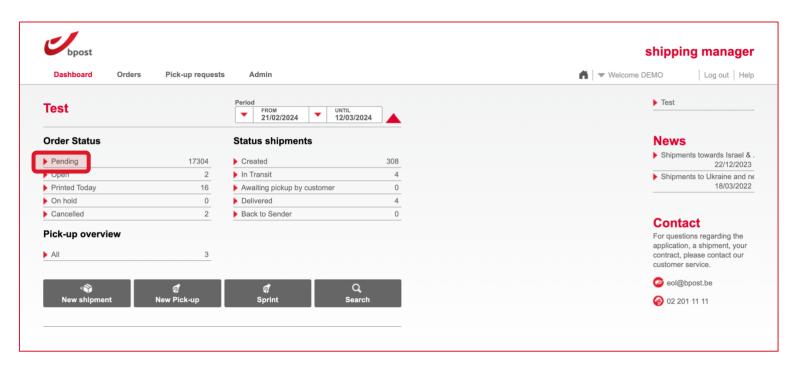




5. Downloading automatically created labels

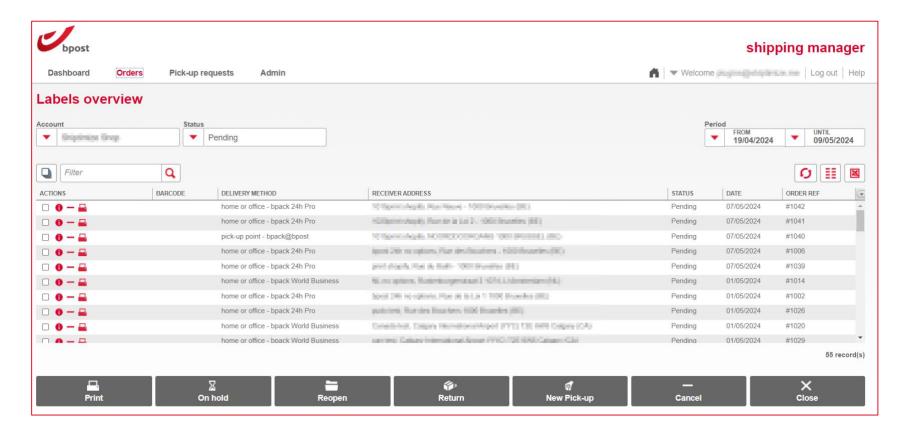
To retrieve automatically generated labels for your shipments:

- Log into your **Shipping Manager** account.
- Click your **Pending** orders





- This opens the label orders overview page.
- On the left (Actions column), select one or more labels you wish to print.
- Click the "Print" button at the bottom of the page. Give the system a moment to create the PDF. Once it's ready, the PDF will automatically download to your device.
- Open your designated downloads folder and print the PDF.





Need help?

Our teams are here to support you with your shipping management tasks.

For questions related to our plug-ins, reach out to: eol@bpost.be

For questions about boost products and services in general, <u>contact our customer service</u> or, if you have one, your account manager.

Happy shipping from bpost!



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