

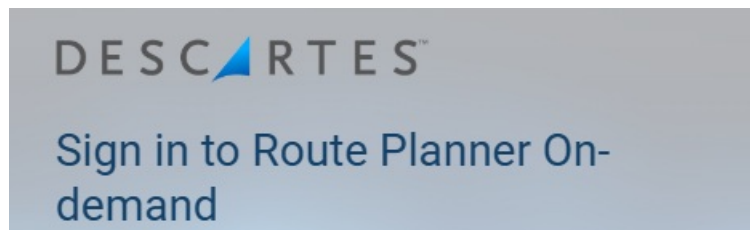
Descartes Integration

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Descartes Integration - How To's

Overview

Descartes Route Planner On-demand is a transportation and delivery management solution that helps businesses plan and optimize delivery routes, dispatch drivers, and track delivery progress in real time. It organizes deliveries into routes with multiple stops, helping businesses coordinate drivers and manage daily delivery operations efficiently.



The **Descartes integration in 1place** connects eligible invoice and credit memo transactions with Descartes to support the delivery workflow and keep relevant transaction information synchronized between the two systems.

This article explains how to configure the Descartes integration in 1place, which settings are required, and when invoices and credit memos are synchronized with Descartes.

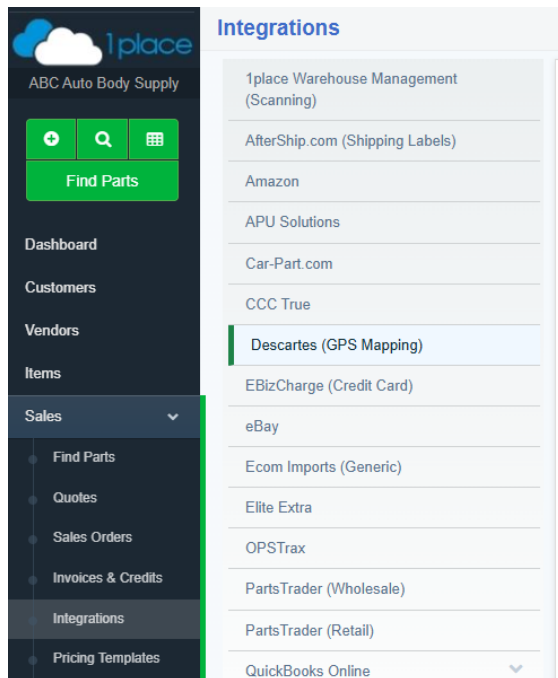
How to Configure the Descartes Integration

Before configuring the integration, obtain the required credentials from Descartes:

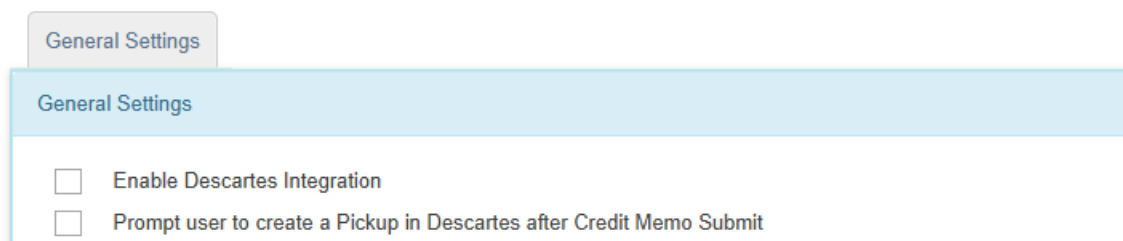
- Username
- Password Hash
- Organization Key

To configure the integration:

1. In 1place, navigate to **Sales > Integrations > Descartes**.



2. Under **General Settings**, select **Enable Descartes Integration** to enable the integration.
3. If users should be prompted to create a pickup in Descartes after submitting a credit memo, select **Prompt user to create a Pickup in Descartes after Credit Memo Submit**.



4. To setup Descartes Shipping Filters, see [How to Configure Descartes Shipping Filters](#).
5. Under **Production**, configure the applicable settings:

Production

Enable API ☐

Authentication

Export By Unit ☐

Send Invoice data on ☐

new Invoice

User Name

ksi

Password Hash

sd

Organization Key

sd

Save Production Settings

- **Enable API:** Enables the API setting.
- **Authentication:** Configure the authentication settings for the Descartes integration.
- **Export By Unit:** When enabled, each unit of an item is exported as a separate line item in Descartes, with a quantity of 1 per line. For example, if an invoice contains an item with a quantity of 2, Descartes will receive two separate line items for that item, each with a quantity of 1. When disabled, the item is exported as a single line item with a quantity of 2.
- **Send Invoice data on new Invoice:** Select this option if invoice data should be sent when a new invoice is created.
- **User Name:** Enter the Descartes username.
- **Password Hash:** Enter the password hash provided by Descartes.
- **Organization Key:** Enter the organization key provided by Descartes.

6. Click **Save Production Settings** to save the production configuration.

Note: Confirm the required API and export settings with 1place Customer Support if you are unsure which options apply to your account.

How to Configure Descartes Shipping

Filters

The **Descartes Shipping Filter** determines whether synchronization is limited to selected shipping methods.

Descartes Shipping Filter

☒ Include certain Shipped Via only

Select	Shipped Via
☐	
☐	Container
☐	Customer Pickup
☐	Delivery charge
☐	FedEx2
☒	Truck 1
☒	Truck 2
☒	Truck 3

Save

1. Under **Descartes Shipping Filter**, select **Include certain Shipped Via only** if only specific shipping methods should be included.
2. Click **Save** to save the shipping filter setting.

If the order's **Shipped Via** value is not included in the configured Descartes shipping methods, the invoice or credit memo will not sync to Descartes.

How to Set Up Descartes Endpoints

The Descartes endpoint settings identify the endpoints used for the applicable Descartes environments.

Descartes EndPoints

NA Production
Endpoint

EMEA Production
Endpoint

NA Pre-Production
Endpoint

EMEA Pre-
Production Endpoint

Save Endpoints

The **Descartes EndPoints** section includes:

- **NA Production Endpoint**
- **EMEA Production Endpoint**
- **NA Pre-Production Endpoint**
- **EMEA Pre-Production Endpoint**

Endpoint configuration must be completed with assistance from **1place Customer Support**.

Contact the 1place team to configure the appropriate endpoints for your environment. After the endpoint values have been provided, click **Save Endpoints** to save the settings.

Understanding When Transactions Sync to Descartes

1place synchronizes invoice and credit memo data with Descartes when the following events occur:

- **Invoice created:** When a new invoice is created.
- **Credit memo created:** When a new credit memo is created.
- **Invoice or credit memo uploaded or updated:** When the **Upload/Update** button is clicked on an invoice or credit memo.
- **Invoices created in bulk:** When invoices are created in bulk from Sales Orders through **Shipping / Receiving > To Invoice & Dispatch**.
- **Invoices resubmitted:** When **Resubmit Selected to DesCartes** is clicked in **Shipping / Receiving > To Invoice & Dispatch**.
- **Credit memo created through the Customer Portal:** When a credit memo is created through the Customer Portal.
- **Invoice or credit memo deleted:** When an invoice or credit memo is deleted in 1place, the corresponding transaction is also deleted in Descartes.

Rare Case: Editing a Transaction That Has Not Been Synced

If an invoice or credit memo is edited but has **not yet been synced to Descartes**, the edited transaction may be synchronized. This is an exception to the normal behavior for edited transactions.

Understanding When Transactions Do Not Sync to Descartes

The following conditions prevent synchronization:

- **An invoice or credit memo has already been synced:** Editing an invoice or credit memo that has already been synced does not automatically synchronize the changes.
- **The Shipped Via value is not included:** If the order's **Shipped Via** value is not included in the configured Descartes shipping methods, the transaction will not sync.
- **An invoice has no shipped line items:** An invoice will not sync if the count of shipped items is zero. This restriction applies to invoices only.

If an invoice or credit memo needs to be synchronized after it has already been sent to Descartes, use the applicable **Upload/Update** action or, for eligible invoices in **Shipping / Receiving > To Invoice & Dispatch**, use **Resubmit Selected to DesCartes**.
