



# EasyPost Integration Setup Checklist

Use this checklist to complete your EasyPost setup before connecting it to Infigo.

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## Before You Begin

Please ensure you have:

- Access to your EasyPost account
  - Access to your Infigo admin area
  - Carrier account credentials
  - Billing/payment details
  - Permission to configure integrations and shipping settings
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## 1. Create Your EasyPost Account

**Estimated Time:** 2–5 minutes

- Sign up for an EasyPost account
  - Verify your email address
  - Log in to the EasyPost dashboard
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## 2. Complete the EasyPost Setup Checklist

**Estimated Time:** 2–5 minutes

Inside EasyPost:



- Open the onboarding/setup checklist
  - Review all required setup steps
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## 3. Connect Your Carrier Accounts

**Estimated Time:** 10–20 minutes

Before you begin:

- Gather all carrier account credentials
- Confirm account numbers and authentication details are available

Inside EasyPost:

- Open **Carrier Accounts**
- Add your shipping carriers (UPS, FedEx, DHL, USPS, etc.)
- Verify each carrier account connects successfully
- Confirm shipping rates can be retrieved successfully

Optional:

- Review the EasyPost supported carrier list
  - Contact EasyPost support if your carrier is unavailable
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## 4. Configure Billing

**Estimated Time:** 5 minutes

Inside EasyPost:

- Open **Billing**
- Add a valid payment method
- Confirm billing details are saved successfully



## 5. Generate API Keys

**Estimated Time:** 2–5 minutes

Inside EasyPost:

- Open **API Keys**
- Locate your **Test API Key**
- Locate your **Production API Key**
- Store your API keys securely

### Important Notes

- Use **Test API Keys** during setup and testing
- Use **Production API Keys** only when ready to go live
- Confirm API keys are stored securely

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## 6. Configure EasyPost in Infigo

**Estimated Time:** 10–15 minutes

Inside Infigo:

- Open the EasyPost integration settings
- Enter your EasyPost API credentials
- Select the correct environment:
  - Test
  - Production
- Save the configuration



## 7. Configure Carrier & Service Settings

**Estimated Time:** 10–15 minutes

Inside the EasyPost plugin configuration:

- Configure carrier and service mappings
- Verify required shipping services are available
- Configure enabled checkout services
- Configure MIS service mappings if required
- Configure service display order
- Configure friendly service names if required

Optional:

- Configure additional shipping fee uplifts
- Configure CSS classes for storefront styling

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## 8. Configure Parcel Settings

**Estimated Time:** 10–20 minutes. Inside the Parcel Settings section:

- Choose a Parcel Allocation Level:
  - Order
  - Order Line
  - Order Line Quantity



- Choose a Parcel Size Calculation method:
  - Auto Calculated Parcels
  - Predefined Parcels

If using automatic parcel calculation:

- Configure maximum parcel weight
- Configure maximum parcel size
- Confirm products contain:
  - Weight
  - Height
  - Length
  - Width

If using predefined parcels:

- Create predefined parcel configurations
  - Configure predefined parcel names if required
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## 9. Configure Shipment Workflow

**Estimated Time:** 5–10 minutes

Choose your shipment workflow:

### Automatic Shipment Creation

- Enable **Buy Shipping Instantly**
- Confirm automatic label generation behaviour
- Review parcel automation behaviour

### Manual Shipment Creation

- Disable **Buy Shipping Instantly**
- Verify manual shipment management workflow
- Confirm Shared Print Operations access



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## 10. Configure Customs Information (If Required)

**Estimated Time:** 5–15 minutes

For international shipping:

- Configure Order Content Type
- Configure Order Content Explanation
- Configure EEL/PFC threshold settings
- Configure fallback HS tariff number
- Configure dummy customs rate call behaviour if required

If shipping to Northern Ireland:

- Configure EORI Tax ID
- Set Tax ID Type to EORI
- Verify Vendor Country configuration

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## 11. Configure Artifact & Label Output Settings

**Estimated Time:** 5–10 minutes

Optional configuration:

- Configure Labels Hot Folder
- Configure Packaging Slip Hot Folder
- Configure Job Ticket Hot Folder

Optional:



- Enable packaging slip label embedding
  - Enable job ticket label embedding
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## 12. Test the Integration

**Estimated Time:** 15–30 minutes

Before going live:

- Retrieve shipping rates successfully
- Generate a test shipment
- Generate a test shipping label
- Verify carrier services appear correctly
- Verify shipping costs display correctly
- Verify tracking information is returned
- Verify tracking URLs function correctly
- Verify Shared Print Operations shipment data
- Verify shipping confirmation emails if enabled

If using manual shipment workflows:

- Verify parcel selection workflow
- Verify shipment rate selection workflow

If using international shipping:

- Verify customs information is included correctly
  - Verify EORI information is included correctly
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## 13. Go Live

**Estimated Time:** 5–10 minutes

Once testing has completed successfully:



- Switch to Production API Keys
  - Confirm production carrier accounts are active
  - Run a final live shipment test
  - Verify live tracking information
  - Confirm shipping labels generate successfully
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## Recommended Final Validation

Before fully launching:

- Verify storefront checkout shipping options
  - Verify delivery pricing accuracy
  - Verify shipment workflows internally
  - Confirm staff understand shipment management process
  - Confirm tracking communication process with customers
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## Support Escalation

If issues occur during setup or testing:

- Contact the Infigo Support Team <https://infigoftware.zendesk.com/hc/en-us>
- Contact EasyPost Support for carrier or account-related issues