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# Section 1 – UPS World Ship Integration

## Chapter 1 – Setting Up UPS World Ship Integration

### Overview

The UPS World Ship Integration software enhancement offers tremendous benefits to the business by integrating the UPS World Ship data that the UPS World Ship System requires with the Polaris Systems Order Entry Module. Special Charges calculated from UPS are applied to the order. This software will increase customer communication while reducing follow-up phone calls.

The system works by starting an order for a customer that has a default ship via of UPS or whatever code is designated for UPS shipments in CD.MAINT. Once an order is established for the client, parts are added as usual. Once a Pick Ticket, Pack List or Job Ticket is printed, the system writes the order information to a separate windows file where the UPS World Ship System can pick it up and process it. The next processing is done by the UPS World Ship system where the shipping clerk will access the order number using the World Ship software, process the order and print the UPS Label(s). Once the label is printed and the order is processed on the world ship system, the shipper will initiate Operation IF to automatically load all of the UPS charges to the order.

### ***IMPORTANT***

**Before moving forward with the setup, it will be important to contact your UPS representative so that they can setup the ODBC files in World Ship.**

### Controls and Toggles

There are several controls that will need to be set in order to initialize the UPS World Ship Interface. Please contact your Polaris Support Representative to ensure that these controls are turned on before proceeding.

#### **File = CF – Control File**

- USING.UPS.INTERFACE – turns on the entire system for processing. <1> or ""
- UPS.PATH – path of the windows file that directs the data to and from the UPS System and to and from the Polaris System. For example: C:\UPS.ORDERS\ORDERDATA.CSV.
- UPS.ADDITIONAL.HANDLING.CHARGE – The additional charge added to the UPS Charge (Cost)
- UPS.OVERSIZE – An additional Oversize amount added to the special charges.
- UPS.SATURDAY.DELIVERY.CHARGE – An additional amount added to the order for Saturday deliveries.
- UPS.UPDATE.POINT – The point at which the system writes the UPS data to the UPS file. Can be either "D" if using PICK TICKETS or "PK" if using PACKLISTS.

#### **File = CL – Code Listing File**

- UPS.MANIFEST.VIAS – A "multi attribute" control that contains the various UPS codes in CD.MAINT, type SV that relates to UPS Services. For Example, if Red label and Blue Label are being used, the short description must be entered in this code listing record in order for the UPS interface to recognize it as a valid ship via for the UPS Interface system.

**Job Queue Maintenance Utilities**

In the EVERY.NIGHT Job Queue, 2 processes can be inserted to ensure that the world ship data is current and accurate. But this is not necessary.

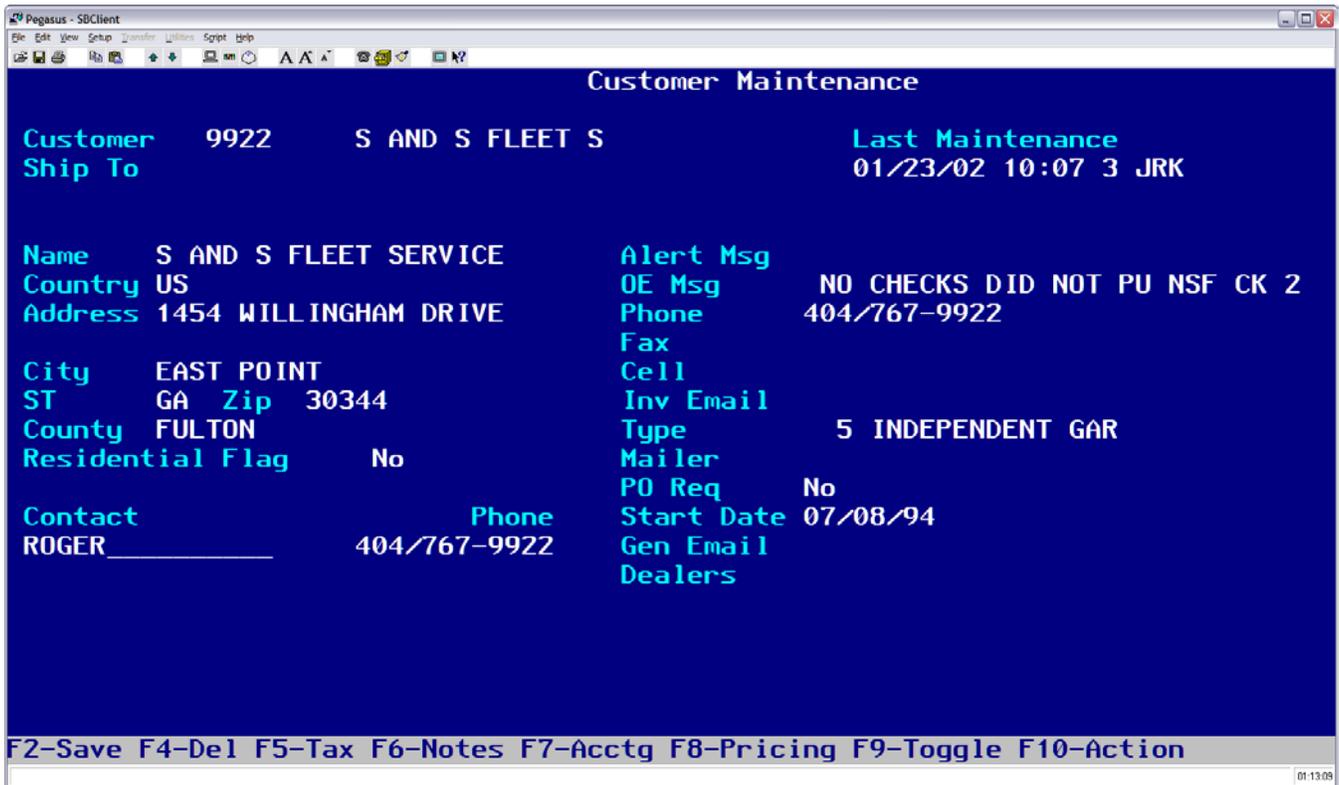
- CLEANUP.UPS.DATA – This process examines the UPS data that was created for the day and deletes any orders that were invoiced and have a status of “HIST”. This ensures that the UPS data only contains open orders and most importantly, it regulates the file size of the UPS data which optimizes the UPS world ship performance.
- UPS.BATCH.EXPORT.CSV – This process is a “reload process” to ensure that all of the orders are accurate. During the course of a day, orders may change without UPS data being updated. This process makes sure that all data is reloaded accurately.

**Customer Maintenance Setup**

Operating Procedures

Accounts Receivable

Accounts Receivable Processing Menu  
Customer Maintenance



- Residential Flag – Default is set to “N”. When set to “Y”, the customer will be billed UPS Residential fees.

## 4 UPS World Ship Integration

Enter the customer whom you want to modify and press <ENTER>.  
Press <F5> to access the Accounting Section of Customer Maintenance

Customer Maintenance

Customer 9922 S AND S FLEET S Last Maintenance 01/23/02 10:07 3 JRK  
Ship To

Customer Accounting Information

Terms	10	CASH/CHECK	Statement	Yes	Ship Via
Salesman	SM1	HOUSE ACCOUNT	Late Charge	Yes	UPS
Territory			Stmt Delivery	P	
Credit Limit			Past Due Flag		Ppd Frt Amt
Account Type	0	Open Item	Core Statement		\$200
Core Handling		Normal	Ship-to Sales	No	
Create Bo	Yes	Merge Bo No	Miscellaneous	No	
Grace Period			Warehouse		
Exempt Drop Ship	No		A/R		
Exempt Shop Supplies	No		Co Credit Limit Salesman		
Invoice Copies	1				
Invoice Delivery	P				
Bill Email					
Quickbooks Cust Name					

F2-Save 01:14:08

- **Ship Via** – Sets the shipping default by customer. The Shipping default must be a valid ship via located in CD.MAINT, type SV. The ship via is entered as soon as Operation N enters the client information into the order.
- **Ppd Frt Amt** – Stands for Prepaid Freight Amount – If the total ticket is greater than the amount in this field, shipping charges on the order will automatically set to \$0.00

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## Chapter 2 – Using the UPS World Ship Interface.

### Operating Procedure

#### Operation N

Add lines through Operation L  
Operation PK, PT or D (if using Pick Tickets)

- The system writes the UPS data to the UPS file on the server so that World ship can access it.

Access the UPS World Ship Program from the PC workstation that has the program.

- Insert the Order Number from the Packing list into the reference number on the World Ship Screen. All of the information concerning the order will appear in the proper slots.
- Create the shipment like you would normally in the UPS program and print the UPS label.

### Operation IF (Incoming Freight)

Once the parts have been picked and the order is ready to be shipped, bring up the order to the screen and initiate Operation IF.

#### ***IMPORTANT***

Because of the amount of information the UPS system has to transfer, it may take several seconds for Operation IF to complete.

When completed, the system does the following:

- Adds the UPS tracking Number to the order messages of the order.
- Adds the package weight to the internal notes section of the order.
- Adds the UPS special charges and the special charges cost to the order. If there are multiple tickets on a UPS Shipment, tracking numbers will be added to all tickets but the special charges and special charges cost will only be added to the initial order in which Operation IF was used.
- If the Prepaid Amount in Customer Maintenance is greater than \$0.00, the Polaris System will compare the order totals to the prepaid amount and if the prepaid condition exists, it will overstrike the Special charge to \$0.00. It will keep the cost.

Always use Operation T to view the totals before printing and finalizing the order.

## Chapter 3 – Troubleshooting Guide

Problem	Solution
My client has a prepaid freight policy and we are shipping multiple tickets that exceed that policy. The system is still charging the UPS Charge.	Currently, there is no way to determine that scenario. Until a programmatic solution is available, multiple tickets will have to be added up manually and Operation SC used to override the UPS charges to \$0.00
We have a prepaid engine kit policy. How does the UPS system handle this?	Right now it does not integrate with the new kit program. Operation SC will have to be initiated to override the shipping charge to \$0.00 if qualification exists. The cost will be there and does not need manipulating.
When I ship an oversized package, the oversize charge is not being applied to the order.	Right now, there is no ODBC link to the UPS oversize charge field, therefore, oversize charges need to be inserted manually.
My Bankcard authorizations are always less than the invoice amount.	Make sure that you authorize the bankcard after Operation IF. And not before. Then finalize the order and print the invoice.
UPS World Ship cannot find my order reference.	Close the World Ship Import window and reopen. During High volume shipping periods, the UPS software gets confused and has to be reset.