



# **RESOLV FREIGHT MANAGEMENT**

**USER MANUAL**

**Version 10.0**

**PRESENTED BY**

**VISTAVU SOLUTIONS**



**SAP**<sup>®</sup> Certified  
SAP Business One Integration

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**RESOLV FREIGHT MANAGEMENT  
USER GUIDE**

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## Freight Management

SAP Business One allows you to create Quotations, Sales Orders, Deliveries, and A/R Invoices., but along the way, orders must be shipped. Many companies use separate computer systems or web services for UPS, FedEx, US Postal Service, and LTL carriers. Maintaining multiple databases for customer addresses and entering information for each shipment is time-consuming and a likely source of errors.

The **Resolv Freight Management** module serves as a bridge between SAP Business One and the carrier shipping systems using Web Services to communicate to the Carriers directly inside of SAP and Resolv. The data is transmitted to the carrier's system and labels are created and printed without having to leave SAP.

**Resolv Freight Management** also includes a Rate Shopping feature, which allows operators to view shipping rates by various carriers and shipping options, from within the Sales Quote or Sales Order screen. This enables them to provide accurate estimates of shipping charges to customers ahead of time.

In addition, you can utilize **Resolv Freight Management Mobile** which will allow users to scan pack on a web enabled handheld device or PC, utilizing SAP's Fiori interface.

## Setup

There is some setup involved before Freight Management can be used. The screens for configuration are located primarily under the *Administration > Resolv Setup > Resolv Freight Management* menu, however there are also some standard SAP screens that require some setup.

### *Resolv Setups*

#### Freight Management Configuration

*Administration > Resolv Setup > Resolv Freight Management > FM Configuration*

There are 3 tabs on this screen; Processing, Shipping, and Carriers.

#### Processing Tab

The screenshot shows the 'Freight Management Configuration' dialog box with the 'Shipping' tab selected. The dialog has three tabs: 'Processing', 'Shipping', and 'Carriers'. The 'Shipping' tab contains the following configuration options:

- Shipping Type Handling: Header
- Set Attention To: Marketing Document Contact
- Use BP Email/Phone When SO Blank
- Default Shipping Profile: IW
- Receiver Account No. Priority:
 

Order	Lookup From
1	Customer
2	Contact
3	Ship To
- Set Reference 1 To: Do Not Set
- Set Reference 2 To: Do Not Set
- Find Packing Slip By: Packing Slip No.
- Auto Create Delivery
- Auto Create Invoice

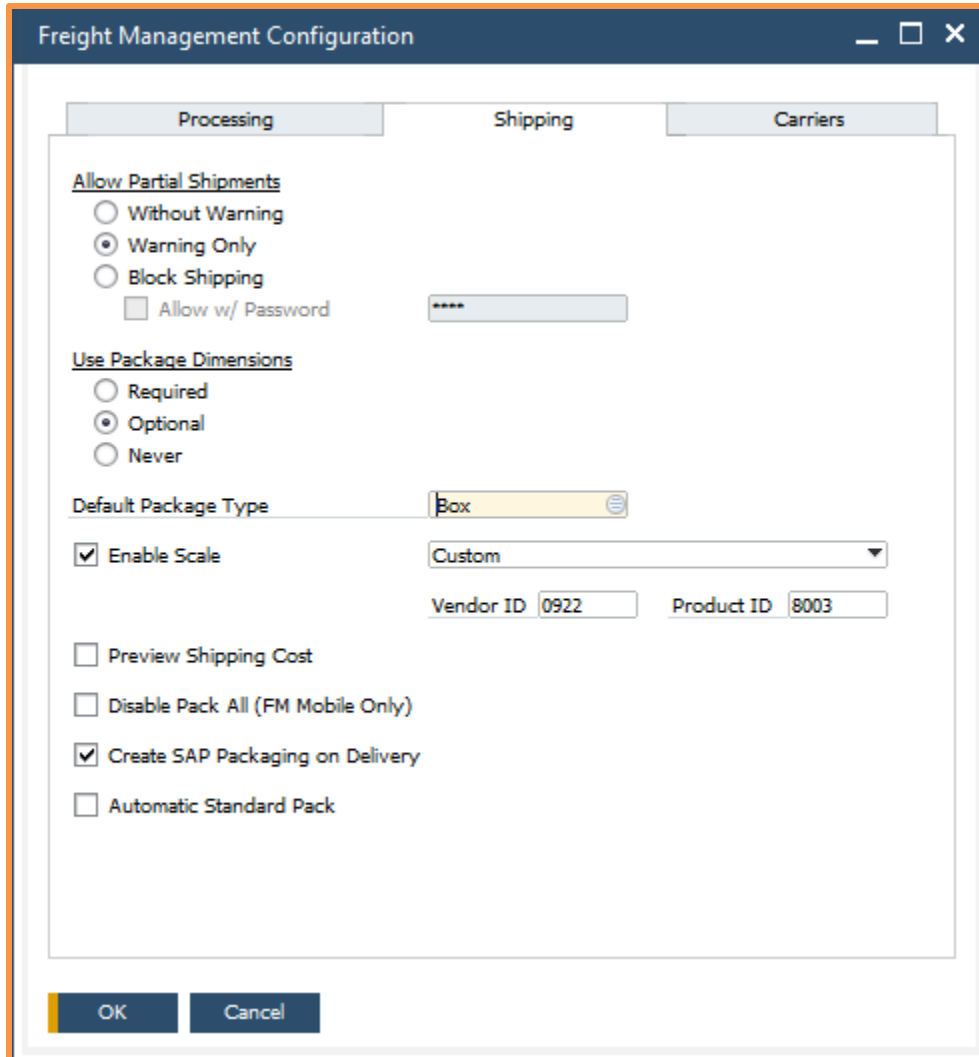
At the bottom of the dialog are 'OK' and 'Cancel' buttons.

<b>Shipping Type Handling</b>	This is what tells Freight Management which Shipping Type field on the Sales Order to use when creating our Packing Slip. If you choose <b>LINE</b> , then each document row's Shipping Type will be considered when packing and shipping. If you choose <b>HEADER</b> , then only the Shipping Type on the Logistics tab will be considered when packing and shipping, ignoring the individual document row's data.
<b>Set Attention To</b>	Choose how you would like to set the Attention To on shipments; Marketing Doc Ship To Address ID, the BP Default Contact, the Marketing Document Contact, or None.
<b>Use BP Email/Phone When SO Blank</b>	Enable this option if you want the packing slip to use the Business Partner's general email address and phone number when those same fields are blank on the SO/RI
<b>Default Shipping Profile</b>	When a marketing document does not have a shipping profile set, this default one will be used when creating the packing slip. Note, setting this field is required.
<b>Receiver Account No. Priority</b>	<p>There are 3 places that you can enter a customer's Carrier Account Number in Freight Management: the BP itself, a specific Ship To, or a specific Contact. Use the up and down arrows to place these in the order you would like them to be used when shipping. Freight Management will then use this order to determine which Carrier Account Number to use when shipments are set to Bill Receiver.</p> <p>Note, this also applies to third party addresses and account numbers when shipments are set to Bill Third Party.</p>
<b>Set Reference 1 To</b>	Choose which field whose value you would like FM to set as Shipment Reference #1
<b>Set Reference 2 To</b>	Choose which field whose value you would like FM to set as Shipment Reference #2
<b>Find Packing Slip By</b>	Choose the default field for finding documents when you are in the Packing Slip screen
<b>Auto Create Delivery</b>	Check this box if you would like the system to create your Delivery automatically after your shipment is completed.

**Auto Create Invoice**

Check this box if you would like the system to create your Invoice automatically after your shipment is completed.

Shipping Tab



**Allow Partial Shipments**

Some companies may decide that the actual contents of each package for shipping do not matter, only the number of packages. If this is the case, then you can choose to allow partial (or empty) packages when shipping, either with or without a warning to the user. If you do not want to allow this option at all, then you can choose the Block Shipping option (with or without a password to override the block on a per shipment basis). If no items are packed, FM will create your delivery/invoice with all the items on your packing slip. If only some (or ALL) items are packed, FM will create your delivery/invoice with only those items that are packed.

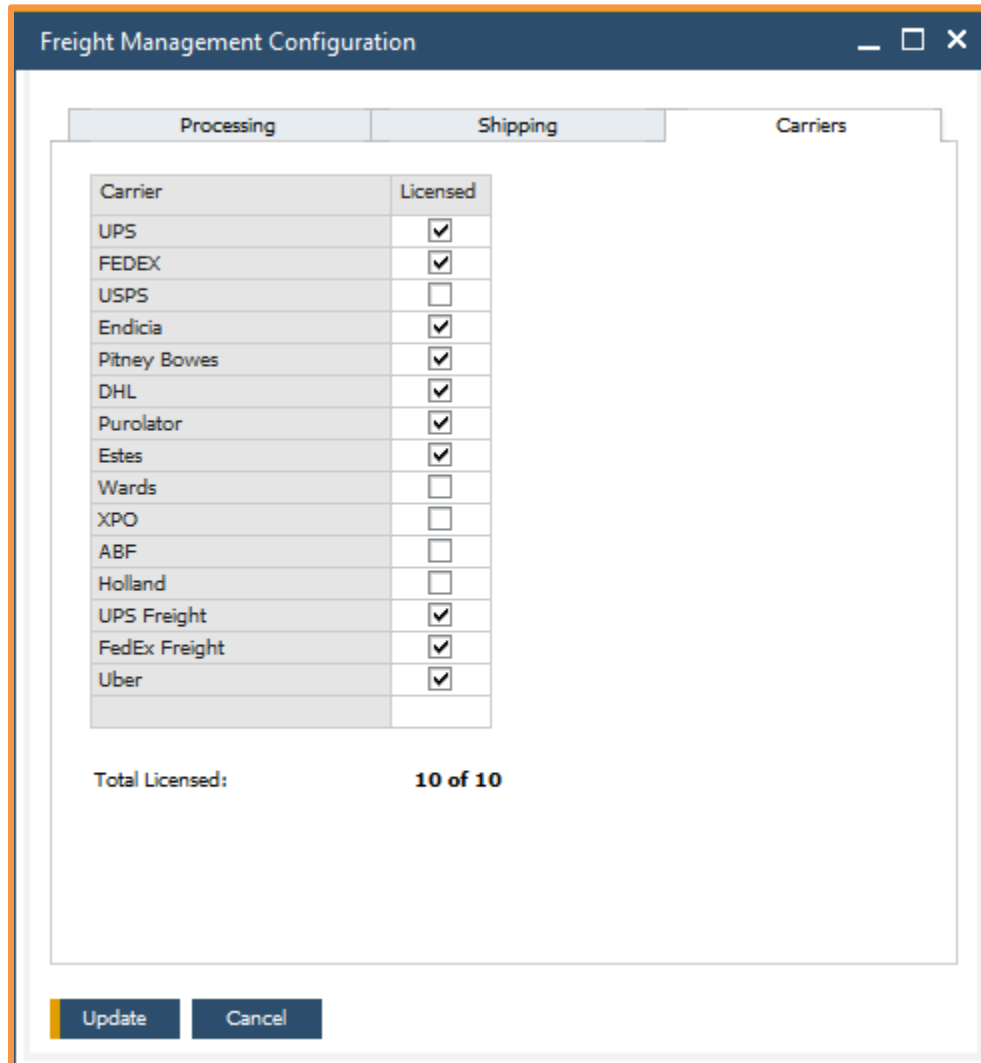


Note, if you are using serialized or batched items that are Issue by Bin (and you do not have Resolv WMS) then you will have to pack shipments that contain those items.

<b>Use Package Dimensions</b>	You can choose to send your package dimensions to the carriers along with your other shipping information. There are 3 options for this new feature; ‘Never’ means the dimensions will not be sent; ‘Optional’ means that if your package has the correct dimension information (meaning length, width, and height all in the same UOM) it will be sent, otherwise it will not; Required means that you cannot ship unless all packages have the correct dimensions.
<b>Default Package Type</b>	Choose an SAP Package Type to be the default package for rate shopping and shipping when your SAP Item Master Data does not have its own packaging defaults
<b>Enable Scale</b>	The packing slip screen can now integrate with a USB scale connected to your local SAP Client PC. You will see a few prest options as well as a “Custom” option that should allow you to utilize whatever scale you want by entering the deviced Vendor ID and Product ID from Windows. If you need assistance getting this info see the scale section in the Appendix of this document.
<b>Preview Shipping Cost</b>	This option allows you to preview the shipping cost in the packing slip before you ship. That way if it seems more expensive than you thought, you can contact your customer or change the shipping method before continuing.
<b>Disable Pack All (FM Mobile Only)</b>	This option will disable the pack all button in Freight Management Mobile and force users to pack items individually
<b>Create SAP Packaging on Delivery</b>	Check this option if you want the packaging data transferred from the Resolv FM Packing Slip to the standard SAP Packing Slip tables when the delivery/invoice is created
<b>Automatic Standard Pack</b>	Check this option if you would like your Packing Slips automatically packed using Resolv FM’s Standard Packaging method (discussed later in this document) when a Packing Slip is created

### Carriers Tab

When you purchase Freight Management, you also must purchase Carrier licenses for the number of Carriers you are going to want to ship with. This tab allows you to choose which Carriers will be licensed and active to shipping in Resolv.



Carrier	Licensed
UPS	<input checked="" type="checkbox"/>
FEDEX	<input checked="" type="checkbox"/>
USPS	<input type="checkbox"/>
Endicia	<input checked="" type="checkbox"/>
Pitney Bowes	<input checked="" type="checkbox"/>
DHL	<input checked="" type="checkbox"/>
Purolator	<input checked="" type="checkbox"/>
Estes	<input checked="" type="checkbox"/>
Wards	<input type="checkbox"/>
XPO	<input type="checkbox"/>
ABF	<input type="checkbox"/>
Holland	<input type="checkbox"/>
UPS Freight	<input checked="" type="checkbox"/>
FedEx Freight	<input checked="" type="checkbox"/>
Uber	<input checked="" type="checkbox"/>

Total Licensed: **10 of 10**

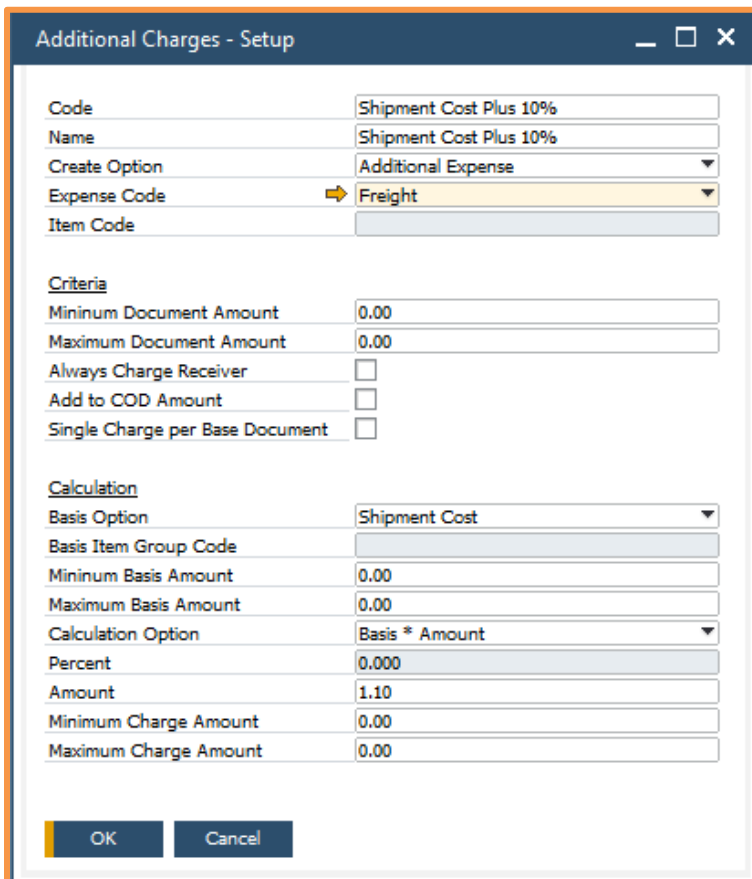
Update Cancel

## Additional Charges

Administration > Resolv Setup > Resolv Freight Management > FM Additional Charges

Additional Charges are used to add various charges to your customer deliveries. While they can be basic calculations such as the shipping cost from the Carrier, they can also be something more complex as you will see with the options below.

Note that the sum of all Additional Charges on a shipment will be what is charged to the customer on the delivery document. If there are no Additional Charges on a Packing Slip, then nothing will be charged on the delivery.



Code	Shipment Cost Plus 10%
Name	Shipment Cost Plus 10%
Create Option	Additional Expense
Expense Code	Freight
Item Code	
<b>Criteria</b>	
Minimum Document Amount	0.00
Maximum Document Amount	0.00
Always Charge Receiver	<input type="checkbox"/>
Add to COD Amount	<input type="checkbox"/>
Single Charge per Base Document	<input type="checkbox"/>
<b>Calculation</b>	
Basis Option	Shipment Cost
Basis Item Group Code	
Minimum Basis Amount	0.00
Maximum Basis Amount	0.00
Calculation Option	Basis * Amount
Percent	0.000
Amount	1.10
Minimum Charge Amount	0.00
Maximum Charge Amount	0.00

Enter the following information:

**Code** Enter a code for this charge

**Name** Enter a name for this charge

<b><i>Create Option</i></b>	<p>Select the method of adding the charge:</p> <ul style="list-style-type: none"> <li>• Additional Expense – enter as a freight-type charge in the footer of the SAP Marketing Document</li> <li>• Item – enter as a separate row in the body of the SAP Marketing Document</li> </ul>
<b><i>Expense Code</i></b>	<p>If the Additional Expense option is selected above, select the SAP freight code to use for this charge.</p>
<b><i>SAP Item Code</i></b>	<p>If the Item option is selected above, enter the item code to use for the charge.</p>
<b><i>Minimum Document Amount</i></b>	<p>Enter the minimum order amount if needed. If the order is less than this amount, the charge will not be incurred.</p>
<b><i>Maximum Document Amount</i></b>	<p>Enter the maximum order amount if needed. If the order is greater than this amount, the charge will not be incurred.</p>
<b><i>Always Charge Receiver</i></b>	<p>If this box is checked then this additional charge will be used even when the shipment’s Bill Transportation setting is something other than “Shipper” (this will be further explained later in this document).</p>
<b><i>Add to COD Amount</i></b>	<p>Check this box if you want this additional charge to be added to the COD amount of your shipment</p>
<b><i>Single Charge per Base Document</i></b>	<p>Check this box if you only want this full additional charge amount to only be charged on the first shipment of a document</p>
<b><i>Basis Option</i></b>	<p>Select the basis for the calculation of this charge. This is the value that will be used in the calculation option selected below:</p> <ul style="list-style-type: none"> <li>• Shipment Cost</li> <li>• Shipment Value</li> <li>• Order Value</li> <li>• Number of Packages</li> <li>• Weight</li> <li>• Volume</li> <li>• Quantity</li> <li>• Order Expenses</li> <li>• Item Group</li> </ul>

<b><i>Basis Item Group Code</i></b>	If the basis is Item Group, this is the item group that it will trigger a charge.
<b><i>Minimum Basis Amount</i></b>	Enter the minimum basis amount if needed. If the basis amount is less than this amount, the charge will not be incurred.
<b><i>Maximum Basis Amount</i></b>	Enter the maximum basis amount if needed. If the basis amount is greater than this amount, the charge will not be incurred.
<b><i>Calculation Option</i></b>	Select the option for how to calculate the charge ( <b>Note:</b> The * indicates multiplication): <ul style="list-style-type: none"> <li>• Basis Only</li> <li>• Stated Amount</li> <li>• Basis * Percentage</li> <li>• Basis * Percentage + Amount</li> <li>• Basis + Amount</li> <li>• Basis + (Basis * Percentage) + Amount</li> <li>• Basis * Amount</li> </ul>
<b><i>Percent</i></b>	If the calculation option requires a percentage, enter the percentage.
<b><i>Amount</i></b>	If the calculation option requires an amount, enter the amount.
<b><i>Minimum Charge Amount</i></b>	This is the minimum amount that should be charged for this additional charge. If the calculation comes to less than the minimum, then the minimum will be charged.
<b><i>Maximum Charge Amount</i></b>	This is the maximum amount that should be charged for this additional charge. If the calculation comes to more than the maximum, then the maximum will be charged.

## Examples of Additional Charge Setups

### Example 1: Actual Freight Charge

Additional Charges - Setup
— □ ×

Code	Shipment Cost
Name	Shipment Cost
Create Option	Additional Expense ▼
Expense Code	➔ Freight ▼
Item Code	

**Criteria**

Minimum Document Amount	0.00
Maximum Document Amount	0.00
Always Charge Receiver	<input type="checkbox"/>
Add to COD Amount	<input type="checkbox"/>
Single Charge per Base Document	<input type="checkbox"/>

**Calculation**

Basis Option	Shipment Cost ▼
Basis Item Group Code	
Minimum Basis Amount	0.00
Maximum Basis Amount	0.00
Calculation Option	Basis Only ▼
Percent	0.000
Amount	0.00
Minimum Charge Amount	0.00
Maximum Charge Amount	0.00

Add
Cancel

### Example 2: Actual Freight Charge plus an additional \$10

Additional Charges - Setup
— □ ×

Code	Actual Charge + 10
Name	Actual Charge + 10
Create Option	Additional Expense ▼
Expense Code	➔ Freight ▼
Item Code	

**Criteria**

Minimum Document Amount	0.00
Maximum Document Amount	0.00
Always Charge Receiver	<input type="checkbox"/>
Add to COD Amount	<input type="checkbox"/>
Single Charge per Base Document	<input type="checkbox"/>

**Calculation**

Basis Option	Shipment Cost ▼
Basis Item Group Code	
Minimum Basis Amount	0.00
Maximum Basis Amount	0.00
Calculation Option	Basis + Amount ▼
Percent	0.000
Amount	10.00
Minimum Charge Amount	0.00
Maximum Charge Amount	0.00

Add
Cancel

### Example 3: Flat Rate Shipping

Additional Charges - Setup
— □ ×

Code	Flat Fee 22
Name	Flat Fee 22
Create Option	Additional Expense
Expense Code	Freight
Item Code	

Criteria

Minimum Document Amount	0.00
Maximum Document Amount	0.00
Always Charge Receiver	<input type="checkbox"/>
Add to COD Amount	<input type="checkbox"/>
Single Charge per Base Document	<input type="checkbox"/>

Calculation

Basis Option	Shipment Cost
Basis Item Group Code	
Minimum Basis Amount	0.00
Maximum Basis Amount	0.00
Calculation Option	Stated Amount
Percent	0.000
Amount	22.00
Minimum Charge Amount	0.00
Maximum Charge Amount	0.00

Add
Cancel

### Example 4: Free Freight for Orders more than \$500

Additional Charges - Setup
— □ ×

Code	FF Over 500
Name	FF Over 500
Create Option	Additional Expense
Expense Code	Freight
Item Code	

Criteria

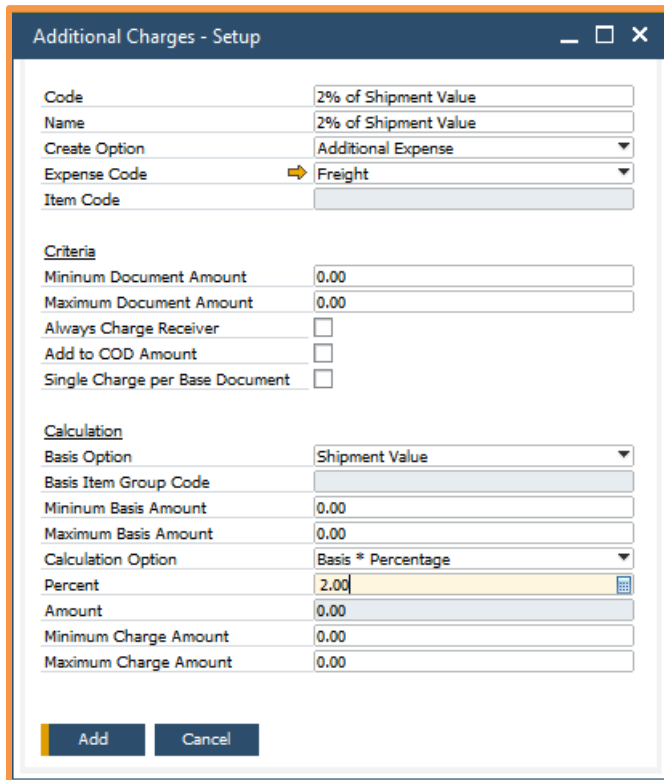
Minimum Document Amount	0.00
Maximum Document Amount	499.99
Always Charge Receiver	<input type="checkbox"/>
Add to COD Amount	<input type="checkbox"/>
Single Charge per Base Document	<input type="checkbox"/>

Calculation

Basis Option	Shipment Cost
Basis Item Group Code	
Minimum Basis Amount	0.00
Maximum Basis Amount	0.00
Calculation Option	Basis Only
Percent	0.000
Amount	0.00
Minimum Charge Amount	0.00
Maximum Charge Amount	0.00

Add
Cancel

### Example 5: Charge 2% of the Shipment's Value



Additional Charges - Setup	
Code	2% of Shipment Value
Name	2% of Shipment Value
Create Option	Additional Expense
Expense Code	Freight
Item Code	
<b>Criteria</b>	
Minimum Document Amount	0.00
Maximum Document Amount	0.00
Always Charge Receiver	<input type="checkbox"/>
Add to COD Amount	<input type="checkbox"/>
Single Charge per Base Document	<input type="checkbox"/>
<b>Calculation</b>	
Basis Option	Shipment Value
Basis Item Group Code	
Minimum Basis Amount	0.00
Maximum Basis Amount	0.00
Calculation Option	Basis * Percentage
Percent	2.00
Amount	0.00
Minimum Charge Amount	0.00
Maximum Charge Amount	0.00
<input type="button" value="Add"/> <input type="button" value="Cancel"/>	

### Example 6: Copy Charges from Sales Order

When using this, the Expense Code field is very important because that is the one the additional charge is going to look at on the Sales Order to determine if it should copy it from the SO to the Delivery. Note, if you are going to use Rate Shopping, and want to have the charge copy to the Delivery from the Sales Order, then make sure the Expense Code field matches the one you set up in your Shipping Types (which we will discuss later)



Additional Charges - Setup
— □ ×

Code	Copy From Sales Order
Name	Copy From Sales Order
Create Option	Additional Expense ▼
Expense Code	Insurance ▼
Item Code	

Criteria

Minimum Document Amount	0.00
Maximum Document Amount	0.00
Always Charge Receiver	<input type="checkbox"/>
Add to COD Amount	<input type="checkbox"/>
Single Charge per Base Document	<input type="checkbox"/>

Calculation

Basis Option	Order Expenses ▼
Basis Item Group Code	
Minimum Basis Amount	0.00
Maximum Basis Amount	0.00
Calculation Option	Basis Only ▼
Percent	0.000
Amount	0.00
Minimum Charge Amount	0.00
Maximum Charge Amount	0.00

Update
Cancel

## Carrier Setup

Administration > Resolv Setup > Resolv Freight Management > FM Carrier

Before you can set up your carriers in Resolv, you will need to make sure you have a shipping account setup and configured to work with web services for them. You will need to contact each carrier individually to setup your account and log in information for shipping and rate shopping (if you choose to add it).

*\*See the Appendix at the end of this document to help you with the correct URLs*

The screenshot shows the 'Carriers - Setup' window with the following fields and values:

- Carrier Name: FedEx
- Carrier Type: FEDEX
- Account Number: 1231312
- Rate Shop URL: https://wsbeta.fedex.com:443/web-services/rate
- Rate Shop Max Weight: 150
- Rate Type: List Rate (Published)
- Ship Service URL: https://wsbeta.fedex.com:443/web-services
- Ship Service License: asqvsaqwed
- Ship Service Meter: 11212312
- Ship Service Password: \*\*\*\*
- Tracking URL: http://fedex.com/Tracking?action=track&tracknumber\_list=<TRA
- Label Output Type: Portable Network Graphics

Below the fields is a table of service levels:

#	Service Level Code	Service Level Description
1	FEDEX_2_DAY	FedEx 2 Day
2	FEDEX_2_DAY_AM	FedEx 2 Freight AM
3	FEDEX_EXPRESS_SAVER	FedEx Express Saver
4	FEDEX_GROUND	FedEx Ground
5	GROUND_HOME_DELIVERY	FedEx Home Ground
6	FIRST_OVERNIGHT	FedEx First Over Night
7	PRIORITY_OVERNIGHT	FedEx Priority Over Night
8	STANDARD_OVERNIGHT	FedEx Standard Over Night
9	EUROPE_FIRST_INTERNATIC	Europe First International Priority
10	INTERNATIONAL_ECONOMY	FedEx International Economy
11	INTERNATIONAL_ECONOMY	FedEx International Economy Distribution
12	INTERNATIONAL_FIRST	FedEx International First
13	INTERNATIONAL_PRIORITY	FedEx International Priority
14	INTERNATIONAL_PRIORITY	FedEx International Priority Distribution

Buttons: Update, Cancel

**Carrier Name** Enter a name for this carrier record

**Carrier Type** Choose the actual carrier from the drop-down list. When you select it from the drop down it will ask if you want to automatically import this carrier’s service levels. If you say Yes, it will save you from having to enter them manually on the bottom part of the screen. It will also make sure you have

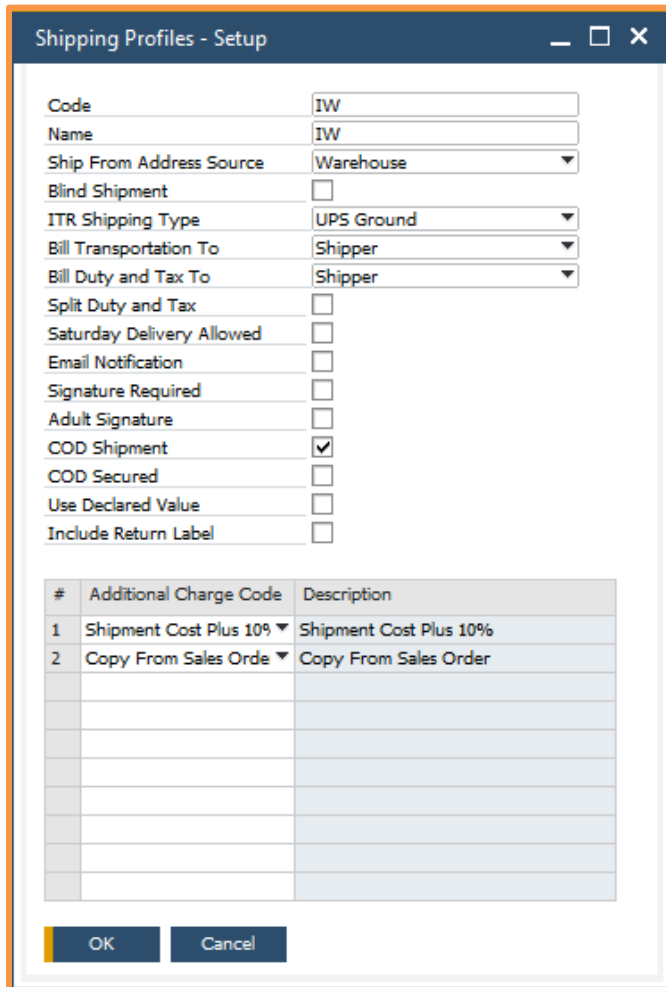
the correct codes for each Carrier's Web Service program. If the codes here do not match what the Carrier is expecting, your shipments will have issues.

<b>Account Number</b>	Enter your company's account number for this carrier. Note, there is a ... button to the right of this field that will open a secondary window and allow you to enter in additional carrier account numbers and licenses per warehouse if need be.
<b>Rate Shop URL</b>	Enter the complete URL to be used when checking rates from this carrier if rate shopping is to be used.  Note, rate shopping might need to be purchased as a service from your carrier. Please contact them with any questions.
<b>Rate Shop Max Weight</b>	Enter the maximum weight per package that is allowed for rate shopping from this carrier
<b>Rate Type</b>	Choose whether you want to use List (Published) or Customer (Negotiated) Rates
<b>Ship Service URL</b>	Enter the complete URL for the carrier's web services to be used when shipping packages.
<b>Ship Service License</b>	Enter the License provided to you by your carrier for your Web Services/Shipping account
<b>Ship Service User Name/Meter</b>	Enter the user ID provided to you by your carrier for your Web Services/Shipping account
<b>Ship Service Password</b>	Enter the password provided to you by your carrier for your Web Services/Shipping account
<b>Tracking URL</b>	Enter the complete URL for the carrier's tracking services. This will allow you to track your packages for this carrier inside of Resolv
<b>Label Output Type</b>	For some carriers, you can select the file type you want for the label. Note the ZPLII file type is suggested but will only work with a Zebra printer.

## Shipping Profiles

Administration > Resolv Setup > Resolv Freight Management > FM Shipping Profile

There are certain shipping options that carriers allow such as requiring a signature or which account to bill the shipping charges to. Setting up Shipping Profiles will allow you to have these options set the way you want for specific customers, ship-to's, contacts, or even Sales Orders. We will see later how to assign these Shipping Profiles when setting up Business Partners or creating Sales Orders, but for now we will go through how to set up the Profiles themselves.



Code	IW	
Name	IW	
Ship From Address Source	Warehouse	
Blind Shipment	<input type="checkbox"/>	
ITR Shipping Type	UPS Ground	
Bill Transportation To	Shipper	
Bill Duty and Tax To	Shipper	
Split Duty and Tax	<input type="checkbox"/>	
Saturday Delivery Allowed	<input type="checkbox"/>	
Email Notification	<input type="checkbox"/>	
Signature Required	<input type="checkbox"/>	
Adult Signature	<input type="checkbox"/>	
COD Shipment	<input checked="" type="checkbox"/>	
COD Secured	<input type="checkbox"/>	
Use Declared Value	<input type="checkbox"/>	
Include Return Label	<input type="checkbox"/>	

#	Additional Charge Code	Description
1	Shipment Cost Plus 10%	Shipment Cost Plus 10%
2	Copy From Sales Order	Copy From Sales Order

Enter the following information:

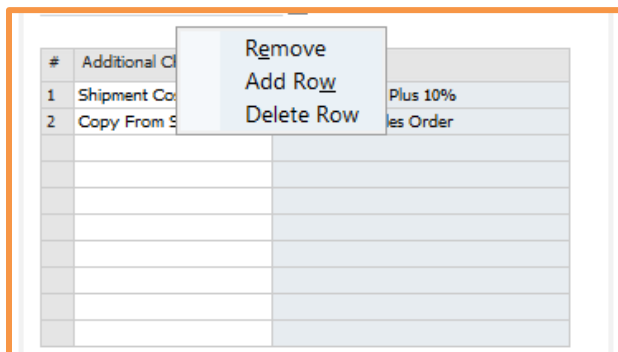
**Code** Give the Shipping Profile a code; something short to help users choose it

**Name** Give the Shipping Profile a name; this can be a longer description of the profile code

<b>Ship From Address Source</b>	<p>Select the ship from address for this Shipping Profile</p> <ul style="list-style-type: none"> <li>• Company Details</li> <li>• Branch</li> <li>• Warehouse</li> <li>• Third Party</li> </ul>						
<b>Blind Shipment</b>	<p>Check this box if you want the Ship From Address Name to be the BPs Name when creating a packing slip using this profile</p>						
<b>ITR Shipping Type</b>	<p>Select the default Shipping Type for shipping ITRs through FM when using this profile</p>						
<b>Bill Transportation To</b>	<p>Select the default charge type for this Shipping Profile. This indicates who the carrier will bill for the freight charges (and possibly the Duty, see Split Duty and Tax below).</p> <table border="0" style="margin-top: 10px;"> <tr> <td style="padding-left: 20px;"><b>Shipper</b></td> <td>Gets account number from carrier setup.</td> </tr> <tr> <td style="padding-left: 20px;"><b>Receiver</b></td> <td>Gets account number from the BP Master (based on your FM settings for Receiver Account No. Priority we saw earlier)</td> </tr> <tr> <td style="padding-left: 20px;"><b>Third Party</b></td> <td>Gets account number from the Third-Party Ship To Address Book which we will see later on (this is also based on your FM settings for Receiver Account No. Priority we saw earlier)</td> </tr> </table>	<b>Shipper</b>	Gets account number from carrier setup.	<b>Receiver</b>	Gets account number from the BP Master (based on your FM settings for Receiver Account No. Priority we saw earlier)	<b>Third Party</b>	Gets account number from the Third-Party Ship To Address Book which we will see later on (this is also based on your FM settings for Receiver Account No. Priority we saw earlier)
<b>Shipper</b>	Gets account number from carrier setup.						
<b>Receiver</b>	Gets account number from the BP Master (based on your FM settings for Receiver Account No. Priority we saw earlier)						
<b>Third Party</b>	Gets account number from the Third-Party Ship To Address Book which we will see later on (this is also based on your FM settings for Receiver Account No. Priority we saw earlier)						
<b>Bill Duty and Taxes To</b>	<p>Select the default type of billing for duty and taxes. The drop-down choices are the same as the Bill Transportation To option:</p> <ul style="list-style-type: none"> <li>• Shipper</li> <li>• Receiver</li> <li>• Third Party</li> </ul>						
<b>Split Duty and Tax</b>	<p>Check this box if you want to split the duty and taxes so that the Duty gets charged to the same account number as the Transportation, and the Tax would then be the only thing charged to the Duty and Tax account number</p>						
<b>Saturday Delivery Allowed</b>	<p>Check this box if you want to allow deliveries on Saturday for this Shipping Profile. Note, carrier's may only allow Saturday deliveries in certain instances so check with them if you have any questions.</p>						

- Email Notification**      Check this box if you want email notifications to be sent from your carrier for this Shipping Profile. Note, an email address must be present in the Business Partner Master Data for this option to work.
- Signature Required**      Check this box if you want a signature required for this Shipping Profile
- Adult Signature**      Check this box if you want an adult signature required for this Shipping Profile
- COD Shipment**      Check this box if you want shipments using this profile to be considered COD Shipments allowing non-secure payment means. Please check with your Carrier to see which options are considered non-secure.
- COD Secured**      Check this box if you want the shipments using this profile to be considered COD Shipments only allowing secure payment methods. Please check with your Carrier to see which options are considered secure.
- Use Declared Value**      Check this box if you want to export the declared value for insurance purposes
- Include Return Label**      Check this box if you would like a return label to also be generated when shipping a packing slip using this profile.

The bottom half of the screen will be where you add the additional charges you want to associate with this profile. Right-click and choose Add Row to begin choosing which additional charges you want to assign (you can add as many as you need). Note, if you do not add any additional charges, nothing will be charged to the customer when the delivery is created.

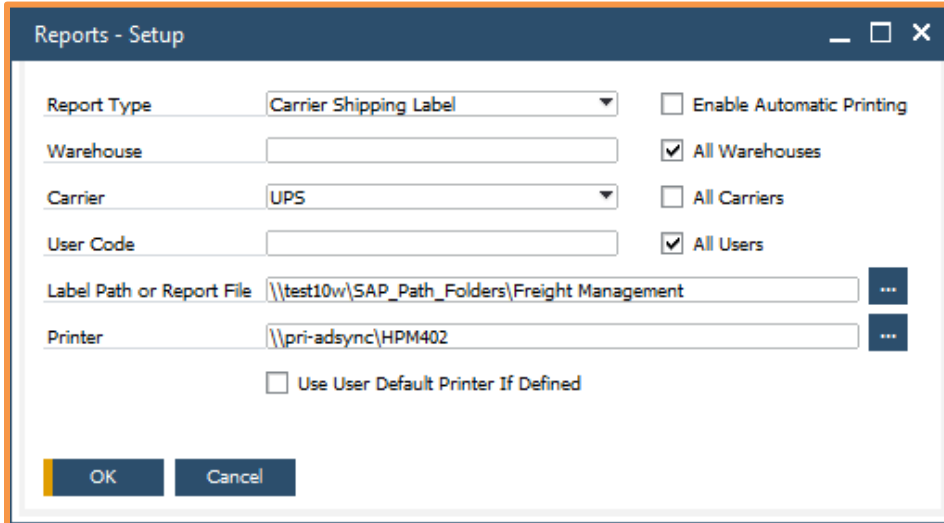


#	Additional Charge	Rate
1	Shipment Cost	Plus 10%
2	Copy From S	Yes Order

## Reports

*Administration > Resolv Setup > Resolv Freight Management > FM Reports*

As a company, you may have only one warehouse, or you may have multiple; you may have one shipping station, or several; you may have one set of printers, or printers for each user. The reports screen allows you to be as general or specific as you want to be with the forms and printers for Freight Management. Let us look at the fields you will use to set them up.



**Report Type** Select the Report Type you are configuring. Note, if you want this report definition to automatically print, select the Enable Automatic Printing checkbox.

You have the following options:

- Carrier Shipping Label – This is the shipping label that the Carrier will send back to you (see appendix for additional configuration info for printing carrier shipping labels)
- Non-Carrier Shipping Label – When you ship using a method that is not linked to one of your FM carriers, this is the shipping label that will be used
- Packing Slip Report – This is a report that you can send with your shipments that outlines the shipment’s information
- Package Label Detail – This is a label that you can print by package that will show the details for the items in said package

- Carrier International Documents – This is the additional documents that the Carrier may send back to you when shipping internationally (like a Commercial Invoice for example)
- Freight BOL – This is the Bill of Lading that your LTL/Freight Carrier will send back to you
- Haz Mat Shipping Paper (FedEx Only) – This is an additional form you can print when shipping Hazardous Material via FedEx. It requires special paper to be printed on that can be gotten from FedEx
- Haz Mat Certification (FedEx Only) – This is an additional form you can print when shipping Hazardous Material via FedEx. It requires special paper to be printed on that can be gotten from FedEx
- Paperless NAFTA Document (UPS and FedEx Only) – This gives you the option to create your own NAFTA Crystal Report that FM will print and upload to the Carrier
- Paperless Commercial Invoice (UPS and FedEx Only) – This gives you the option to create your own Commercial Invoice Crystal Report that FM will print and upload to the Carrier

**Warehouse** Choose the specific warehouse for the selected Report Type or choose All Warehouses if the same printer and report layout will be used across your warehouses.

**Carrier** This option is only available for the Carrier Shipping Label Report Type. Choose the specific Carrier or choose All Carriers if the same printer and label file path will be used across your carriers.

**User Code** Choose the specific user code for the selected Report Type or choose All Users if the same printer and report layout will be used for everyone.

Note, as we will see later in this document, there are already printer fields for FM in the SAP User Setup screen. You can use them to assign a specific report and label printer for each of your users without having to create an individual Report Setup record for them.

Because of this, there are only 2 reasons to choose a specific user here in this Report Setup screen. The first is if you want to set a specific report file path for individual users. The second is if you want to use this field in



conjunction with the warehouse field and set up different printers for the same user but in different warehouses.

**Label Path or Report File** This field serves a dual purpose. When you are setting up your Carrier Shipping Label, this field is used to set a path for the folder your carrier label images will be saved in during shipping. This folder will hold the label images that the Carriers send back through the Web Services. This can be any folder you want, but it is recommended to be a network folder that the SAP client machines will have read/write access to.

For all other reports, this field will be the path to where the actual report file is located.

**Printer** Browse to and select the Windows printer that you want this FM Report to print to

**Use User Default Printer if Defined** Check this box if you would like the FM printer fields in the SAP User Setup screen (which we will discuss later) to be used instead of the printer defined in this setup. For those who have those user printer fields set, it will use their printer; for those who do not have them set, it will use the printer you defined here in this screen.

Note, you can delete a report setup, by right-clicking on the screen and choosing Remove.

## SAP Setups

### Shipping Types

Administration > Setup > Inventory > Shipping Types

There are a few fields we need to set on the standard SAP Shipping Types screen for Freight Management to work correctly.

#	Name	Web Site	Ship Rental ITR in FM	Service Level Code	Rate Shop Expense Code	FedEx One Rate	Carrier
1	Motor Express		<input type="checkbox"/>			<input type="checkbox"/>	
2	UPS Red		<input type="checkbox"/>			<input type="checkbox"/>	
3	Fedex EM		<input type="checkbox"/>			<input type="checkbox"/>	
4	Fedex ON		<input type="checkbox"/>			<input type="checkbox"/>	
5	UPS Ground		<input type="checkbox"/>	03	1	<input type="checkbox"/>	UPS
6			<input type="checkbox"/>			<input type="checkbox"/>	

**Carrier** Select the Freight Management carrier for this shipping type

**Service Level Code** Select the carrier service level for this shipping type. There is a magnifying glass button in the field you can use to look up your options.

**Rate Shop Expense Code** Select the SAP Freight Charge to be used when selecting a Rate Shop option. There is a magnifying glass button in the field you can use to look up your options. Note, this will add the charge to your marketing document, but you still need to create an additional charge, so it is copied to the delivery.

**FedEx One Rate** Check this box if this SAP Shipping Type should be considered a FedEx One Rate service type. For additional information on FedEx One Rate please contact FedEx.

## Business Partner Master Data

*Business Partners > Business Partner Master Data*

Freight Management adds several fields to the Business Partner Master Data screen. The fields are seen on the User-Defined Fields panel, the Contact Persons tab, and the Addresses tab. They can all hold different values that are specific just to them (BP, Ship To, or Contact).

### User-Defined Fields Panel

The screenshot shows the 'Business Partner Master Data' window. The 'User-Defined Fields' panel is highlighted with an orange border on the right side. It contains the following fields:

Hide from Order To Cash	No
BP Price Group	
Assign Tracking To	
UPS Account #	
Fed Ex Account #	
Fed Ex Freight Account #	
DHL Account #	
Purolator Account #	
Shipping Profile	
Default Third Party Address	
Review Cycle Days	
\$ Buying Target	
Weight Buying Target	
Rec Qty Prefix	

Enter the following in the Business Partner User-defined Fields panel:

#### **Shipping Profile**

Enter the Shipping Profile for this customer

#### **UPS/FedEx/Etc. Account #**

Enter the corresponding Carrier account numbers for this customer

#### **Default Third Party Address**

Click on the list picker button in the field to bring up the list of third-party address/accounts from the address book and select the default for this BP. If you do not have any set up yet, select the new option to create one (we will discuss this a little later).

## Ship-To Addresses

Ship To		<a href="#">Show Location in Web Browser</a>
BP Price Group		
Ship-To Name	Thompson Construction	
Phone Number		
Email Address		
Residential or Commercial	Commercial	
UPS Account #	123121	
Fed Ex Account #		
Fed Ex Freight Account #		
DHL Account #		
Purolator Account #		
Shipping Profile	IWI	
Default Third Party Address		

Enter the following information in the Ship To's on the Addresses tab:

### **Ship-To Name**

If you fill in this field, then it will be copied into the AddressName2 field on the Sales Order, which then will be used as the Ship To Name when shipping with your carriers. If left blank, FM will use the BP Name instead.

### **Residential/Commercial**

Select "Residential" or "Commercial" for this address.

### **Shipping Profile**

Enter the Shipping Profile for this specific Ship To

### **UPS/FedEx/Etc. Account #**

Enter the Corresponding Carrier account numbers for this specific Ship To

### **Default Third Party Address**

Click on the list picker button in the field to bring up the list of third-party address/accounts from the address book and select the default for this Ship To. If you do not have any set up yet, select the new option to create one (we will discuss this a little later).

### **Email Address**

Enter the shipment notification email address for this specific Ship To

### **Phone Number**

Enter the phone number for this specific Ship To



Contact Persons

Enter the following information on the Contact Persons tab:

- Shipping Profile**                      Enter the Shipping Profile for this specific Contact Person
  
- UPS/FedEx/Etc. Account #**      Enter the corresponding Carrier account numbers for this specific Contact Person
  
- Default Third Party Address**      Click on the list picker button in the field to bring up the list of third-party address/accounts from the address book and select the default for this Contact Person. If you do not have any set up yet, select the new option to create one (we will discuss this next)

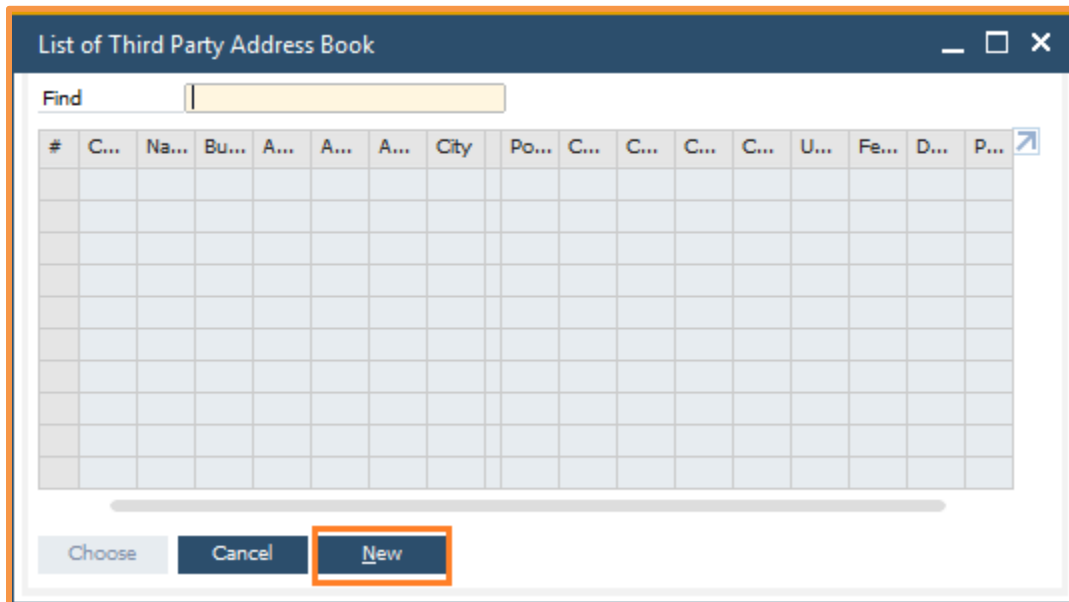
### Third Party Address Book

As mentioned earlier we have the option to set shipping account numbers and addresses from a Third Party. To use this option, you will have to create entries in the Third-Party Address Book.

To get to the address book, pull up the Business Partner Master Data screen, find one of the Default Third Party Address fields, and click on the list picker button.



This will bring up the Third-Party Address Book window. To create a new address book entry, click on the New button at the bottom.



That will open the Third-Party Address Window. Once in here you can fill in all the necessary fields (including the BP if you want this Third Party to only be available for this BP) and hit Add to save it to the address book. Note, double check that the Third-Party Zip Code matches the Zip Code the Carrier has on file for this Third-Party account. Also, make sure to use the 2-letter code for the Country as that is what the Carrier is expecting.

**Third Party Address Book**

Code	Walsh Systems	Name	Walsh Systems
Business Partner	C20000	Address Line 1	30 Rockefeller Plaza
Address Line 2		Address Line 3	
City	New York <b>Business Partner</b>	State/Province	NY
Postal Code	10018	Country	US
Contact Name	Ian Walsh	Contact Phone	
Contact Email	iwalsh@achieveits.com	UPS Account Number	12341212
Fed Ex Account Number		DHL Account #	
Purolator Account #			

**Add** **Cancel**

Once it is added I can select it as my Default Third Party Address for either my BP, Ship To Address, or Contact Person. If you need to edit the third-party address book information you can just click on the gold arrow to open the window and make your changes.

### **Package Types Setup**

*Administration > Setup > Inventory > Package Types*

Freight Management uses the standard SAP Package Types. These will be used to create standard packaging on Sales Quotes and Sales Orders for Rate Shopping as well as for packaging items in our packing slips (which we will see later).

**Package Types - Setup**

#	Type	Length	Width	Height	Volume	Volume UoM	Weight
1	Box	16"	12"	8"	1,536	ci	8Oz
2	Pallet	40"	40"	4"	6,400	ci	5Lb
3	Container	40'	10'	10'	4,000	cf	1,000Lb
4	Barrel						
5						ci	



## Item Master Data Setup

*Inventory > Item Master Data*

Freight Management uses several fields from the Item Master Data for packaging. These fields include weights, sales units of measure and sales package types.

It is important to enter this information if you intend on using Rate Shopping. If even one item on a quote or order does not have weight or sales packaging information set up, Rate Shopping can only be completed by manually packing and entering a scale weight.

The screenshot shows the 'Item Master Data' form with the following fields and values:

- Item No.: Manual ps001
- Description: Poland Spring - Sparkling Water - Lime (UoM Group)
- Foreign Name: (empty)
- Item Type: Items
- Item Group: Beverages
- UoM Group: Beverages
- Price List: Base Price
- Bar Code: (empty)
- Unit Price: Primary Curr
- Pricing Unit: Bottle
- Inventory Item:
- Sales Item:
- Purchase Item:
- Is Quality Check Required?:

The 'Inventory Data' tab is selected, showing the following fields:

- Sales UoM Code: 6pack
- Sales UoM Name: 6pack
- Items per Sales Unit: 6
- Package Type: Box
- Quantity per Package: 2
- Length: 12"
- Width: 6"
- Height: 8"
- Volume: 576
- Weight: 5Lb

Orange boxes highlight the Sales UoM Code, Sales UoM Name, Package Type, and Quantity per Package fields. Blue boxes highlight the dropdown arrows for the Sales UoM Code and Package Type fields.

**Sales UoM and Package Types**

Item No.  UoM Group  Inventory UoM

**Sales UoM**

- Bottle
- 6pack**
- Case
- Pallet
- Add Rows

Unit Name

Items per Unit  6pack =  Bottle

Sales UoM Dimensions

Length "  
 Width "  
 Height "  
 Volume    
 Weight

**Package Types**

- Box**
- Pallet
- Container
- Barrel
- Add Rows

Qty per Package

Package Type Dimensions

Length "  
 Width "  
 Height "  
 Volume    
 Weight

For international shipments, you may need to send additional fields like Country of Origin or Tariff Number/Harmonized Code.

We added a UDF on the Item Master for Country of Origin. If there is a value in this field, FM will use it for your shipment; if it is blank, it will use the country code for your ship from warehouse.

TEST2

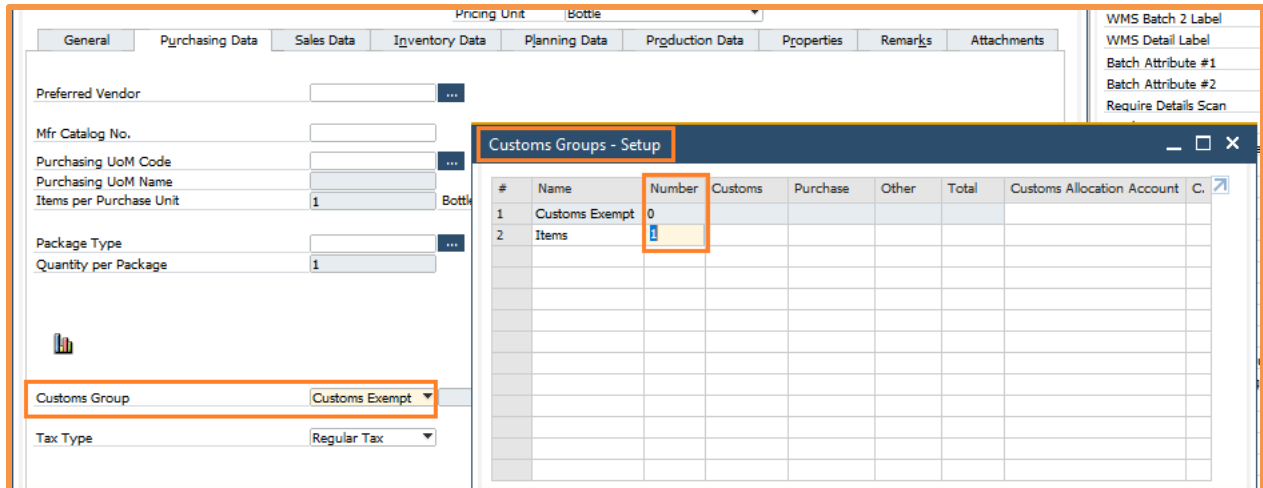
EDI 846 Qty 1

FDI 846 Qty 2

**Country of Origin**

Price Update Use Code

For the tariff number/harmonized code, we will be using the corresponding number from the Item Master Data Customs Group for the items being shipped. If there is no value, then nothing will be sent.

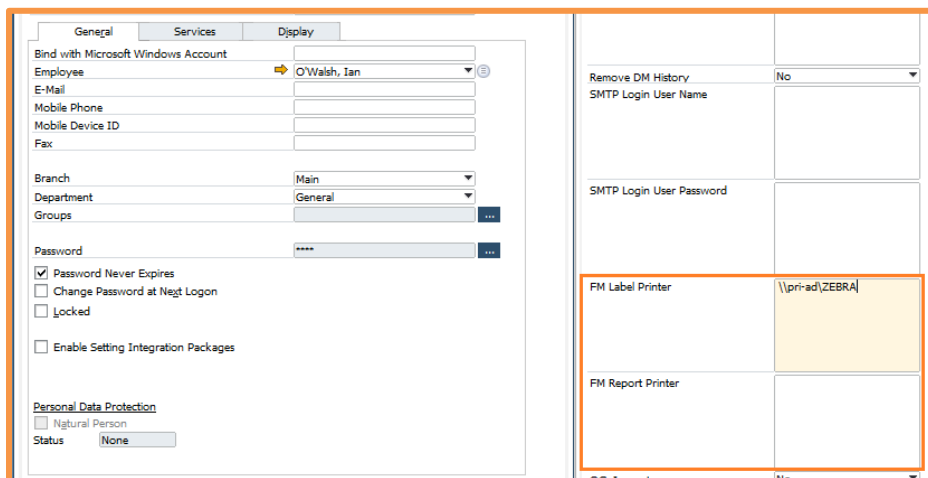


## User Setup

*Administration > Setup > General > Users*

As mentioned briefly, there are Freight Management printer fields on the standard SAP User Setup screen. You can use them to assign a specific report and label printer for each of your users without having to create an individual FM Report Setup record for them. Note, the printer setups here will be used for all warehouses so if you want to setup different printers per warehouse for a user, you will have to use the FM Report Setup screen instead.

But just because you set printer names into these fields here does not necessarily mean they will be used. As we saw above in the FM Report Setup screen, there was a checkbox called “Use User Default Printer if Defined” which determines if these fields here are even looked at. When that box is checked, the report will use these fields here in the SAP User Setup screen if they are defined. If the box is not checked, then these fields here are ignored.



## Procedures

The following sections describe the procedures used in Resolv Freight Management.

Note, procedures may differ a little bit if you are using **Resolv Warehouse Management** in conjunction with **Resolv Freight Management**. See the Freight Management Mobile section in this guide for additional procedure topics.

### ***Sales Quotes and Sales Orders***

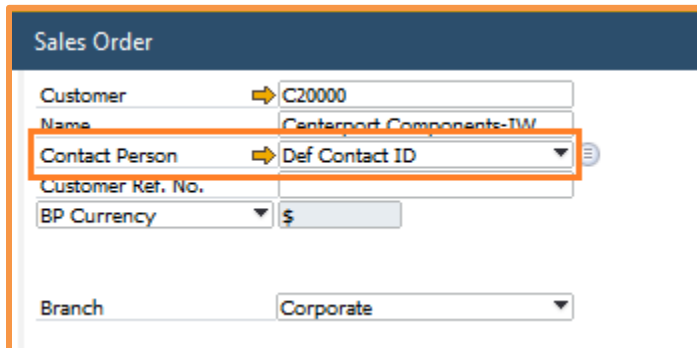
For the purposes of this document, we will use Sales Orders, but the Freight Management fields used on Sales Orders are the same in Sales Quotes. So, if you use Sales Quotes, you can begin there, if not then you can start with a Sales Order.

### **Standard SAP Fields**

There are several standard SAP fields that are relevant to Freight Management.

#### **Contact Person**

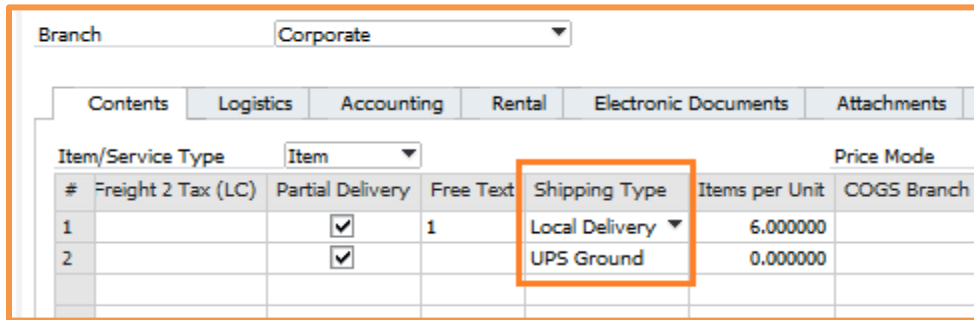
If in the FM configuration, you chose your attention to be set to the Marketing Document Contact, then make sure you select the correct contact person.



The screenshot shows a 'Sales Order' form with several fields. The 'Contact Person' field is highlighted with an orange border and contains the value 'Def Contact ID'. Other visible fields include 'Customer' (C20000), 'Name' (Centerport Components-IW), 'Customer Ref. No.', 'BP Currency' (\$), and 'Branch' (Corporate).

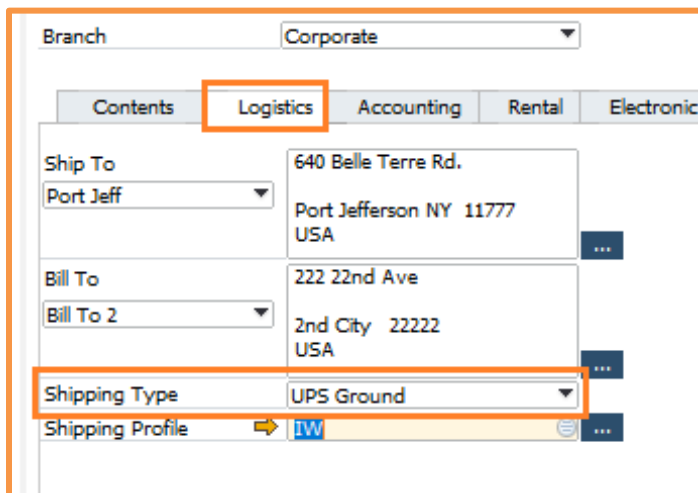
## Shipping Type

Depending on your configuration settings earlier, the Shipping Type is handled either at the line or header level. If you have chosen to use line level, make sure all lines on your document have the shipping type set appropriately since these are the shipping types used during shipping



Branch Corporate						
Contents Logistics Accounting Rental Electronic Documents Attachments						
Item/Service Type Item						Price Mode
#	Freight 2 Tax (LC)	Partial Delivery	Free Text	Shipping Type	Items per Unit	COGS Branch
1		<input checked="" type="checkbox"/>	1	Local Delivery	6.000000	
2		<input checked="" type="checkbox"/>		UPS Ground	0.000000	

If you have chosen to use header level, make sure that the shipping type field on the Logistics tab is set appropriately since this is the shipping type used during shipping.



Branch Corporate

Contents **Logistics** Accounting Rental Electronic

Ship To: 640 Belle Terre Rd.  
Port Jeff  
Port Jefferson NY 11777  
USA

Bill To: 222 22nd Ave  
Bill To 2  
2nd City 22222  
USA

**Shipping Type**: UPS Ground

Shipping Profile: IW

## Ship To

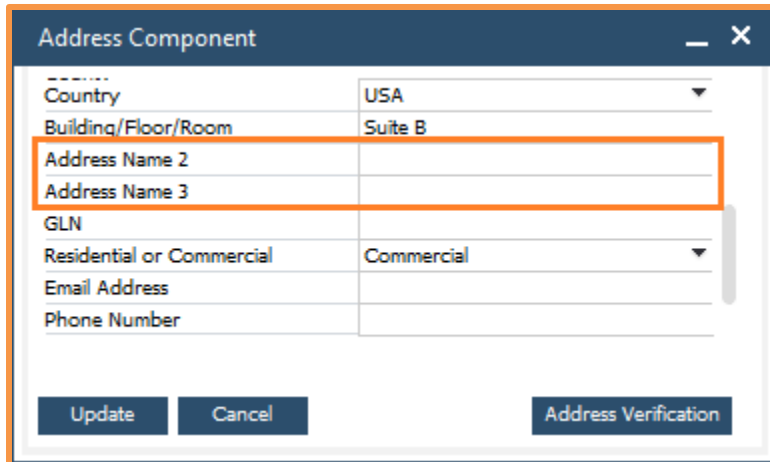
The information in the SAP Ship To fields will be used when shipping your packages. Make sure they are filled in correctly to ensure proper delivery through the carrier services.

The screenshot shows the SAP interface for a shipment. The 'Ship To' field is highlighted with an orange box and contains the address: 640 Belle Terre Rd., Port Jefferson NY 11777, USA. Below it, the 'Bill To' field contains: 222 22nd Ave, 2nd City 22222, USA. The 'Shipping Type' is set to 'UPS Ground' and the 'Shipping Profile' is 'IW'. An 'Address Component' dialog box is open, showing the address details: Street / PO Box (640 Belle Terre Rd.), Street No., Block, City (Port Jefferson), Zip Code (11777), County, State (New York), and Country (USA). The dialog box has 'OK', 'Cancel', and 'Address Verification' buttons. The background interface includes tabs for Contents, Logistics, Accounting, Rental, Electronic Documents, Attachments, Document Delivery, and Packing. Other fields include Branch (Corporate), Branch Reg. No. (CORP), Print Picking Sheet (unchecked), Language (English), Procure Non Drop-Ship Items (unchecked), Procure Drop-Ship Items (checked), and Approved (checked). The Sales Employee is Ian O'Walsh and the Total Before Discount is 13.50 \$.

Also, on the Ship To drill in, there are a couple of standard SAP fields that now have additional purposes when using Freight Management.

Address Name 2 will be defaulted in with your ship to name. This will either be the Ship To Name on the BP Master like we saw earlier, or the BP Name itself (if the Ship To Name field is blank). This information will be sent to the carrier during shipping as the Ship To Name. Note, you can also enter data into this field on the fly to be used for this one shipment only.

Address Name 3 will be defaulted in with the attention name based on the FM configurations we saw earlier. This information will be sent to the carrier during shipping as the Attention To. Note, you can also enter data into this field on the fly to be used for this one shipment only.



### **Additional Fields added by Freight Management**

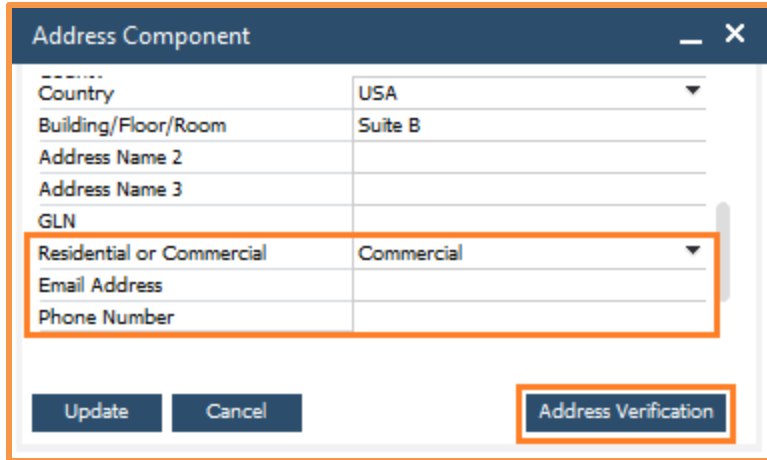
There are some new fields/functions that Freight Management will add to the document screen. We will discuss those here.

#### Ship To

On the ship to drill in screen, there are 3 added FM fields; Email Address, Phone Number, and Residential or Commercial. The Email Address and Phone Number fields will be defaulted in with the Email Address and Phone Number for the “Attention To” person (based on the FM configurations we saw earlier). The Residential or Commercial field will be set based on the same field on the BP Master Data > Addresses tab. The information in these fields will be sent to the carrier during shipping. Note, you can also enter data into this field on the fly to be used for this one shipment only.

Also, on the ship to drill in screen, there is a new button for Address Verification. If you click on it, Freight Management will connect to the carrier and verify the address. If it finds an alternate address it will display it for you, and you can then select it for the shipment if you choose. Note you may need to contact your carrier to make sure your account includes address verification.

Note, the carrier used to verify the address will be the one from the shipping type field in the current document.



Address Component	
Country	USA
Building/Floor/Room	Suite B
Address Name 2	
Address Name 3	
GLN	
Residential or Commercial	Commercial
Email Address	
Phone Number	

Update    Cancel    Address Verification

### Shipping Profile

As we saw earlier, you can establish different shipping profiles and assign them to the BP, Ship To, or Contact. If you have any of these shipping profile fields filled in on the BP Master Data, Freight Management will default it into this field for you. To determine which field to use it will first check the Ship To, then the Contact, and then the BP UDF.

If the system does not find anything in any of those fields, then the FM Default Shipping Profile we set earlier will be used.

If you want to manually choose a profile for this document, you can do so by entering the profile code into the field or clicking on the picker button to bring up a list of profiles. Even if something does default in, you still can use the list to choose a different profile for this one document if you like.



#	Code	Name	Bill Tran
1	1PTotal	1% Total	Shipper
2	5PTest		Shipper
3	850	850	Shipper
4	California	California	Shipper
5	Central America	Central America	Shipper
6	CFSOI	CFSOI	Shipper
7	Cost + 10	Cost Plus 10%	Receiver
8	DELETE	DELETE	Shipper
9	E+S	Ensurance + Shipping	Receiver
10	E+S Shipper	Ensurance + Shipping Shipper	Shipper
11	EP	Ensurance Package	Shipper
12	EP1PRec	Ensurance + 1% Receiver	Receiver
13	Freight Cost+10	Freight Cost+10%	Receiver
14	Freight No Insurance	Freight No Insurance	Receiver
15	Int. Freight	Int. Freight	Shipper
16	IW	IW	Shipper
17	IW3P	IW3P	Third Pa
18	IWA	IWA	Receiver

You also have the option of using a one-time “On-the-fly” profile. By clicking on the ... button to the right of the Shipping Profile field it will launch the Document Shipping Profile window. This allows you to make one-time changes to this profile that will only be utilized for this single Sales Order.

#	Additional Charge Code	Description
1	Shipment Cost	Shipment Cost
2	Copy From Sales Orde	Copy From Sales Order



That will open the Third-Party Address Window. Once in here you can fill in all the necessary fields (including the BP if you want this Third Party to only be available for this BP) and hit Add to save it to the address book. Note, double check that the Third-Party Zip Code matches the Zip Code the Carrier has on file for this Third-Party account. Also, make sure to use the 2-letter code for the Country as that is what the Carrier is expecting.

Once you are finished adding the record, it will automatically be entered into the field for you.

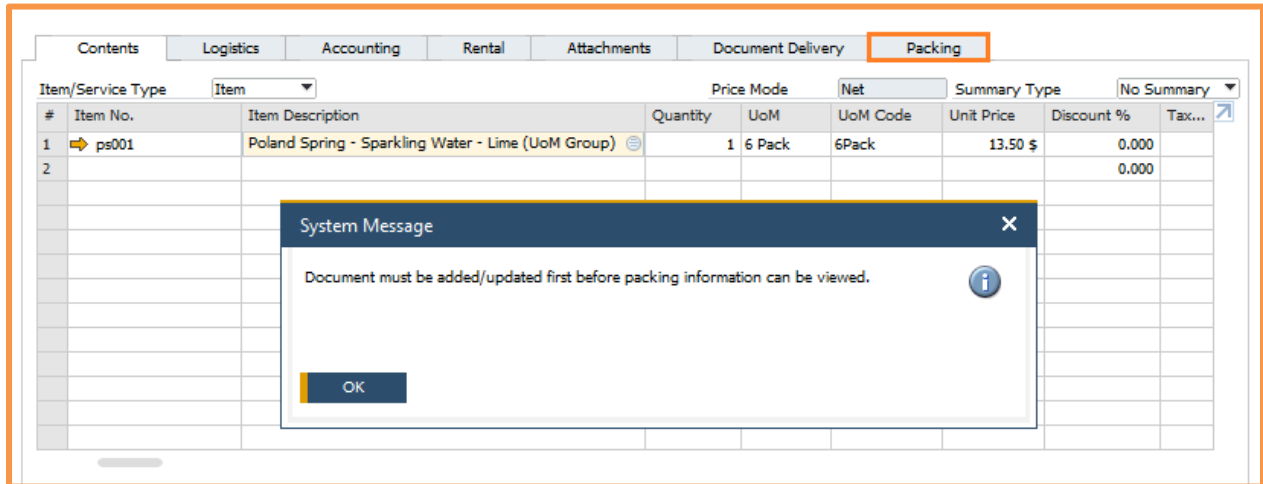
Third Party Address records can also be set up ahead of time and assigned to a BP, Ship To Address, or Contact Person. If this has already been done, then the assigned Third-Party Address record will be defaulted into the Sales Order for you.

You can also set up a one-time “On-the-fly” Third Party Address. By clicking on the ... button to the right of the Third-Party Address field it will launch the Third-Party Address Component window. This allows you to make one-time changes to this third-party address record that will only be utilized for this single Sales Order. Note, you can only use this option if your profile is set to Bill Third Party.

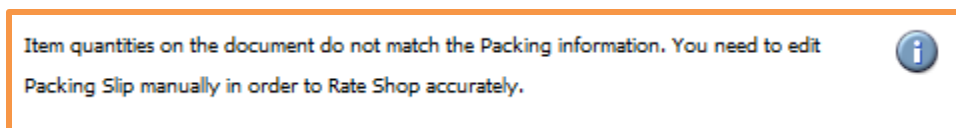
## Packing Tab

**Note, currently, the main reason to use the Packing Tab is to Rate Shop. If you are not going to be Rate Shopping, you may not use this tab very often.**

There is a new tab on the document screen labelled Packing, but it can only be accessed once the document is saved. If you try to click on it while you are in Add or Update mode, you will get an error message.



Note, after your first time clicking on the packing tab (when the system does the auto-packing based on the Item Master data setups), any time you click on the Packing tab again, Freight Management will compare the packed items to the items on the document. If it finds that the quantities do not match, it will let you know that you need to update your packing slip manually if you are going to Rate Shop accurately.



When you first click on the Packing tab, Freight Management will try to pack the items for you, based on quantity, UoM, and packaging settings from the Item Master Data we discussed earlier.

Once on the Packing tab you will see two sections: the packages grid on the left, and the action buttons on the right. Let us first take a quick look at the packages grid.

## Packages Grid

There are two view styles to this grid: the Package View and the Item View. Both views have the same exact fields in them and show you the items that have been packed. However, the Item View has the Item No. and Item Description columns first, whereas the Package View has the Package # and Package Type fields first.

Package No.	Package Type	Item No.	Item Description	Quantity	UoM Code	Items per Unit	Total Weight
▼ 1	▼ Box	→ ps001	Poland Spring - 6.000	6Pack	6.000	498.508Oz	
▼ 2	▼ Box	→ ps001	Poland Spring - 1.000	6Pack	6.000	97.808Oz	

Item No.	Item Description	Package No.	Package Type	Quantity	UoM Code	Items per Unit	Total Weight
▼ → ps001	▼ Poland Spring - Sparkling Water - Lim	1	Box	6.000	6Pack	6.000	498.508Oz
		2	Box	1.000	6Pack	6.000	97.808Oz

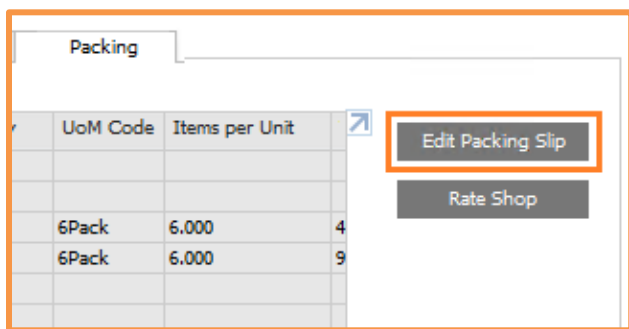
## Action Buttons

On the right side of the Packing tab there are two action buttons that work in conjunction with each other; the Edit Packing Slip button and the Rate Shop button.

### Edit Packing Slip

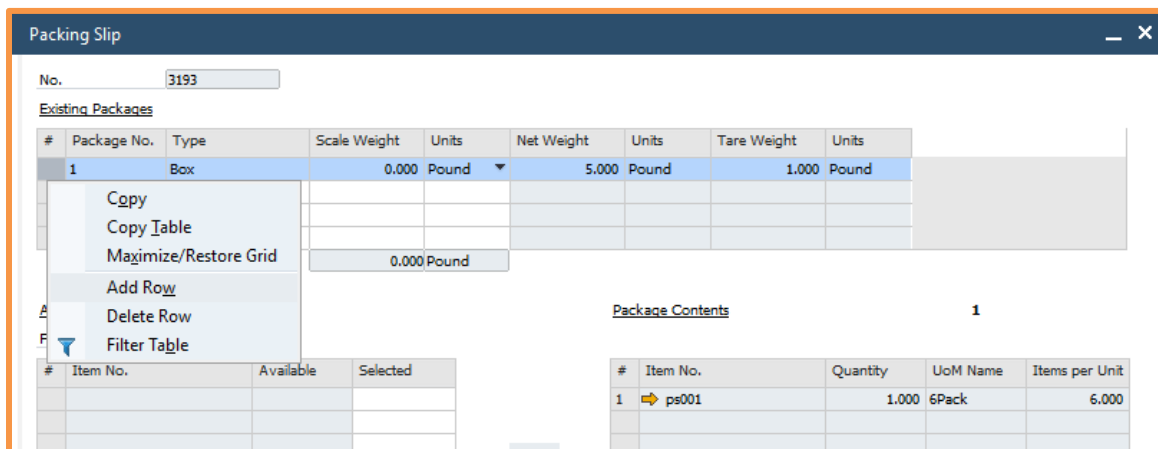
Before you can Rate Shop, you must make sure your packages are defined correctly, otherwise the Rate Shopping estimates will not be accurate.

As we mentioned, the system will try to create the packages automatically based on the Item Master Data. However, if you do not have that data set up, or you just need to make some changes to the auto-packing, you can click on the Edit Packing Slip button to do just that.



When the Packing Slip screen opens, you will see 3 areas: the Existing Packages, the Available Items, and the Package Contents. We will briefly go over these areas now, but we will go into much more detail later in the Packing Slip section of this document.

The Existing Packages section is where you will create your packages, enter the package types, and the weight of the packages. To add or delete a package, right click on the grid, and select Add Row or Delete Row.



To select the package type, click on the picker button in the field and make your selection from the pop-up window. The list of packages comes from your standard SAP package types.

Existing Packages							
#	Pkg No.	Type	☰	Scale Weight	Units	Net Weight	Units
1			⊖	2.000	Ounce ▾	5.000	Pound
2				3.000	Ounce ▾	5.000	Pound
3				4.000	Ounce ▾	5.000	Pound
3				9.000	Ounce		

The Scale Weight and Units fields are the first place the system will check for rate shopping. If nothing is entered into those fields, then it will use the weights from your Item Master Data. Note, if your items do not have weights defined in the Item Master Data then you must enter in a scale weight, otherwise you will not be able to rate shop.

Existing Packages							
#	Pkg No.	Type	☰	Scale Weight	Units	Net Weight	Units
1			⊖	2.000	Ounce ▾	5.000	Pound
2				3.000	Ounce ▾	5.000	Pound
3				4.000	Ounce ▾	5.000	Pound
3				9.000	Ounce		

The Available Items and Package Contents sections on the bottom show you all the items from your document with their available quantities to pack as well as the items that are already packed into your existing packages. You will use the grid to choose which items and quantities you want to pack and use the arrows to move them back and forth, ensuring you have each package set correctly.

Existing Packages										
#	Package No.	Type	☰	Scale Weight	Units	Net Weight	Units	Tare Weight	Units	Tracking Number
1				0.000	Ounce ▾	0.000	Ounce	0.000	Ounce	
2				0.000	Ounce ▾	0.000	Ounce	0.000	Ounce	
3				0.000	Ounce ▾	0.000	Ounce	0.000	Ounce	
3				0.000	Ounce					

Available Items				Package Contents				
#	Item No.	Available	Selected	#	Item No.	Quantity	UoM Name	Items per Unit
	B10000	3.00						
	Serialized	2.00						
	ps001	3.00	4					

**Existing Packages**

#	Package No.	Type	Scale Weight	Units	Net Weight	Units	Tare Weight	Units	Tracking Number
1			0.000	Ounce	10.000	Pound	0.000	Ounce	
2			0.000	Ounce	0.000	Ounce	0.000	Ounce	
3			0.000	Ounce	0.000	Ounce	0.000	Ounce	

**Available Items**

Find

#	Item No.	Available	Selected
➔	B10000	3.00	
➔	Serialized	2.00	
➔	ps001	1.00	

**Package Contents** 1

#	Item No.	Quantity	UoM Name	Items per Unit
1	➔ ps001	2,000	6Pack	6,000

When you have finished editing your packages you can hit Update to save them.

If you would like to clear all packages and start over, you can click on the Repack button below the Package Contents sections.

Note, if you edit your default packaging in a Sales Quote, when you copy your quote to your Sales Order, you will have to re-pack your items, but only if you want to Rate Shop again.

### Rate Shop

Now that the packages are all set, you can do your rate shopping.

The rate shopping feature allows you to view possible shipping charges for various carrier service levels. You can see all methods for a carrier and compare the rates for a specific shipment. This feature is particularly useful for companies where orders are placed while a customer is on the telephone, so that you can quote and compare estimated charges for the order and allow them to choose their shipping method.

When you click on the Rate Shop button, the system is going to communicate to your carriers and bring back information about your available shipping options.



Rate Shop
— □ ×

Select	Shipping Type	Carrier	Service Level	Base Charge	Total Charge	Pickup Date	Days To Delivery
<input type="checkbox"/>	UPS 3 Day Select	UPS	UPS Three-Day Select	43.50	47.85		3
<input type="checkbox"/>	UPS Next Day Air E	UPS	UPS Next Day Air Early	131.27	144.40		1
<input type="checkbox"/>		UPS	UPS Second Day Air A.M.	64.35	70.78		2
<input type="checkbox"/>	UPS Ground	UPS	UPS Ground	35.49	39.04		
<input type="checkbox"/>		UPS	UPS Next Day Air Saver	74.67	82.14		1
<input type="checkbox"/>	UPS Red	UPS	UPS Next Day Air	77.93	85.72		1
<input type="checkbox"/>		UPS	UPS Second Day Air	60.29	66.32		2
<input type="checkbox"/>		FEDEX	FedEx First Over Night	123.35	135.68		1
<input type="checkbox"/>	FedEx Priority Over	FEDEX	FedEx Priority Over Night	91.70	100.87		1
<input type="checkbox"/>	Fed Ex Std Overnig	FEDEX	FedEx Standard Over Night	86.67	95.34		1
<input type="checkbox"/>	Fed Ex Ground	FEDEX	FedEx Ground	36.77	40.45		1
<input type="checkbox"/>		FEDEX	FedEx 2 Freight AM	68.92	75.81		2
<input type="checkbox"/>	FedEx 2 Days	FEDEX	FedEx 2 Day	65.41	71.95		2
<input type="checkbox"/>	FedEx Express Saver	FEDEX	FedEx Express Saver	60.18	66.20		3
<input type="checkbox"/>		Endicia	Priority Mail Express	26.45	29.10		2
<input type="checkbox"/>		Endicia	Library Mail	5.40	5.94		8
<input type="checkbox"/>	USPS Media (END)	Endicia	Media Mail	5.69	6.26		2
<input type="checkbox"/>	USPS Parcel Select	Endicia	Parcel Select	8.06	8.87		2
<input type="checkbox"/>		Endicia	Priority Mail	8.31	9.14		1

Package Information

Package 1: 6 lbs , 72(L) x 6(W) x 8(H) IN

Select

Quote

Cancel

If you want to change the shipping type on this document to one of the options in the Rate Shop screen, check the box for that line and click on the Select button on the bottom.

If you want to change the shipping type on this document to one of the options in the Rate Shop screen, AND you want to also add the selected Total Charge to the document, check the box for that line and click on the Quote button on the bottom. When adding the charge, it will use the Rate Shop Expense Code that we assigned to the selected shipping type.

Note, the Total Charge column will be calculated based on the additional charges for the Shipping Profile selected excluding any “Copy From Sales Order” ones.

Contents	Logistics	Accounting	Rental	Attachments	Document Delivery	Packing												
Ship To Port Jeff	640 Belle Terre Rd. Port Jefferson NY 11777 USA					<input type="checkbox"/> Print Picking Sheet Language English												
Bill To Bill To 2	222 22nd Ave 2nd City 22222 USA					<input type="checkbox"/> Procure Non Drop-Ship Items <input checked="" type="checkbox"/> Procure Drop-Ship Items <input checked="" type="checkbox"/> Approved <input checked="" type="checkbox"/> Allow Partial Delivery												
Shipping Type	UPS 3 Day Select					BP Channel Contact Pick and Pack Remarks BP Channel Name												
Shipping Profile	IV																	
3rd Party Address																		
Sales Employee Owner	Ian O'Walsh O'Walsh Emp, Ian					<table border="1"> <tr> <td>Total Before Discount</td> <td>13.50 \$</td> </tr> <tr> <td>Discount</td> <td>%</td> </tr> <tr> <td>Freight</td> <td>47.85 \$</td> </tr> <tr> <td><input type="checkbox"/> Rounding</td> <td>0.00 \$</td> </tr> <tr> <td>Tax</td> <td></td> </tr> <tr> <td>Total</td> <td>61.35 \$</td> </tr> </table>	Total Before Discount	13.50 \$	Discount	%	Freight	47.85 \$	<input type="checkbox"/> Rounding	0.00 \$	Tax		Total	61.35 \$
Total Before Discount	13.50 \$																	
Discount	%																	
Freight	47.85 \$																	
<input type="checkbox"/> Rounding	0.00 \$																	
Tax																		
Total	61.35 \$																	
Remarks																		

## Pick Pack Manager – Sales Orders and AR Reserve Invoices

To be able to pack and ship with Freight Management you must first use the standard SAP Pick Pack Manager. Once your SO/RI Pick Lists are created and your items are picked, you have 2 options for creating your packing slip.

### Pick List

The first is to use the Packing button on the bottom of the pick list screen. This will create a packing slip document (or documents) for all the picked items/qtys in this pick list only. You cannot select multiple pick lists and you cannot choose only some of the rows using this method.

It will combine rows with the same BP Code, Ship To Address Description, Ship From Address (from your Shipping Profile) and Shipping Type into a packing slip, so depending on the data in your pick list you may end up with a single packing slip or multiples.

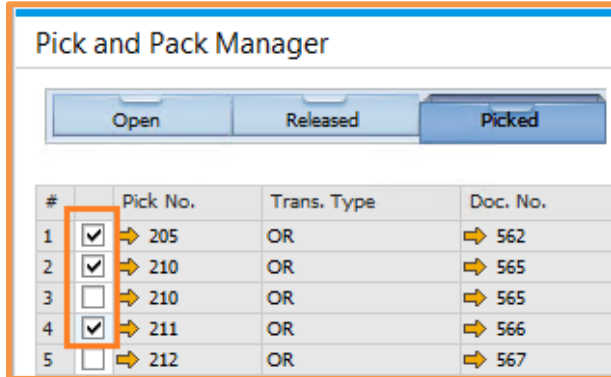
The screenshot shows the SAP Pick List interface. At the top, there are input fields for Pick Number (3095), Pick Date (03/12/2021), User (Christine Cuadra), Picker (Christine Cuadra), and Status (Closed). A Remarks field is also present. Below this is a table with the following data:

#	Trans. Type	Doc. No.	BP Code	Delivery/Due Date	Number	Description	U.
1	OR	3192	Paris	03/12/2021	VALFB12	Varsoviene Caja Alfajores Blanco 12 Unidades	BX1
2	OR	3192	Paris	03/12/2021	VALFB12	Varsoviene Caja Alfajores Blanco 12 Unidades	BX1
3	OR	3192	Paris	03/12/2021	VALFMC12	Varsoviene Caja Alfajores Milk Chocolate 12 Unidades	BX1
4	OR	3192	Paris	03/12/2021	VALFMC12	Varsoviene Caja Alfajores Milk Chocolate 12 Unidades	BX1

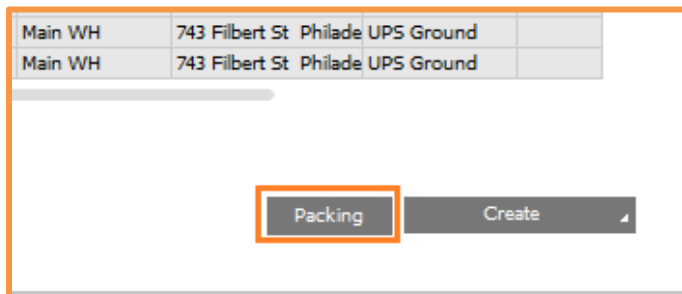
At the bottom of the screen, there is a toolbar with buttons: OK, Cancel, **Packing** (highlighted with an orange box), Create, Pick All, and Clear All.

## Picked Drawer

The second will be to go to the Picked drawer and check the boxes of the line items you want to pack for your shipment.



Once you have selected your lines, click the Packing button on the bottom right of the screen.



Just like with the pick list option, you can combine lines across multiple documents as long as they share the same values for the following:

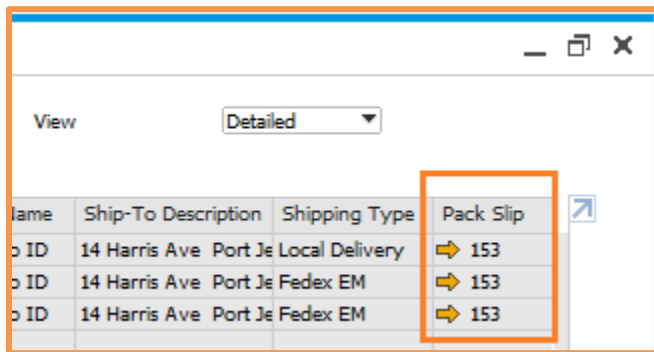
- BP Code
- Ship To Address Description
- Ship From Address (from your Shipping Profile)
- Shipping Type

Whse	Open Quantity	BP Code	BP Name	Ship-To Name	Ship-To Description	Shipping Type	Pack Slip
02	5.000	C20000	Centerport Components	Def ShipTo ID	Def ShipTo Street/PO Box Def ShipTo Block Def ShipTo City NY 12208-3479 USA	Fedex EM	26
02	5.000	C20000	Centerport Components	Def ShipTo ID	Def ShipTo Street/PO Box Def ShipTo Block Def ShipTo City NY 12208-3479 USA	Fedex EM	26
02	3.000	C20000	Centerport Components	Def ShipTo ID	Def ShipTo Street/PO Box Def ShipTo Block Def ShipTo City NY 12208-3479 USA	Fedex EM	
02	2.000	C20000	Centerport Components	Def ShipTo ID	Def ShipTo Street/PO Box Def ShipTo Block Def ShipTo City NY 12208-3479 USA	Fedex EM	
02	3.000	C20000	Centerport Components	Def ShipTo ID	Def ShipTo Street/PO Box Def ShipTo Block Def ShipTo City NY 12208-3479 USA	Fedex EM	

If the data in all those fields is not the same, the system will let you know.

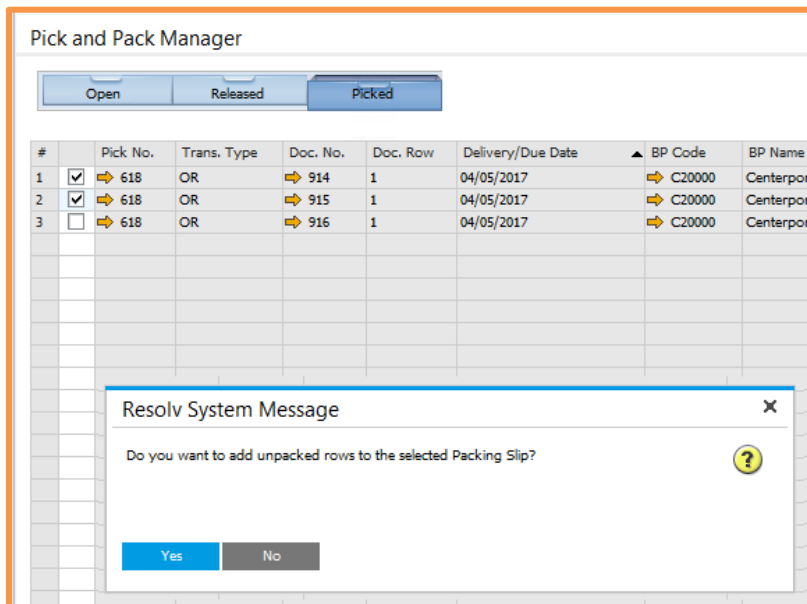


You will see that back on the Pick Pack Manager there is a Pack Slip column, which will have your Packing Slip number and a gold arrow for drilling into the Packing Slip screen.



There is also a stand-alone Packing Slip screen that you can get to from the Freight Management menu, but we will look at that later on.

Note, you can add additional rows from the Picked Drawer to an existing open packing slip if they have the same matching criteria, we mentioned above and are not associated to another packing slip already.



## Packing Slip

Once you are inside the Packing Slip screen, you will see the Packing Slip number and Customer on the top left. You will also see Status, Delivery No., and Invoice No. on the top right. These fields will be discussed later in the Stand-alone Packing Slip section.

Inside the Packing Slip, there are three tabs: Logistics, Packages and Additional Charges. We will first look at the Logistics Tab.

### Logistics Tab

The logistics tab contains fields for the shipment such as addresses and shipping options. These fields will all default in for you based on things like your Shipping Profile or Sales Order data, however you may change any of the fields in this screen if you need to before shipping.

**Packing Slip**

No.  Status   
 Customer   Delivery No.   
 Invoice No.

Logistics Packages Additional Charges

Ship To Address

Name   
 Address Line 1   
 Address Line 2   
 Address Line 3   
 City / State    
 Zip Code   
 Country   
 Contact Name   
 Telephone   
 Email Address   
 Residential/Commercial

Ship From Address

Name   
 Address Line 1   
 Address Line 2   
 Address Line 3   
 City / State    
 Zip Code   
 Country   
 Contact Name   
 Telephone   
 Email Address

Shipment Options

Shipping Type   
 Carrier   
 Service Level   
 Bill Transportation To   
 Bill Account #1   
 Bill Duty and Tax To   
 Bill Account #2

Split Duty and Tax  
 Saturday Delivery Allowed  
 Email Notification  
 Signature Required  
 Adult Signature  
 COD Shipment  
 COD Secured  
 Use Declared Value

*Ship To Address*

<b><i>Name</i></b>	The Address Name 2 field from the Sales Order Ship To
<b><i>Address Line 1</i></b>	The Street/PO Box field from the Sales Order Ship To
<b><i>Address Line 2</i></b>	The Block field from the Sales Order Ship To
<b><i>Address Line 3</i></b>	The Street No. field from the Sales Order Ship To
<b><i>City / State, Zip Code, and Country</i></b>	The City, State, Zip Code, and Country fields from the Sales Order Ship To
<b><i>Contact Name</i></b>	The Address Name 3 field from the Sales Order Ship To
<b><i>Telephone</i></b>	The Telephone field is set based on your “Set Attention To” option in FM Config.
<b><i>Email Address</i></b>	The Email Address field from the Sales Order Ship To
<b><i>Residential/Commercial</i></b>	This comes from the “Residential or Commercial” field (on the BP Master Data Addresses tab) for the Ship To Code from the Sales Order.



### *Ship From Address*

As we saw earlier, the Shipping Profile has a field called “Ship From Address Source”. When the packing slip is created, it will use that field to determine what Ship From address to use. Note, the ship from options of Warehouse and Branch do not have a ship to name, phone number, or email address fields. So, in those cases they will be taken from the SAP company details. Also, the option of Customer uses the BP’s default Bill To Address as the Ship From.

### *Shipment Options*

- |                                      |   |
|--------------------------------------|---|
| <b><i>Shipping Type</i></b>          | This includes the carrier and service level. Depending on your FM setting for Shipping Type Handling, it can be pulled from the Logistics tab or the individual rows of the Sales Order.  |
| <b><i>Bill Transportation To</i></b> | Indicates how the freight charges will be billed by the carrier. This will come from the Shipping Profile selected on the Sales Order (or the default profile if the SO did not have one) <ul style="list-style-type: none"> <li>• Shipper – the carrier bills the shipping company</li> <li>• Receiver – the carrier bills the customer who placed the order (will depend on your FM Configuration setting for “Receiver Account No. Priority”)</li> <li>• Third Party – the carrier bills a different company based on the default third party settings in your BP</li> </ul> |
| <b><i>Bill Account #1</i></b>        | The account number that will be billed for the shipping charges. This is based on the Bill Transportation To setting and the FM Configuration setting for “Receiver Account No. Priority”   |
| <b><i>Bill Duty and Tax To</i></b>   | The default type of billing for duty and taxes. This will come from the Shipping Profile selected on the Sales Order (or the default profile if the SO did not have one) <ul style="list-style-type: none"> <li>• Shipper – the carrier bills the shipping company</li> <li>• Receiver – the carrier bills the customer who placed the order (will depend on your FM Configuration setting for “Receiver Account No. Priority”)</li> <li>• Third Party – a different company based on the default third party settings in your BP</li> </ul>                                    |
| <b><i>Bill Account #2</i></b>        | The account number that will be billed for the duty and taxes. This is based on the Bill Duty and Taxes To setting and the FM Configuration setting for “Receiver Account No. Priority”   |
| <b><i>Checkboxes</i></b>             | See descriptions of these checkboxes in the Shipping Profile setup section. They may be changed as needed for each shipment.  |

## Packages Tab

Next, we will look at the Packages Tab. On this tab, you will see several sections and buttons; we will start with the package heading information at the top of the screen.

### Existing Packages

In this area, we will create our actual packages. To add a new package, right click on the grid, and select Add Row.

**Packing Slip**

No.

Customer  Centerport Components

Logistics Packages

Existing Packages

#	Pkg No.	Type	Scale Weight	Units	Net Weight	Units
1			0.000	Ounce	0.000	Ounce
			0.000	Ounce		

- Copy
- Copy Table
- Maximize/Restore Grid
- Cancel
- Close
- Add Row**
- Delete Row
- Filter Table

Package Con

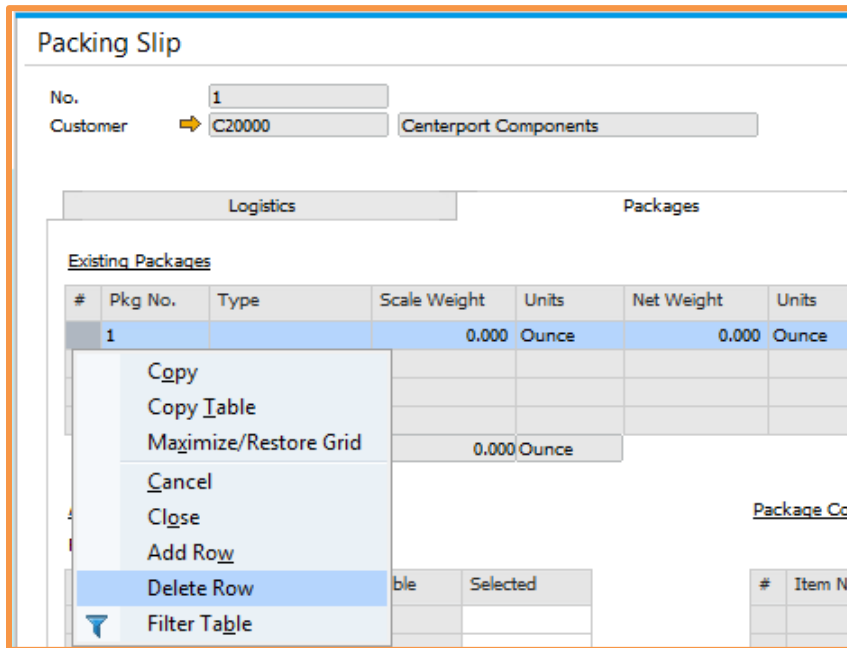
# Item No

Logistics Packages Additional Charges

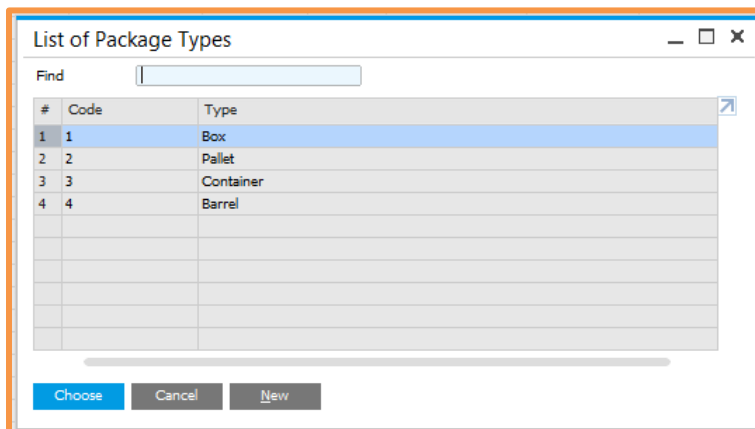
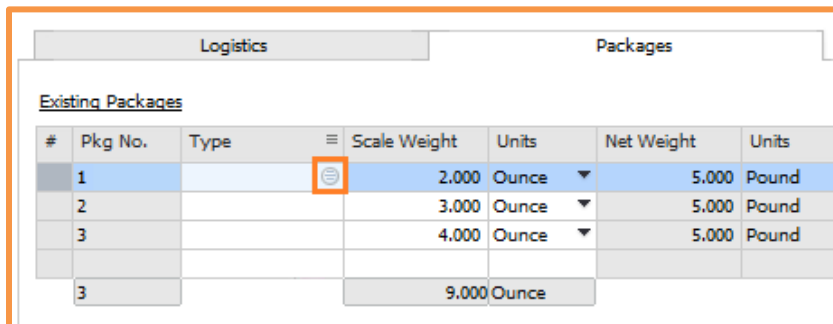
Existing Packages

#	Pkg No.	Type	Scale Weight	Units	Net Weight	Units	Tare Weight	Units	Dclr Value	Tracking Number
1			0.000	Ounce	15.000	Pound	0.000	Ounce	19.50	
1			0.000	Ounce						

If you want to remove a package, right click on the row of the package, and select Delete Row.



To select the package type, click on the picker button and make your selection from the pop-up window. The list of packages comes from your standard SAP package types.



The Scale Weight and Units fields are the ones that will be used by the carrier for shipment. After you have selected the items for your package(s) on the bottom part of the screen (which we will see in a little bit) you will need to enter the actual package weight from your scale into these fields. Note, if you enter in the scale weight before you assign your items to the packages, the scale weight is zeroed out and will need to be re-entered.

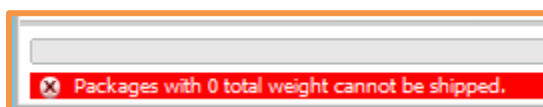
#	Pkg No.	Type	Scale Weight	Units	Net Weight	Units
1			2.000	Ounce	5.000	Pound
2			3.000	Ounce	5.000	Pound
3			4.000	Ounce	5.000	Pound
			9.000	Ounce		

If you have the Scale Integration enabled, you will see a button here that says Read Scale. To use it, highlight the package you want to weigh, put the item on the scale, and click the Read Scale button.

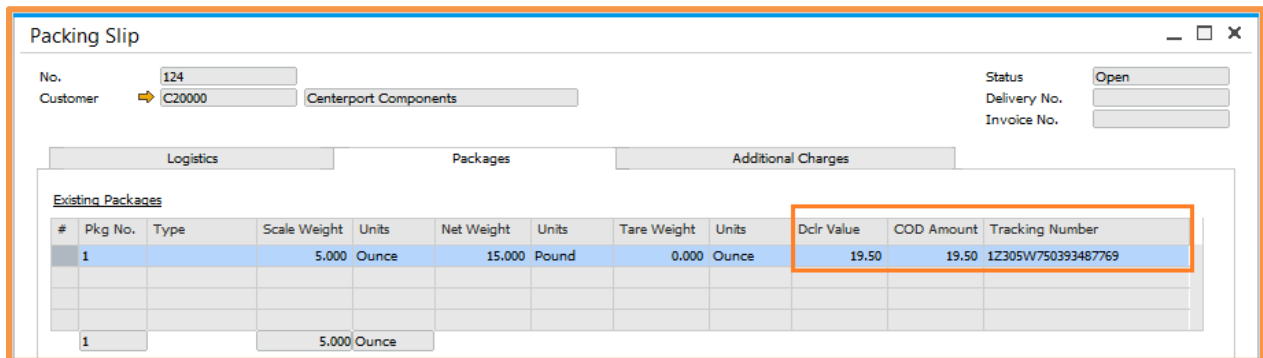
#	Pkg No.	Type	Scale Weight	Units	Net Weight	Units
1			0.000	Ounce	0.000	Ounce

You will also see a few other weight fields that you cannot edit. These are the item weights and tare weights based on the data in your SAP Item Master Data and Package Type Setups and are only displays. You can use them to help determine what scale weight to enter, but you still must always enter in a scale weight to ship your packages.

If you do not enter in a weight, it will not allow you to ship.



There are a few more fields here on the grid; Declared Value, COD Amount, and Tracking Number.



The screenshot shows a 'Packing Slip' window with a header section and a table. The header includes fields for 'No.' (124), 'Customer' (C20000), 'Centerport Components', 'Status' (Open), 'Delivery No.', and 'Invoice No.'. Below the header are tabs for 'Logistics', 'Packages', and 'Additional Charges'. The 'Existing Packages' table is highlighted with an orange border and contains the following data:

#	Pkg No.	Type	Scale Weight	Units	Net Weight	Units	Tare Weight	Units	Dclr Value	COD Amount	Tracking Number
1			5.000	Ounce	15.000	Pound	0.000	Ounce	19.50	19.50	1Z305V750393487769

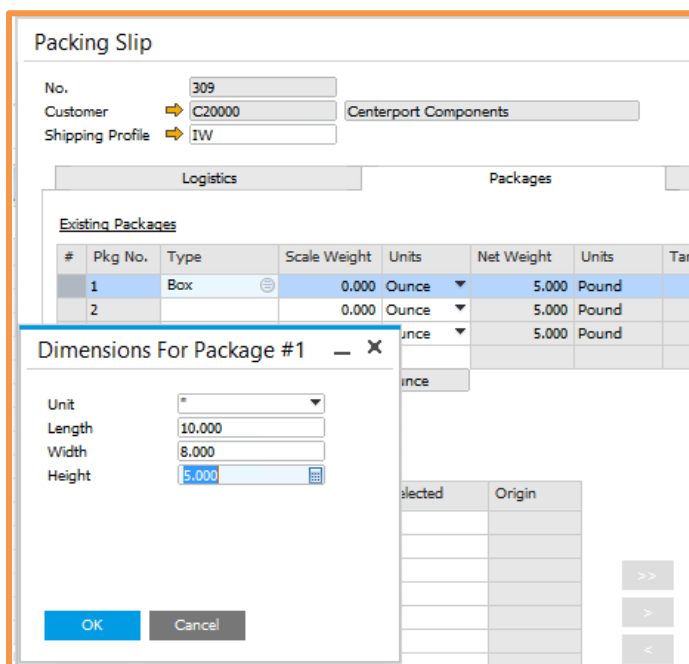
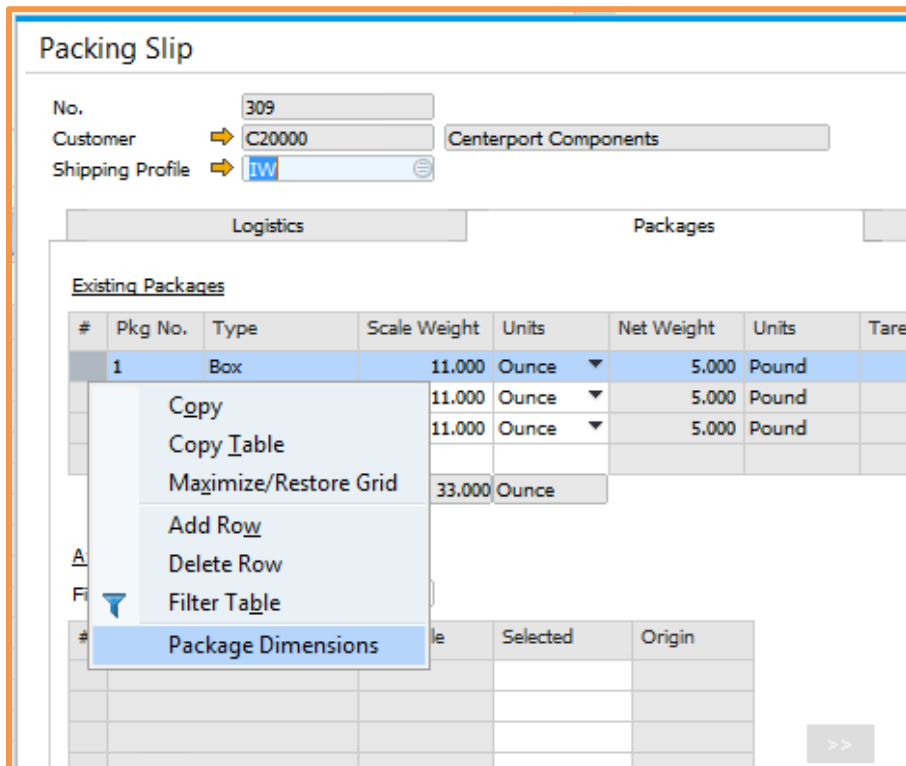
The Declared Value field will be calculated from the value of the items in each package, based on the Sales Orders they came from. If you want to override this value and send something else to the carrier you can edit this field before you ship.

The COD Amount field will also be calculated from the value of the items in each package but will include other things like tax and additional charges where applicable.

The tracking number field will be automatically filled in by the carrier after you ship your packages. If you are not shipping your packing slip with a carrier, the tracking number fields are editable so you may enter in your own manually if you so choose.

One more thing you can do in this section is enter in package dimensions on the fly. If you chose the option in FM Configuration to send the package dimensions, then it will use your package type dimensions to send to the carrier. However, there may instances when you are using a one-off package and you don't want to add that package type to SAP. This is where the on-the-fly dimensions can come into play.

To open the window, right click on the package you want to enter them for and choose the Package Dimensions option.



Note, you can enter in dimensions on the fly even if you have a package type selected. If you do this, the on-the-fly dimensions will be used.

### Available Items

This section on the bottom left of the Packing Slip shows you all the items from your selected pick list lines and their available quantities for packing. You will use the grid to choose which items and quantities you want to pack in each package, and then move them over to the Package Contents section on the right.

To do this, you first will highlight the package row that you are packing on the top. The Package Contents section will show you which package you are currently working on.

The screenshot shows the 'Existing Packages' table with the following data:

#	Package No.	Type	Scale Weight	Units	Net Weight	Units	Tare Weight	Units	Tracking Number
1			0.000	Ounce	0.000	Ounce	0.000	Ounce	
2			0.000	Ounce	0.000	Ounce	0.000	Ounce	
3			0.000	Ounce	0.000	Ounce	0.000	Ounce	
3			0.000	Ounce					


Below the table, the 'Available Items' section shows a list of items:

#	Item No.	Available	Selected
1	B10000	3.00	
2	Serialized	2.00	
3	ps001	3.00	

The 'Package Contents' section shows a table with the following data:

#	Item No.	Quantity	UoM Name	Items per Unit
1				

Now that you have your package row highlighted, click into the Selected column of the first item you want to pack and enter the quantity that you want to pack in the current package.

Once you do that the  button will be enabled, and you can click on it to move your item over to the Package Contents section.

The screenshot shows the 'Available Items' table with the following data:

#	Item No.	Available	Selected
1	B10000	3.00	
2	Serialized	2.00	
3	ps001	3.00	4

The 'Package Contents' section shows a table with the following data:

#	Item No.	Quantity	UoM Name	Items per Unit
1				

**Existing Packages**

#	Package No.	Type	Scale Weight	Units	Net Weight	Units	Tare Weight	Units	Tracking Number
1			0.000	Ounce	10.000	Pound	0.000	Ounce	
2			0.000	Ounce	0.000	Ounce	0.000	Ounce	
3			0.000	Ounce	0.000	Ounce	0.000	Ounce	
3			0.000	Ounce					

**Available Items**

Find

#	Item No.	Available	Selected
	B10000	3.00	
	Serialized	2.00	
	ps001	1.00	

**Package Contents** 1

#	Item No.	Quantity	UoM Name	Items per Unit
1	ps001	2.000	6Pack	6.000

Note, in addition to the single arrow buttons that you can use to pack/un-pack one item at a time, there are also double arrows. The double arrows going to the right will pack all the items from the Available Items grid into the package you currently have selected. The double arrows going to the left, will un-pack everything from the Package Contents grid for the package you currently have selected.

As you pack the items, you will notice the Available column updates to show the quantity that is remaining to pack for each.

**Existing Packages**

#	Package No.	Type	Scale Weight	Units	Net Weight	Units	Tare Weight	Units	Tracking Number
1			0.000	Ounce	10.000	Pound	0.000	Ounce	
2			0.000	Ounce	0.000	Ounce	0.000	Ounce	
3			0.000	Ounce	0.000	Ounce	0.000	Ounce	
3			0.000	Ounce					

**Available Items**

Find

#	Item No.	Available	Selected
	B10000	3.00	
	Serialized	2.00	
	ps001	1.00	

**Package Contents** 1

#	Item No.	Quantity	UoM Name	Items per Unit
1	ps001	2.000	6Pack	6.000

When you select a Batch or Serial managed item and move it over to the Package Contents section, another window will open to allow you to choose which Batch or Serial number is being packed into the current package (Note if you move the full quantity of a Batch or Serial managed item over it will select all of the serial or batch numbers for you and not pop up the selection window).



### Batch Managed

When the Batch Number Selection screen pops up you will see there are three sections on the screen. The top has the item you are packing, along with the Total Needed and Total Selected for the current package. The bottom left section shows you the batches available for packing. And the bottom right section shows the batches you have selected for the current package.

**Batch Number Selection for Pack Slip #153**
\_ X

Item No.	Item Description	Whse Code	Total Needed	Total Selected	Total Batches
➔ B10000	Book 001 (Batches) issue by batch	➔ 02	1		0

**Available Batches**

Find

#	Batch	Available Qty	Selected Qty	System Number
1	➔ IW001	957		77
2	➔ c20000	1		78
3	➔ IW002	17		79
4	➔ IW003	20		80
5	➔ IW004	9		81
6	➔ PC001	1		84
7	➔ IW040	1		85
8	➔ BXXX001	9		87
9	➔ 66	75		89
10	➔ IW999	70		90
11	➔ DATE001	2		91
12	➔ 465352	100		92

>


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**Selected Batches**

#	Batch	Selected Qty	System Number

Update
Cancel

Note, the Available Batches section may differ depending on your items settings (release by bin vs. release by batch).

To begin click into the Selected Qty column of the first batch you want to pack in the current package and enter in the quantity of the selected batch. That will enable the  button for you to click on and move your batch over to the Selected Batches section.

Batch Number Selection for Pack Slip #153

Item No.	Item Description	Whse Code	Total Needed	Total Selected	Total Batches
B10000	Book 001 (Batches) issue by batch	02	1		0


Available Batches

Find


#	Batch	Available Qty	Selected Qty	System Number
1	IW001	957	1	77
2	c20000	1		78
3	IW002	17		79
4	IW003	20		80
5	IW004	9		81
6	PC001	1		84
7	IW040	1		85
8	BXXX001	9		87
9	66	75		89
10	IW999	70		90
11	DATE001	2		91
12	465352	100		92

Selected Batches

#	Batch	Selected Qty	System Number
---	-------	--------------	---------------



Update Cancel

If you need to remove a batch from the package, you can click on it in the Selected Batches Section, which will enable the  button for you. Click on it to move the batch back to the Available Batches section.

Batch Number Selection for Pack Slip #153

Item No.	Item Description	Whse Code	Total Needed	Total Selected	Total Batches
B10000	Book 001 (Batches) issue by batch	02	1	1	1


Available Batches

Find

#	Batch	Available Qty	Selected Qty	System Number
1	IW001	956		77
2	c20000	1		78
3	IW002	17		79
4	IW003	20		80
5	IW004	9		81
6	PC001	1		84
7	IW040	1		85
8	BXXX001	9		87
9	66	75		89
10	IW999	70		90
11	DATE001	2		91
12	465352	100		92

Selected Batches

#	Batch	Selected Qty	System Number
1	IW001	1.000	77



Update Cancel

As you move the batches back and forth, the Available Qty column on the Available Batches section will be updated, as well as the Total Needed, Total Selected, and Total Batches column on the top section.

Batch Number Selection for Pack Slip #153

Item No.	Item Description	Whse Code	Total Needed	Total Selected	Total Batches
➔ B10000	Book 001 (Batches) issue by batch	➔ 02	1	1	1

Available Batches

Find

#	Batch	Available Qty	Selected Qty	System Number
1	➔ IW001	956		77
2	➔ c20000	1		78
3	➔ IW002	17		79
4	➔ IW003	20		80
5	➔ IW004	9		81
6	➔ PC001	1		84
7	➔ IW040	1		85
8	➔ BXXX001	9		87
9	➔ 66	75		89
10	➔ IW999	70		90
11	➔ DATE001	2		91
12	➔ 465352	100		92

Selected Batches

#	Batch	Selected Qty	System Number
1	➔ IW001	1.000	77

> <

When you are all done, you can hit Update to save the batches for this package. Then hit OK to close the Batch Number Selection window and bring you back to the Packing Slip window.

11	➔ DATE001	2	91
12	➔ 465352	100	92

11	➔ DATE001	2	91
12	➔ 465352	100	92

## Serial Managed

When the Serial Number Selection screen pops up you will see there are three sections on the screen. The top has the item you are packing, along with the Total Needed and Total Selected for the current package. The bottom left section shows you the serial numbers available for packing. And the bottom right section shows the serial numbers you have selected for the current package.

Serial Number Selection for Pack Slip #153
— ✕

Item No.	Item Description	Whse Code	Total Needed	Total Selected
➔ Serialized	Serialized Item issue by serial	➔ 02	1	1

Available Serial Numbers

Find

#	Serial Number	System Number
1	➔ B10231380559	104
2	➔ SER003	3
3	➔ SER004	4
4	➔ SER008	8
5	➔ SER011	11
6	➔ SER013	13
7	➔ SER014	14
8	➔ SER015	15
9	➔ SER022	22
10	➔ SER027	27
11	➔ SER028	28
12	➔ SER029	29

Selected Serial Numbers


#	Serial Number	System Number

>
<

Update
Cancel

Note, the Available Serial Numbers section may differ depending on your items settings (release by bin vs. release by serial).

To begin click on the row of the first serial number you want to pack in the current package.

Once your row is selected the  button will be enabled. Click it to move your serial number over to the Selected Serial Numbers section.

**Serial Number Selection for Pack Slip #153**

Item No.	Item Description	Whse Code	Total Needed	Total Selected
Serialized	Serialized Item issue by serial	02	1	1

**Available Serial Numbers**


Find:

#	Serial Number	System Number
75	SER095	95
76	SER096	96
77	SER097	97
78	SER098	98
79	SER099	99
80	SER100	100
81	SER990	103
82	SERDTL001	109
83	SERDTL002	110
84	c20000	101
85	SER024	24
86	SER023	23

**Selected Serial Numbers**

#	Serial Number	System Number
---	---------------	---------------

Buttons: Update, Cancel

If you need to remove a serial number from the package, you can click on it in the Selected Serial Numbers section, which will enable the  button for you. Click on it to move the serial number back to the Available Serial Numbers section.

**Batch Number Selection for Pack Slip #153**

Item No.	Item Description	Whse Code	Total Needed	Total Selected	Total Batches
B10000	Book 001 (Batches) issue by batch	02	1	1	1

**Available Batches**

Find:

#	Batch	Available Qty	Selected Qty	System Number
1	IW001	956		77
2	c20000	1		78
3	IW002	17		79
4	IW003	20		80
5	IW004	9		81
6	PC001	1		84
7	IW040	1		85
8	BXXX001	9		87
9	66	75		89
10	IW999	70		90
11	DATE001	2		91
12	465352	100		92

**Selected Batches**

#	Batch	Selected Qty	System Number
1	IW001	1,000	77

Buttons: Update, Cancel

As you move the serial numbers back and forth, the Total Needed and Total Selected on the top section will update.

Serial Number Selection for Pack Slip #153

Item No.	Item Description	Whse Code	Total Needed	Total Selected
Serialized	Serialized Item issue by serial	02	1	1

Available Serial Numbers

Find

#	Serial Number	System Number
75	SER095	95
76	SER096	96
77	SER097	97
78	SER098	98
79	SER099	99
80	SER100	100
81	SER990	103
82	SERDTL001	109
83	SERDTL002	110
84	r20000	101
85	SER024	24
86	SER023	23

Selected Serial Numbers

#	Serial Number	System Number

> <

Update Cancel

When you are all done, you can hit Update to save the serial numbers for this package. Then hit OK to close the Serial Number Selection window and bring you back to the Packing Slip window.

11	DATE001	2	91
12	465352	100	92

Update Cancel


11	DATE001	2	91
12	465352	100	92

OK Cancel

## Package Contents

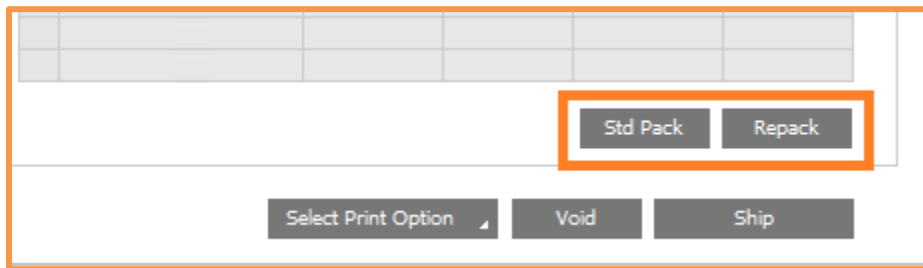
The Package Contents section will show you all the items you have in the package you are working on. It will also show you the quantities of those items, their UoMs and their Items per Unit.

The screenshot shows the 'Existing Packages' table with three rows. The first row is selected. Below it is the 'Available Items' table with three rows. To the right is the 'Package Contents' table for package 1, showing three items: ps001 (2.000 6Pack, 6.000 items per unit), B10000 (1.000 Each, 1.000 items per unit), and Serialized (1.000 Each, 1.000 items per unit). Navigation arrows are visible between the Available Items and Package Contents sections.

If you need to remove an item from a package, just highlight the package number on the Existing Packages grid, then select the item row in the Package Contents section. That will enable the  button for you. Click on it to move the items and quantities back to the Available Items section.

This screenshot is similar to the previous one, but the first row in the 'Package Contents' table (ps001) is highlighted with a blue background. The left arrow button between the 'Available Items' and 'Package Contents' sections is also highlighted with a blue background, indicating it is now active for moving items back to the available list.

On the bottom right of this section you will see 2 buttons; one labeled Std Pack, and one labeled Repack.



Clicking the Std Pack button will use the standard SAP fields for Qty Per Package, Default Package Type, and Item Per Sales Unit to determine how many packages you need, how many of each item will go into each package, and then pack it up for you.

The Repack option will clear all package contents, and default you back to just Package 1. You will notice though that after it clears the packaging, it goes into Update mode. That means that you still have to hit Update to save it. That way if you hit Repack by accident, you can just hit Cancel to leave the screen and your packing slip will be the same as it was the last time you saved it.





You can also enter in your own shipping cost manually if you are shipping with a non-carrier. That way the shipping cost can be passed to the delivery document like regular carrier shipments do.

Packing Slip \_ □ ✕

No.  Status

Customer   Delivery No.

Shipping Profile  Invoice No.

Logistics		Packages		Additional Charges					
#	Additional Charge Code	Basis Option	Basis Amount	Calc Option	Percent	Amount	Min Charge	Max Charge	Charge Amt
1	Shipment Cost	Shipment Cost	11.12	Basis Only	0.000	0.00	0.00	0.00	11.12
3		Shipment Cost	0.00	Basis Only	0.000	0.00	0.00	0.00	0.00

Note, this will only work if the additional charge has a Basis Option of Shipment Cost (if it is another option, it will let you fill in the field, but it will just override it with the original amount that was in there after you hit update)

## Footer Buttons

In the footer section of the Packing Slip, there are several function buttons that can be used during packing and shipping.

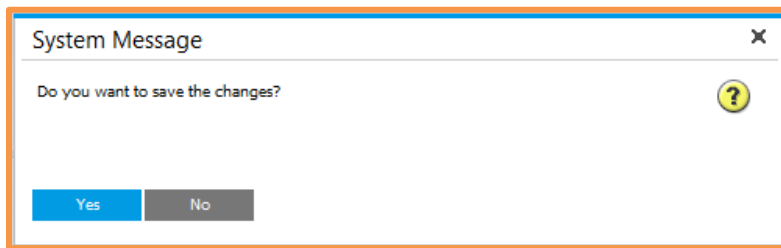
### *Update/OK*

This button will change depending on the state of your Packing Slip. If you have made changes to it, but have not saved them, you can hit Update to do so.

If you are just looking at your packing slip and have not made any changes, you can hit OK to leave the screen.

### *Cancel*

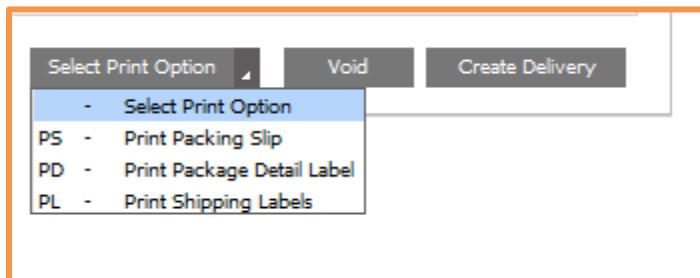
If you have made changes to it, and hit Cancel, it will ask you if you want to save you changes; say Yes to save them, or No to leave the screen and lose any un-saved changes.



If you are just looking at your packing slip and have not made any changes, you can also hit Cancel to leave the screen.

### *Select Print Option*

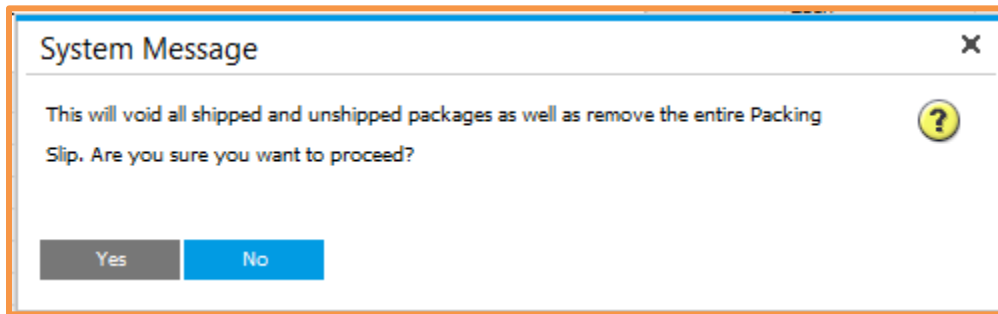
You can use this drop-down option to manually print your FM reports or labels. There are settings in Freight Management to have them print automatically as well, but you could still use this option to re-print them manually if you choose.



### *Void*

The function of the Void button changes depending on the status of your Packing Slip. If you have not shipped your packages yet, then hitting the Void button will un-pack everything and cancel the entire packing slip.

If you have shipped your packages (but have not created your delivery or invoice yet) then it will not only un-pack everything and remove the entire packing slip, but it will also transmit a void request to the carrier to void the packages and tracking numbers associated with them.



### *Ship/Create Delivery/Create Invoice*

This is another button that will change depending on the status of your Packing Slip.

If you have not yet shipped your packages, then the button will say Ship, and clicking on it will send your package data to the carrier. If the shipment is successful, it will write back your tracking numbers and create your labels. We will discuss this in more detail later in this document.

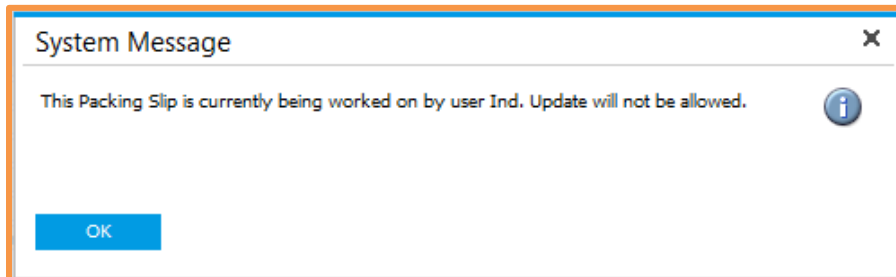
At this point, if you do not have FM set to create deliveries or invoices, the button will change to say Create Delivery so you can have Freight Management create your delivery when you are ready.

If you have FM set to only create deliveries or to create deliveries AND invoices, and you have shipped your packages, but the delivery failed, then the button will change to say Create Delivery. When you have resolved the issue, you can click on the button to try again.

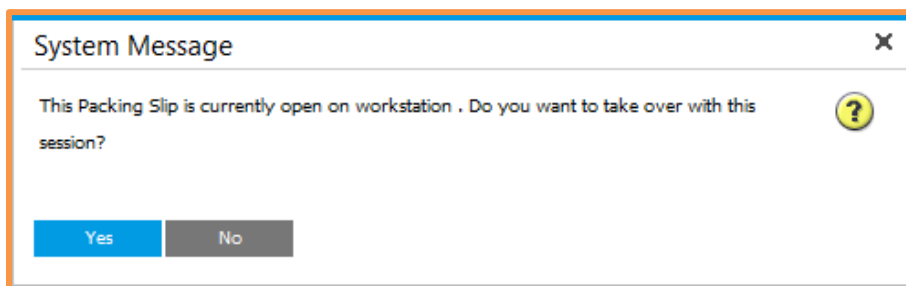
If you have FM set to only create invoices, and you have shipped your packages, but the invoice failed, then the button will change to say Create Invoice. When you have resolved the issue, you can click on the button to try again.

## Packing Slip in Use

Only one user can be in a packing slip at a time. If you try to open one up while someone else is in it, you will get a message letting you know. At this point the packing slip will open, but you will not be able to make any updates.



If you try to open a packing slip that is already in use by your own user, it will give you the option of taking over the session or not. If you choose Yes, you can continue working with it. If you choose No, it will still open so you can look at it, but you will not be able to update it.



## ***Pick Pack Manager – Inventory Transfer Requests***

Most of the process for shipping ITRs is the same as we just used with the Sales Orders and Reserve Invoices above; to be able to pack and ship with Freight Management for ITRs, you must first use the standard SAP Pick Pack Manager to create and pick your items, then go to the Picked drawer to create your Pack Slip.

There first main difference is where the packing slip gets some of the shipment data from.

If your ITR is linked to a Business Partner:

- The Ship To Address, Telephone and Email Address will all default from the BP Ship To chosen in the ITR document.
- The Ship To Contact Name will be based on the same rules we discussed above in the SO/RI shipping section
- The Shipping Profile (and subsequently the fields that go along with that such as Ship From, Additional Charges, ITR Shipping Type, etc.) will be set based on the same rules we discussed above in the SO/RI shipping section.

If your ITR is not linked to a BP:

- The Ship To Address will default from the address of the To WHSE in the ITR document.
- The Ship To Contact Name, Telephone, and Email Address will all default in blank.
- The Shipping Profile (and subsequently the fields that go along with that such as Ship From, Additional Charges, ITR Shipping Type, etc.) will be set based on the Default Shipping Profile option in the FM Configuration screen.

The other main difference is that there is no option in the packing slip (manual or automated) to create the target document, which in the case of an ITR is a transfer. That will have to be done using standard SAP processes.

## Carrier Shipping Process

Now that our items are packed, and we have double checked all the data in the packing slip, it is time to ship.

### Ship Button in Packing Slip

Begin by clicking on the Ship button on the bottom right of the packing slip.

The screenshot shows the 'Packing Slip' window with the following details:

- No.:** 21
- Customer:** C20000
- Centerport Components:** Centerport Components
- Status:** Open
- Delivery No.:** (empty)
- Invoice No.:** (empty)

The interface is divided into two tabs: **Logistics** and **Packages**. The **Packages** tab is active, showing a table of existing packages:

#	Pkg No.	Type	Scale Weight	Units	Net Weight	Units	Tare Weight	Units	Tracking Number
1		Box	2.000	Ounce	5.000	Pound	0.500	Kilogram	
2		Pallet	3.000	Ounce	0.000	Ounce	0.000		
3		Barrel	4.000	Ounce	0.000	Ounce	0.000		
			9.000	Ounce					

Below the packages table, there are two sections: **Available Items** and **Package Contents**. The **Package Contents** section shows 3 items:

#	Item No.	Quantity	UoM Name	Items per Unit
1	ps001	1.000	6Pack	6.000

At the bottom of the window, there are several buttons: **OK**, **Cancel**, **Print Packing Slip**, **Void**, and **Ship**. The **Ship** button is highlighted with an orange border.

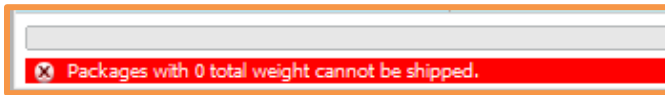
If all items on the packing slip are not packed, it will let you know with a warning message. If you want to still ship you can click on Yes, however if you want to go back and finish packing, then say no to return to the packing slip.

The screenshot shows a 'Resolv System Message' dialog box with the following text:

Not all items are packed, would you still like to Ship?

At the bottom of the dialog box, there are two buttons: **Yes** and **No**.

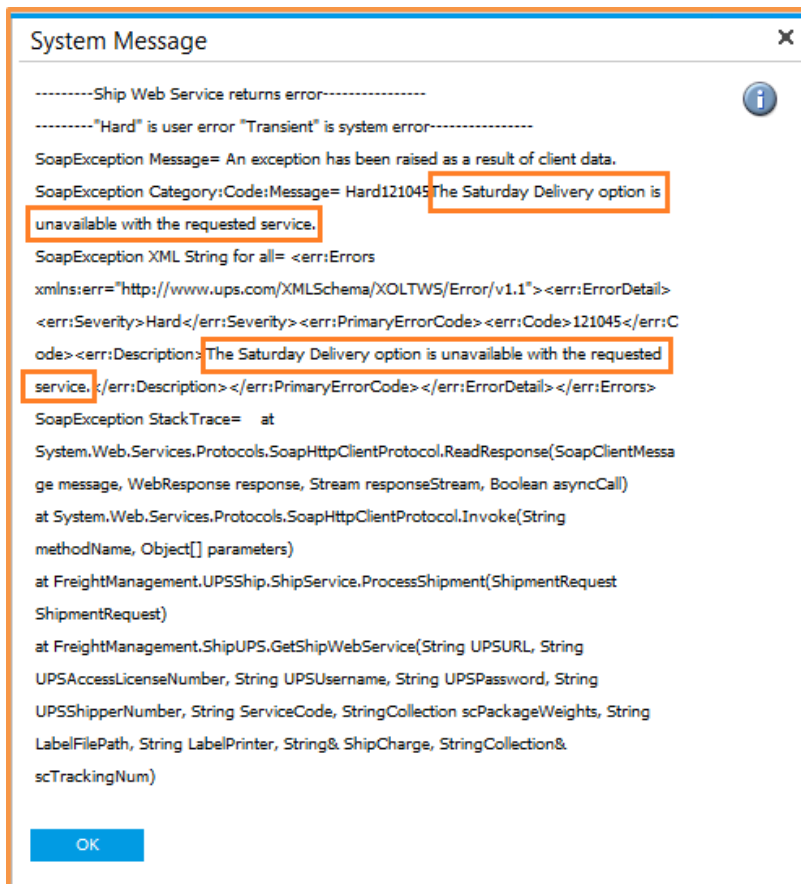
If there are any issue with the packing slip, like missing scale weights for example, it will give you an error and stop you from shipping until you resolve it.



If everything on the packing slip looks good, it will begin communicating with the Carrier, sending them all of the shipping information from your packing slip. Also, if FM is set to auto print, your packing slip will print out (otherwise you will have to print the packing slip manually using the print button on the bottom of the screen).



If the communication itself with the Carrier is successful, but the carrier has an issue with the packing slip, it will return an error message. Note that the errors are coming directly from the carrier and thus might be a little confusing. The message below is telling me that Saturday Delivery is not allowed with the service level I have chosen. If you cannot tell what the issue is based on the message, you may need to contact the specific carrier for help.





If the communication with the Carrier is successful, and the carrier has no issues with the packing slip, it will retrieve your tracking numbers and shipping labels.

### Packing Slip

No.

Customer

Status

Delivery No.

Invoice No.

Logistics      Packages

Existing Packages

#	Pkg No.	Type	Scale Weight	Units	Net Weight	Units	Tare Weight	Units	Tracking Number
1		Box	2.000	Ounce	5.000	Pound	0.500	Kilogram	1Z305W750395210660
2		Pallet	3.000	Ounce	0.000	Ounce	0.000		1Z305W750399312678
3		Barrel	4.000	Ounce	0.000	Ounce	0.000		1Z305W750399505086
			9.000	Ounce					

WEST COST WAREHOUSE  
1901 AVENUE OF THE STARS  
LOS ANGELES CA 90067

1 LBS      1 OF 1

**SHIP TO:**  
DEF CONTACT ID  
CENTERPORT COMPONENTS  
14 HARRIS AVE  
PORT JEFFERSON NY 11777

---

## NY 117 0-04

---

**UPS GROUND**
TRACKING #: 1Z 305 W75 03 9980 3898

---

# SAMPLE


---

BILLING: P/P  
DESC: Ship webservice API

If your shipment is international, it may also retrieve the corresponding International Documents as well.

## Invoice

Page 1

<b>FROM</b> Tax ID/EIN/VAT No.: Contact Name: Manager West Coast Warehouse 1901 Avenue of the Stars  Los Angeles, CA 90067  United States Phone: 631-543-3200	Waybill Number: 305W75TLTTV Shipment ID: 305W75TLTTV  Date: 06/APR/2018 Invoice No: 542 PO No: Terms of Sale (Incoterm): Reason for Export: SALE
<b>SHIP TO</b> Tax ID/VAT No.: Contact Name: Troy Brown Aquent Systems 123 Chemin de la Côte-Sainte-Catherine  Montreal, QC H2V 2A7  Canada Phone: 555-0101	<b>SOLD TO INFORMATION</b> Tax ID/VAT No.: Contact Name: Troy Brown Aquent Systems 123 Chemin de la Côte-Sainte-Catherine  Montreal, QC H2V 2A7  Canada Phone: 555-0101

Units	U/M	Description of Goods/Part No.	Harm. Code	C/T/O	Unit Value	Total Value
10	EA	Basic Stock Item	11221133	CA	90.00	900.00

**Additional Comments:**

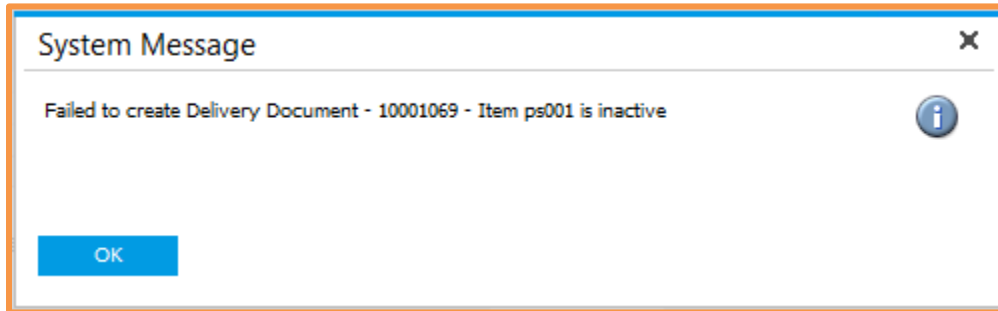
<b>Declaration Statement:</b>   Shipper _____ Date _____	<table style="width: 100%;"> <tr><td style="text-align: right;"><b>Invoice Line Total:</b></td><td style="text-align: right;">900.00</td></tr> <tr><td style="text-align: right;"><b>Discount/Rebate:</b></td><td style="text-align: right;">0.00</td></tr> <tr><td style="text-align: right;"><b>Invoice Sub-Total:</b></td><td style="text-align: right;">900.00</td></tr> <tr><td style="text-align: right;"><b>Freight:</b></td><td style="text-align: right;">0.00</td></tr> <tr><td style="text-align: right;"><b>Insurance:</b></td><td style="text-align: right;">0.00</td></tr> <tr><td style="text-align: right;"><b>Other:</b></td><td style="text-align: right;">0.00</td></tr> <tr><td style="text-align: right;"><b>Total Invoice Amount:</b></td><td style="text-align: right;">900.00</td></tr> </table> <table style="width: 100%; margin-top: 5px;"> <tr> <td style="text-align: right;"><b>Total Number of Packages:</b> 1</td> <td style="text-align: right;"><b>Currency:</b> USD</td> </tr> <tr> <td style="text-align: right;"><b>Total Weight:</b> 1.0 LBS</td> <td></td> </tr> </table>	<b>Invoice Line Total:</b>	900.00	<b>Discount/Rebate:</b>	0.00	<b>Invoice Sub-Total:</b>	900.00	<b>Freight:</b>	0.00	<b>Insurance:</b>	0.00	<b>Other:</b>	0.00	<b>Total Invoice Amount:</b>	900.00	<b>Total Number of Packages:</b> 1	<b>Currency:</b> USD	<b>Total Weight:</b> 1.0 LBS	
<b>Invoice Line Total:</b>	900.00																		
<b>Discount/Rebate:</b>	0.00																		
<b>Invoice Sub-Total:</b>	900.00																		
<b>Freight:</b>	0.00																		
<b>Insurance:</b>	0.00																		
<b>Other:</b>	0.00																		
<b>Total Invoice Amount:</b>	900.00																		
<b>Total Number of Packages:</b> 1	<b>Currency:</b> USD																		
<b>Total Weight:</b> 1.0 LBS																			

These items are controlled by the U.S. Government and authorized for export only to the country of ultimate destination for use by the ultimate consignee or end-user(s) herein identified. They may not be resold, transferred, or otherwise disposed of, to any other country or to any person other than the authorized ultimate consignee or end-user(s), either in their original form or after being incorporated into other items, without first obtaining approval from the U.S. government or as otherwise authorized by U.S. law and regulations.

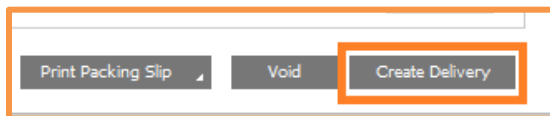
If FM is set for auto-printing, your labels will print out. Otherwise, you can use the Select Print Options button we saw earlier to print them manually (or print them from the SAP Delivery or Invoice screens, which we will see in a little bit).

At this point, depending on your settings, the system will either try and create your delivery and/or invoice automatically, or change the Ship button to say Create Delivery so you can manually create it.

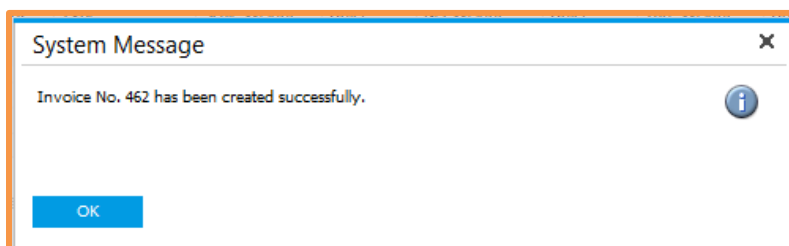
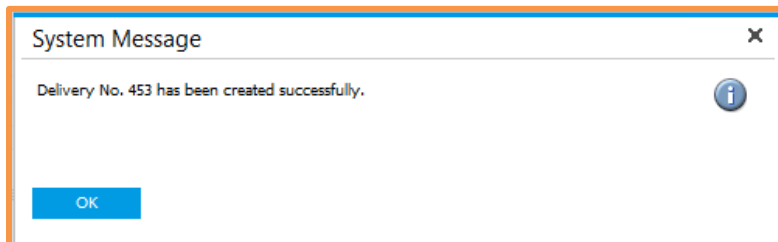
If SAP finds any issues with creating your document(s), then an error message will be displayed explaining why.



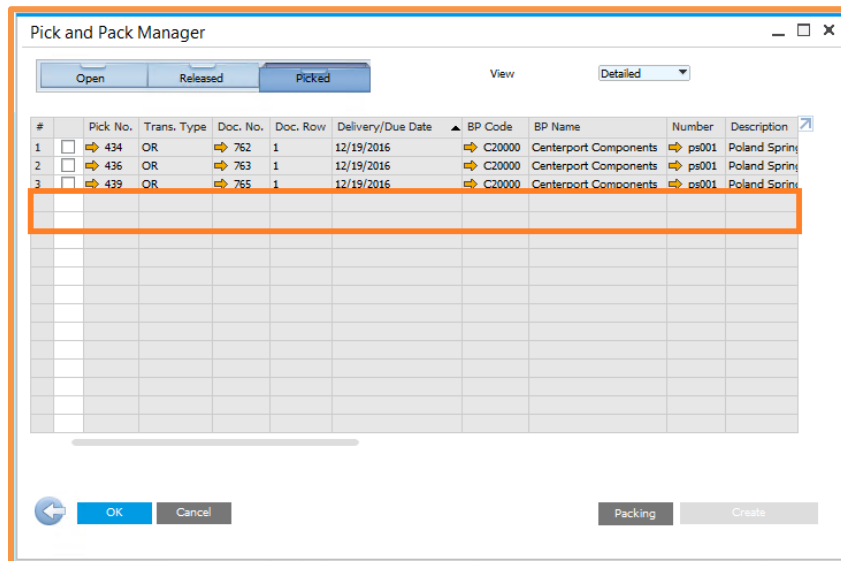
After fixing the issue, you can come back to the packing slip to click on the Create Delivery or Create Invoice button to try again.



If SAP does not find any more issues, then your document(s) will be created.



Once the document(s) are created, the packing slip screen will close and the lines from the Picked drawer will be removed. This is because the pick list lines are now closed.



Note, if the delivery or invoice is not created, the lines will stay on the screen so that you can pull the packing slip back up.

## SAP Target Documents

Now that you have your labels, your tracking numbers, and the SAP target documents have been created, let's look at the Delivery (and/or Invoice) screen to see the Freight Management data.

You can see that the additional charges have been copied to the SAP Freight field. Note, additional charges will only copy over if your shipment had the Bill Transportation To option set to Shipper, or you have the additional charge set to Always Charge Receiver.

Delivery
— □ ×

Customer → C20000

Name Centerport Components

Contact Person → Def Contact ID

Customer Ref. No.

Local Currency

No. Primary 453

Status Closed

Posting Date 12/19/2016

Delivery Date 12/19/2016

Document Date 12/19/2016

Branch Corporate

Branch Reg. No. CORP

Contents   Logistics   Accounting   Attachments   Document Delivery

Item/Service Type  Item   Summary Type  No Summary

#	Item No.	Quantity	Unit Price	Disc...	Tax ...	Total (LC)
1	→ ps001	3	6.50 \$	0.000	→ Exempt	19.50 \$

Sales Employee  Ian O'Walsh

Owner → O'Walsh Emp, Ian

Remarks  Based On Sales Orders 764.

Total Before Discount 19.50 \$

Discount  0%

Freight → 27.33 \$

Rounding

Tax

Total 46.83 \$

OK   Cancel

Copy From   Copy To

If you go to the Logistics Tab you will see the Lead Tracking number.

### Delivery

Customer	C20000	No.	Primary	453
Name	Centerport Components	Status		Closed
Contact Person	Def Contact ID	Posting Date		12/19/2016
Customer Ref. No.		Delivery Date		12/19/2016
Local Currency		Document Date		12/19/2016

Branch	Corporate	Branch Reg. No.	CORP
--------	-----------	-----------------	------

Contents	Logistics	Accounting	Attachments	Document Delivery
----------	-----------	------------	-------------	-------------------

Ship To	14 Harris Ave	Language	English
Def ShipTo ID	Port Jefferson NY 11777 USA	Tracking No.	12305W750395210660
Bill To	222 22nd Ave	Stamp No.	
Bill To 2	2nd City 22222 USA	Pick and Pack Remarks	
Shipping Type	UPS Ground	BP Channel Name	
		BP Channel Contact	

Sales Employee	Ian O'Walsh	Total Before Discount	19.50 \$
Owner	O'Walsh Emp, Ian	Discount	%
		Freight	27.33 \$
		<input type="checkbox"/> Rounding	
		Tax	
		Total	46.83 \$

Remarks	Based On Sales Orders 764.
---------	----------------------------

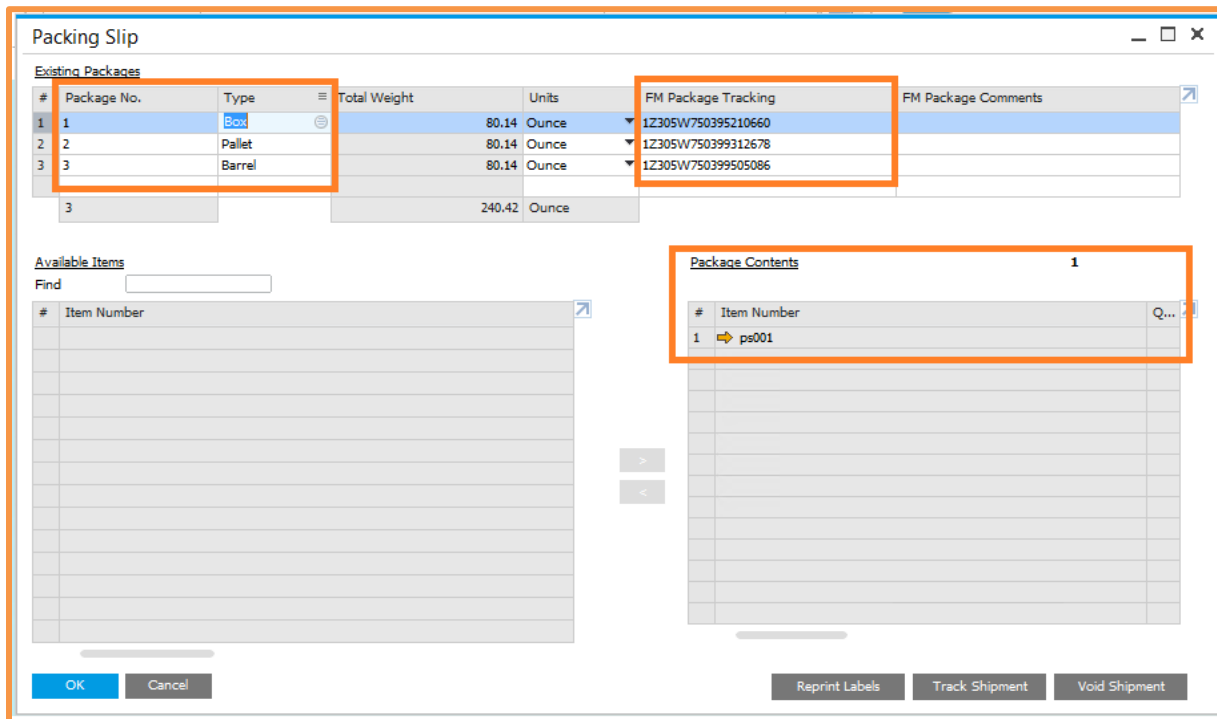
  

OK
Cancel

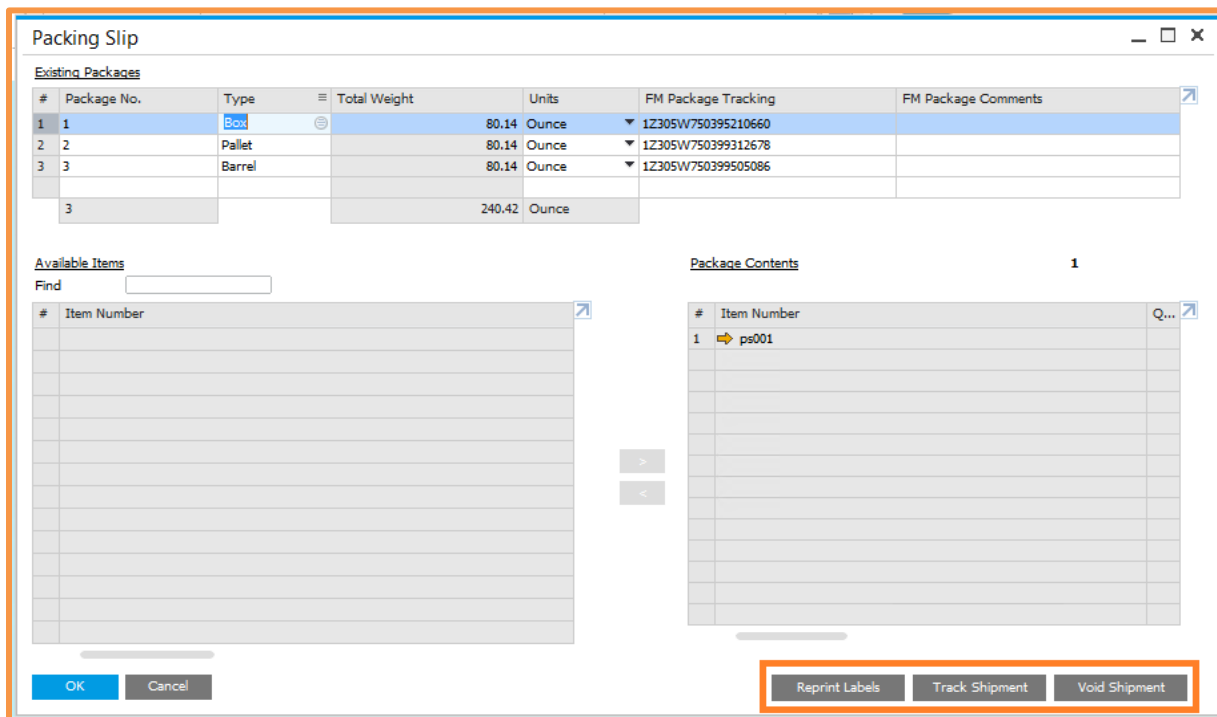
Copy From
Copy To



This will open SAP's packing slip screen where you will see that the SAP packages have been set with the data from your FM Packing Slip.



There will also be some new options on the bottom right that have been added for Freight Management.



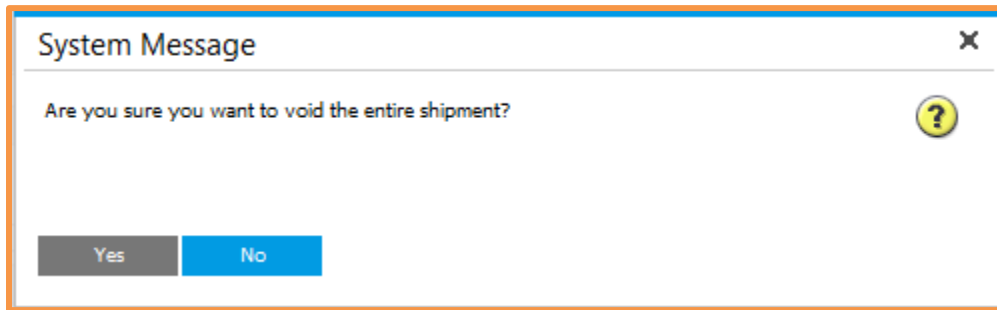


The Reprint Labels option will do just that; click on the button to reprint your shipping labels in case something happened to them.

The Track Shipment button will launch the carrier’s tracking website so that you can see where your shipment is.

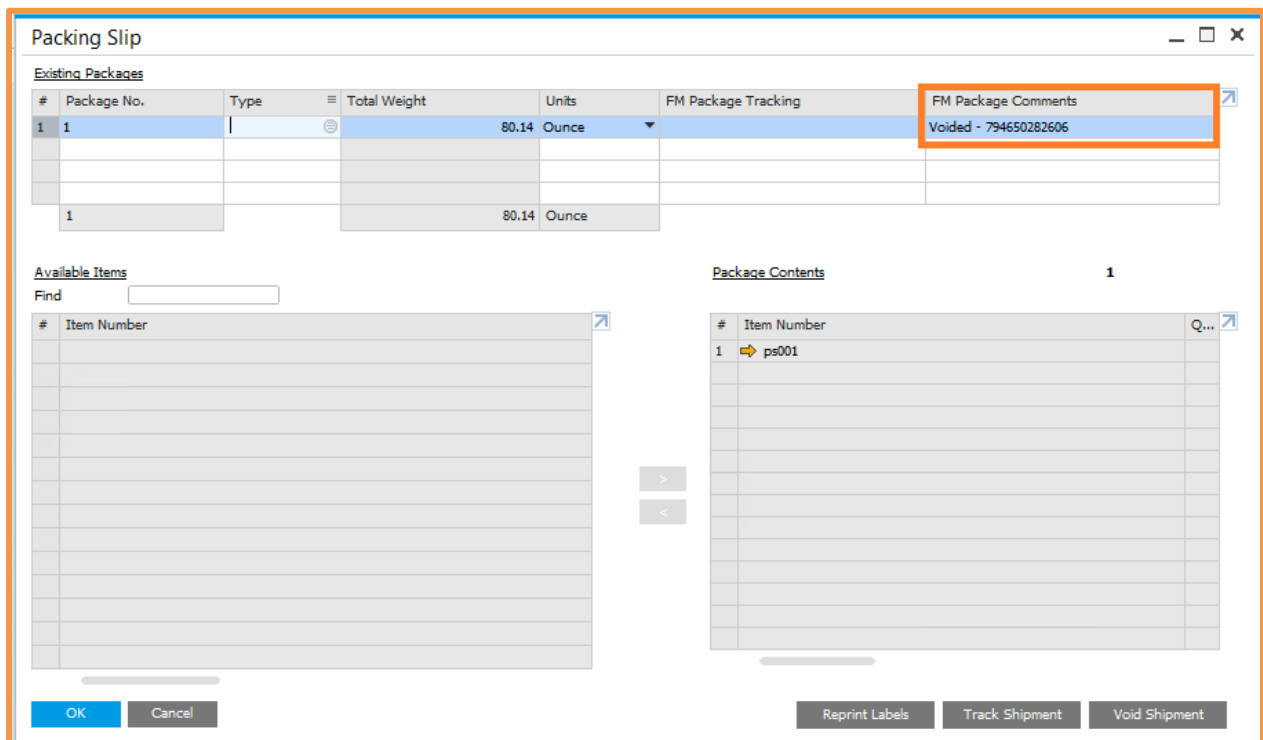


If you click on the Void Shipment button, it will ask you if you want to void the entire shipment.



If you say yes, it will communicate with the carrier and void all packages and associated tracking numbers for this shipment. If there is an issue and the carrier cannot void the shipment, it will let you know with an error message. Otherwise, if the carrier can void it, it will close the SAP packing slip screen and automatically update the document.

If you go back into the SAP packing slip screen, you will see that the tracking numbers have been moved to the FM Package Comments field, and we have added a prefix of "Voided" to them. We do this so that even after you void it, you can see what the tracking numbers were, and that they were voided.



At this point, if you need to re-do the shipment, you are going to have to either re-open your Sales Order using standard SAP methods or create a new Sales Order.

### Non-Carrier Shipping Process

There are a couple of differences when using non-carrier shipping types. The first is that the labels you can print will be the Non-Carrier Shipping Labels we saw earlier in this document, instead of the actual shipping labels coming from the carrier.

Next, the tracking number fields will be editable, so you can enter in your own tracking information if necessary.

The screenshot shows a 'Packing Slip' window with the following details:

- No.: 95
- Customer: C20000 (Centerport Components)
- Status: Open
- Delivery No.:
- Invoice No.:

The interface is divided into three tabs: Logistics, Packages, and Additional Charges. The 'Existing Packages' table is as follows:

#	Pkg No.	Type	Scale	Weight	Units	Net Weight	Units	Tare Weight	Units	Dclr Value	Tracking Number
1				0.000	Ounce	5.000	Pound	0.000	Ounce	6.50	ABCDEF
1				0.000	Ounce						

Also, when using the Ship button on the FM Packing Slip, it will skip the carrier communication and just move to the next step, which is determining if it should create a delivery, invoice, or both based on your FM Configuration settings.

Similarly, hitting the Void button will also skip the carrier communication piece, and void just the packing slip.

The screenshot shows the bottom control panel of the Packing Slip interface with the following buttons:

- Select Print Option
- Repack
- Void
- Create Delivery



## Stand-alone Packing Slip Screen

*Resolv > Resolv Freight Management > Packing Slip*

As mentioned earlier, you can also access your packing slip directly from the Main Menu.

The screen has all the same fields and options as the one you launch from the Pick Pack Manager, but when you launch it from here you can switch into Find mode, and search for existing Packing Slips.

**Packing Slip**
— □ ×

No.

Customer

Status

Delivery No.

Invoice No.

Logistics

Packages

Existing Packages

#	Pkg No.	Type	Scale Weight	Units	Net Weight	Units	Tare Weight	Units	Tracking Number
1			2,000 Ounce						

Available Items

Find

#	Item No.	Available	Selected

Package Contents 1

#	Item No.	Quantity	UoM Name	Items per Unit

>  
<

Repack

Find
Cancel

Print Packing Slip
Void
Create Delivery

There are also 3 fields that we have not discussed yet in the documentation: Status, Delivery No., and Invoice No.

### ***Status***

A packing slip can have 3 statuses; Open, Closed, and Cancelled.

If the status is Open, it means the packing slip can still be updated and shipped.

If the status is Closed, it means that your target documents have been created and the Packing Slip can no longer be updated.

If the status is Cancelled, it means that you voided the packing slip.

### ***Delivery No.***

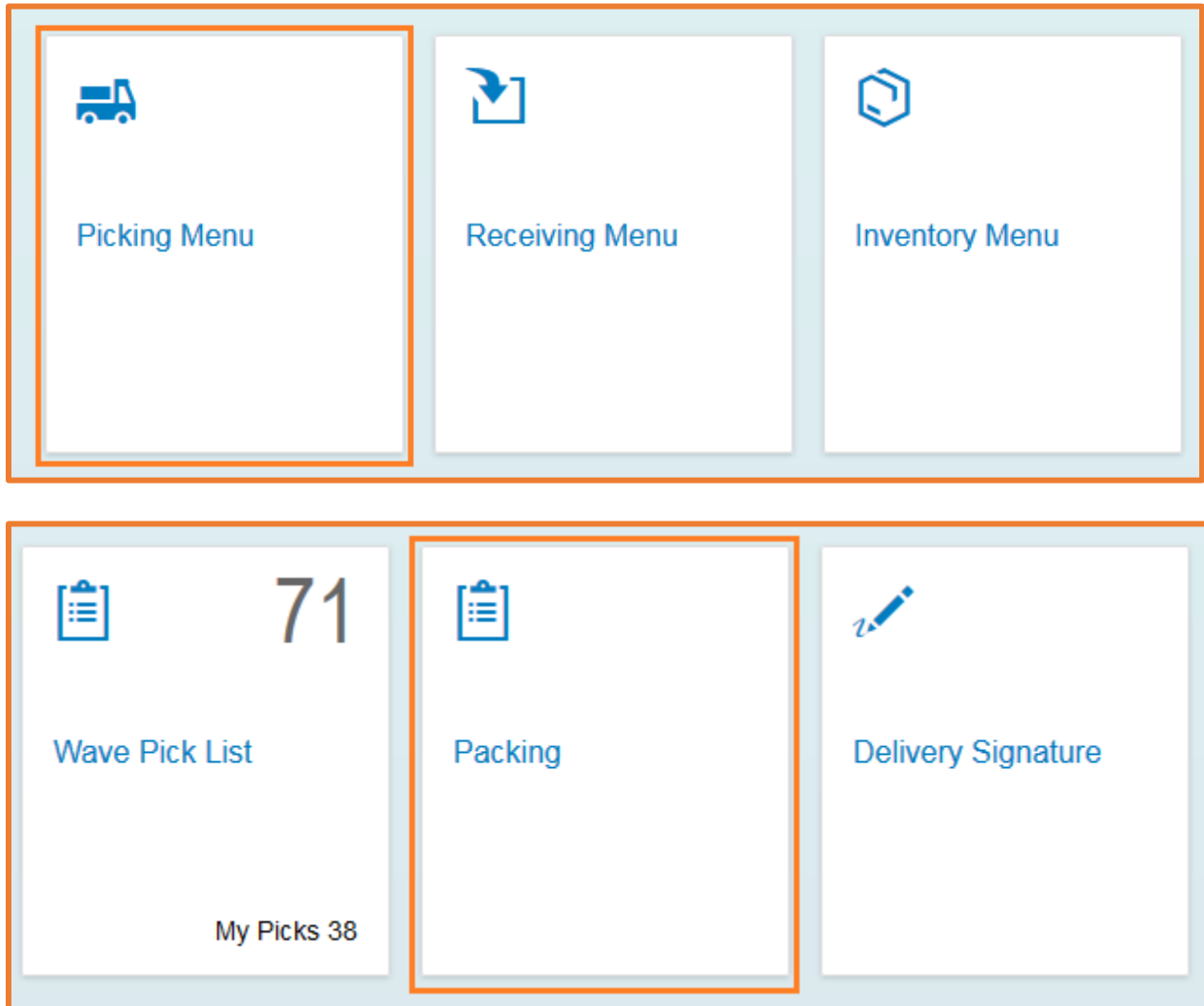
When you create your delivery from your packing slip, either automatically or manually, this field will be set with the SAP delivery document number. You can click on the gold arrow to drill into the delivery document itself. You can also use this field when the packing slip is in Find mode.

### ***Invoice No.***

When you create your Invoice from your packing slip automatically, this field will be set with the SAP invoice document number. You can click on the gold arrow to drill into the invoice document itself. You can also use this field when the packing slip is in Find mode.

## Integration with Resolv Mobile

(Picking Menu > Packing)



## Packing

When you first open the Packing screen you will notice 3 fields that you can use to begin packing: Pick List, Document, and Packing Slip. Pick List and Document will be used if you are packing a new Packing Slip, whereas the Packing Slip field will allow you to pull up an existing Packing Slip. We will begin by looking at creating new Packing Slips.

### Main Screen – New Packing Slip

First scan or enter in your Pick List or Document (SO or AP Reserve Invoice) number.

The screenshot shows the 'Packing' screen with three input fields: 'Pick List:', 'Document:', and 'Packing Slip:'. The 'Pick List' and 'Document' fields are highlighted with an orange box. Below the fields is a light blue bar containing four buttons: '+ Add', 'Pack' (with a box icon), 'Save' (with a floppy disk icon), and 'Void' (with a trash can icon).

If you are not sure of the number, you can use the look up buttons to pull up a list of available documents.

This screenshot shows the 'Packing' screen with the same three input fields. In addition to the look up buttons on the bottom bar, each of the three input fields now has a small copy icon (two overlapping squares) in its top right corner, indicating that look up functionality is available for each field.



Once inside the lookup screen, you can use the standard Resolv Mobile functions to sort, search, etc. (please see the **Resolv 10.0 - Warehouse Management User Guide** for full instructions on these functions).

Pick List	Trans Type	Warehouse	Priority	Due Date	Name	Picker
1090	OR	02	First	06/05/2018	Centerport Components	Ian O'Walsh User
1074	OR	02	First	05/07/2018	Centerport Components	Ian O'Walsh User

Once you enter, scan, or select your Pick List/Document Number, the system will generate a Pack Slip number for you and display the open items and quantities from your document on the bottom grid.

Document	Item	Qty	UOM	Line	Cust
1291	ps001	3	6Pack	0	C20
1291	B10000	3	Each	1	C20
1291	Serialized	3	Each	2	C20

Note, the packing screen is “real-time” which means at this point the Packing Slip document has been generated already. So, if you need to leave the screen (either because you want to continue working on this Packing Slip later or you have completed you packing, or you just want to delete this packing slip and start over), you will need to Save or Void it.

### Packing

Pick List:	
Document:	
Packing Slip:	389

+ Add
Pack
Save
Void

If you choose the Save option, all your current work will be saved, and you can exit the Packing screen.

If you however choose the Void option, all your work, including the Packing Slip document itself, will be deleted (and you can exit the Packing screen).

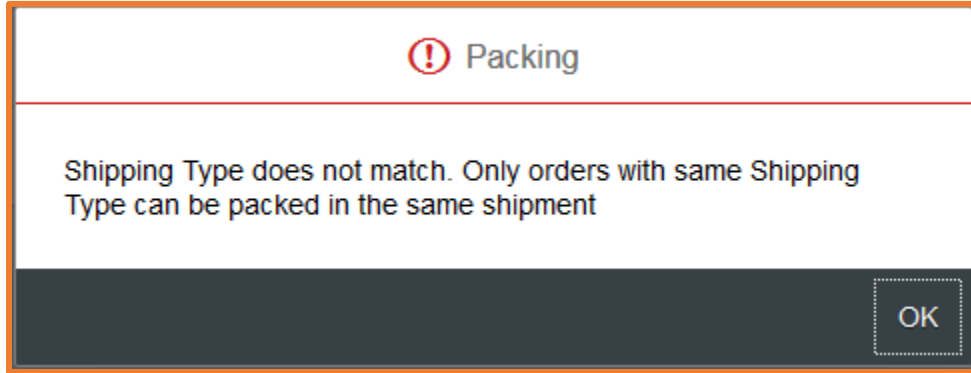
### ? Packing

---

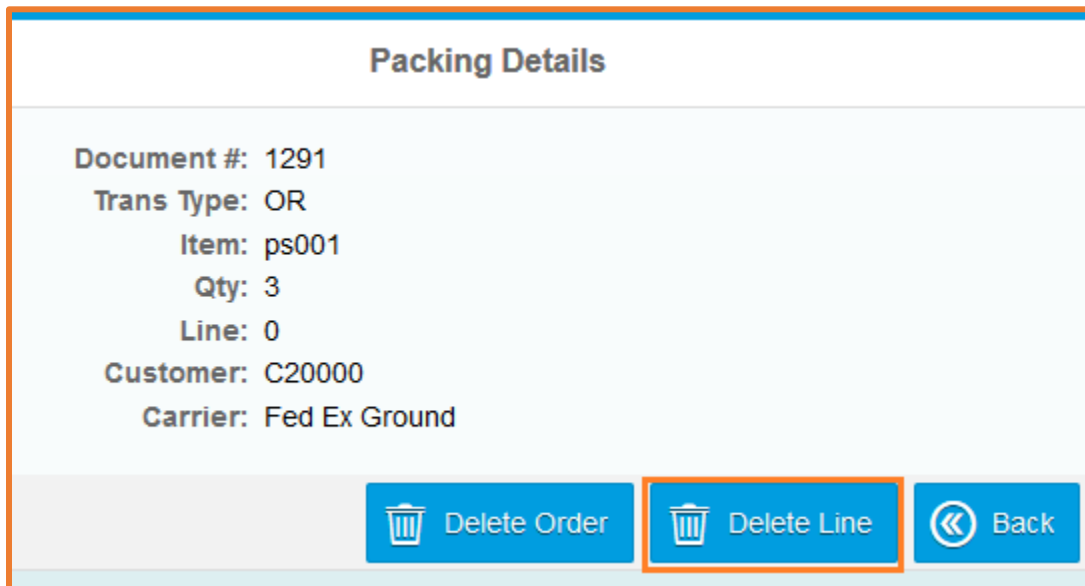
This will VOID the Packing Slip and all packages. Are you sure you want to VOID?

Yes
No

If you want to you can add more Pick Lists/Documents to this Packing Slip just by entering, scanning, or selecting more from the fields at the top. However, you will only be able to combine documents that have the same BP, Ship To, Delivery Date, FM Shipping Profile, and Shipping Type. If you try to combine ones that do not have all those things the same, the system will stop you.



Conversely, if you want to remove any items from the bottom grid and thus from the Packing Slip itself, you can do so by clicking on the item row. This will bring you to the Packing Details screen which will show you some information about the item, but also let you delete it by using the Delete Line button.



You will also notice an option in there called Delete Order. This will not only remove the selected line from the Packing Slip, but also any other lines on the Packing Slip from the same Sales Order. This is helpful when adding a large Pick List to a Packing slip and you need to remove 1 or 2 full Sales Orders from it; you can use this button instead of having to delete lines one by one.

### Packing Details

**Document #:** 1291  
**Trans Type:** OR  
**Item:** ps001  
**Qty:** 3  
**Line:** 0  
**Customer:** C20000  
**Carrier:** Fed Ex Ground

Delete Order

Delete Line

Back

Once you have all the items you wish to pack on this Packing Slip on the bottom grid, you will click the Pack button.

### Packing

**Pick List:**

**Document:**

**Packing Slip:** 389

Add

Pack

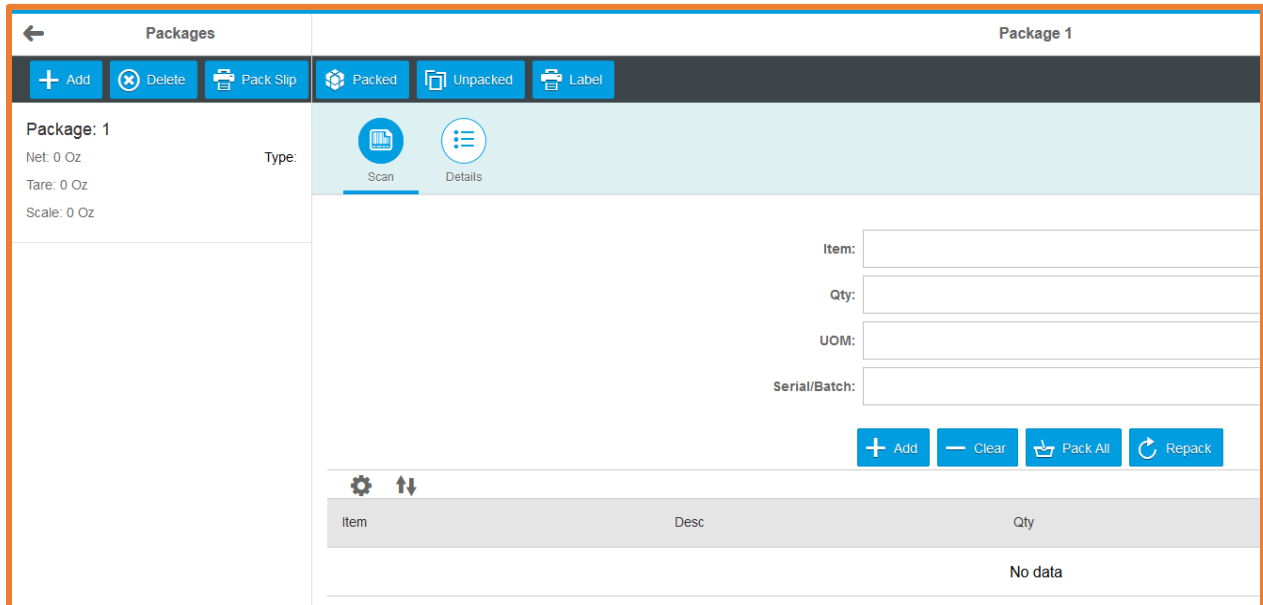
Save

Void

UOM	Line
6Pack	0
Each	1
Each	2

This will bring you to packages screen.

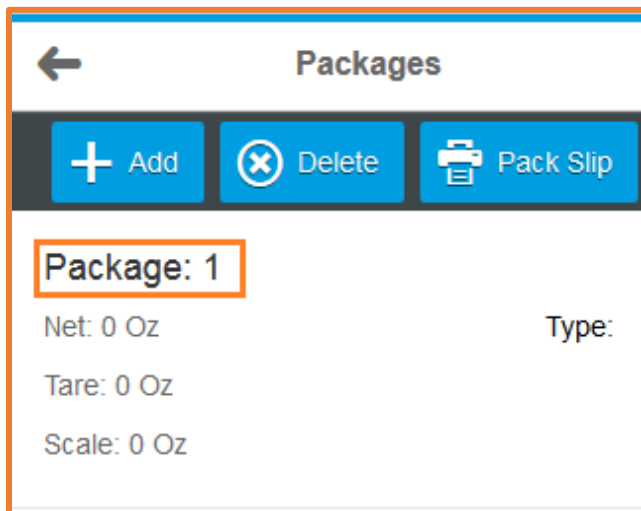
## Packages Screen



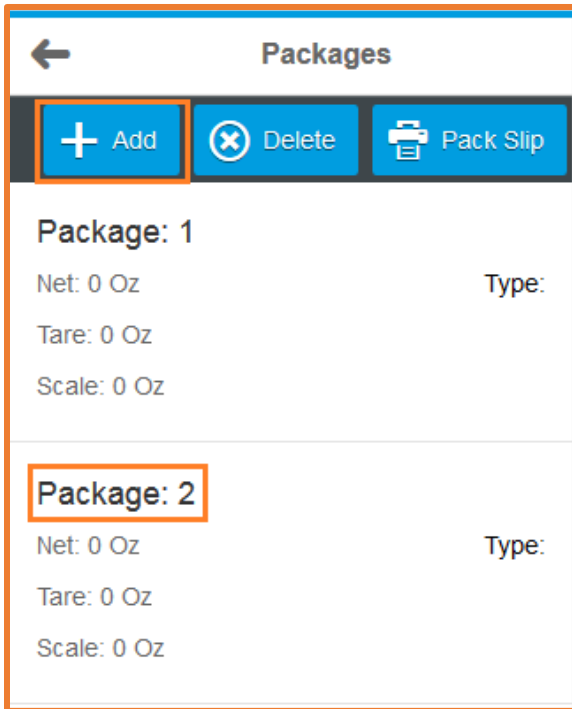
There are several different parts and functions for this screen, so let's first start with the Packages section on the left.

### Packages Section

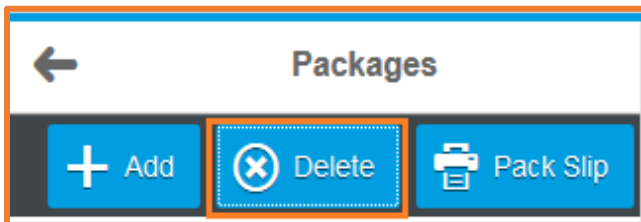
To start, it will default your first package in for you.



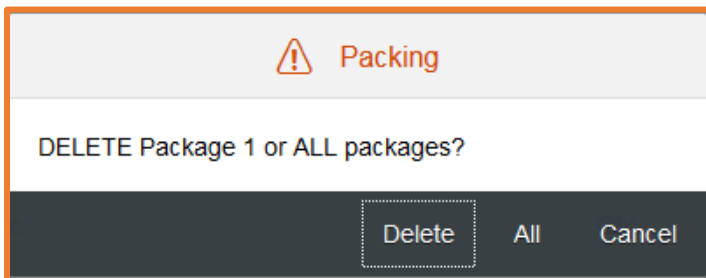
If you ever need to add more packages, just use the Add button at the top.

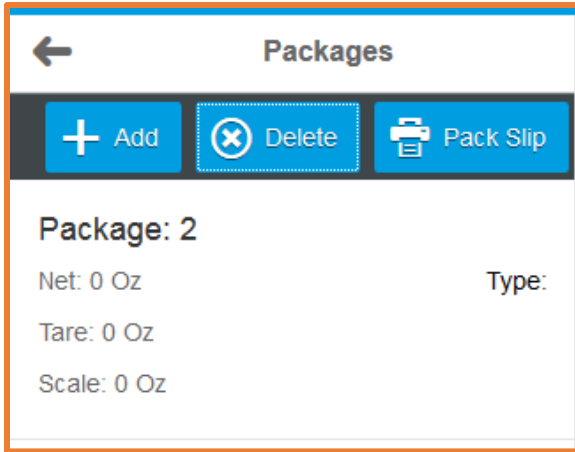


And if you ever need to delete a package (or all your packages), just select one that you want to delete and click on the Delete button.

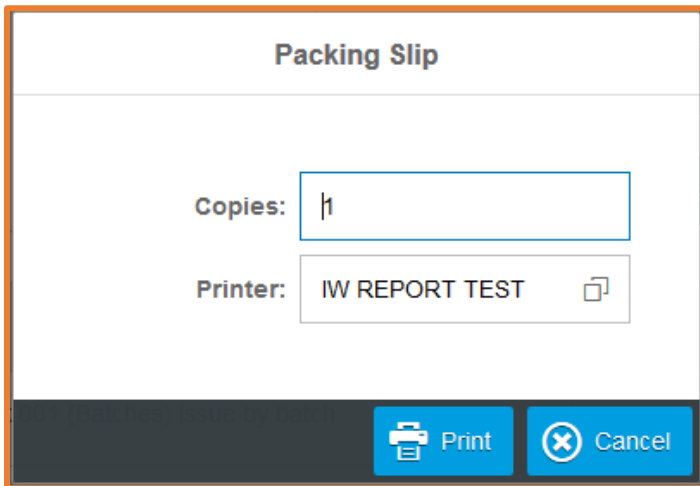
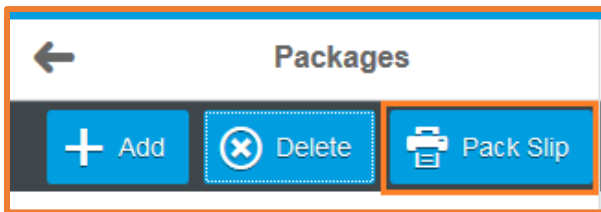


It will then ask you if you just want to delete the current package or all packages, so select the appropriate response for your situation.





You can also print a Pack Slip from this section of the screen by clicking on the Pack Slip button. It will use the report layout you have defined in the Resolv FM Reports screen and use the default printers you have configured with Resolv FM inside of SAP. If you need further information on these, please see the sections above.



Ok, now let's take a look at the individual Package section.

## Individual Package Section

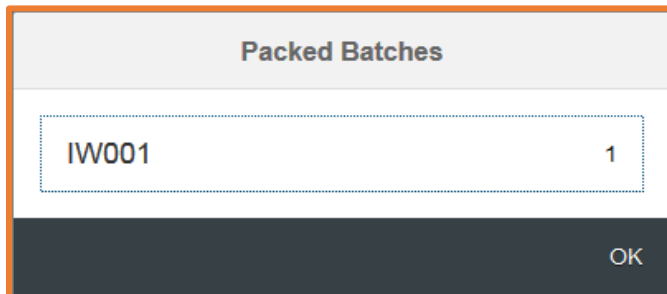
On the top left of this section, you will see 3 buttons. The Packed button will take you to a screen that shows you everything from the Packing Slip that is already packed, and how many are in each package.



The screenshot shows the 'Packed Lines' interface. At the top, there is a search bar labeled 'Package' with a search icon and three utility icons (target, gear, and up/down arrows). Below the search bar is a table with the following data:

Package	Item	Item Description	Qty
2	ps001	Poland Spring - Sparkling Water - Lime (UoM Group)	1

You can also see which Batch or Serial Numbers have been packed for each item by clicking on the item's row.



The Unpacked button will take you to a screen that shows you everything on the Packing Slip that has not been packed yet.



The screenshot shows the 'Unpacked Lines' interface. At the top, there is a search bar labeled 'Item' with a search icon and three utility icons (target, gear, and up/down arrows). Below the search bar is a table with the following data:

Item	Item Description	Qty
B10000	Book 001 (Batches) issue by batch	2
ps001	Poland Spring - Sparkling Water - Lime (UoM Group)	3
Serialized	Serialized Item issue by serial	3



You can also see which Batch or Serial Numbers have not been packed for each item by clicking on the item's row.

Unpacked Batches	
465352	1
IW999	1

OK

The Label button will print a Package Label for the selected package. It will use the report layout you have defined in the Resolv FM Reports screen and use the default printers you have configured with Resolv FM inside of SAP.



### Package Label

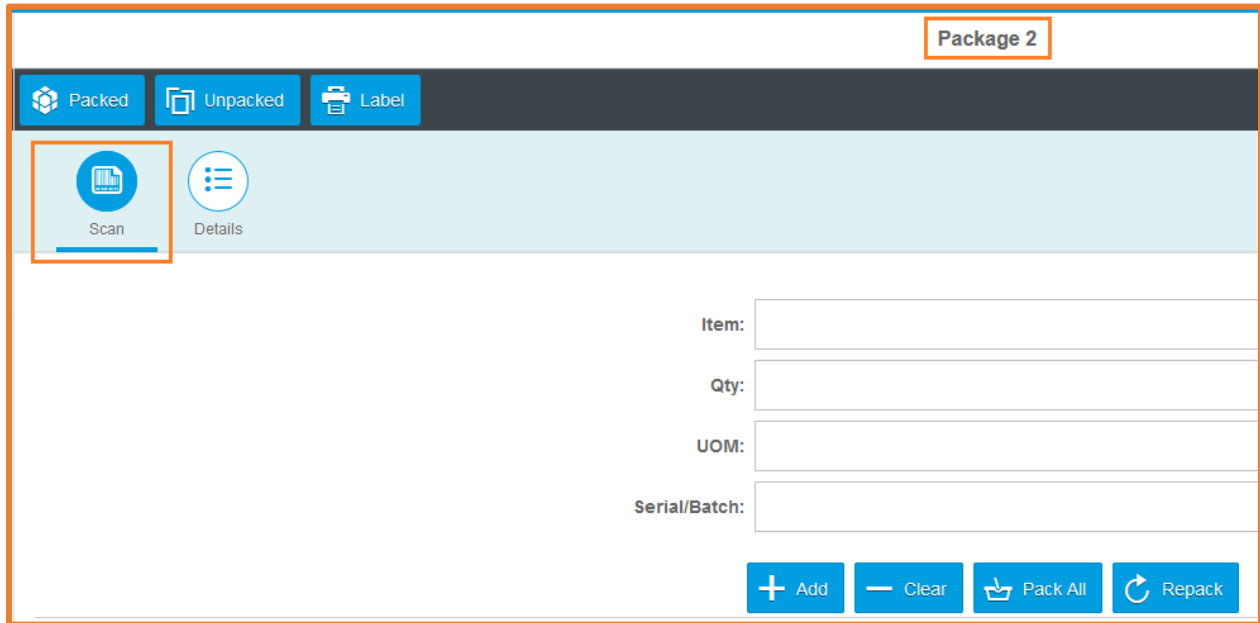
Copies:

Printer:

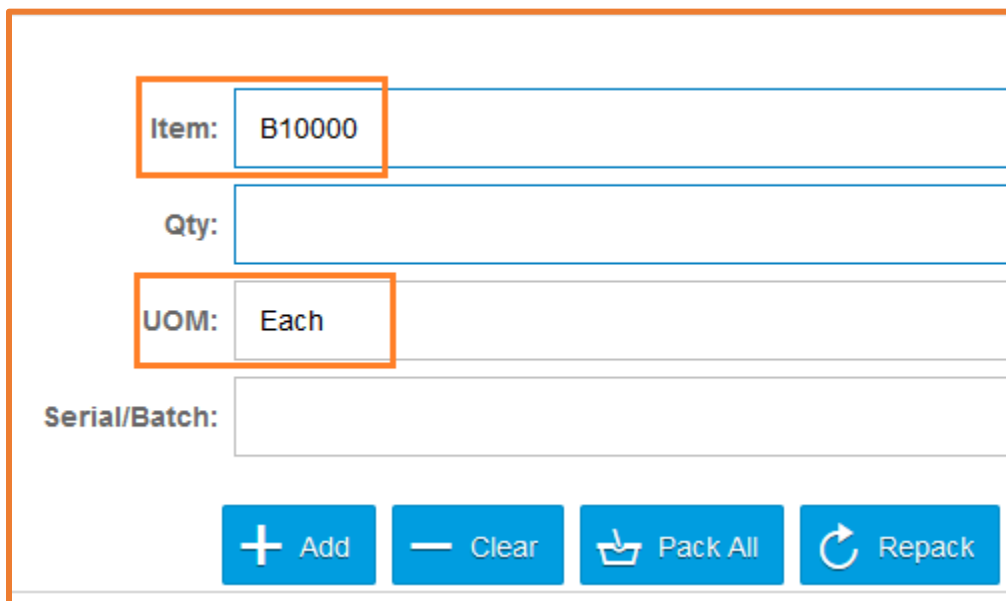
Print
 Cancel

Below the 3 buttons we just discussed there are 2 different “tabs” that contain information for the selected package: Scan and Details. Since it defaults to the Scan tab, we will look at that one first.

Scan Tab



The Scan tab is where you will scan/enter/select the items, quantities, and serial/batches that you want packed into the selected package. Start by entering in the first item you want to pack. A UoM will automatically default in (if you scan it, it will be based on the UoM barcode you scanned), however you can change it if you so choose.



Next enter in the quantity you want to pack.

Item:

Qty:

UOM:

Serial/Batch:

Add
 Clear
 Pack All
 Repack

If the item is not Batch/Serial managed, it will add itself to the bottom grid. However, if it is Batch/Serial managed, you will first have to choose which Batch(es) and Serial Number(s) you are packing into the selected Package, then it will add itself to the bottom grid.

Item:

Qty:

UOM:

Serial/Batch:

Add
 Clear
 Pack All
 Repack

Item:

Qty:

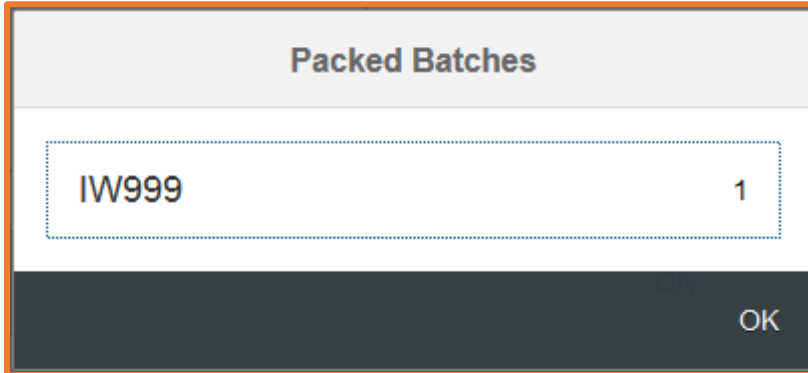
UOM:

Serial/Batch:

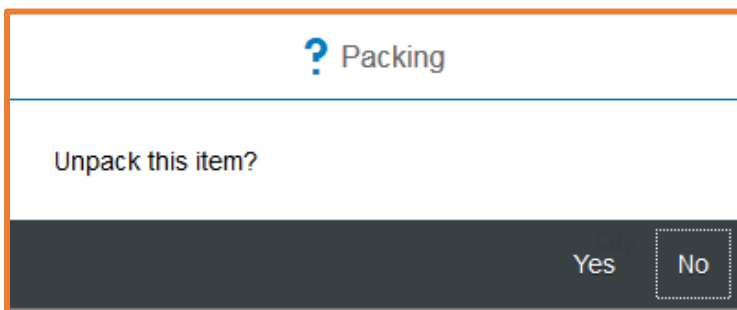
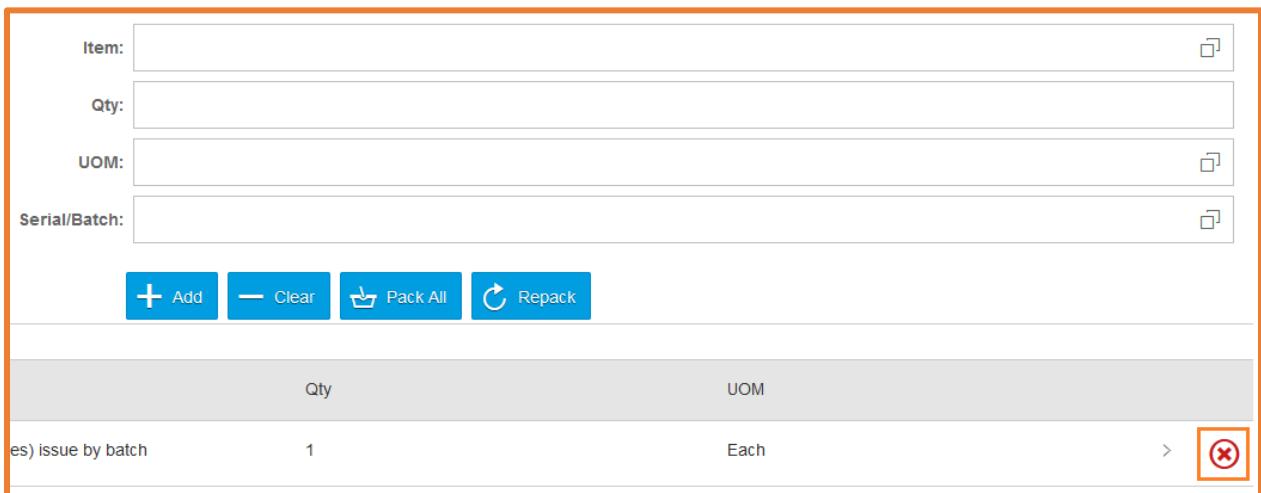
Add
 Clear
 Pack All
 Repack

Item	Desc	Qty
B10000	Book 001 (Batches) issue by batch	1

Once an item is on the bottom grid, it is considered packed in the selected Package. From this grid you can do 2 things; review the Batch or Serial numbers that were packed or un-pack an item. To review, just click on the item row.



To un-pack it, just click on the Red X all the way on the right of the row.



Besides the standard Resolv Mobile fields of Add and Clear, there are 2 other buttons here on the Scan tab to pay attention to; Pack All and Repack.



The Pack All button will take whatever is currently unpacked in this Packing Slip and pack it in the current package.

Item:

Qty:

UOM:

Serial/Batch:

+ Add
− Clear
 Pack All
 Repack

Desc	Qty
Book 001 (Batches) issue by batch	1

? Packing

---

Pack all unpacked items into package 2?

Yes
No



The Repack button does sort of the opposite. It will unpack everything that has already been packed in the current package, so that you can re-pack them.

Item:

Qty:

UOM:

Serial/Batch:

**+** Add
**-** Clear
 Pack All
 Repack

	Qty
Items issue by batch	1

? Packing

Unpack all items for package 2?

Yes
No

Now that you are done packing all your items for this package, let's check out the Details tab.

## Details Tab

Package 2

Packed Unpacked Label

Scan Details

Package Number: 2

Package Type:

Net Weight: 0

Net Units:

Tare Weight: 0

Tare Units: Ounce

Scale Weight:

Scale Units:

Clear

Here on the details tab, you have the option to enter in some additional information such as the Package Type and the Scale Weight. These will be used later in the Freight Management process when you return to SAP to Ship your packing slip. Note, you can also enter this information from the Packing slip inside of FM Desktop, so they are not required to be filled in here on this tab.

Package 2

Scan Details

Package Number: 2

Package Type:

Net Weight: 0

Net Units: Ounce

Tare Weight: 0.5

Tare Units: Kilogram

Scale Weight:

Scale Units:

Clear

There are also some fields on this tab that you cannot update. These fields are informational and are calculated automatically from your Item Master and Package Master setups in SAP. The Net Weight is the weight of the items that are packed in this package, and the Tare Weight is the weight of the Package Type you selected.

Package Number:	2
Package Type:	Box
Net Weight:	80.14
Net Units:	Ounce
Tare Weight:	0.5
Tare Units:	Kilogram
Scale Weight:	5
Scale Units:	Pound

You will also notice that this information now presents itself in the Packages area on the left side of the screen. This allows you to see all the packages weight and package information at a glance instead of having to go into each packages' individual Details tab.

←
**Packages**

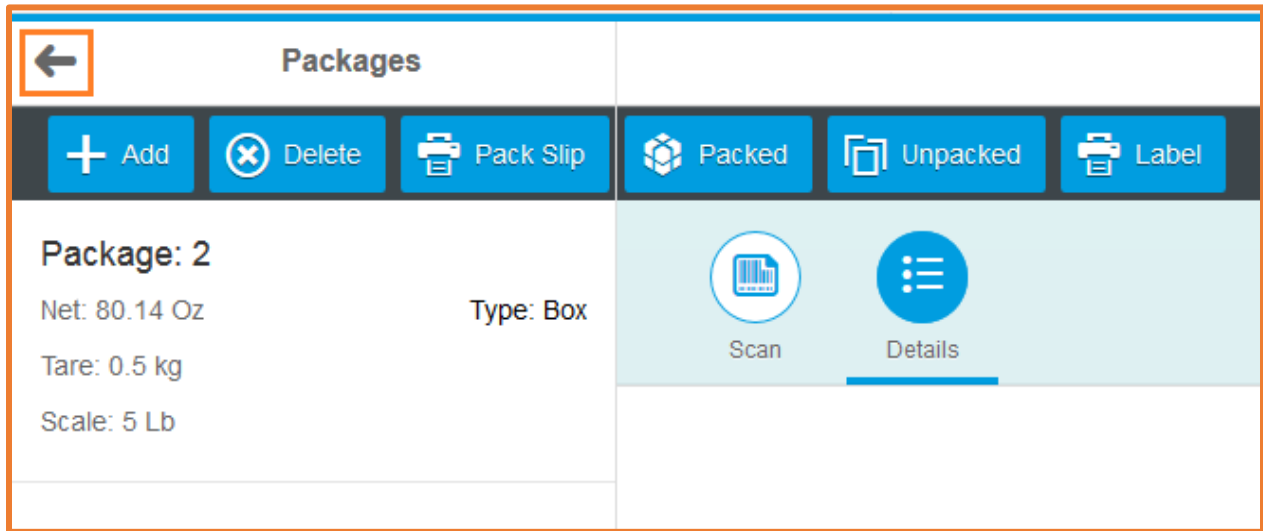
+ Add
✕ Delete
🖨️ Pack Slip

**Package: 2**

Net: 80.14 Oz	Type: Box
Tare: 0.5 kg	
Scale: 5 Lb	

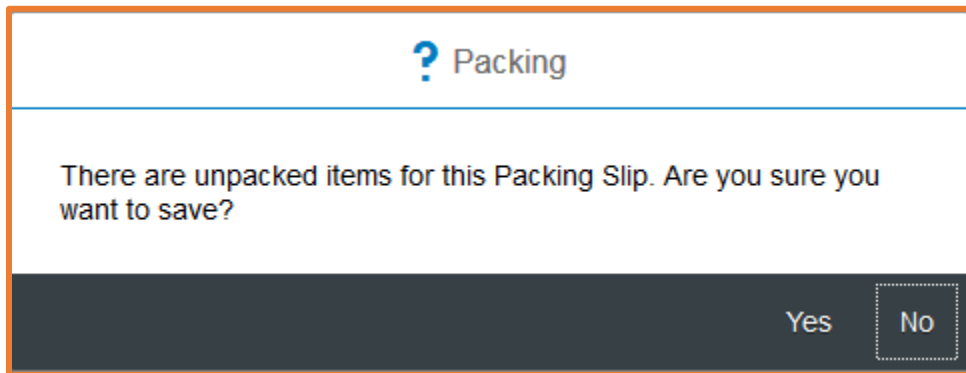


Once you are done with all your packing for this Packing Slip (or are at least done for now), you will hit the Back arrow button on the top left to bring you back to the Main Screen.



### Back to the Main Screen

Once you have finished packing and are back to the Main Screen you would hit the Save button to complete this packing session. If you hit Save, and the system finds unpacked items, it will give you a warning message (don't worry, you can pull the packing slip back up and continue working on it later if necessary).



From here you would now go to the FM Packing Slip screen inside of SAP/Resolv Desktop to complete the shipping process for this packing slip.

## Main Screen – Existing Packing Slip

You have the ability to pull up an existing Packing Slip in the Packing screen as well, so I just wanted to touch on that for a bit before wrapping up this user guide.

To pull up an existing Packing Slip, you would scan, enter, or select (from the lookup screen) the Packing Slip number you want to work on. Note, you cannot pull up a Completed Packing Slip, Cancelled/Voided Packing Slip, or one that has already been sent to the Carrier for shipment.

The screenshot shows the 'Packing' screen with the following fields and controls:

- Pick List:
- Document:
- Packing Slip:  (highlighted with a red box)
- Buttons: + Add, Pack, Save, Void
- Table:
 

Document	Item	Qty	UOM	Line
No data				

The screenshot shows the 'Packing' screen with the following fields and controls:

- Pick List:
- Document:
- Packing Slip:
- Buttons: + Add, Pack, Save, Void
- Table:
 

Document	Item	Qty	UOM	Line
1291	ps001	3	6Pack	0
1291	B10000	3	Each	1
1291	Serialized	3	Each	2

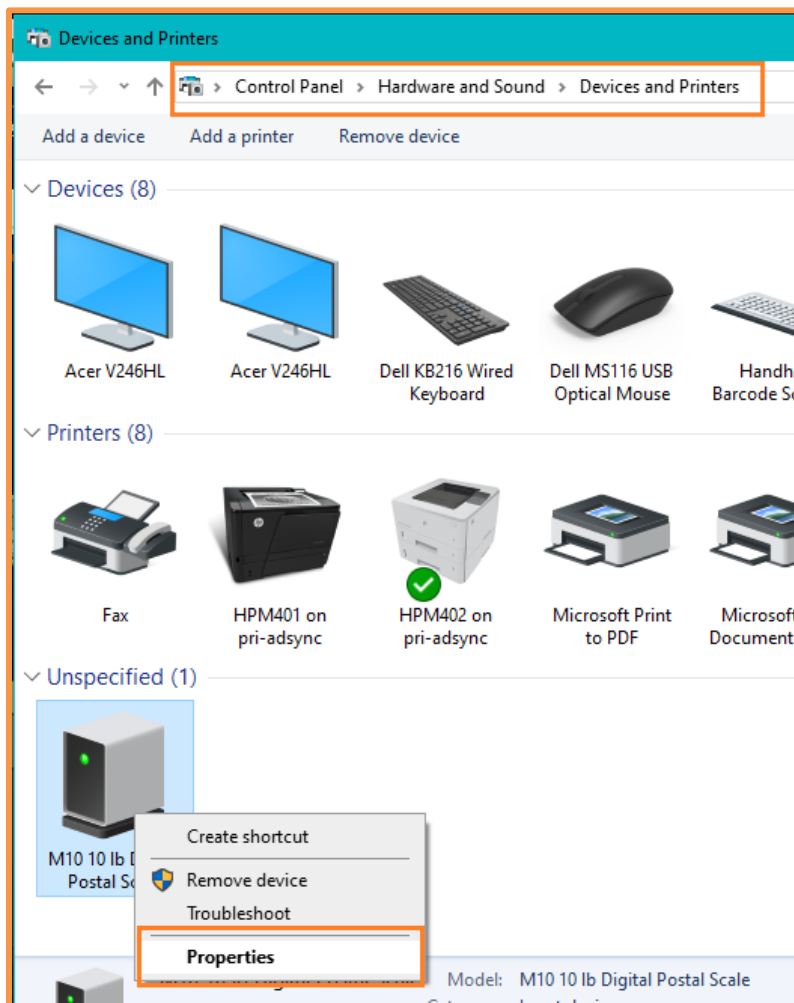
At this point you can perform any of the functions that were able to with a new Packing Slip (as we discussed above).

Just remember that it is all “Real-Time” so if you just wanted to take a quick look at one, or you pull up the wrong one, make sure you hit Save to leave the screen and not Void.

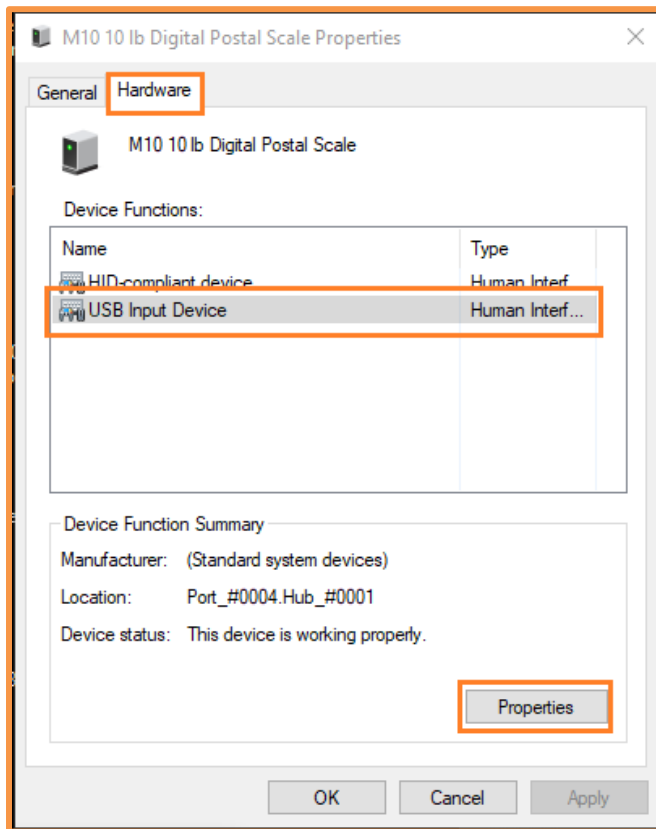
## Appendix

### Custom Scale Setup

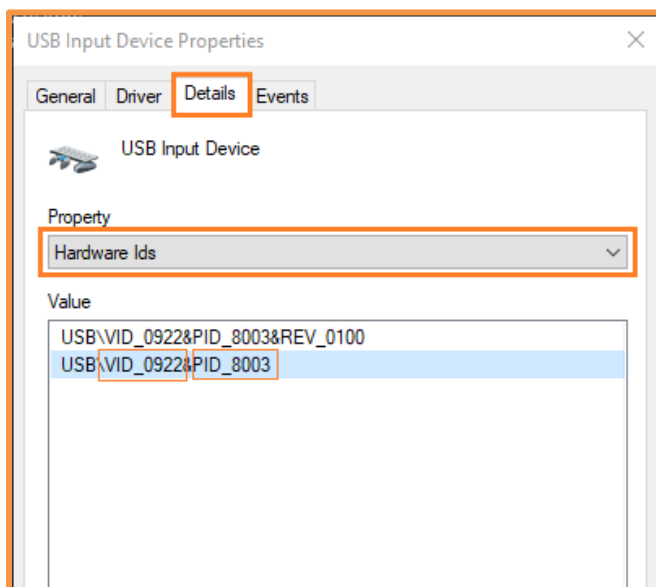
To get the VID and PID start by opening the Windows Devices and Printers screen, find your scale device, right-click on it, and choose Properties.



Next, click on the Hardware tab, then on USB Input Device, and then choose Properties on the bottom right.

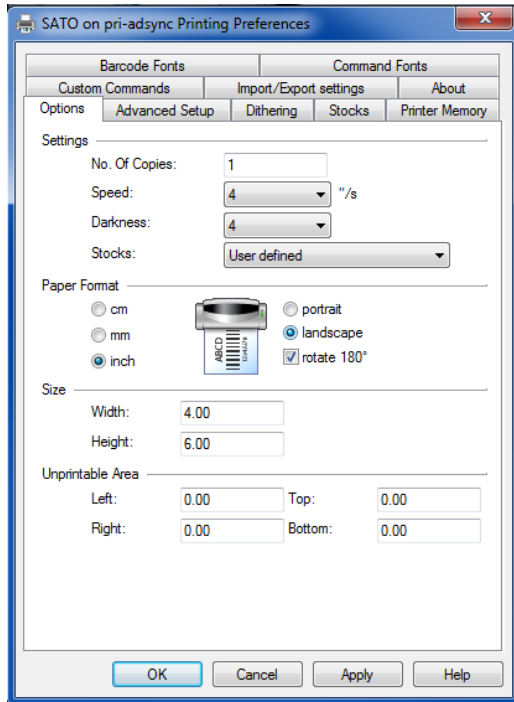


Lastly click on the Details tab, choose Hardware Ids from the Property drop-down, and make note of the Vendor and Product IDs (VID/PID).

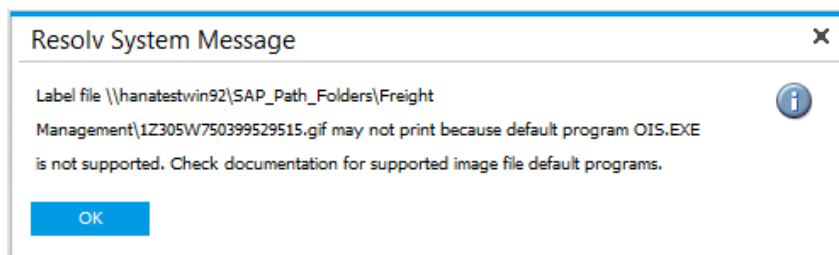


## Printing Carrier Labels

Because the Carrier label files are sent directly from the carriers and we do not manipulate them, and because there are many different options for things such as label printers, label sizes, label file extensions, default programs to open said file extensions, etc., you may have to tweak those settings to get the label to print and to print correctly (size, orientations, etc.)



If you get a message like below when printing, it means you have a default program set to open the label file that we do not recognize. If it prints, let us know and we will add that default program to our approved list and remove the pop-up message. If it doesn't print change the default program to something like Paint, IE, or Windows Photo Viewer and try printing again.



## Carrier Setup Info

### UPS

Tracking - [wwwapps.ups.com/WebTracking/processInputRequest?tracknum=<TRACKING NUMBER>](http://wwwapps.ups.com/WebTracking/processInputRequest?tracknum=<TRACKING NUMBER>)

Test Rate Shop - <https://wwwcie.ups.com/webservices/Rate>

Test Ship URL - <https://wwwcie.ups.com/webservices/Ship>

Live Rate Shop - <https://onlinetools.ups.com/webservices/Rate>

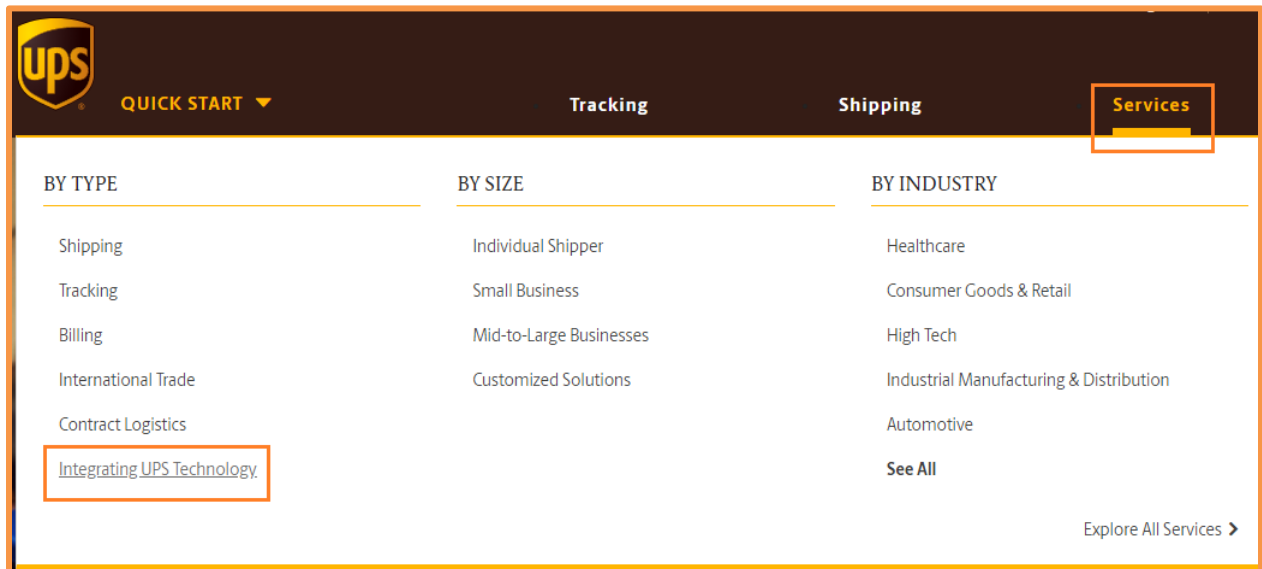
Live Ship - <https://onlinetools.ups.com/webservices/Ship>

UPS does not require an End of Day process.

After you set up your MyUPS account and log into it, you will need to go to this URL to get your Web Services license.

[https://www.ups.com/upsdeveloperkit/downloadresource?loc=en\\_US](https://www.ups.com/upsdeveloperkit/downloadresource?loc=en_US)

If the URL does not work, follow the screenshots below.



new equipment or want to enhance your existing systems, UPS has

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## UPS Developer Kit

Create a seamless customer experience. No stitching required.



Stop toggling between systems—have your programmers (we can help boost both your productivity and your sales. Your team or giving online shoppers the info they need to make Interfaces (APIs) smooth the way.

Make shipping—and selling—easier. We're here to help.

[Learn About Integrating UPS Developer Kit APIs](#)

## View the Developer Kit FAQs

### Step 3: Developers: Download APIs

Obtain and manage your API credentials and download developer kits.

[Access the UPS Developer Kit](#)

[Access Gemini Downloads and Tool Kit](#)

[Home](#) > [Technology Support](#) > [Developer Resource Center](#) > UPS Developer Kit

# UPS Developer Kit

## ANNOUNCEMENTS AND API UPDATES

The UPS Developer Kit APIs are updated in January and July each year. Enhancements can range from individual API functionality changes to brand new APIs. There are numerous enhancements to the APIs for January 2018. To view January 2018 and previous release changes please select the **More** link located in the bottom right corner of this box.

[More](#)

## HOW TO GET STARTED

- Step 1: [Sign up](#) for a ups.com® profile or [Log-in](#) now.
- Step 2: Select an API.
- Step 3: Download the API documentation.
- Step 4: [Request an access key.](#)

## ACCESS AND ADMINISTRATION

- [Manage Access Keys](#)
- [Administration](#)
- [UPS Developer Resource Center](#)



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  - [Host Customer Info Center ▲](#)

Pickup packages for FREE at The UPS Store and UPS Access Point locations.

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## UPS Developer Kit

### Request Access Key

Please enter your contact and account information and select **Request Access Key** to continue. Required fields are indicated with \*.

**Primary Contact Information:** [Edit](#)

Note: If you update your primary contact information, your My UPS profile will also be updated.

PORT JEFFERSON, NY 11777  
US  
631-543-3200

**Secondary Contact Information**

Please enter contact information for an additional contact within the company for which you are integrating the UPS APIs.

**Company or Name:**

**Telephone:**

**E-mail:**

**Additional Registration Information:**

**UPS Account:** [Add a UPS Account](#)

Request Access Key

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## UPS Developer Kit

**Request Access Key - Confirmation** Print

Thank you. Your request for an access key has been received. Your access key information is provided below. Please print this page for your records. You will also receive an e-mail confirmation of the access key request.

**Access Key: ABC123456DEF**

Provides Access To:	Developer Resource	Access Type
	Address Validation - City, State, ZIP	Production
	Address Validation - Street Level	Production
	Locator - Package	Production
	Pickup - Ground Freight	Test
	Pickup - Package	Production
	Quantum View - Package	Production
	Rating - Ground Freight	Test
	Rating - Package	Production
	Shipping - Ground Freight	Test
	Shipping - Package	Production
	Time In Transit - Package	Production
	Tracking - Package, Ground Freight, and Air Freight	Production
	UPS Signature Tracking - Package	Production
	UPS TradeAbility - Package	Production

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## FedEx

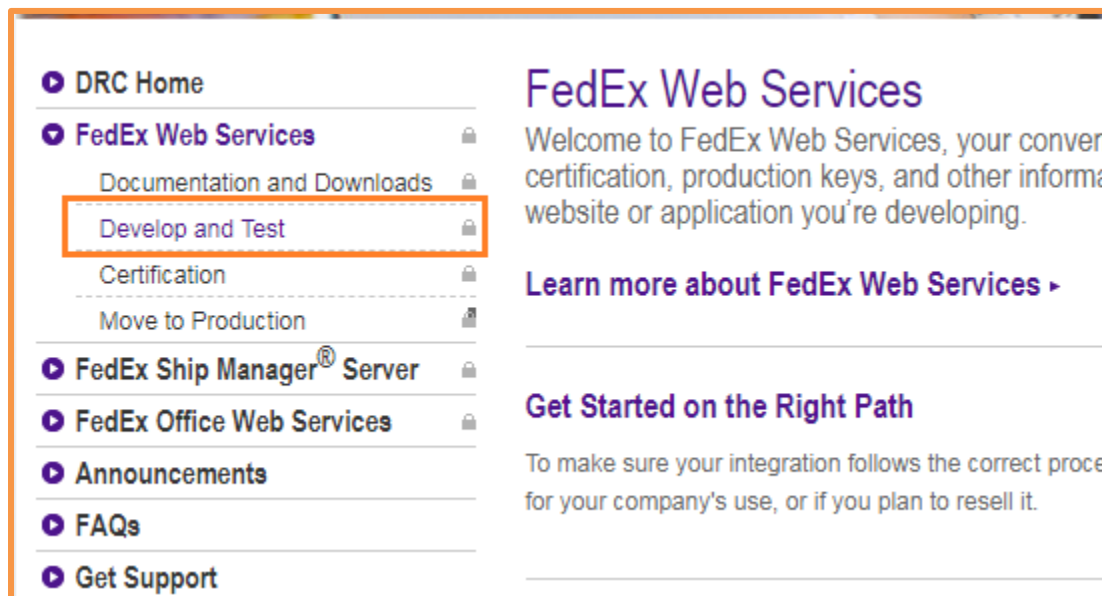
Tracking - [http://fedex.com/Tracking?action=track&tracknumber\\_list=<TRACKING NUMBER>&cntry\\_code=us](http://fedex.com/Tracking?action=track&tracknumber_list=<TRACKING NUMBER>&cntry_code=us)

Test Rate Shop - <https://wsbeta.fedex.com:443/web-services/rate>


Test Ship Service - <https://wsbeta.fedex.com:443/web-services>

You can contact Fed Ex Technical Support to get yourself setup with your test credentials.

You may also be able to get yourself setup with test credentials on your own by going to <https://www.fedex.com/us/developer/web-services/index.html> and following the screenshots below.



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## FedEx Web Services

Welcome to FedEx Web Services, your convenient source for developer guides, sample code, certification, production keys, and other information you will need to integrate FedEx into a website or application you're developing.

[Learn more about FedEx Web Services ▶](#)

- Documentation and Downloads
- Develop and Test**
- Certification
- Move to Production

### Develop and Test

The FedEx Web Services Testing Environment is a functional, full run-time environment ideal for testing your web services solutions. Although good for confirming functionality, the Testing Environment should not be used for stress testing. It is recommended that developers test and assure themselves that their code operates as desired.

#### Obtain Your Test Key

Obtaining a set of testing credentials is easy. Once you have read and accepted the terms and conditions of the Testing Agreement, you will receive a Test Account Number, a Test Meter Number, and a Developer Test Key and Password. These credentials must be included in your code as specified in the FedEx Web Services technical documentation. Without this information, your transactions will be rejected. Once your code includes the testing credentials, you may proceed to fully testing your application.

[Get your test key](#)



**FedEx.**

### FedEx Test System Access Confirmation

① Contact Info ② License Authorization ③ Confirmation

Congratulations! Your Test System Access information is confirmed.

There are two parts to the FedEx Authentication process. There is a security code and a test key.

Please retain the following information in a secured environment. You will need this information to run your Web Services in the FedEx test environment.

A confirmation email will be sent to you with your Test Security Code and directions for testing your FedEx Web Service application in the FedEx Test environment.

**Required for All Web Services**

Developer Test Key: T6tPwyN14RmVzfcM

**Required for FedEx Web Services for Intra Country Shipping in US and Global**

Test Account Number: 510087240  
Test Meter Number: 119039826

**Required for FedEx Web Services for Office and Print**

Test FedEx Office Integrator ID: 123  
Test Client Product ID: TEST  
Test Client Product Version: 9999

Go to **FedEx Developer Resource Center**

You will get an email with your test credentials to confirm you are all set up, but make sure you write down the Developer Test Key from the completion screen. This, for some reason, is not in the email confirmation they sent to you.

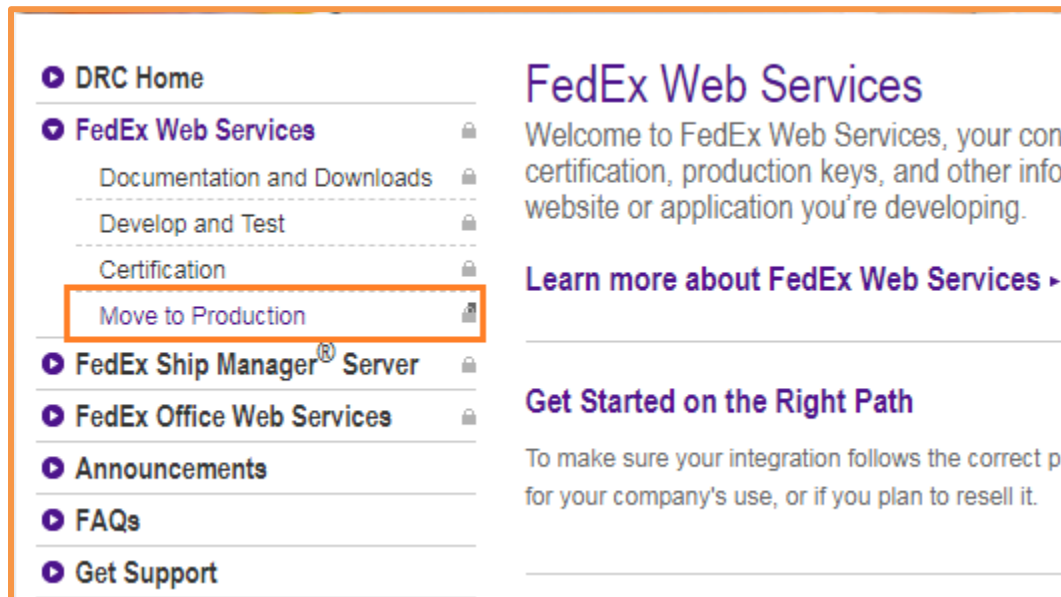
Once you have tested you will need to get your labels certified. To do this, you can use the Certification link on the FedEx website (see below), email [websupport@fedex.com](mailto:websupport@fedex.com) or call 877.339.2774 and say “web services” at the voice prompt. Note if you call or email, let them know you are getting ready to move to production and need to be certified.

[DRC Home](#)  
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**FedEx Web Services**  
 Welcome to FedEx Web Services, your con certification, production keys, and other infor website or application you're developing.

[Learn more about FedEx Web Services >](#)

Once you are certified and ready for production access, you will return to the above website and go to the Move to Production screen to get your production credentials.



You will then need to replace all test credentials (Account Number, Meter Number, Authentication Key, and Password) with the LIVE credentials. In addition, the Ship URL and Rate Shop URL will need to be changed to the LIVE ones.

Live Ship URL - <https://ws.fedex.com:443/web-services>

Live Rate Shop URL - <https://ws.fedex.com:443/web-services/rate>

Production credentials will not authenticate in the test environment, and test credentials will not authenticate in production, so passing your requests to the correct server is important.

FedEx does not require an End of Day process.

## **USPS**

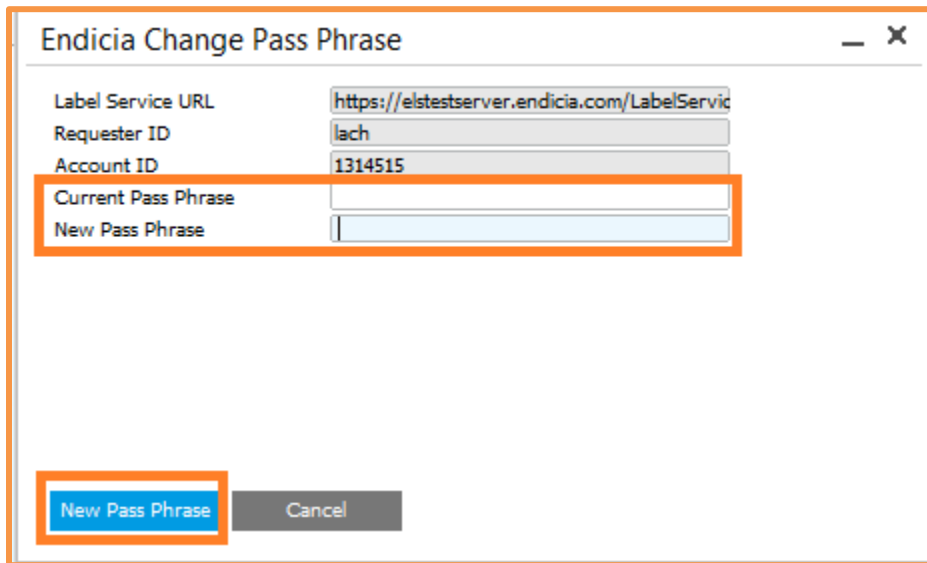
The stand-alone USPS Carrier option only does rate shopping, address verification, pickup scheduling, and pickup cancelling. For actual USPS shipping (like UPS and FedEx) you will need to use Endicia (see below).

Rate Shop URL - <https://secure.shippingapis.com/ShippingAPI.dll>





In that window, enter your current pass phrase, a new pass phrase, and click on the New Pass Phrase to save/update it.



You should now be fully registered to ship with Endicia. Note, you may need to purchase Postage before you can ship depending on how your account is set up. Contact Endicia if you have any questions.

You can only use the Sandbox URLs if you obtain a separate Sandbox account from Endicia. If you do not or cannot get one, you can use the Production URLs, just make sure the LIVE SHIPMENTS option is unchecked while testing.

Sandbox Rate Shop/Ship URL -

<https://elstestserver.endicia.com/LabelService/EwsLabelService.aspx>

Production Rate Shop/Ship URL -

<https://labelserver.endicia.com/LabelService/EwsLabelService.aspx>

Requester ID - lach

Note, the Declared Value needs to be set when COD is used with Endicia. If the Declared Value is zero, then FM will just use the COD Amount as the Insured Value.

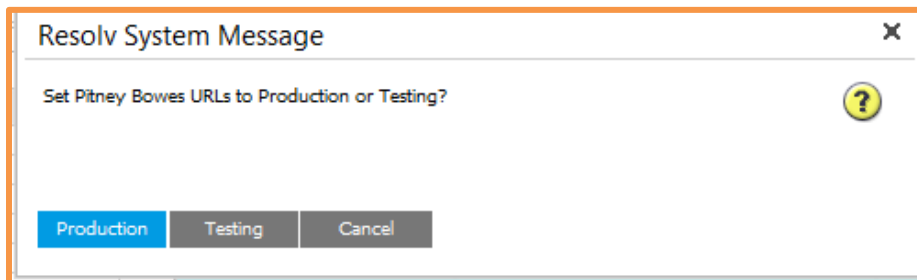
## Pitney Bowes

Rate Shop URL - <https://api-sandbox.pitneybowes.com>

Ship Service URL - <https://api-sandbox.pitneybowes.com>

The way to setup Pitney Bowes is a little different than other carriers, you don't need to have the shipping account setup because during your configuration in Resolv FM you will create your Pitney Bowes account as well.

Once you choose Pitney Bowes as your Carrier in the Carrier Setup screen, the system will ask you if you want to set this up as Production or Testing. Choose Production if you want to start working with live Pitney Bowes Shipments or choose Testing to begin with test shipments.

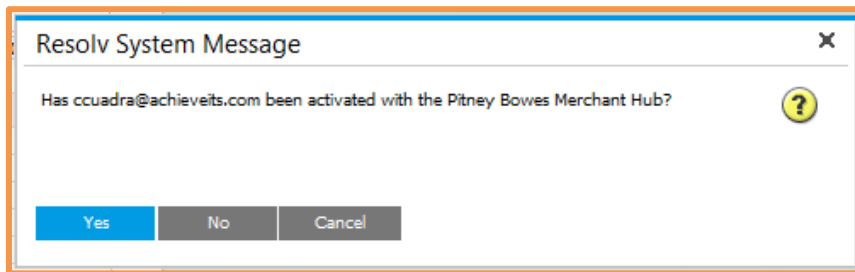


Next you need to enter in the email you want to use for the account into the Subscription Email field.

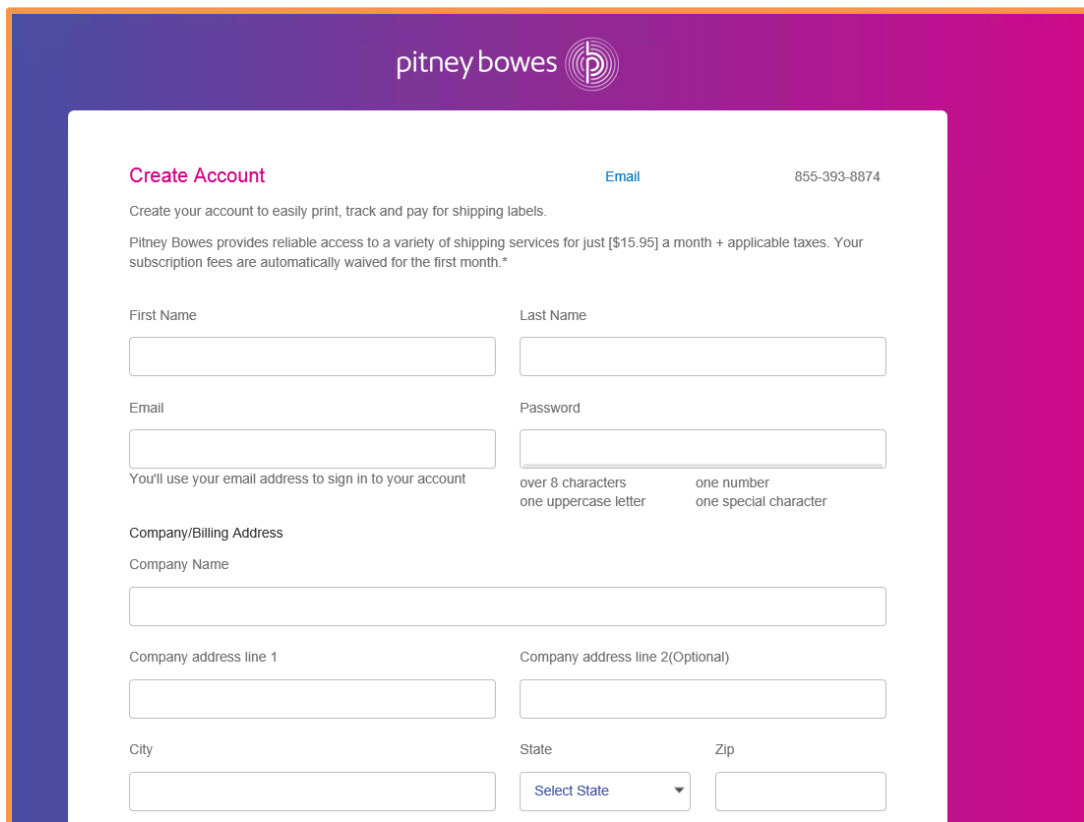
Subscription Email	<input type="text"/>	
Auth Token	<input type="text"/>	Expires <input type="text"/>
#	Service Level Code	Service Level Description
1	FCM	▼ First Class Mail
2	PM	▼ Priority Mail
3	EM	▼ Priority Mail Express

After that, click on the Merchant ID button at the bottom. The system will then tell you that the Authentication Token must be retrieved first. Click on OK, and the system will populate the Auth Token and Expiration date fields for you.

After that, the system will ask you if this email address has already been activated with Pitney Bowes. If it has, then click on Yes. If not, click on No.



When you say No, the system tells you to register your email address and then launches Pitney Bowes’s web page so that you can do just that.



Follow the instructions from Pitney Bowes web page. Once you are done, Pitney Bowes will send to you all the information about the account, which you will then use to fill in the rest of the fields on the FM Carrier Setup screen.

## **DHL**

Rate Shop/Ship Service Testing URL - <https://xmlpitest-ea.dhl.com/XMLShippingServlet>

Rate Shop/Ship Service Production URL - <https://xmlpi-ea.dhl.com/XMLShippingServlet>

## **Purolator**

Rate Shop/Ship Service Testing URL - <https://devwebservices.purolator.com/EWS/V1>

Rate Shop/Ship Service Production URL - <https://webservices.purolator.com/EWS/V1>

## **Estes**

Rate Shop URL - <http://www.estes-express.com/tools/rating/ratequote/v3.0/services/RateQuoteService>

Ship Service URL - <http://www.estes-express.com/bol/services/BolService>

## **Ward**

Rate Shop URL - <http://208.51.75.23:6082/cgi-bin/map/RATEQUOTE>

Test Ship Service URL - <http://208.51.75.23:6082/cgi-bin/map/PICKUPTEST>

Live Ship Service URL - TBD

## **XPO**

Rate Shop URL - <https://ltl.xpo.com/XMLj/X-Rate>

Ship Service URL - <https://ltl.xpo.com/XMLj/X-BOL>

## **ABF**

Ship Service URL - <http://www.abfs.com/xml/bolxml.asp>

Note, there is no rate shop for ABF

## **Holland**

Rate Shop URL - <https://api.hollandregional.com/api/RateQuote/doRateQuote?>

Ship Service URL - <https://api.hollandregional.com/api/PickupRequest/SchedulePickup?>

### **UPS Freight**

Rate Shop URL - <https://wwwcie.ups.com/webservices/FreightRate>

Ship Service URL - <https://wwwcie.ups.com/webservices/FreightShip>

### **FedEx Freight**

Test Rate Shop URL- <https://wsbeta.fedex.com:443/web-services/rate>

Test Ship Service URL - <https://wsbeta.fedex.com:443/web-services>

### **Uber Freight**

Test Rate Shop URL - <https://sandbox-api.uber.com>

Test Ship Service URL - <https://sandbox-api.uber.com>