

Balance Point Technologies, Inc.
www.maxtoolkit.com

Package Shipping

User Guide

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Publication Date	April 2021

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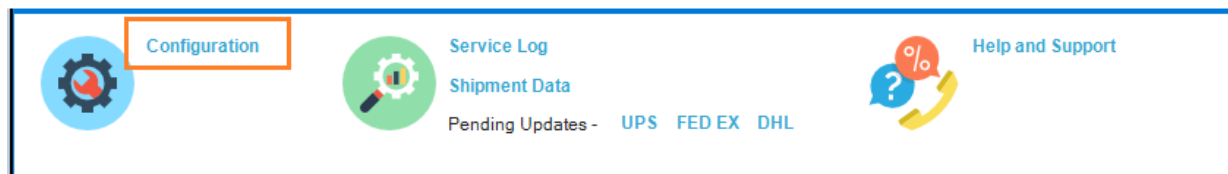
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Package Shipping

- Package Shipping is automatically downloaded and installed through MAX Workbench.
- Before launching Package Shipping:
 - Configure 'Waive Shipping Charges' user defined field in MAX on SO_Master

Waive Shipping Charges	DoZeroOverride	Boolean		0				23
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- Determine the location of folder '\BPT\Package Shipping\URL'. This is the folder where Package Shipping stores .url files. If the folder does not exist, create it.
- Start MAX Workbench, login and click on the Package Shipping tile to launch Package Shipping.
- Click on Configuration to launch the Settings dialog.



- The package Shipping dialog displays

Settings

Order Header

Update Notes Print on SO Print on INV

Order Detail

Update Notes Print on SO Print on INV

Uri Shortcut Folder:

(Overrides Charges to zero)

RCODE_RC
*

User Design Code:

Auto Display Log

Update MAX SO UDF

UPS Charge Level

Package

Ship Total

Calculate and Assign Undiscounted Order Value

Ship Codes:

Code	Description
<input checked="" type="checkbox"/> 01	Federal Express
<input type="checkbox"/> 02	UPS Ground
<input type="checkbox"/> 03	DHL International
<input type="checkbox"/> 04	Best Way - Rate Shop

Amount Configuration:

	Min Amount	Max Amount	Perc
*			

List Price Batch Update

Up Charge Percent Up Charge Dollars

(i.e. 2% Enter .02) (i.e. 2\$ Enter 2.00)

Auto assign 'Bill Transportation To' to order based on customer

Automatically assigning customer specific up-charge based on Customer Master Ext configuration

Assign Upcharge Based on Weight

	Min Weight	Max Weight	Amount
▶	<	20	25
	21	45	35
	46	58	50
	59	>	60
*			

Save Settings

Package Shipping

- Order Header
 - Update Notes – If checked, a tracking number and the date of the shipment will be recorded in the sales order header notes. This option is enabled by default.
 - Print on SO - If checked, the note containing the tracking number and ship date will be marked as a note that is to be displayed as part of the sales order header notes on reports. This option is enabled by default.
 - Print on INV - If checked, the note containing the tracking number and ship date will be marked as a note that is to be displayed as part of the invoice header notes on reports. This option is left disabled by default.
- Order Detail
 - Update Notes – If checked, a tracking number and the date of the shipment will be recorded in the sales order line notes. This option is left disabled by default.
 - Print on SO - If checked, the note containing the tracking number and ship date will be marked as a note that is to be displayed as part of the sales order detail notes on reports. This option is left disabled by default.
 - Print on INV - If checked, the note containing the tracking number and ship date will be marked as a note that is to be displayed as part of the invoice detail notes on reports. This option is left disabled by default.
- UPS Charge Level – This option is specific to UPS. The default value is Ship Total, and it is used in 99% of the time. Per Package Charge Level is only used when sales order line level integration is in place.
- URL Shortcut Folder – This is the folder where Package Shipping will be storing the .url files that are generated for each shipment and associated with the sales orders. This value is mandatory and must be specified.
- MAX Reason Codes – It must contain at least one value. The default reason code is X. If an order with a matching reason code is detected, the freight charges of the order will be automatically updated to \$0.
- Up Charge Percent – Adds an additional amount to the already specified freight amount. This option is left disabled by default.
- Up Charge Dollars – Adds an additional amount to the already specified freight amount. This option is left disabled by default.
- Auto Display Log – Displays a text file log each time processing completes. This option is left disabled by default.
- Update SO UDF – If checked, Package Shipping will update field UDFREF_27 with the tracking number. This option is left disabled by default.

Package Shipping

- Auto assign 'Bill Transportation To' to order based on customer.
 - This option is dependent on the user defined fields shown below. The fields must be configured exactly as shown in the image below for this functionality to function as intended.
 - a) Customer_Master_Ext

Label	Field Name	Data Type	Browser	Lenç	Default Value	Data Range	List Separator	Selection List	Screen Location
Bill Transportation To	BillTransportationTo	ComboBox		50	Shipper		:	3rdParty;Receiver;Shipper	4

b) SO_Master_Ext

Label	Field Name	Data Type	Browser	Lenç	Default Value	Data Range	List Separator	Selection List	Screen Location
Bill Transportation To	BillTransportationTo	ComboBox		50	Shipper		:	3rdParty;Receiver;Shipper	3

- When enabled, a sql trigger (tr_SO_Master_BillTransportationTo_AfterInsert_BPT) will be placed on db table SO_Master. The trigger will monitor for newly created order headers. For each new order header, the trigger will automatically detect the assigned 'Bill Transportation To' option of the customer and assign the same option to the order.
- When disabled, the sql trigger will be automatically removed.

- Automatically assigning customer specific up-charge based on Customer master Ext configuration.
 - This option is dependent on the user defined fields shown below. The fields must be configured exactly as shown in the image below for this functionality to function as intended.
 - a) Customer_Master_Ext

Label	Field Name	Data Type	Browser	Lenç	Default Value	Data Range	List Separator	Selection List	Screen Location
Up-Charge Assignment	UpchargeAssignment	ComboBox		13	No Up-charge		:	No Up-charge;Dollar Amount;Percentage	1
Up-Charge Dollar Amount	UpchargeAmount	Double							2
Up-Charge Percentage	UpchargePercentage	Double							3

- Package Shipping will automatically detect that the user defined fields are present and enable or disable this option accordingly.

Package Shipping

- Calculate and assign undiscounted order value
 - This option is dependent on the user defined fields shown below. The fields must be configured exactly as shown in the image below for this functionality to function as intended.

a) SO_Master_Ext

Label	Field Name	Data Type	Browser	Lenç	Default Value	Data Range	List Separator	Selection List	Screen Location
Total List Price	TOTAL_LIST	Double							5
Estimated Freight	EST_FREIGHT	Double							7

b) SO_Detail_Ext

Label	Field Name	Data Type	Browser	Lenç	Default Value	Data Range	List Separator	Selection List	Screen Location
List Price	LIST_PRICE	Double							1

- Ship Codes configuration

The Ship Codes grid allows the user to specify the ship codes that this functionality will apply to.

Ship Codes:

Code	Description
<input type="checkbox"/> 01	Federal Express
<input checked="" type="checkbox"/> 02	UPS Ground
<input type="checkbox"/> 03	DHL International
<input checked="" type="checkbox"/> 04	Best Way - Rate Shop

- Amount configuration

The Amount configuration grid allows the user to specify a range of amounts and a percentage that will be used to calculate the estimated freight that will later be assigned to the order by the stored procedure mentioned in the next section in point b)

Amount Configuration:

	Min Amount	Max Amount	Perc
	<	100	5
	101	200	10
	201	>	15
*			

Package Shipping

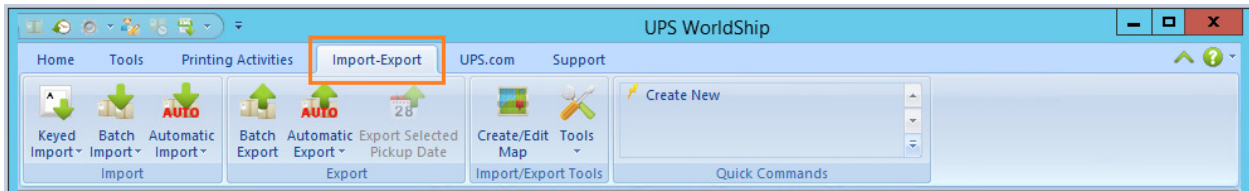
- When 'Calculate and assign undiscounted order value' option is enabled
 - a) A sql trigger (tr_SODetail_After_Update_AssignListPrice_BPT) will be placed on db table SO_Detail. The trigger will monitor for newly created or updated order line items and it will execute the stored procedure mentioned in point b) below.
 - b) A sql stored procedure (proc_AssignSODetailListPrice_BPT) will be created. The stored procedure will be executed from the trigger mentioned in point a) above and from within the Package Shipping Data Setting dialog when the List Price Batch Update button is clicked. The stored procedure will execute the following actions:
 - i. Retrieve the Ship Via code of the corresponding order and check to see if it a Ship Via code that has been designated to qualify the orders for the List Price Update.
 - ii. If the order qualifies for the list price update, the stored procedure will retrieve the price of the corresponding line item from Part Sales and assign the price to the SO_Detail_Ext.LIST_PRICE field. Also, the stored procedure will calculate the sum of List Prices for each line on the order and assign the result to field SO_Master_Ext.TOTAL_LIST. In addition, the stored procedure will determine the Estimated Freight based on the Total List Price. The Estimated Freight will be assigned to field SO_Master_Ext.EST_FREIGHT.
- Assign up-charge based on weight
 - When enabled, Package Shipping will automatically add an up-charge to the existing shipment freight amount based on the shipment freight and the configured range of weights and amounts.
- Click Save Changes to save the specified settings.
- Close the settings dialog. Package Shipping is not configured.
- Package Shipping can also be instructed to not assign a freight amount. Creating the shown user defined field below on Customer Master Ext and enabling it for a customer, will instruct Package Shipping to not assign a freight amount.

Do Not Assign Freight	DoNotAssignFreight	Boolean			0			5
-----------------------	--------------------	---------	--	--	---	--	--	---

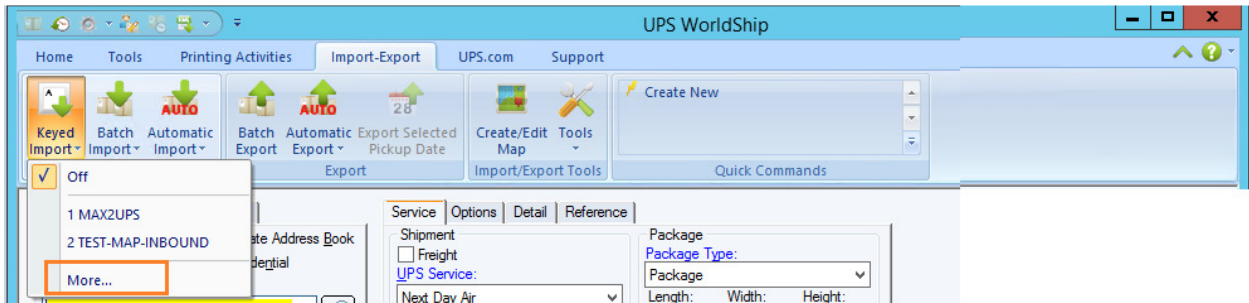
UPS WorldShip 2020

MAX to UPS

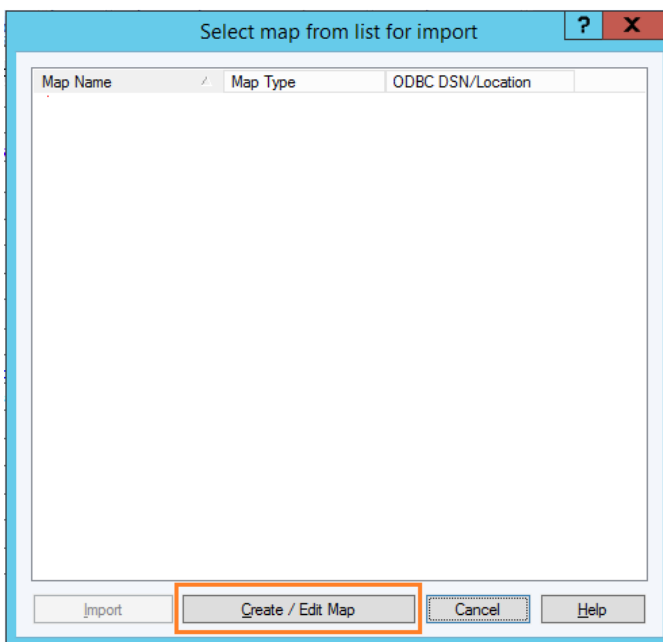
- Configure System DSN named MAX2UPS.
- Launch UPS WorldShip
- Click on Import-Export tab



- Click on Keyed Import and select the More... option

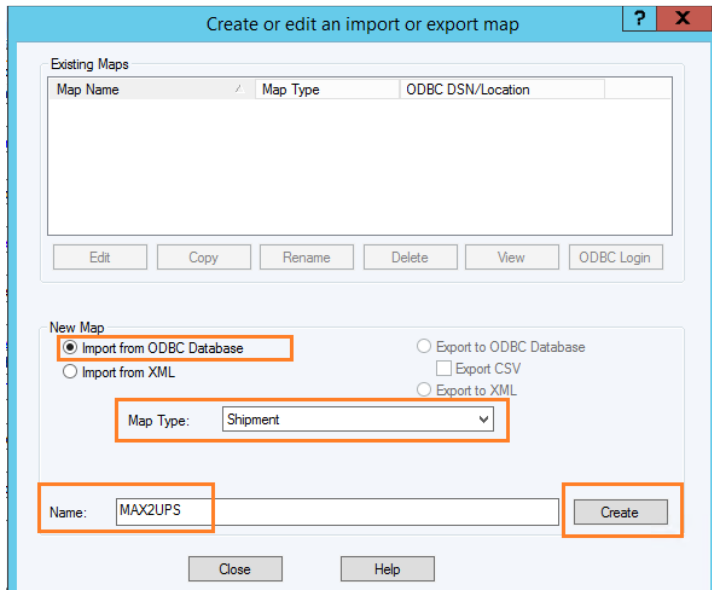


- Click on Create / Edit Map button

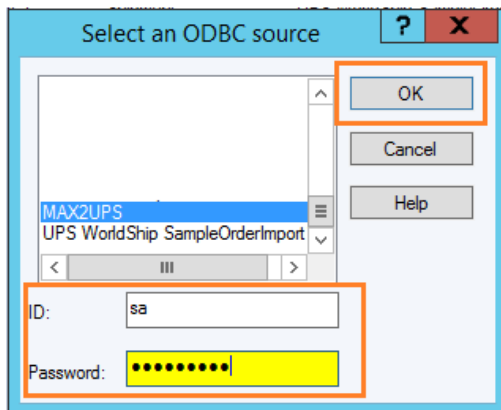


Package Shipping

- Click on Create / Edit Map button.
- Proceed with the following steps on the Create / Edit Map dialog:
 - Select Import from ODBC Database option.
 - Select Shipment as the Map Type.
 - Specify MAX2UPS as the Name of the map.



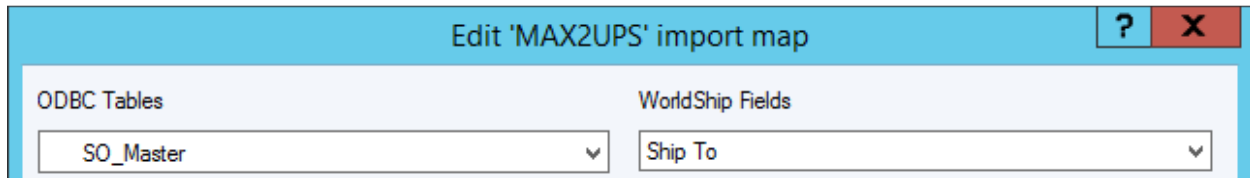
- Click Create button.
- On the Select ODBC Source dialog, select the MAX2UPS DSN and specify the sql username and password used to create the DSN. Preferable to use the sa account or a clone of the sq account named bpts.



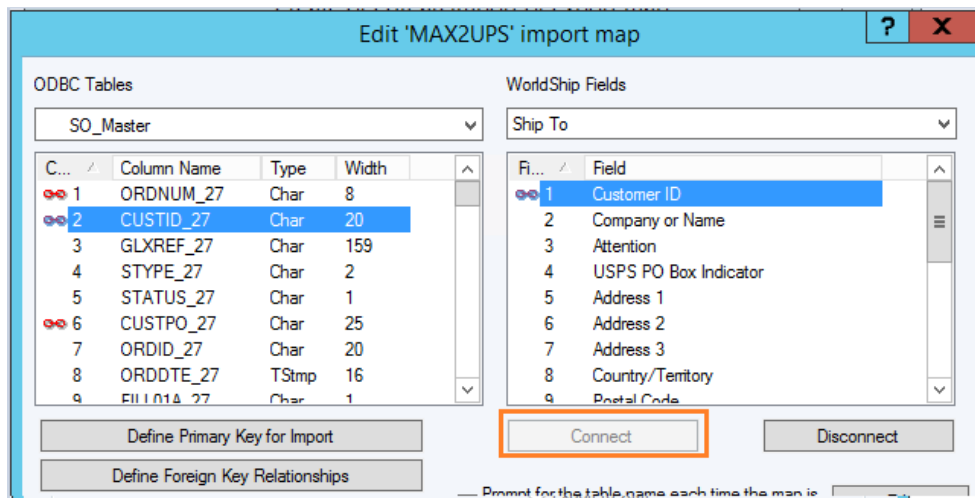
- Click Ok button to save the credentials and proceed to the next step.

Package Shipping

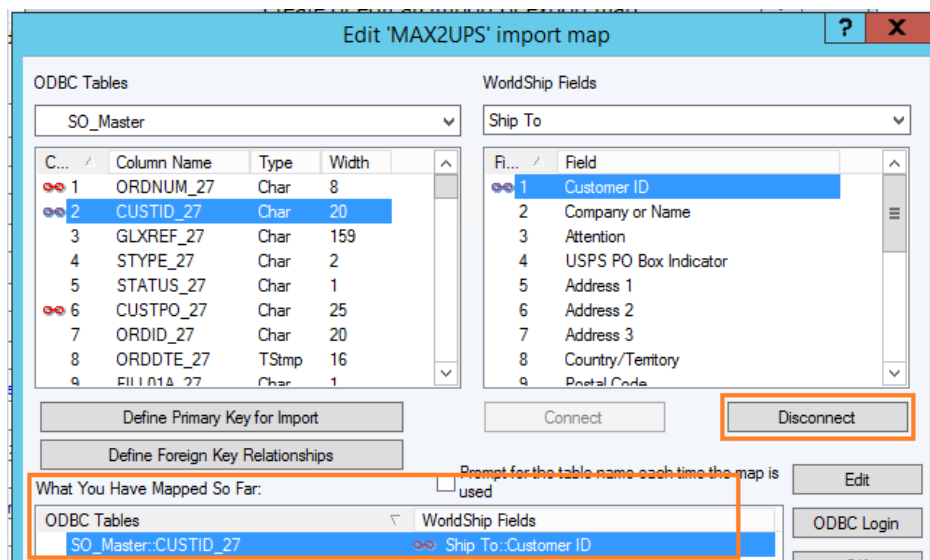
- On Edit 'MAX2UPS' map:
 - Use the dropdowns at the very top of the dialog to switch between the available tables



- To map fields, select a field from both sides and click the Connect button.



- To remove mapped fields, selected the mapped fields from the already mapped fields list and click on the Disconnect button



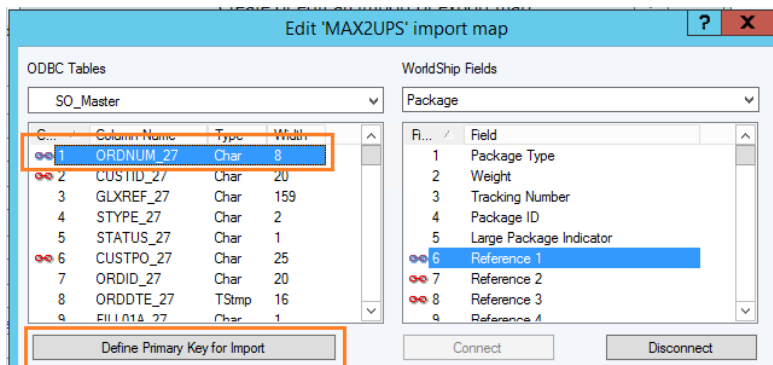
Package Shipping

- Configure the following mappings:
- SO_Master to Package

ODBC Tables	WorldShip Fields
SO_Master	Package

ODBC (MAX)			UPS WorldShip		
Table	Field #	Field Name	Table	Field #	Field Name
SO_Master	1	ORDNUM_27	Package	6	Reference 1
	2	CUSTID_27		8	Reference 3
	6	CUSTPO_27		7	Reference 2

- Highlight field ORDNUM_27 and click on the Define Primary Key for Import button



- SO_Master to Ship To

ODBC Tables	WorldShip Fields
SO_Master	Ship To

ODBC (MAX)			UPS WorldShip		
Table	Field #	Field Name	Table	Field #	Field Name
SO_Master	2	CUSTID_27	Ship To	1	Customer ID
	34	ADDR1_27		5	Address 1
	35	ADDR2_27		6	Address 2
	52	ADDR3_27		7	Address 3
	36	CITY_27		10	Coty or Town
	37	STATE_27		11	State
	38	ZIPCD_27		9	Post Code
	39	CNTRY_27		8	Country/Territory
	40	PHONE_27		12	Telephone

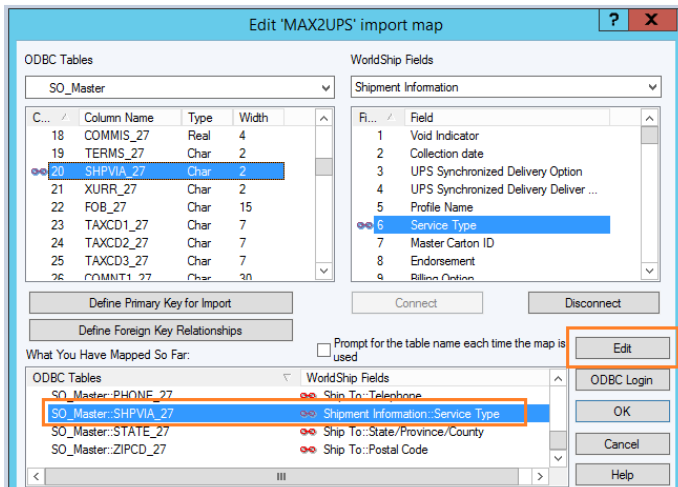
Package Shipping

- SO_Master to Shipment Information

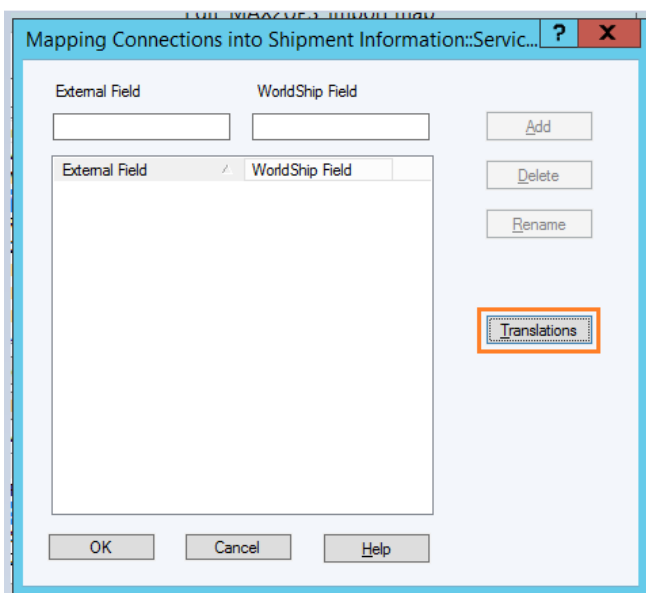
ODBC Tables: SO_Master | WorldShip Fields: Shipment Information

ODBC (MAX)			UPS WorldShip		
Table	Field #	Field Name	Table	Field #	Field Name
SO_Master	20	SHPVIA_27	Shipment Information	6	Service Type

- Highlight the SHPVIA_27 to Service Type mapping and click on the Edit button

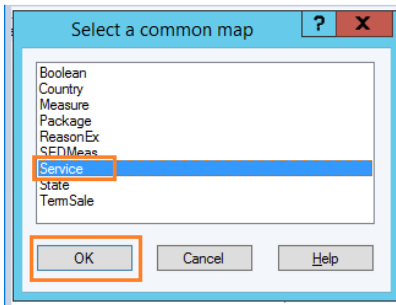


- On the Mapping Connections dialog, press the Translations button

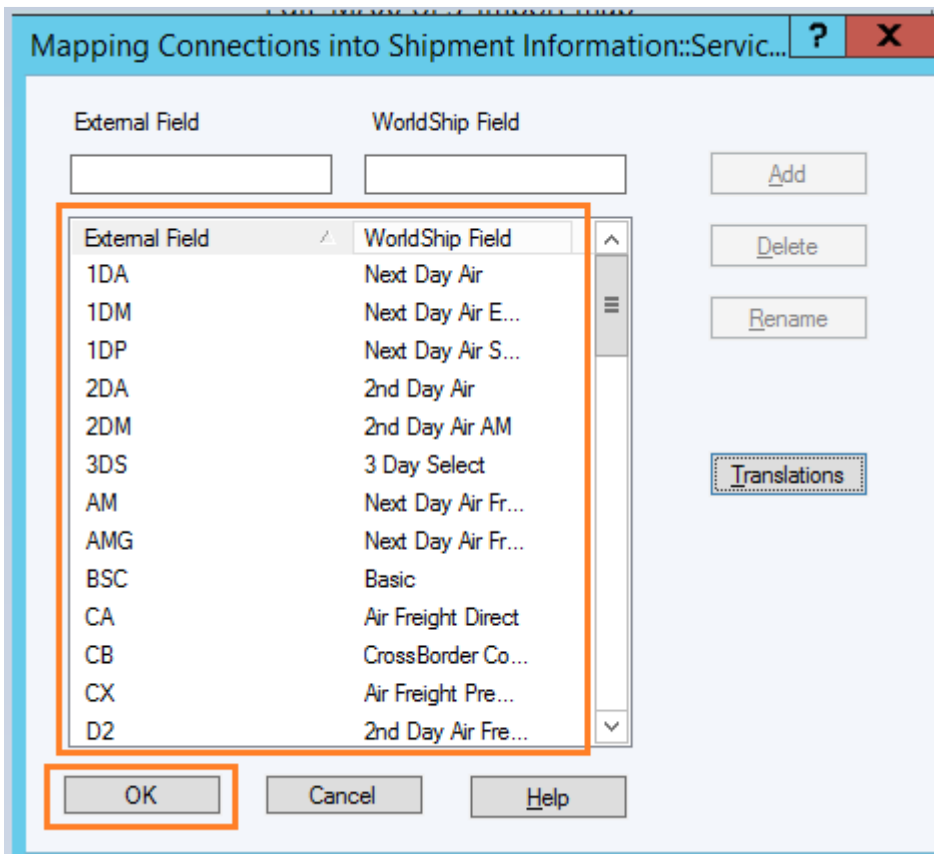


Package Shipping

- On the Transactions dialog, select the Service option and click Ok.

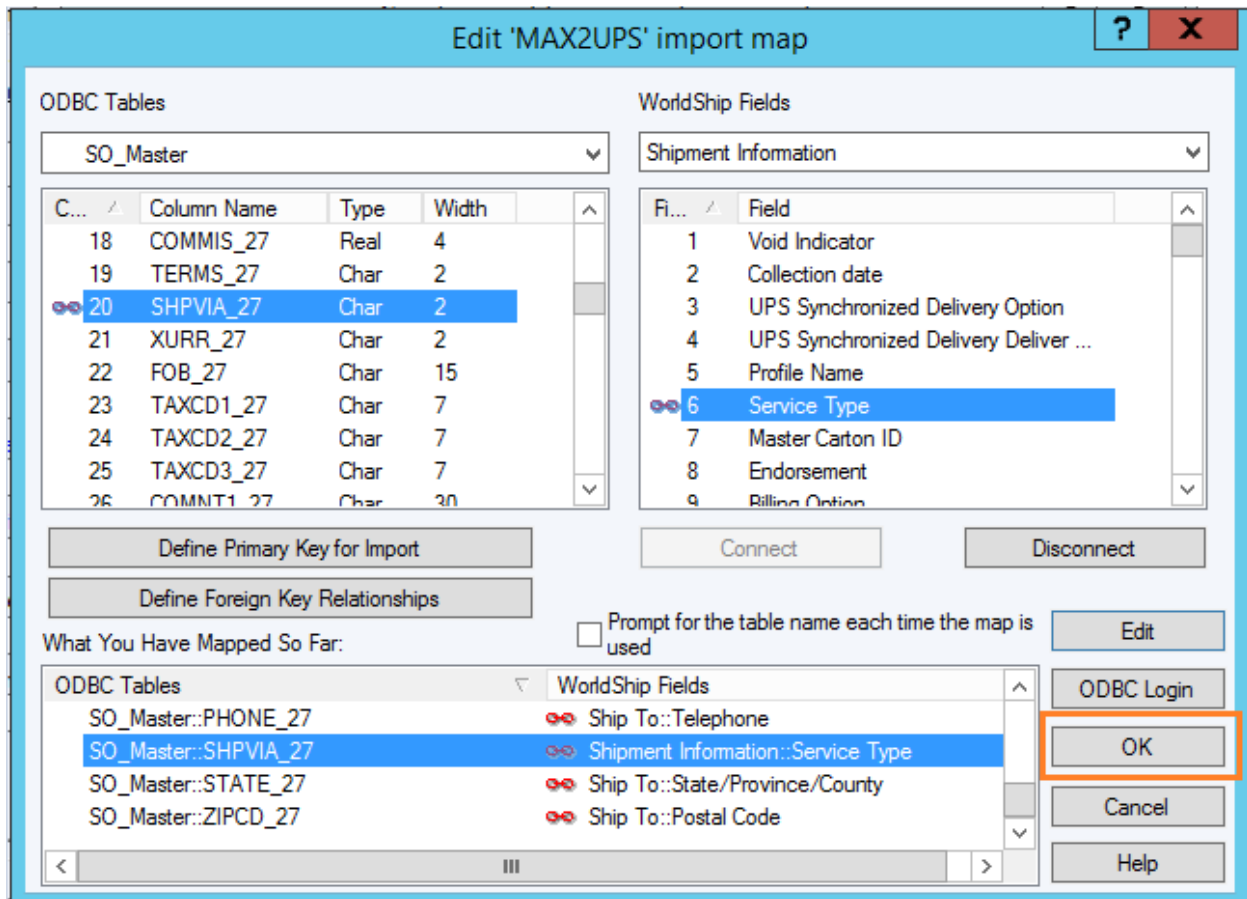


- The selected service type mappings will be automatically applied. Click ok to close the Mapping Connections dialog.

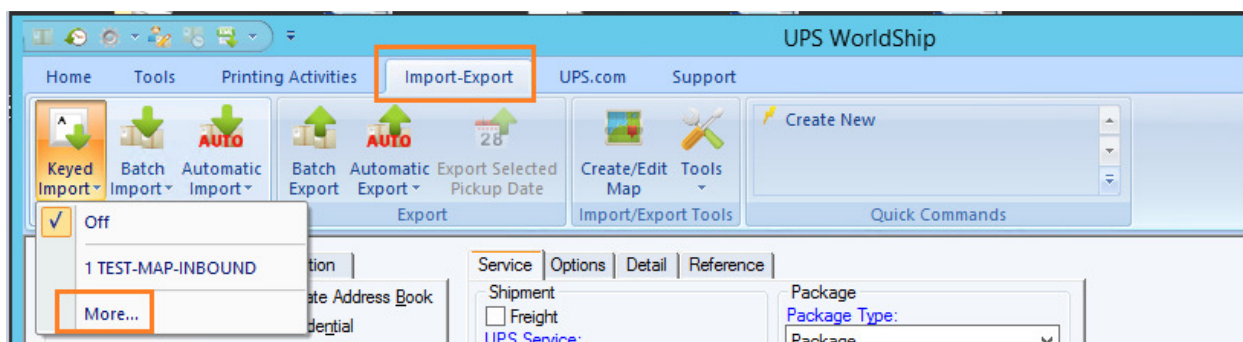


Package Shipping

- Click OK to save and close the MAX2UPS map.

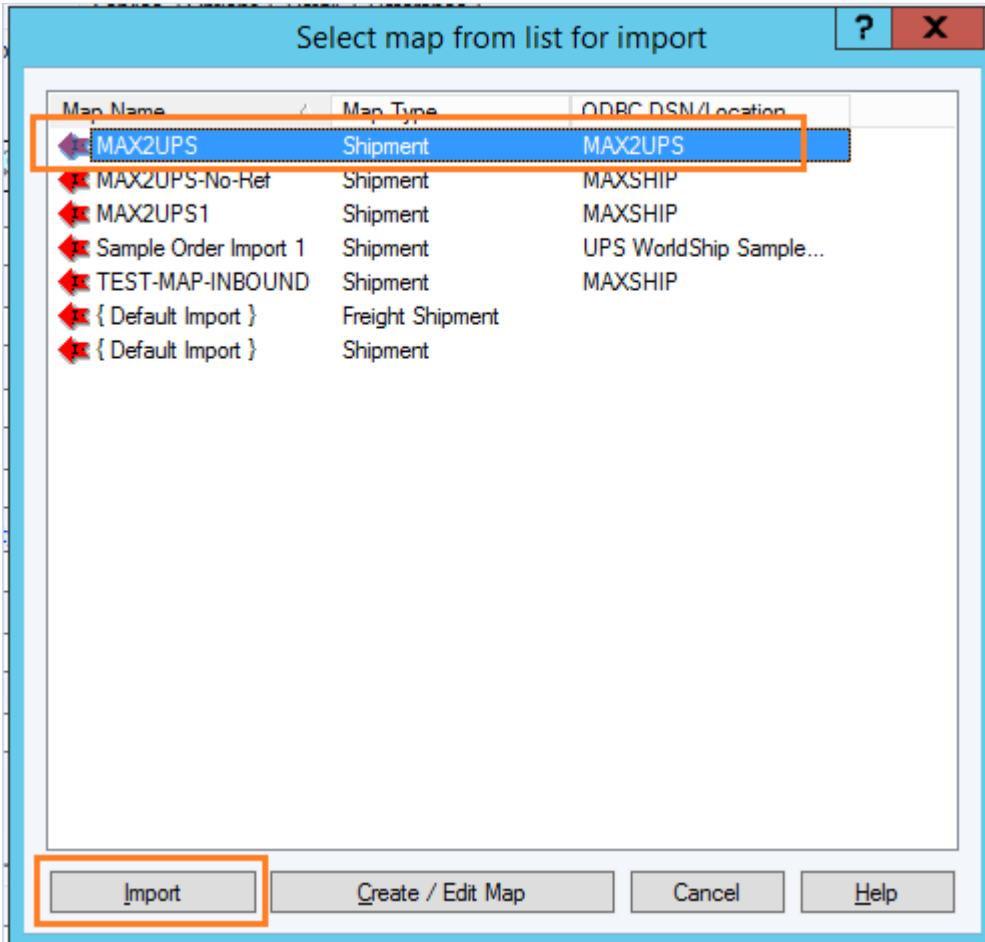


- To select the MAX2UPS map
 - click Import-Export -> Keyed Import to open the dialog with the available import maps



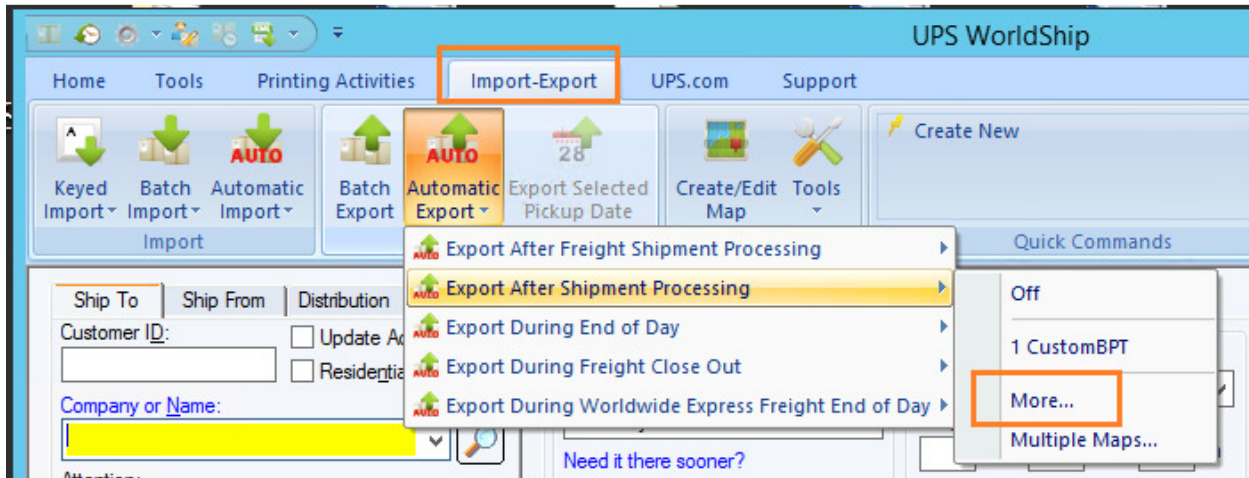
Package Shipping

- Select the MAX2UPS map and press the Import button to select the import map.

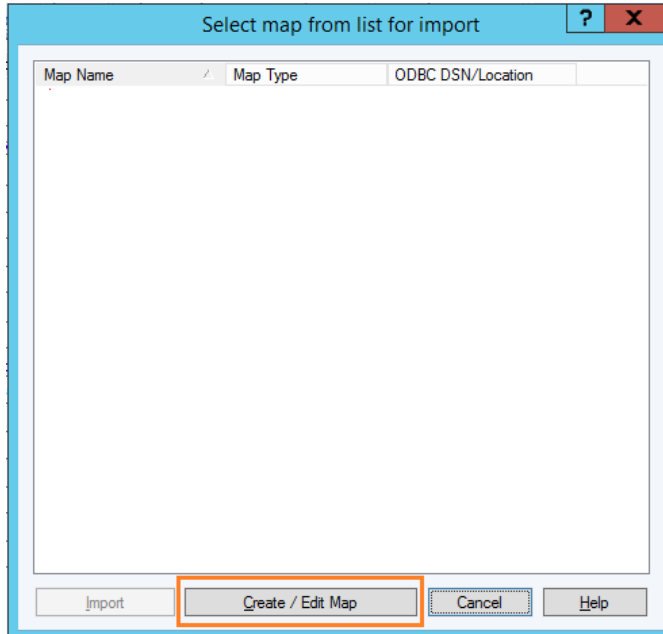


UPS to MAX

- Configure System DSN named UPS2MAX.
- Launch UPS WorldShip
- Click on Import-Export tab
- Select Automatic Export -> Export After Shipment Processing -> More ...



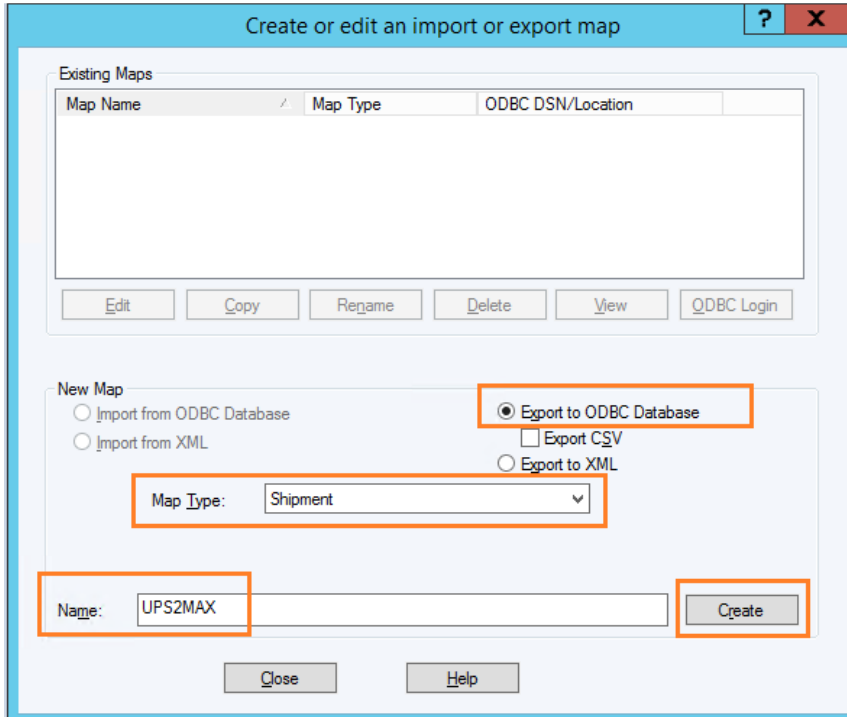
- Click on Create / Edit Map button



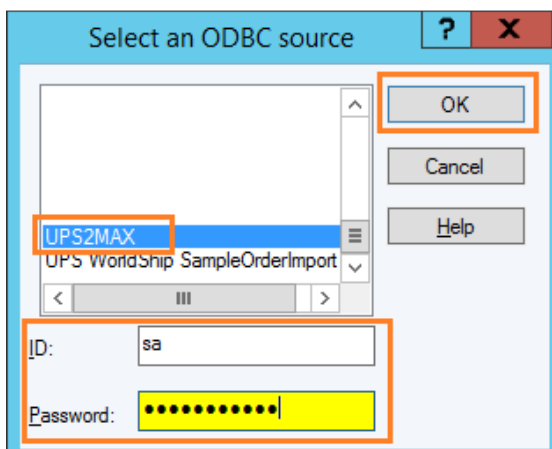
- Click on Create / Edit Map button.

Package Shipping

- Proceed with the following steps on the Create / Edit Map dialog:
 - Select Export to ODBC Database option.
 - Select Shipment as the Map Type.
 - Specify UPS2MAX as the Name of the map.



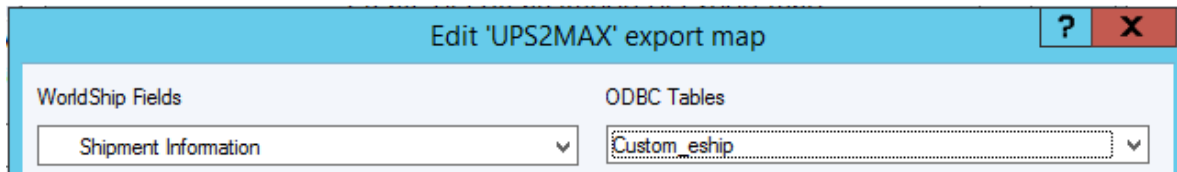
- Click Create button.
- On the Select ODBC Source dialog, select the MAX2UPS DSN and specify the sql username and password used to create the DSN.



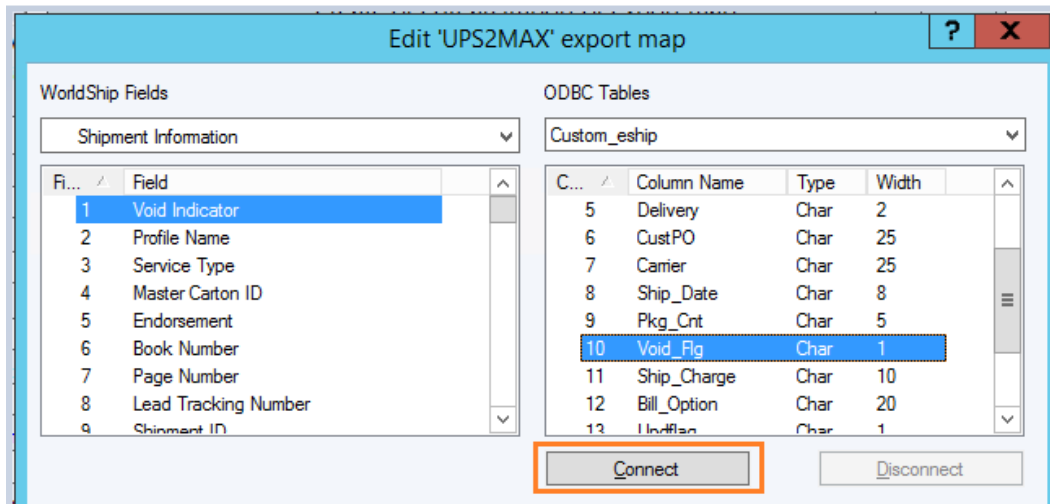
- Click Ok button to save the credentials and proceed to the next step.

Package Shipping

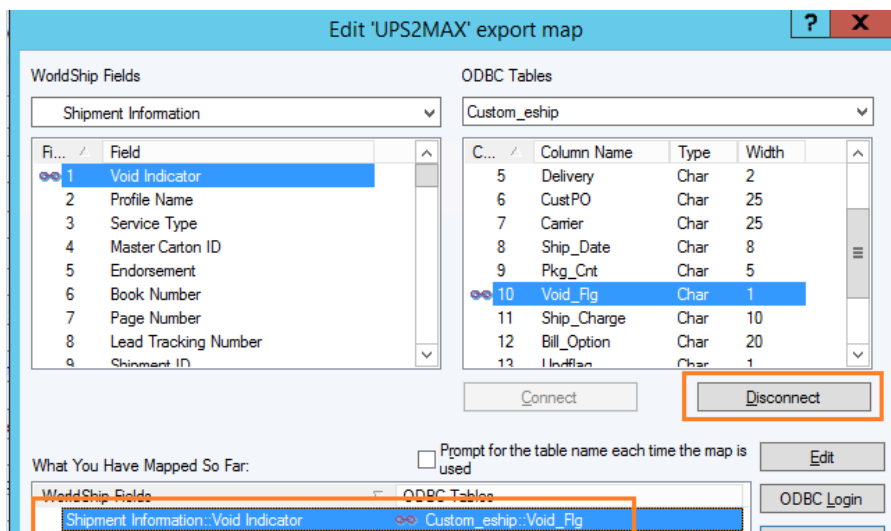
- On Edit 'UPS2MAX' map:
 - Use the dropdowns at the very top of the dialog to switch between the available tables.



- To map fields, select a field from both sides and click the Connect button.



- To remove mapped fields, selected the mapped fields from the already mapped fields list and click on the Disconnect button.



Package Shipping

- Configure the following mappings:
- Shipment Information to Custom_eship

WorldShip Fields	ODBC Tables
Shipment Information	Custom_eship

UPS WorldShip			ODBC (MAX)		
Table	Field #	Field Name	Table	Field #	Field Name
Shipment Information	1	Void Indicator	Custom_eship	10	VoifFlg
	3	Service Type		7	Carrier
	28	Collection Date		8	ShipDate
	237	Number Of Packages		9	Pkg_Count
	222	Total Shipment Negotiated Rate Charge		11	Ship_Charge
	224	Total Shipper Reference Charge		11	Ship_Charge
	16	Billing Option		12	Bill_Option
	15	Billable Weight		16	Weight

- **Ship Charge Note:** By Default, Ship_Charge field is mapped to field #224 Total Shipper Reference Charge. In some cases, companies could have negotiable rates. If the negotiable rate is to be shown in package Shipping and recorded in MAX, map field Ship_Charge to field #222 Total Shipment Negotiated Rate Charge
- Package to Custom_eship

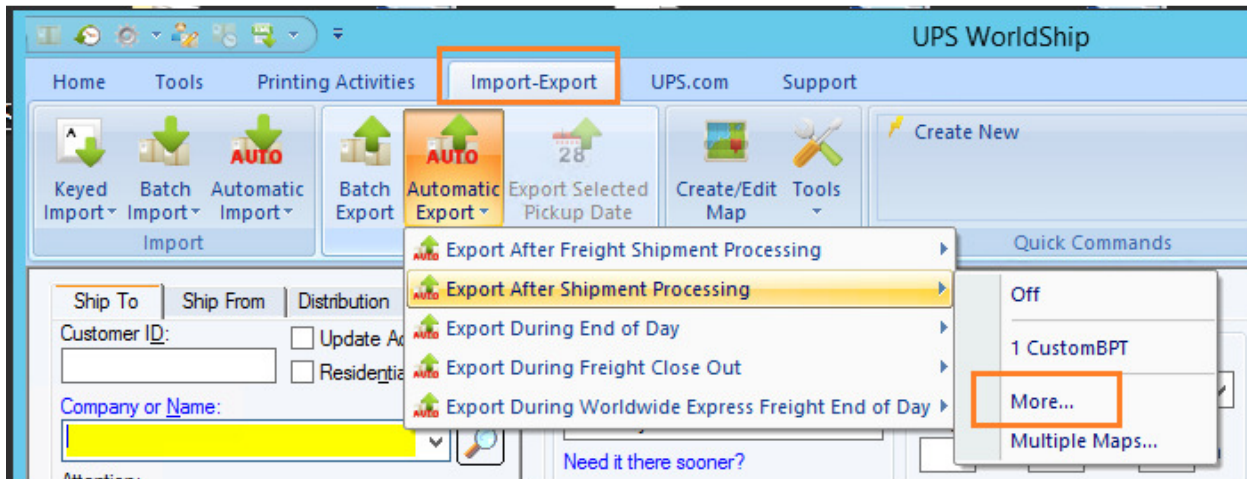
WorldShip Fields	ODBC Tables
Package	Custom_eship

UPS WorldShip			ODBC (MAX)		
Table	Field #	Field Name	Table	Field #	Field Name
Package	17	Tracking Number	Custom_eship	1	Track_No
	20	Reference 1		3	OrdNum
	21	Reference 2		6	CustPO
	22	Reference 3		2	CustID

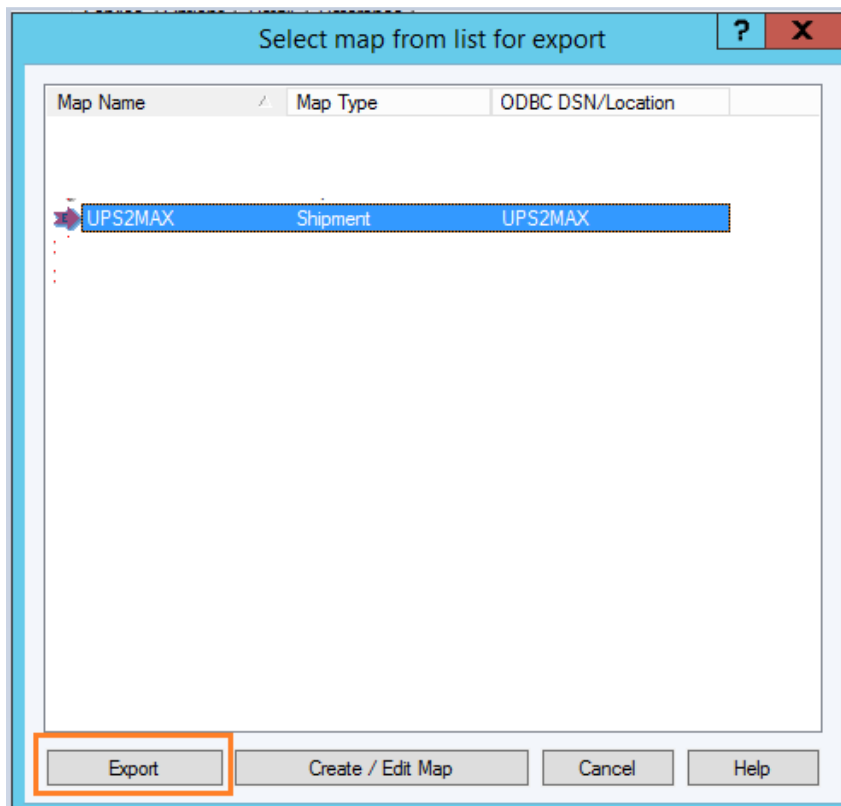
- Click the OK button on the Edit 'UPS2MAX' button to save the map and close the dialog.

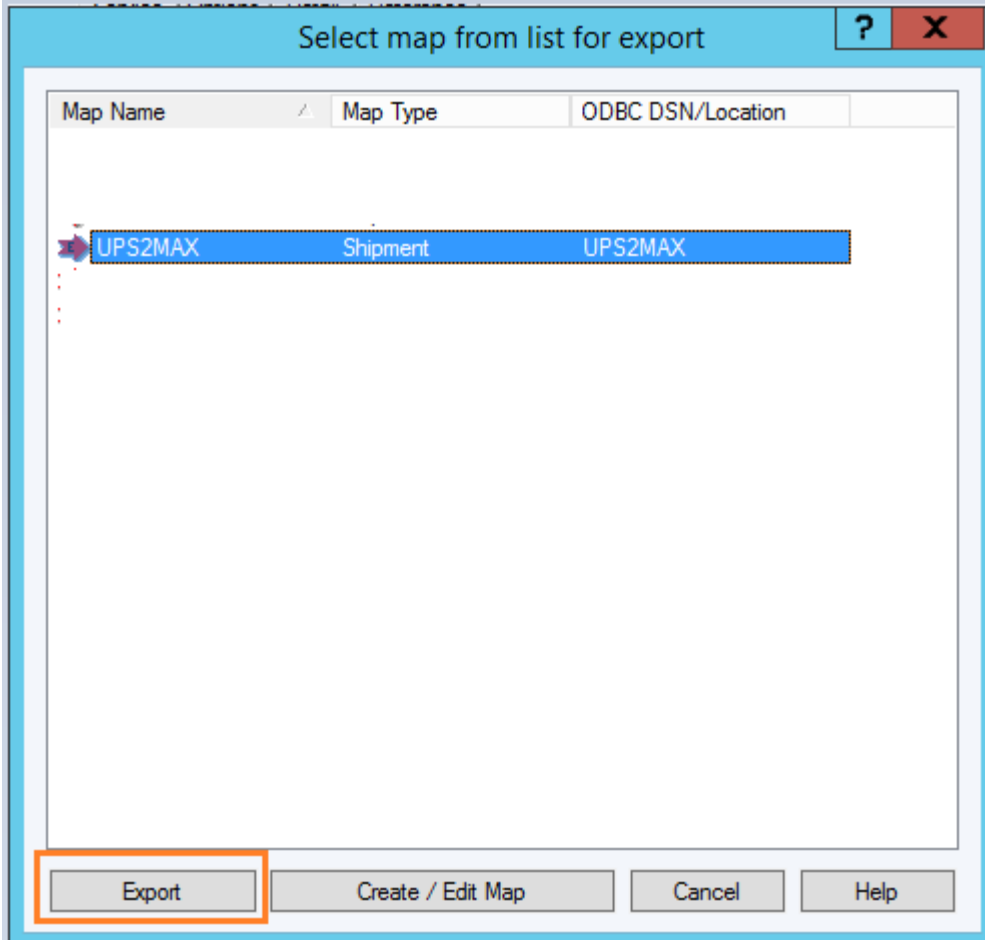
Package Shipping

- To select the UPS2MAX map
 - select Automatic Export -> Export After Shipment Processing -> More ...



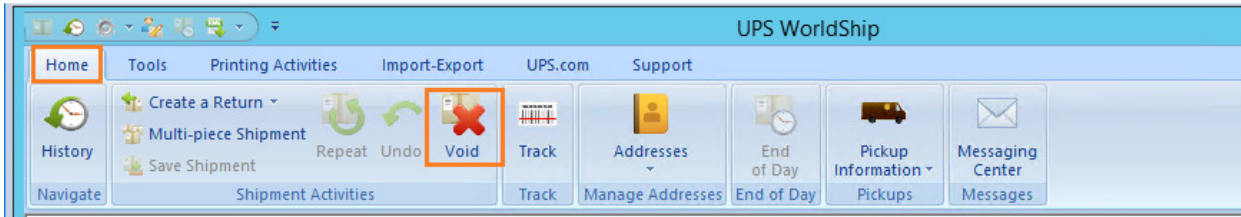
- Select UPS2MAX map from the list of available maps and click Export.



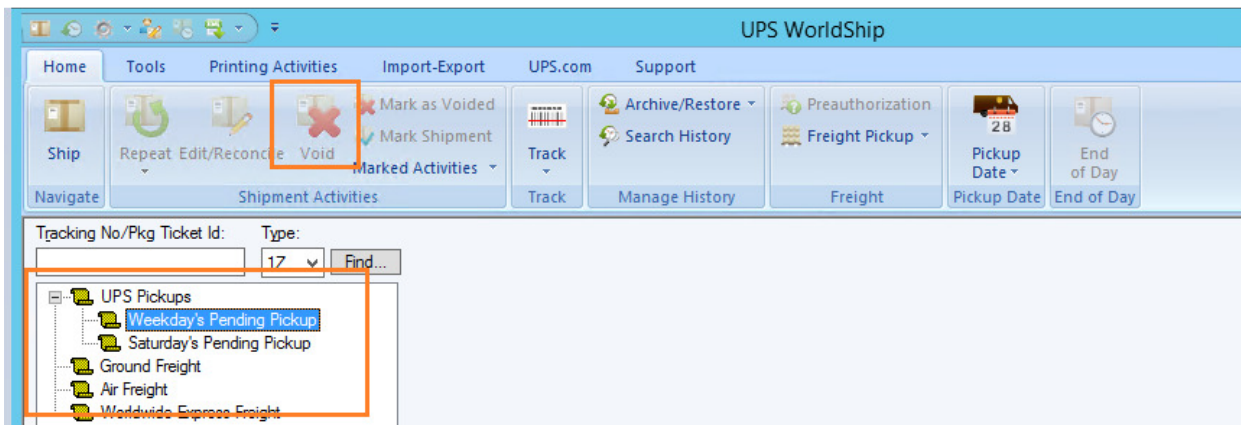


Void a Shipment

- To void an existing shipment
 - Click the Home tab -> Void



- Highlight a shipment in the left pane with the list of available shipments and click the Void button at the top.



Import/Export maps

- UPS WorldShip stores configured maps in folder C:\ProgramData\UPS\WSTD\ImpExp\Shipment

Name	Date modified	Type	Size
defIn.bin	12/7/2016 4:38 PM	BIN File	8 KB
defOut.bin	12/7/2016 4:38 PM	BIN File	50 KB
SampleOrderImport1.bin	12/7/2016 4:38 PM	BIN File	9 KB
CustomBPT.dat	4/13/2017 5:42 PM	DAT File	43 KB
MAX2UPS.dat	3/22/2019 8:51 AM	DAT File	3 KB
TEST-MAP-INBOUND.dat	3/22/2019 8:58 AM	DAT File	3 KB
TEST-MAP-OUTBOUND.dat	3/22/2019 9:10 AM	DAT File	43 KB
UPS2MAX.dat	7/3/2019 10:22 AM	DAT File	43 KB
ShipmentExport.xsd	12/7/2016 4:36 PM	XSD File	130 KB
ShipmentImport.xsd	12/7/2016 4:36 PM	XSD File	97 KB

The rest is to be determined ...

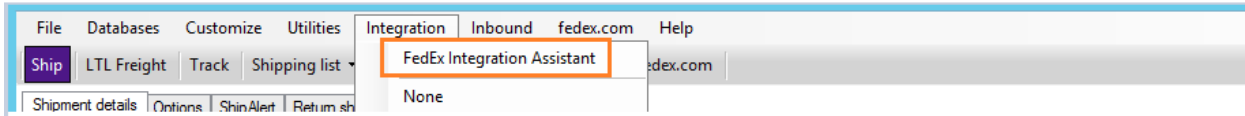
Tips

- Updating an existing map does not always apply the changes right away after saving. A restart of UPS WorldShip client might be required.

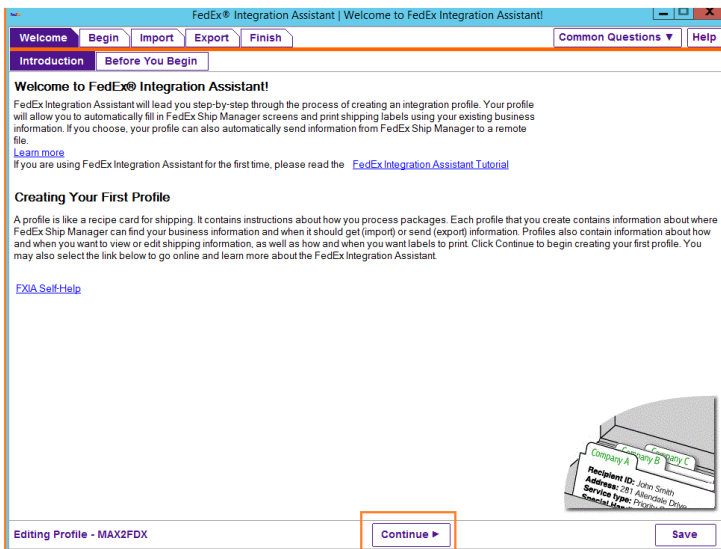
Package Shipping

FedEx

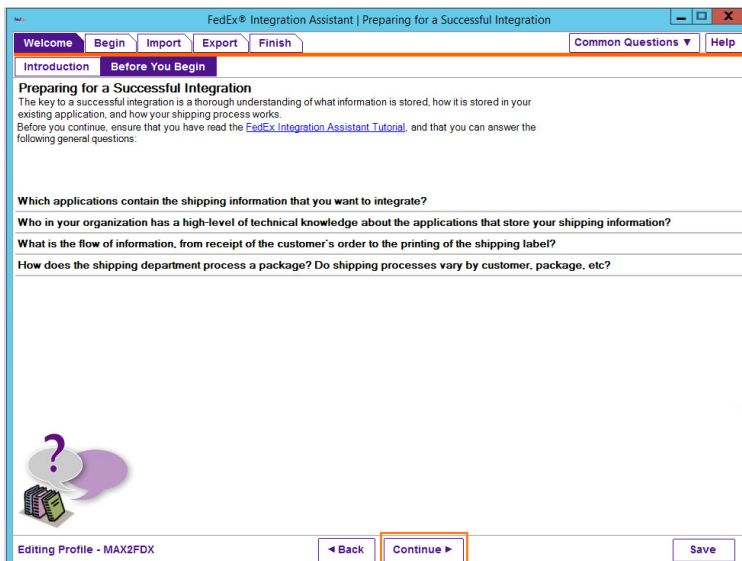
- Configure System DSN named MAX2FEDEX
- Launch FedEx Ship Manager
- Click on Integration - > FedEx Integration Assistant



- Configure System DSN named MAX2FEDEX
- Click Continue on the Introduction dialog



- Click Continue on the before You Begin dialog



Package Shipping

- Click the Create a new profile option and click Continue.

FedEx® Integration Assistant | What do you want to do?

Welcome Begin Import Export Finish Common Questions Help

Create Integration Type

What do you want to do?
Select "Create a new profile" to start a new profile. Select "Edit an existing profile" if you want to create a new profile by editing an existing profile, or if you want to complete an unfinished profile.

Create a new profile
Start a new profile (Clears all unsaved changes).

Edit an existing profile
Select the profile that you want to edit. To delete a profile, select it, and then click Remove. To save a copy of a profile with a new name, select it and then click Duplicate.

NewProfile < Back Continue > Save

- Make the following selections on the Integration Type dialog and click Continue.

FedEx® Integration Assistant | Which type of integration profile do you need?

Welcome Begin Import Export Finish Common Questions Help

Create Integration Type

Which type of integration profile do you need?
Select the type of profile that you want to create.

Import

Export

Both Import and Export

Your Data Source

Customer ID	Company	Country	Contact
AA001N002	Atlas Machine	USA	Swicegood
AX002A001	Baskets Galore	Canada	Jones
AX003S001	Best Computers	USA	Davis
BB001J002	Taylor Finishing	USA	Rinehart

Export

Import

Shipment details Options ShipAlert Commc

Recipient information

Ship to group Include a Return Label

Recipient ID: AX002A001

Country: CA - Canada

Contact name: Gwen Jones

Company name: Baskets Galore

Address 1: 1234 Central Blvd

Address 2: Suite 3

Postal code: H3A 3G3

Is this an LTL Freight Profile?

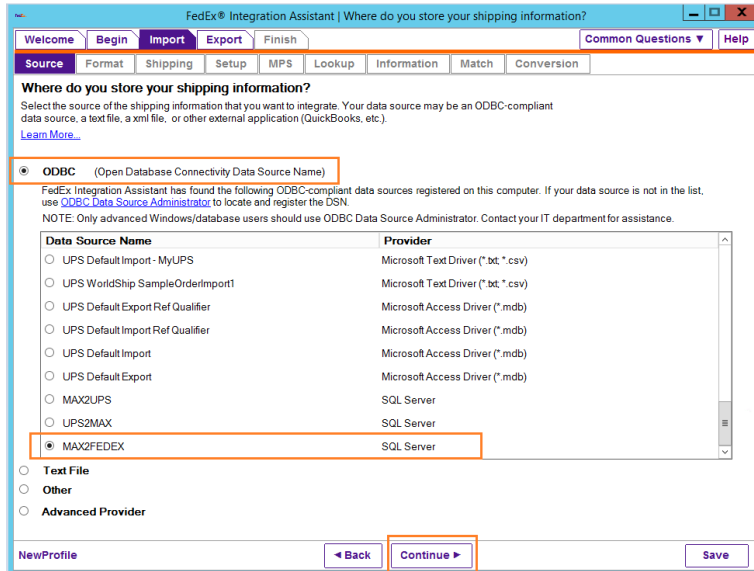
Yes

No

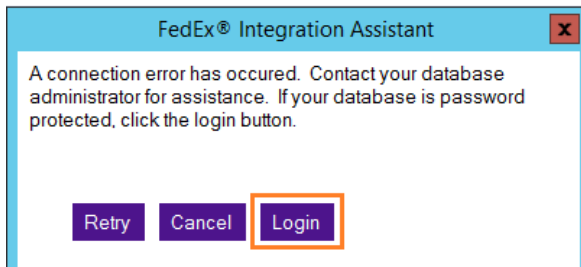
NewProfile < Back Continue > Save

MAX to FedEx

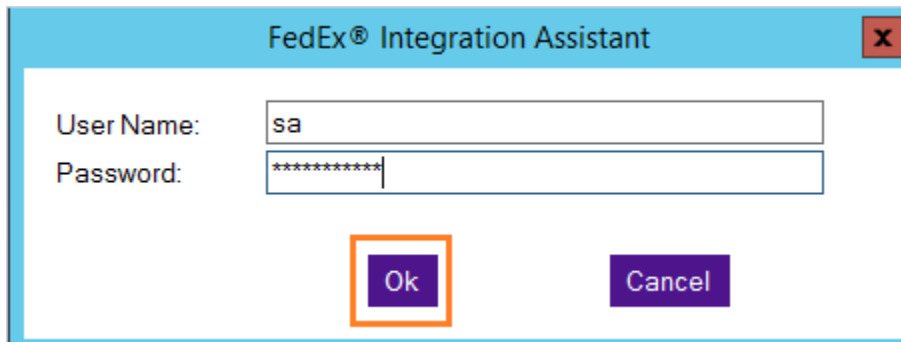
- On the Source dialog, select ODBC as the data source, select the MAX2FEDEX DSN and click Continue.



- Click Login on the Connection Error dialog.



- Specify the sql credentials used to create the DSN and click Ok.



Package Shipping

- Make the following selections on the Shipping dialog and click Continue.

FedEx® Integration Assistant | How will you create shipping labels for your packages?

Welcome Begin **Import** Export Finish Common Questions Help

Source Format **Shipping** Setup MPS Lookup Information Match Conversion

How will you create shipping labels for your packages?

Answer each question that appears below. FedEx Integration Assistant will select the best shipping method based on your answers. If your answers vary by situation, answer the questions appropriate for the first situation, complete the profile, and then run FedEx Integration Assistant again to create a profile for each additional situation.

Do you print labels one at a time? Yes No

Do you use a unique name or code to look up each package? Yes No

Do you need to edit shipping information before printing the label? Yes No

More Automated ← Batch Batch Edit Single **Single Edit** → Less Automated

NewProfile ◀ Back Continue ▶ Save

- Make the following selections on the Lookup dialog and click Continue.

FedEx® Integration Assistant | How do you want to lookup and import information?

Welcome Begin **Import** Export Finish Common Questions Help

Source Format **Shipping** Setup MPS **Lookup** Information Match Conversion

How do you want to lookup and import information?

Select the method below that most closely supports your shipping process.

After I enter a lookup value
Uses the value that you type into the lookup dialog box to lookup the record.

After I enter a Recipient ID
Uses the value you type into the Recipient ID text box to lookup the record.

Lookup Value
Enter the lookup value for the package(s) you wish to import.
Lookup: Abcd1234
OK Cancel

Select the position you would like to leave the cursor after a lookup: Weight

NewProfile ◀ Back Continue ▶ Save

Package Shipping

- Click Recipient.

FedEx® Integration Assistant | What types of information do you want to import?

Welcome Begin **Import** Export Finish Cor

Source Format **Shipping** Setup MPS Lookup **Information** Match Conversion

What types of information do you want to import?

Select the FedEx Ship Manager data group(s) that you want to populate with data from your data source. The category choices provided here match the key data entry areas in FedEx Ship Manager.

- ◆ **Recipient**
- ◆ Package
- ◆ Sender
- ◆ Special Services
- ◆ International
- ◆ All Fields

- On the Recipient dialog, select the following fields and click OK.

Recipient

Shipment Return

Recipient

Address

- Address 1*
- City*
- Contact Name
- Location Number
- Phone Extension
- State/Province*

- Address 2
- Company*
- Country*
- Phone
- Postal Code*

Miscellaneous

- Auto Track
- ID
- Tax ID
- Brazilian Resident Delivery Flag
- Save/Update in Address Book

Check All Check All * Clear All OK Cancel

Package Shipping

- Click Package.

FedEx® Integration Assistant | What types of information do you want to import?

Welcome Begin **Import** Export Finish

Source Format **Shipping** Setup MPS Lookup **Information** Match Conversion

What types of information do you want to import?

Select the FedEx Ship Manager data group(s) that you want to populate with data from your data source. The category choices provided here match the key data entry areas in FedEx Ship Manager.

- ✓ Recipient
- ◆ **Package**
- ◆ Sender
- ◆ Special Services
- ◆ International
- All Fields

- On the Package dialog, select the following fields and click OK.

Package

Shipment Return

Reference

- Code
- Delivery Instructions
- Notes
- Shipment ID
- Customer Reference
- Invoice Number
- P.O. Number

Service Type

- Service Type*

Shipment Contents

- Code
- PartNumber
- SKU/Item/UPC
- Description
- Quantity

Weight

Check All Check All * Clear All

OK Cancel

Package Shipping

- Click Continue.

The screenshot shows the 'FedEx® Integration Assistant' window with the title 'What types of information do you want to import?'. The 'Import' tab is selected in the top navigation bar. Below the navigation bar, there are tabs for 'Source', 'Format', 'Shipping', 'Setup', 'MPS', 'Lookup', 'Information', 'Match', and 'Conversion'. The 'Information' tab is active. The main content area contains the heading 'What types of information do you want to import?' and a sub-heading 'Select the FedEx Ship Manager data group(s) that you want to populate with data from your data source. The category choices provided here match the key data entry areas in FedEx Ship Manager.' Below this, there is a list of options: 'Recipient' (checked), 'Package' (checked), 'Sender', 'Special Services', 'International', and 'All Fields'. At the bottom of the window, there are three buttons: 'NewProfile', 'Back', and 'Continue' (highlighted with a red box), and 'Save'.

- Select SO_Master from the dropdown with available tables. Fields will be dragged from left to right.

The screenshot shows the 'FedEx® Integration Assistant' window with the title 'Match FedEx Ship Manager fields with your fields.' The 'Match' tab is selected in the top navigation bar. Below the navigation bar, there are tabs for 'Source', 'Format', 'Shipping', 'Setup', 'MPS', 'Lookup', 'Information', 'Match', and 'Conversion'. The 'Match' tab is active. The main content area contains the heading 'Match FedEx Ship Manager fields with your fields.' and a sub-heading 'Select the table from your data source that you want to display for match. Drag and drop your fields to one or more FedEx Ship Manager fields to match for import. Drag two of your data points to one field to merge. Click the Settings icon to use advanced features. Click X on a matched field to clear the match.' Below this, there is a 'Your Data' section with a dropdown menu showing 'SO_Master' (highlighted with a red box) and a list of fields: 'ORDNUM_27', 'CUSTID_27', 'GLXREF_27', 'STYPE_27', 'STATUS_27', 'CUSTPO_27', 'ORDID_27', 'ORDDTE_27', 'FILL01A_27', 'FILL01_27', 'SHPCODE_27', 'REP1_27', 'SPLIT1_27', and 'REP2_27'. A 'Drag to Match' button is positioned between the 'Your Data' and 'FedEx Ship Manager Fields' sections. The 'FedEx Ship Manager Fields' section has a table with columns 'Field' and 'Default (Optional)'. The table is divided into sections: 'Shipment Data', 'Recipient - Address', and 'Recipient - Miscellaneous'. The 'Recipient - Address' section includes fields for 'Address 1', 'Address 2', 'City', 'Company', 'Country', 'Phone', and 'Postal Code'. The 'Recipient - Miscellaneous' section includes the 'ID' field. At the bottom of the window, there are three buttons: 'NewProfile', 'Back', and 'Continue' (highlighted with a red box), and 'Save'.

Package Shipping

- Map the fields as shown in the images below.
- Assign US as the default country and a default shipping method of your choice. Default value for the shipping method is usually the Ground shipping method.

Shipment Data
Recipient - Address

Address 1	<input type="text" value="ADDR1_27"/>	<input type="text"/>
Address 2	<input type="text" value="ADDR2_27"/>	<input type="text"/>
City	<input type="text" value="CITY_27"/>	<input type="text"/>
Company	<input type="text" value="NAME_27"/>	<input type="text"/>
Country	<input type="text" value="CNTRY_27"/>	<input type="text" value="US - UNITED STATES"/>
Phone	<input type="text" value="PHONE_27"/>	<input type="text"/>
Postal Code	<input type="text" value="ZIPCD_27"/>	<input type="text"/>

Recipient - Miscellaneous

ID	<input type="text" value="CUSTID_27"/>	<input type="text"/>
----	--	----------------------

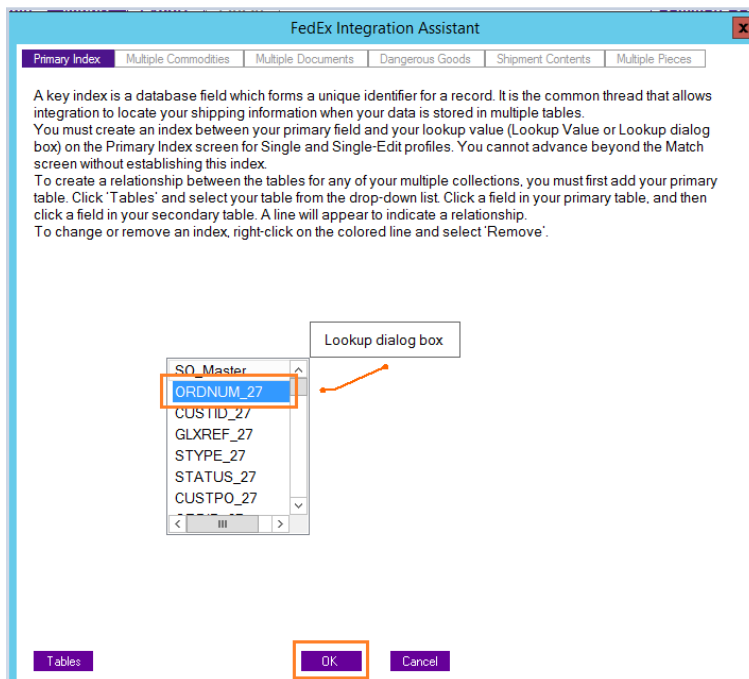
Package - Reference

Customer Reference	<input type="text" value="ORDNUM_27"/>	<input type="text"/>
P.O. Number	<input type="text" value="CUSTPO_27"/>	<input type="text"/>

Package - Service Type

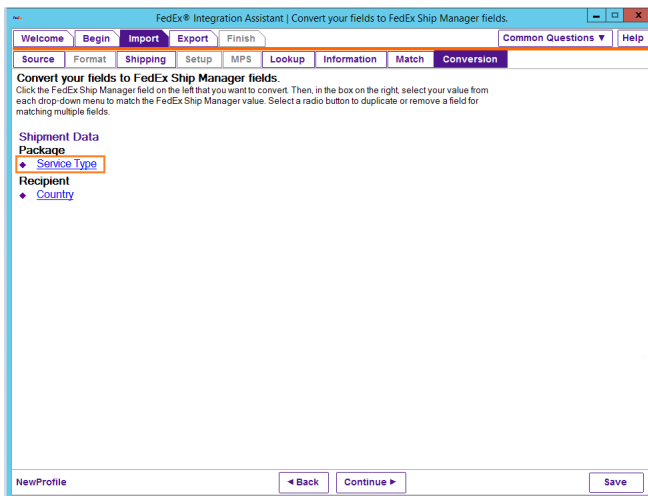
Service Type	<input type="text" value="SHPVIA_27"/>	<input type="text" value="92 - Ground"/>
--------------	--	--

- Click Continue.
- Select ORDNUM_27 as the lookup dialog box value and click OK.



Package Shipping

- Click Continue.
- Click on the Service Type option.



- The Service Type conversions mapping allows us to map FedEx ship methods with ERP (MAX) ship methods. This section is not configurable by Balance Point. It is configured by a person familiar with the currently used shipping methods on premise. That person is usually someone from the shipping department.

Shipment Data - Package - Service Type Apply Custom Defaults

Default: Select a default

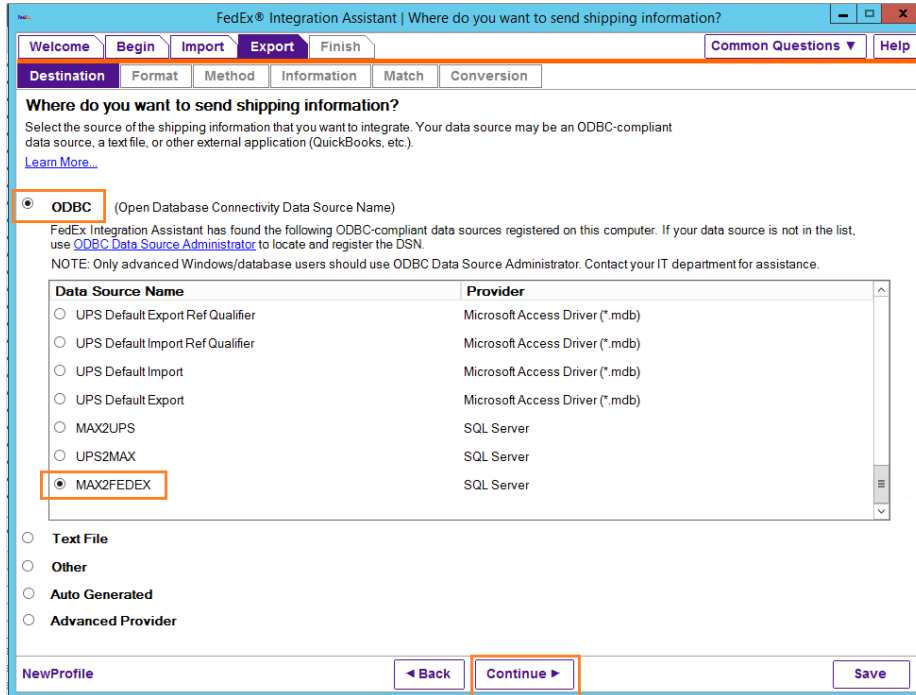
To (FSM value)	From (your value)
<input type="radio"/> 1 Day Freight	<None>
<input type="radio"/> 2 Day	<None>
<input type="radio"/> 2 Day A.M.	<None>
<input type="radio"/> 2 Day Freight	<None>
<input type="radio"/> 3 Day Freight	<None>
<input type="radio"/> A IP DirectDistribution	<None>
<input type="radio"/> D IP DirectDist Freight	<None>
<input type="radio"/> FedEx Economy (non-US)/Intra-US only Express ...	<None>
<input type="radio"/> First Overnight	<None>
<input type="radio"/> First Overnight Freight	<None>

Duplicate Remove Clear All

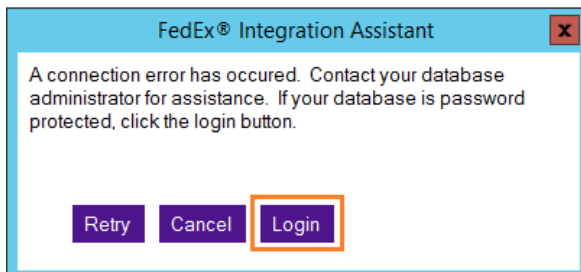
- Click Continue.

FedEx to MAX

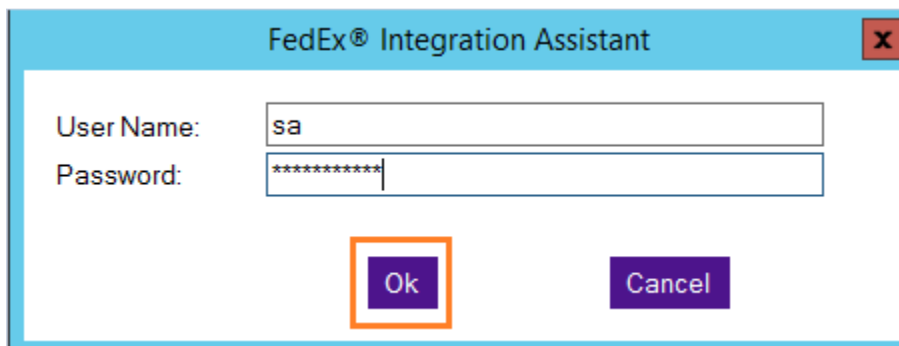
- On the Source dialog, select ODBC as the data source, select the MAX2FEDEX DSN and click Continue.



- Click Login on the Connection Error dialog.



- Specify the sql credentials used to create the DSN and click Ok.



Package Shipping

- Make the following selections on the Method dialog and click Continue.

The screenshot shows the 'Method' dialog box in the FedEx Integration Assistant. The title bar reads 'FedEx® Integration Assistant | How will your data source receive exported information?'. The 'Export' tab is selected. The 'Method' sub-tab is active. The main heading is 'How will your data source receive exported information?'. Below this, there is a note: 'Select the event that will trigger the export and the method for writing information to the destination data source. NOTE: To avoid unintentionally corrupting the data source, the export method that you choose here must be compatible with the structure of your data source. Contact your IT department if you are unsure of which option to use.' The dialog contains several sections with radio button options and checkboxes, all of which are highlighted with orange boxes:

- When do you want to export to your data source?**
 - Each time a shipment is completed
 - Also export each time a package is deleted.
 - At the end of day
 - On demand
- How do you want to update your data source?**
 - Insert a new record
 - When a package is deleted, how do you want to update your datasource.**
 - Set flag in existing record to indicate deleted shipment
 - Remove record
 - Update an existing record
 - Update an existing record
- Include manual shipments

At the bottom of the dialog, there are three buttons: 'NewProfile', '◀ Back', and 'Continue ▶', with the 'Continue ▶' button highlighted by an orange box. A 'Save' button is also present at the bottom right.

- Click on Tracking Numbers.

The screenshot shows the 'Information' dialog box in the FedEx Integration Assistant. The title bar reads 'FedEx® Integration Assistant | How will your data source receive exported information?'. The 'Export' tab is selected. The 'Information' sub-tab is active. The main heading is 'What types of information do you want to export?'. Below this, there is a note: 'Select the FedEx Ship Manager data groups that contain information you want to send back to your data source. Category choices match the key data entry areas in FedEx Ship Manager.' A list of information types is displayed, with 'Tracking Numbers' highlighted by an orange box:

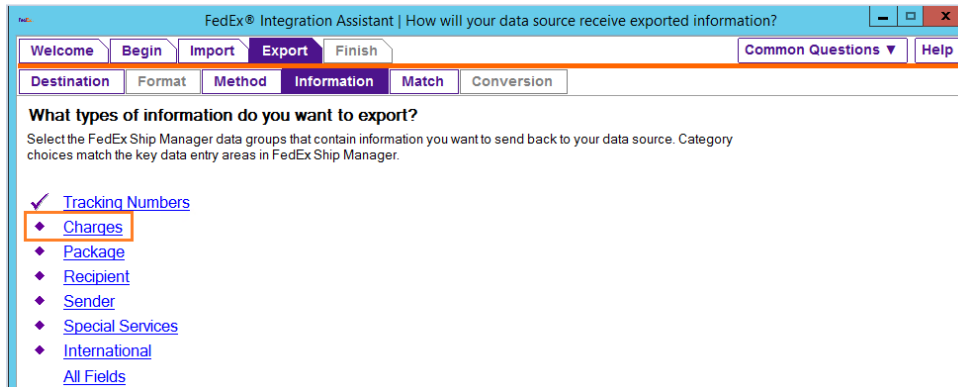
- ◆ Tracking Numbers
- ◆ Charges
- ◆ Package
- ◆ Recipient
- ◆ Sender
- ◆ Special Services
- ◆ International
- All Fields

- On the Tracking Numbers dialog, select the following fields and click OK.

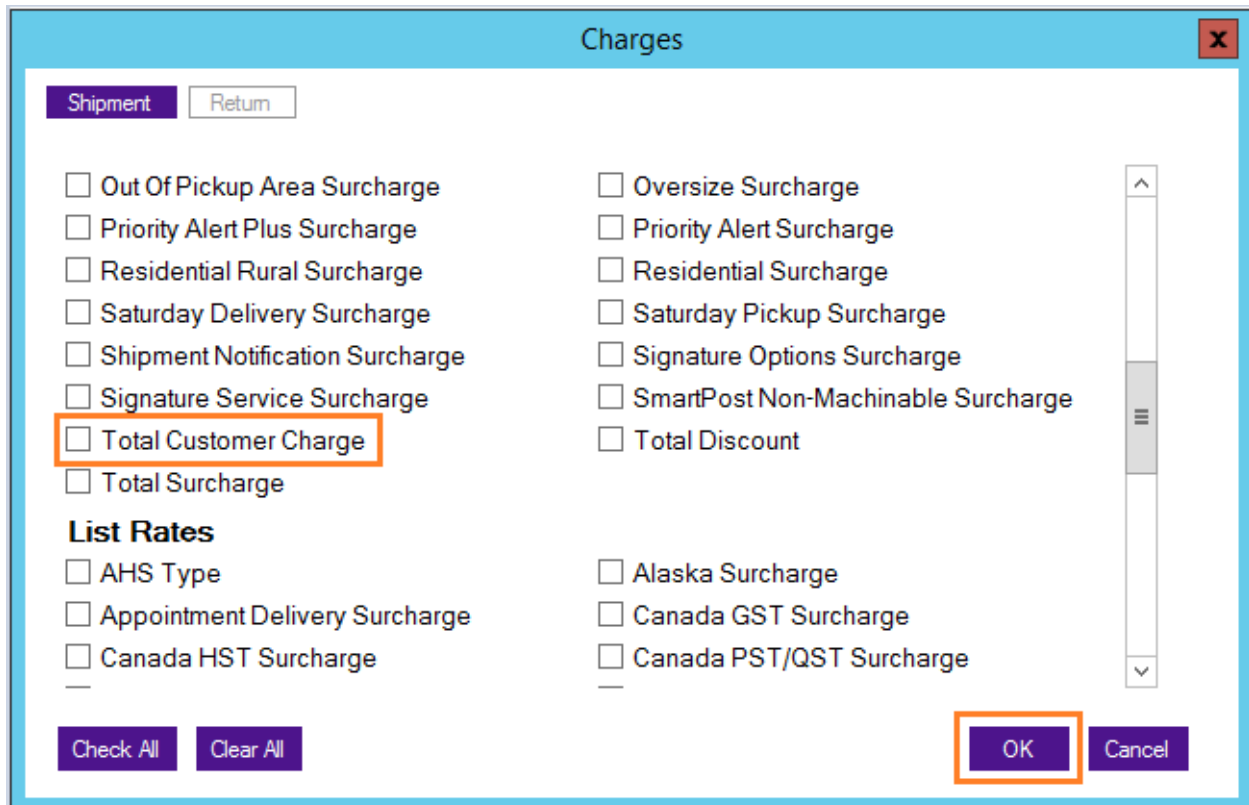
The screenshot shows the 'Tracking Numbers' dialog box. The title bar reads 'Tracking Numbers'. There are two tabs: 'Shipment' and 'Return', with 'Shipment' selected. The main heading is 'Tracking Numbers'. Below this, there is a sub-heading 'Tracking Numbers' and two checkboxes: 'Master Tracking Number' and 'SmartPost Ground Tracking Number'. The 'Tracking Number' checkbox is checked and highlighted by an orange box. At the bottom of the dialog, there are four buttons: 'Check All', 'Clear All', 'OK', and 'Cancel', with the 'OK' button highlighted by an orange box.

Package Shipping

- Click on Charges.

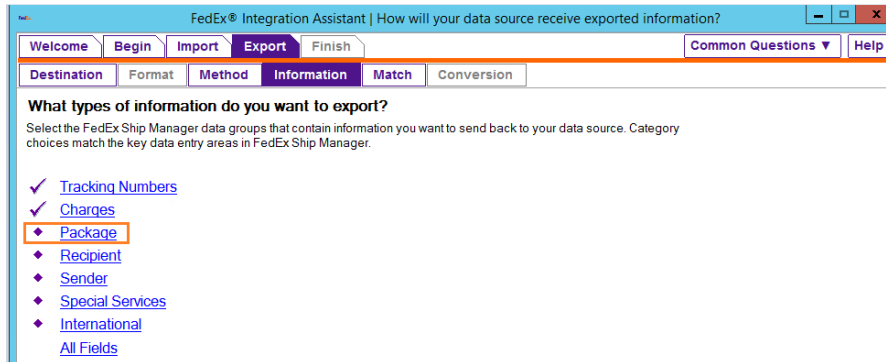


- On the Charges dialog, select the following fields and click OK.

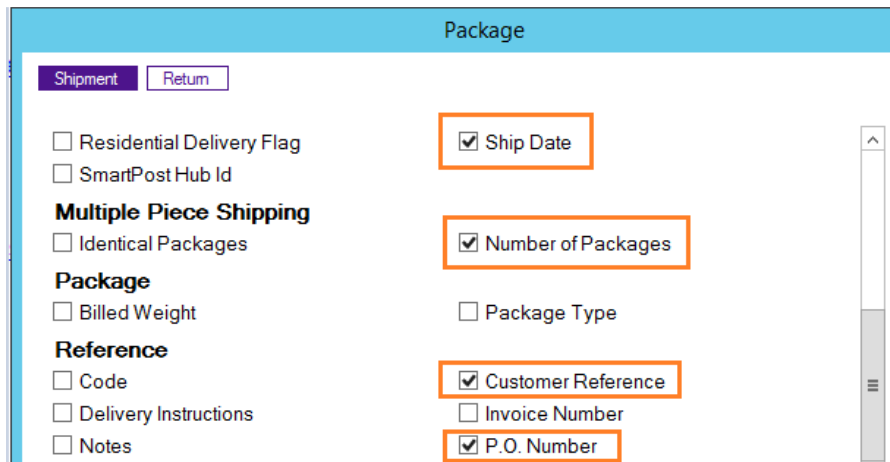
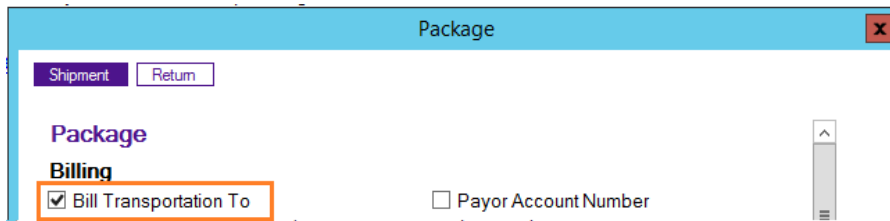


Package Shipping

- Click on Package.

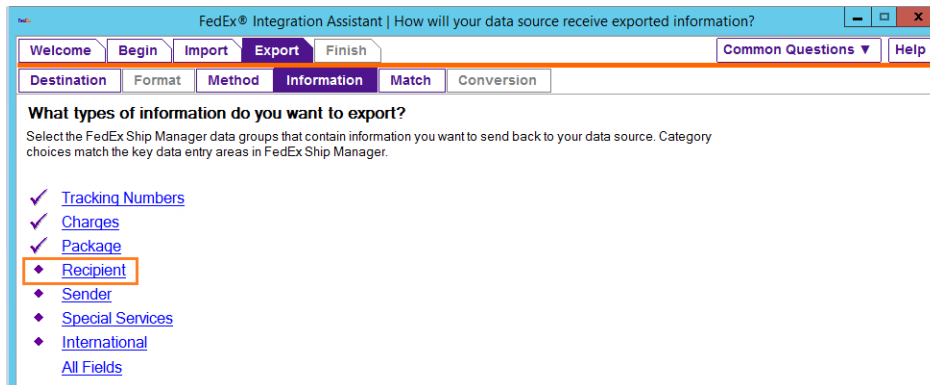


- On the Package dialog, select the following fields and click OK.

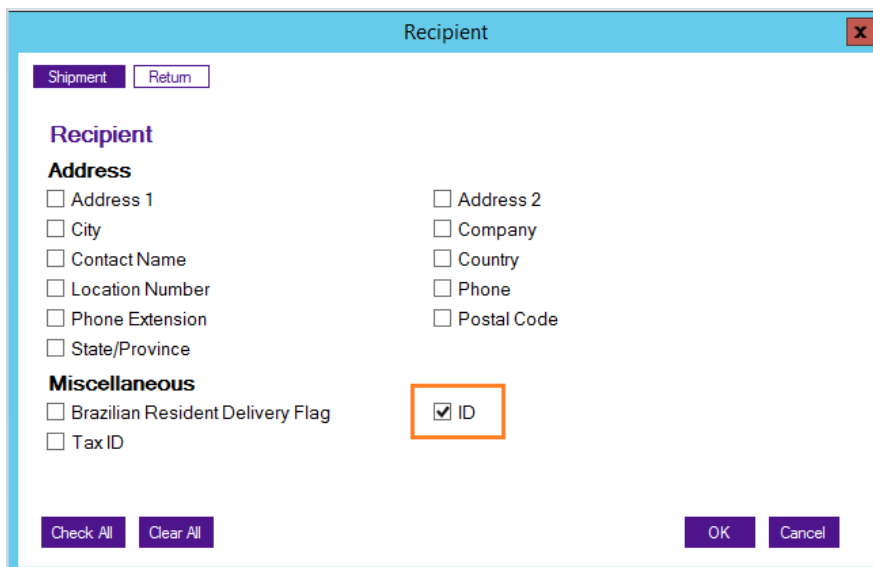


Package Shipping

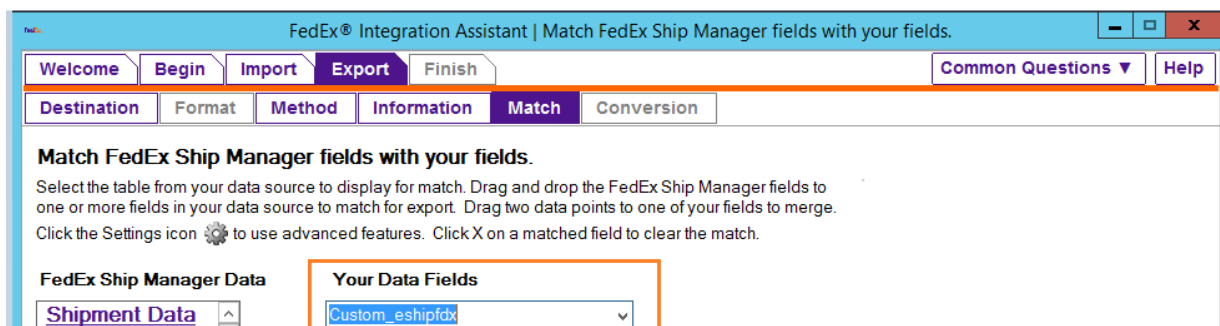
- Click on Recipient.



- On the Recipient dialog, select the following fields and click OK.



- Click Continue to proceed to the Match section.
- Select Custom_eshipfedex from the dropdown with available tables. Fields will be dragged from left to right.



Package Shipping

- Map the fields as shown in the images below.

Track_No	Tracking Number	
Custid	ID	
Ordnum	Customer Reference	
Line		
Delivery		
CustPO	P.O. Number	
Carrier	Service Type	
Ship_Date	Ship Date	
Pkg_Cnt	Number of Packages	
Ship_Charge	Total Customer Charge	
Surcharge		
Bill_Option	Bill Transportation To	
Updflag		
Upddt		
SelectIT		
WEIGHT	Billed Weight	

- Click Continue.

Package Shipping

- Click on Bill Transportation To, assign the values shown in the image below and click Continue.

FedEx® Integration Assistant | Convert your fields to FedEx Ship Manager fields.

Welcome Begin Import **Export** Finish Common Questions Help

Destination Format Method Information Match **Conversion**

Convert FedEx Ship Manager fields to your fields.
Click the FedEx Ship Manager field(s) on the far left that you want to convert. A list of available FedEx Ship Manager values will appear in the orange box. Select your value from each drop-down menu, or type in a value, to match the FedEx Ship Manager value.

Shipment Data
Package
✓ Bill Transportation To

Shipment Data - Package - Bill Transportation To Apply Custom Defaults

From (FSM value)	To (your value)
Bill Recipient	2
Bill Sender	1
Bill Third Party	3
FedEx Ground Collect	4
SmartPost Prepaid	5

Clear All

NewProfile ◀ Back Continue ▶ Save

- Review the Summary and click Continue.

FedEx® Integration Assistant | Here is a summary of your integration profile.

Welcome Begin Import Export **Finish** Common Questions Help

Summary Instructions

Here is a summary of your integration profile.
Review the following profile summary. To make changes to your profile, first save the profile, and then click Back or select the Edit link to return to the tab that contains the information you would like to edit.

General
Profile type: Import and Export
Profile name: MyProfile
Modified: 5/10/2020 4:50:15 PM

Import Summary
Data Source: [Edit](#)
Name: MAX2FEDEX
Lookup: [Edit](#)
Method: Lookup dialog box

Shipping Activities: [Edit](#)
Shipping method: Single Edit
Review/edit information before shipping: Yes

Field Matches: [Edit](#)

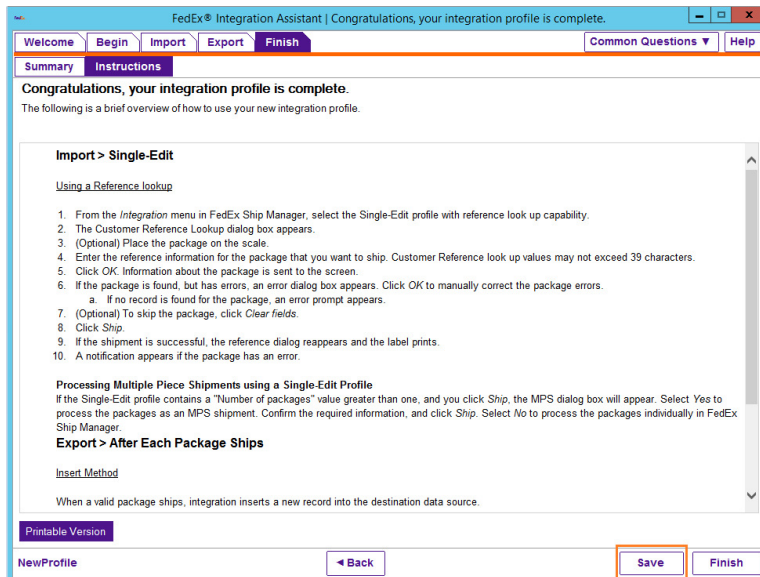
Shipment Data
Table: SO_Master
ADDR1_27 >>> Recipient - Address 1
CITY_27 >>> Recipient - City
ADDR2_27 >>> Recipient - Address 2
NAME_27 >>> Recipient - Company
CNTRY_27 >>> Recipient - Country
PHONE_27 >>> Recipient - Phone
ZIPCD_27 >>> Recipient - Postal Code
CUSTID_27 >>> Recipient - ID

Printable Version

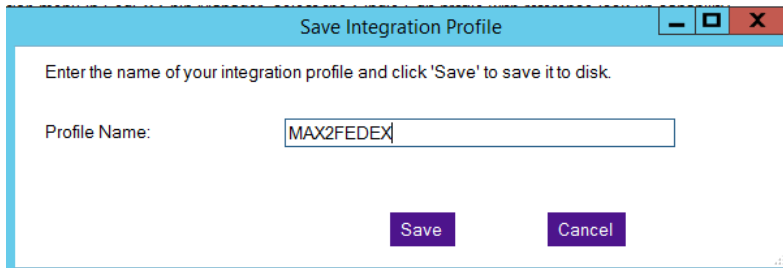
NewProfile ◀ Back Continue ▶ Save

Package Shipping

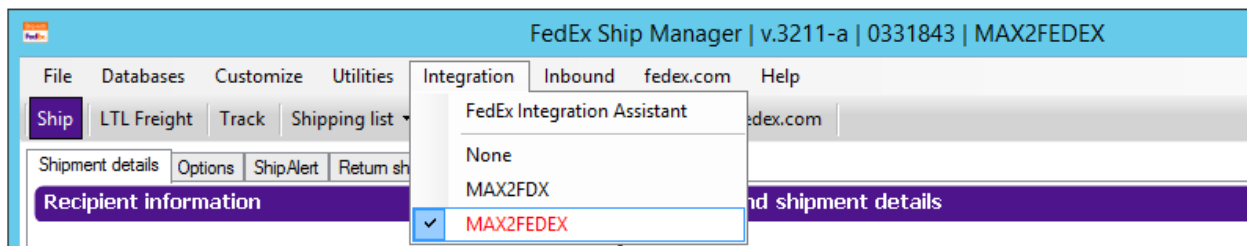
- Review the instructions and click Save.



- Specify MAX2FEDEX as the profile name and click Save.

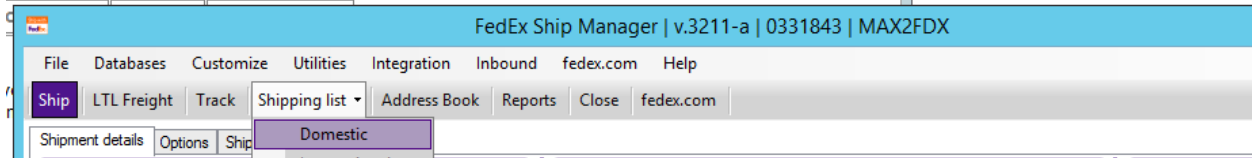


- To select a profile, click on Integrations and select the profile from the dropdown list.

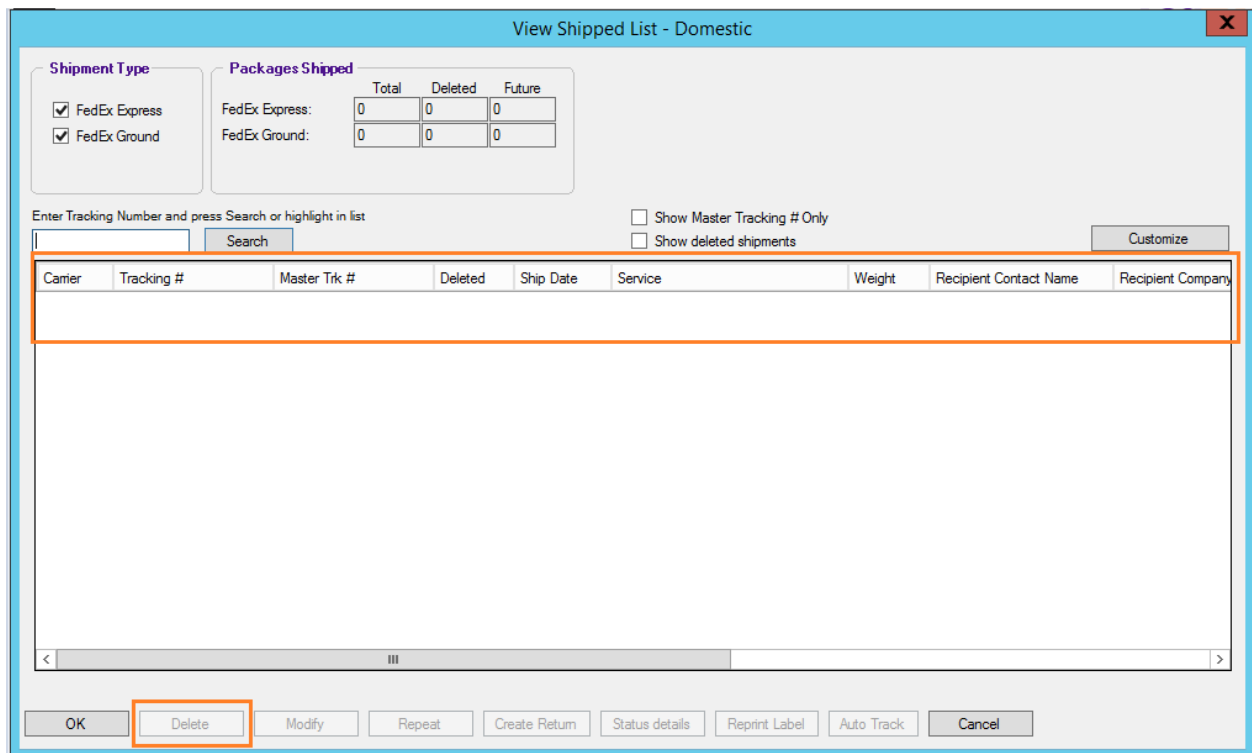


Void a Shipment

- To void an existing shipment
 - Select Shipping List - > Domestic

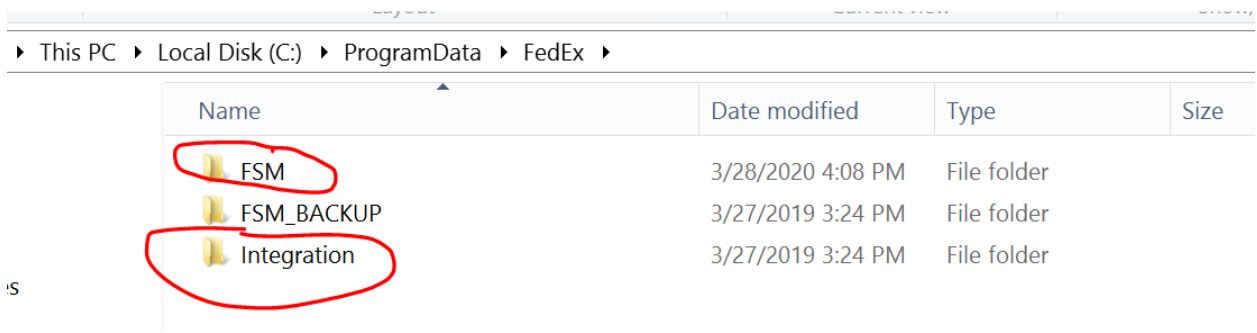


- Select a shipment from the list of available shipments and press Delete button



Import/Export maps

- FedEx Ship Manager stores configured maps in folder C:\ProgramData\FedEx



This PC > Local Disk (C:) > ProgramData > FedEx

Name	Date modified	Type	Size
FSM	3/28/2020 4:08 PM	File folder	
FSM_BACKUP	3/27/2019 3:24 PM	File folder	
Integration	3/27/2019 3:24 PM	File folder	

The rest is to be determined ...

Package Shipping

Tips

- Sometimes, selecting a printer is required in order for FedEx to update table Custom_eshipfdx after processing a shipment.