Shipping

Introduction

You can use FastManager's integrated shipping module to ship packages via UPS.

> UPS Integration is initially not available in the *"Basic Edition"* However, customers with a *Basic Edition* license can purchase the module for a nominal fee. To purchase the Ship Module, simply try to ship a package, FastManager will give you the option to purchase the module.

Advantages of Integrated Shipping:

- No more double entry.
- The tracking number is stored in your work order.
- Your customer is automatically charged a shipping and handling fee based on your charge preferences.
- Drop ship made easier. Based on how a customer is setup you can have your customer's address populate as the "FROM" Address and have their customer's address populate the "TO" address.
- When charging your customer you can add a % markup to the ship charges plus add a handling fee as well as a handling fee per box.
- Track your shipment directly from FastManager. No need go to the UPS web site.
- FastManager's integrated UPS shipping supports package insurance as well as UPS notifications.
- Notification emails are sent to the email address on the sales order, the associated sales rep as well as a master address that you setup so you can have a copy of every UPS notification email.
- You can also print the UPS labels directly from FastManager. You can use your existing label printer or any standard laser or inkjet printer will also work.
- Your shipping employee does not have to see the invoice screen in order to ship. FastManager adds the ship charge in the background and he can ship directly from the job board.
- FastManager will automatically change your WO status and comment once the shipment is processed.

UPS Setup

- Open the Job Board and select an order
- Click on Ship UPS
- In the UPS dialog that pops up, click on the `UPS Setup` hyperlink

These settings are *per computer*. So if you have multiple ship accounts or more than one company you can have 2 computers each with its own setup.

Enter your UPS account information.

- This will be your UPS web account id and password, you account number as well as your API Access Key that you can get from UPS.com

UPS API Access Key

> In order to connect FastManager to your UPS account, you will need to acquire an `API Access Key`.
> This will not cost you anything and it only takes 5 minutes online. Here is how:

- Browse to ups.com/upsdeveloperkit/ and login and with your UPS.com user ID and password.
- Click on `Manage Access Keys` in the **Access and Administration** section.

- Click on the `Request New Access Key` hyperlink at the bottom of the page:

- Fill out the information and then click on `Request Access Key` at the bottom. This will generate a new access key that you can enter on the setup screen in FastManager.

> You may be asked to **"Request production service"** as a next step.
> This is not required for FastManager's module to work so you can ignore that step.

FastManager will only use your account if the `Payor Type` selected is *Sender*.

- Enter your company address. This is the *FROM* address that you want to use when you ship to your customers.
- When shipping you will be able to toggle between this address and your customer's address in the event that you need to drop ship the order to their customer.

UPS Ship Methods

To cross-match your current ship methods to those of UPS:

- From the Ship screen, under `Ship: Pickup` you can click on the `Setup` hyperlink.
- Each ship method you currently have in FastManager can be cross matched to the UPS service type as well as who will be paying.

> This way you can have 2 Ground shipments, for example:
>
> - UPS Ground, and
> - UPS Ground 3rd Party

Ship UPS

To create a shipment go to the `Job Board`.

💡 If you have your statuses setup in an intuitive way you can filter out all jobs that are not ready for shipment:
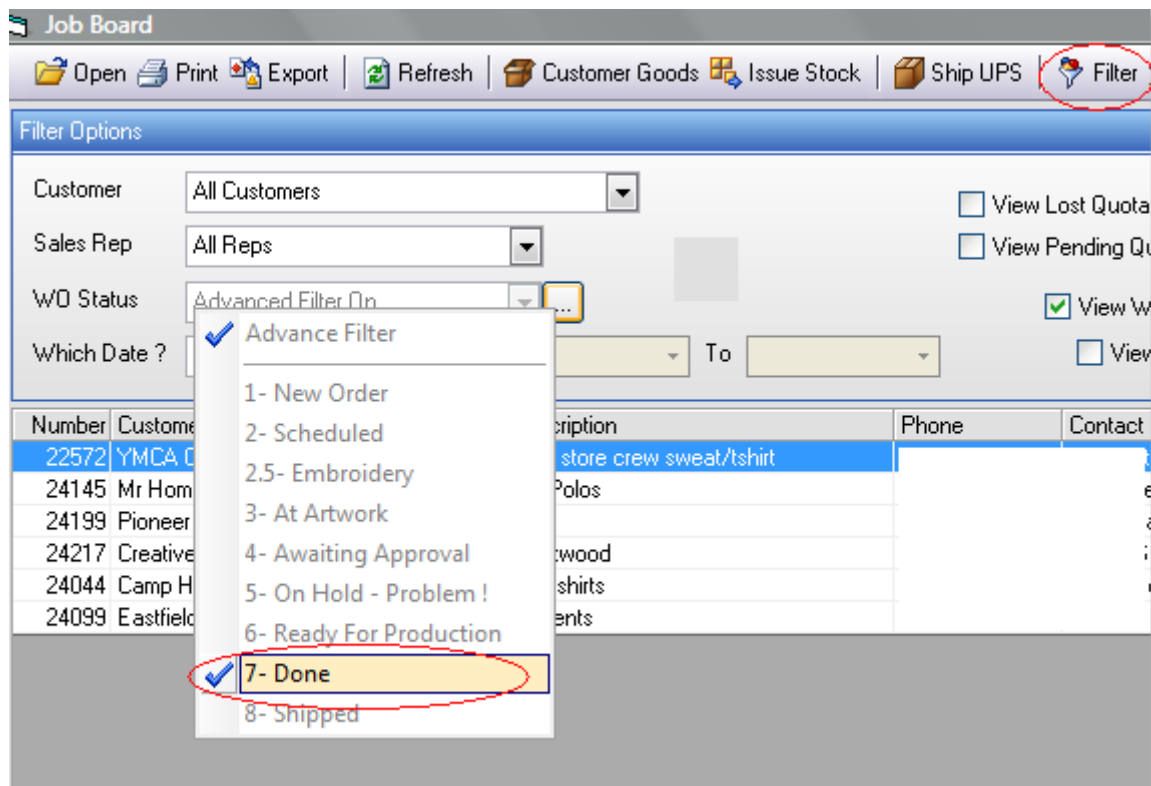
Select the WO order you need to ship.

Click on the Ship UPS button
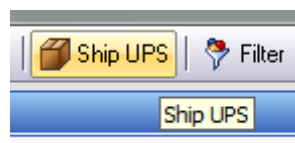
📝 You will need an internet connection in order to use this module.
If you dont have the ship module active then you will have the opportunity to purchase it directly from within FastManager.

📝 FastManager should automatically fill in all the relevant addresses and select the correct service type if these were entered correctly on the Sales Screen

Ship UPS

YMCA Camp Chingachgook
Order: 22572 - 2013-1913 store crew sweat/tshirt

UPS Setup...

| General | Update Work Order | Confirmation |

Ship From

Name:	ABC Company
Company:	chris.waldick@gmail.co
Address:	587 Edgebrook Lane
City/State:	Wellington / FL
Zip/Country:	33411 / US
Phone:	561-629-3371

Toggle Address

Ship To

Name:	Jane Smith
Company:	YMCA Camp
Address:	1872 Pilot Knob Rd
City/State:	Kattskill Bay / NY
Zip/Country:	12844 / US
Phone:	555-123-12134

☑ Address is residence

Ship: Deliver

UPS Service
Ground

Who is paying ?
Sender

Setup

Customer Account Info

Account: _____
Payor Zip: _____

Update Customer Master Record

➕ Add ❌ Delete

Package Type	Weight (Lbs)	L	W	H	Insurance	Content Description	Packing Typ	Tracking Number Returned

>>Next Step

FastManager will select your address as the ship FROM if `Who is paying = Sender`

- If not, then FastManager will assume you want to drop ship to your customer and will select your Customer's address as the FROM address.
- You can still toggle between the addresses by clicking on the hyperlink below the address

FastManager will try and Parse the freeform addresses that your entered into the sales order or your customer's master address.
If you enter the address as follows then FastManager will seamlessly parse the address:

Ship Address field on the Sales Screen:
——————————————
COMPANY NAME
CONTACT PERSON

| ADDRESS |
| BUILDING OR SUITE NUMBER (Optional) |
| CITY, STATE ZIP |

Use State abbreviations such NY or FL.
Use the country abbreviation such as US

Next you can add how many boxes you have.

Click on the Add button.
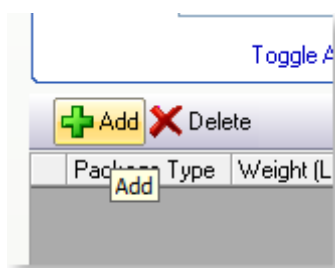
Complete the information below

The insured value is per box.

These settings will be saved, so when you ship the next time you will not have to enter this information again, unless you ship a different size box every time.

- You can add more boxes by clicking on the Add button again.

- You can delete mutiple boxes by highlighting many rows and then click on the Delete button.

Payor Account Info

- If the Payor type is **not** Sender, you will also need to enter your payor's UPS account number and zip code

Click Next at the bottom of the screen

From this tab you have 2 sections that you need to complete:

- First, select how your customer is billed for the shipment as well as the item code you want to use in the sales screen.
    - To change the item code click on the hyperlink:

> **note**
> FastManager will only apply the markup if the shipment is marked `Sender`.
> If the payor type is not sender then FastManager will still charge the handling fees.

The next section is where you tell FastManager to update the WO status and make a comment.

- The text `{TRN}` will automatically be replaced with the master tracking number that is sent to FastManager from UPS.

> You can save these settings in order save time the next time you ship.

The markup and handling fees can be saved as a company default or customer default.
The customer default will supercede the company default. So if there is no default charge for your customer then the company default will apply.

- You can of course make all values zero.

Next click on the `Create Shipment` Link.

- This may take a few minutes while we connect to the UPS server.

Once completed you will see a summary of the shipment including the tracking number and all charges.

If you are not satified with the amounts you can select to Cancel the entire shipment at this time.

From here you can also select to print the shipping labels.

Once you are done, you will see that FastManager updated your WO status and comment

If you open the order on the Sales Screen, you will see that FastManager has added the charge as a new line item.

32		Screen Usage Charge				1	0.00	0.00	Non
35	SHIP	UPS: 1ZW8276A0395376962				1	55.59	55.59	Non
						1	0.00	0.00	

Printing Labels

Right after shipping you will have the opportunity to print the shipping labels .

- If you made a mistake you can always re-print the labels from the Job Board, Sales Screen or Task Screen

> ⚠️ Once UPS receives your box and the shipment status changes then you will no longer be able to cancel the order or print the labels.

- To re-print the labels from the Job Board, select the work and order and click on the `Shipping` tab below.

General	Sales Order Detail	Purchase Orders	Attached Files	Tasks	Shipping

| 🔍 Track | 🖨 Print Labels | ❌ Cancel Shipment | 📋 Copy |

Date	Tracking Number	No. Boxes	Status	Ship To		
7/31/2012 6:31:34	1ZW8276A0391727563	2	NEW	chris.waldick@gmail.com	Att: ABC Company	587 Edgebrook Lane, Wellington, FL 33411
8/1/2012 4:57:54 A	1ZW8276A0399426785	2	NEW	chris.waldick@gmail.com	Att: ABC Company	587 Edgebrook Lane, Wellington, FL 33411

- To re-print the labels from the Sales Screen, click on the Fast Action button and select UPS `Shipments`.

- To re-print the labels from the Tasks Screen, click on the Action button and select UPS `Shipments`

Select which printer you want to print from as well as the other settings that may be required.

You can print to almost any printer including, inkjet, laser and label printers.
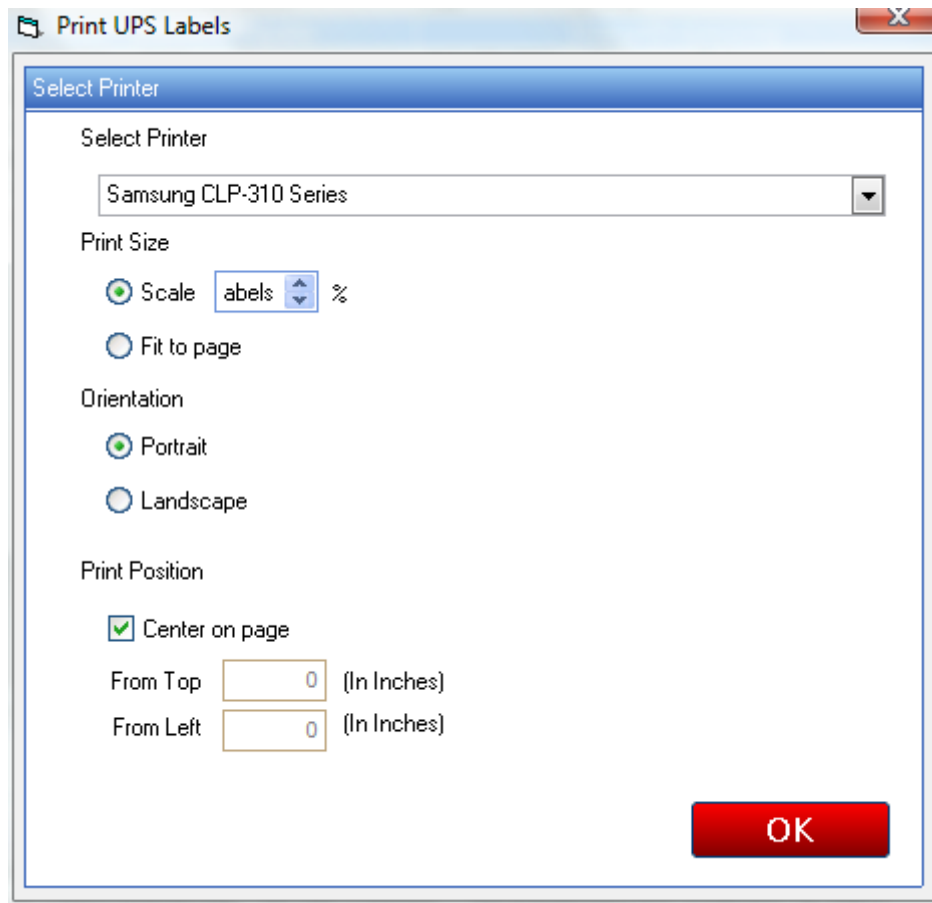
> After testing on a Zebra label printer we found that scaling the print image to 50% worked best.
> Once you click OK these settings will be saves to this computer ready for when you ship again.

You will see a grid with all the boxes listed.
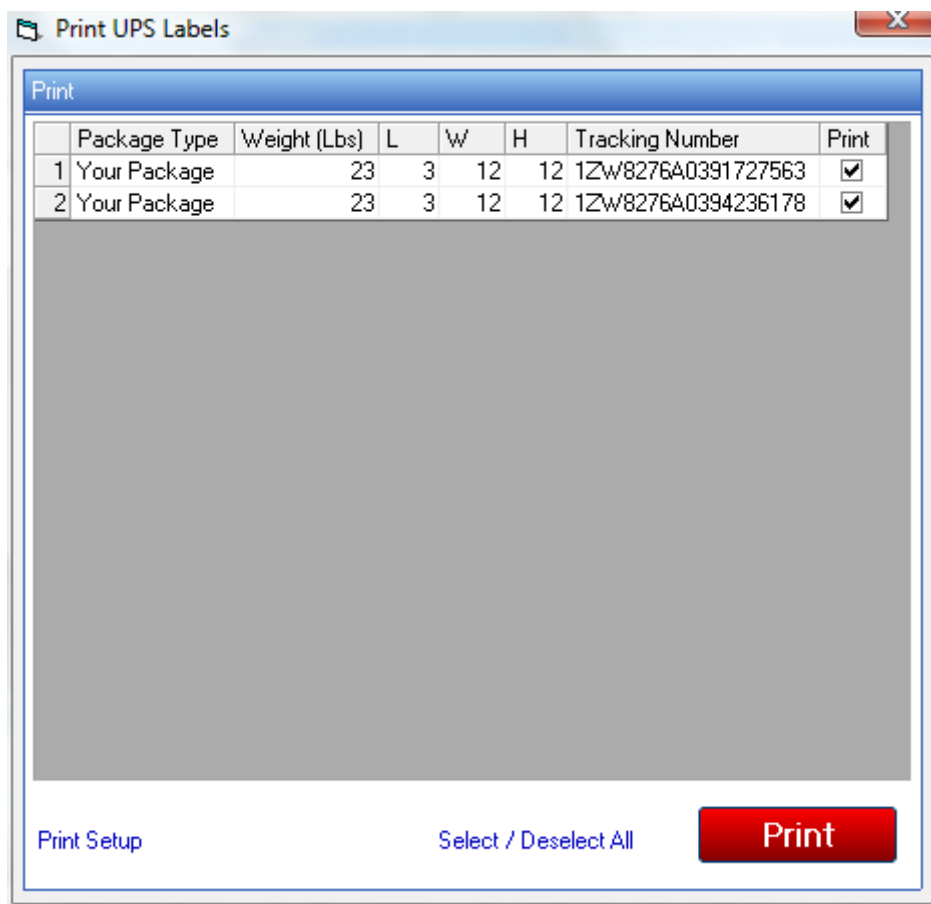
- By default all check boxes are checked.
- You can uncheck and only print the labels you want.
- At first you may only want to print 1 label until you have your setup 100% correct.

> 🗒️ tip> You can click on the `Print Setup` hyperlink to go back to the previous page and then print another test label if required.

Click on `Print.`

Cancel UPS Shipment

After creating the shipment you will have an opportunity to cancel the entire shipment.
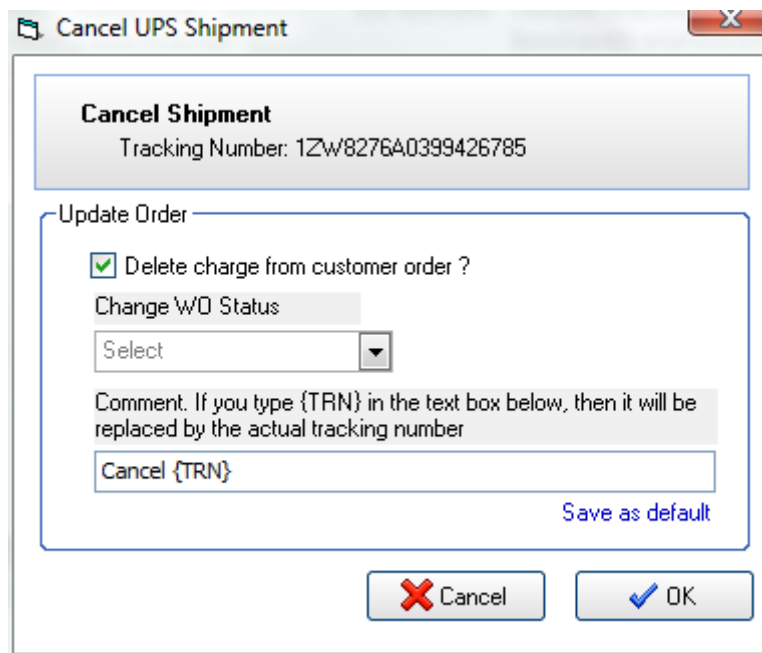
- You can also try and cancel later, however UPS will need to authorize the cancellation.

> 💡 Similar to printing labels, you can cancel your shipments from the Job Board, Task Screen or Sales Screen.

- Select the shipment you want to cancel.

- Click on the `Cancel Shipment` button

- You can also select if you want FastManager to remove the charge from the sales screen and change the WO status.
- FastManager will change the WO status as well.

> 💡 The WO comment text {TRN} will be replaced with the master tracking number

Track The Shipment

Similar to printing labels you can track your shipment from the Job Board, Sales Screen or Task Screen.

To track a shipment, select the Shipment you want to track from the Job Board

On the `Ship UPS` tab at the bottom, click on the Track button.

- It may take a few seconds while we connect to UPS to fetch the tracking info.
- FastManager will show you detailed results of the shipment.

Track UPS Shipment

Results

|	
Master Tracking #: 1ZW8276A0355864170	Shipment Reference: 25781
Shipper Number: W8276A	Shipment Weight: 57.50 LBS
Service Type: GROUND	Number of Packages: 3
Ship Date: 07-26-2012	Status: DELIVERED

Shipped From: 700 SILVER ST AGAWAM, MA 01001 2907 US

Shipped To: SANDWICH, MA 02563 US

Tracking Number	Date Stamp	Location	Status
+ 1 1ZW8276A0355864170	07-27-2012, 16:20	LEFT WITH MAN SANDWICH, MA US	DELIVERED
− 2 1ZW8276A0357925789	07-27-2012, 17:08	LEFT WITH WOMAN SANDWICH, MA US	DELIVERED
	07-27-2012, 05:46	WEST YARMOUTH, MA US	OUT FOR DELIVERY
	07-27-2012, 03:59	WEST YARMOUTH, MA US	ARRIVAL SCAN
	07-27-2012, 02:06	CHELMSFORD, MA US	DEPARTURE SCAN
	07-27-2012, 00:07	CHELMSFORD, MA US	LOCATION SCAN
	07-26-2012, 22:47	CHELMSFORD, MA US	ARRIVAL SCAN
	07-26-2012, 20:39	W SPRINGFIELD, MA US	DEPARTURE SCAN
	07-26-2012, 19:21	W SPRINGFIELD, MA US	ORIGIN SCAN
	07-26-2012, 15:23		BILLING INFORMATION RECEIVED
+ 3 1ZW8276A0357043197	07-27-2012, 16:20	LEFT WITH MAN SANDWICH, MA US	DELIVERED

✔ Done

Once you click Done, FastManager will also update the shipment status.

⇐ **Production: Overview**   **Invoicing** ⇒

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