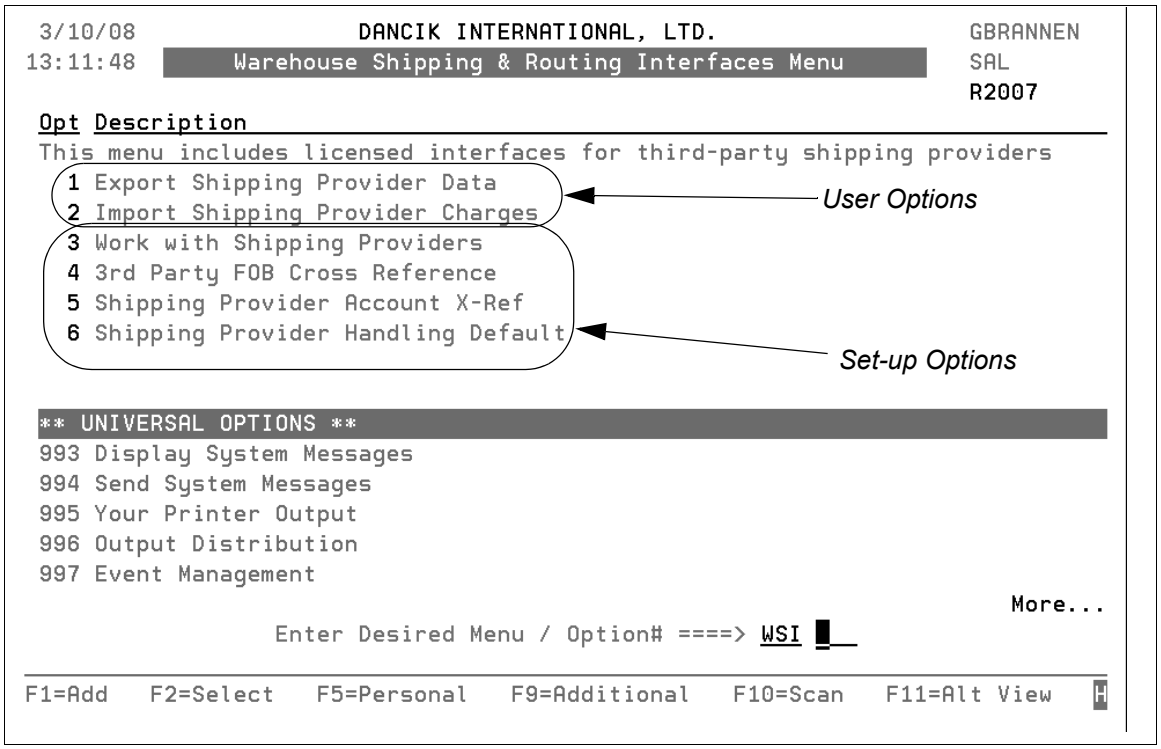
Kerridge
Commercial Systems

Warehouse Shipping and Routing Interface

Warehouse Shipping & Routing Interfaces Menu (WSI)

This menu contains the set-up and user options that allow you to import and export shipping information from the Dancik system to third party shippers such as UPS and Fedex. This eliminates having to manually enter shipment information into the third party's software application (i.e., Worldship for UPS and Fedex Ship Manager). This interface can also upload assigned and tracking numbers into the orders on the core system.

Note: These shipping interfaces are separately licensed programs available from Dancik International, and require the respective third party software.



Other Parts of the Dancik System that Affect the WSI Menu

Classification Codes File (FIL 19)

Ensure the necessary Ship Via and FOB codes are established. This is done via option FIL 19 on the core system.

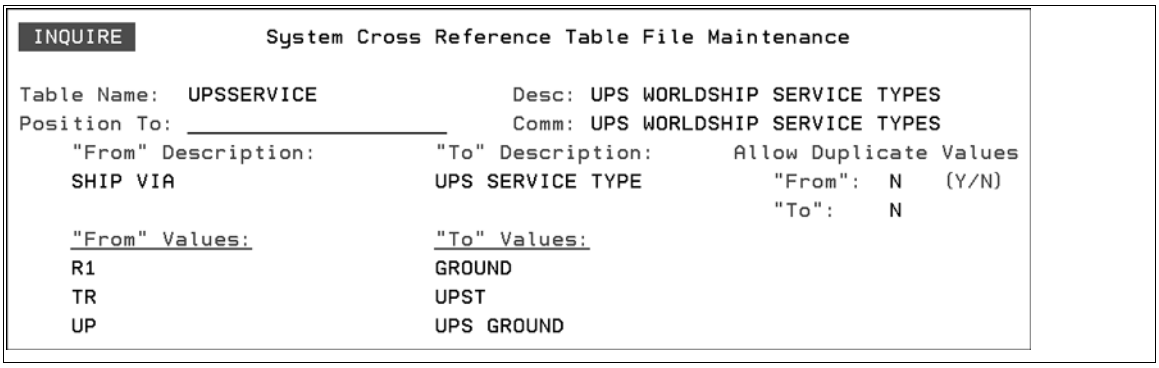
System Tables

Ensure the following tables exist and are accurate.

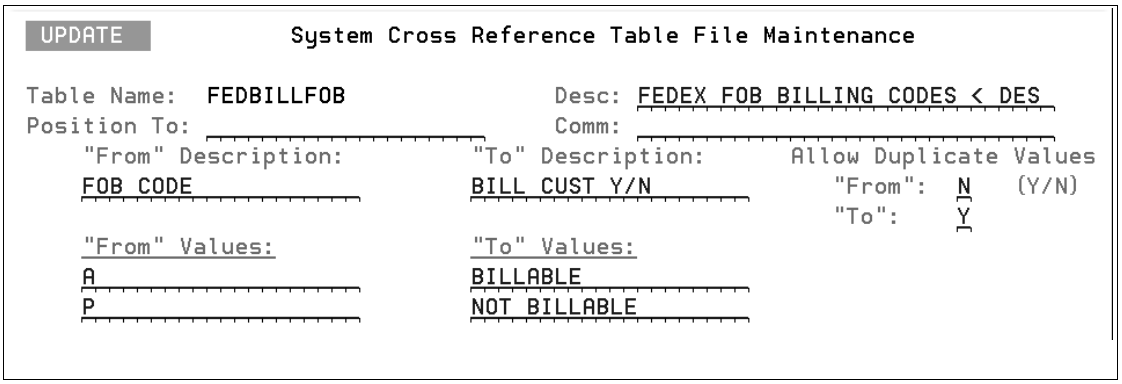
Note: The first three characters in the table names, in these examples shown as XXX (such as UPS), must relate to a shipping prefix assigned using option **3 - Work with Shipping Providers** *on the WSI menu.*

- **XXXSERVICE** (where XXX is the shipping provider code such as FED or UPS) - Maps the shipvias in your core system to the ones used between Dancik and the shipping providers' application. Orders with shipvias in this table get exported to the shipping provider's application.

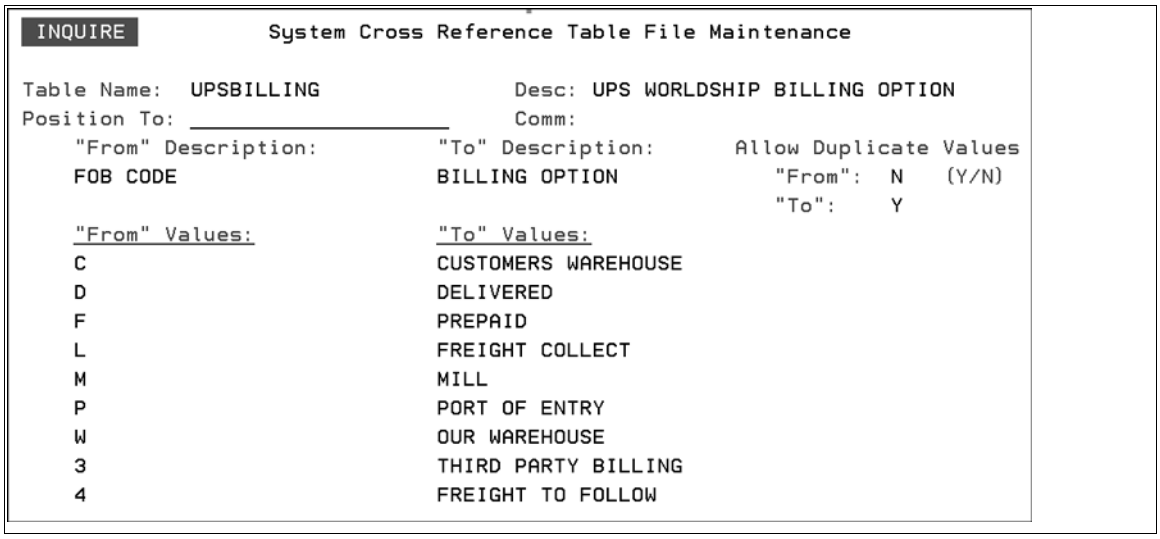
  Note: During the order entry process, Shipvia codes are designated on the Order Header screen.



- **XXXBILLFOB** - This table lets the Dancik system know whether or not to charge the customer for shipping. There are two Dancik established defaults for this table: A and P. Enter your FOB codes in this table.



- **XXXBILLING -** The system uses the FOB codes in this table to determine whether the customer is charged or not. This information is exported to the shipping provider's application.



Note: During the order entry process, FOB codes are designated on the Order Header screen.

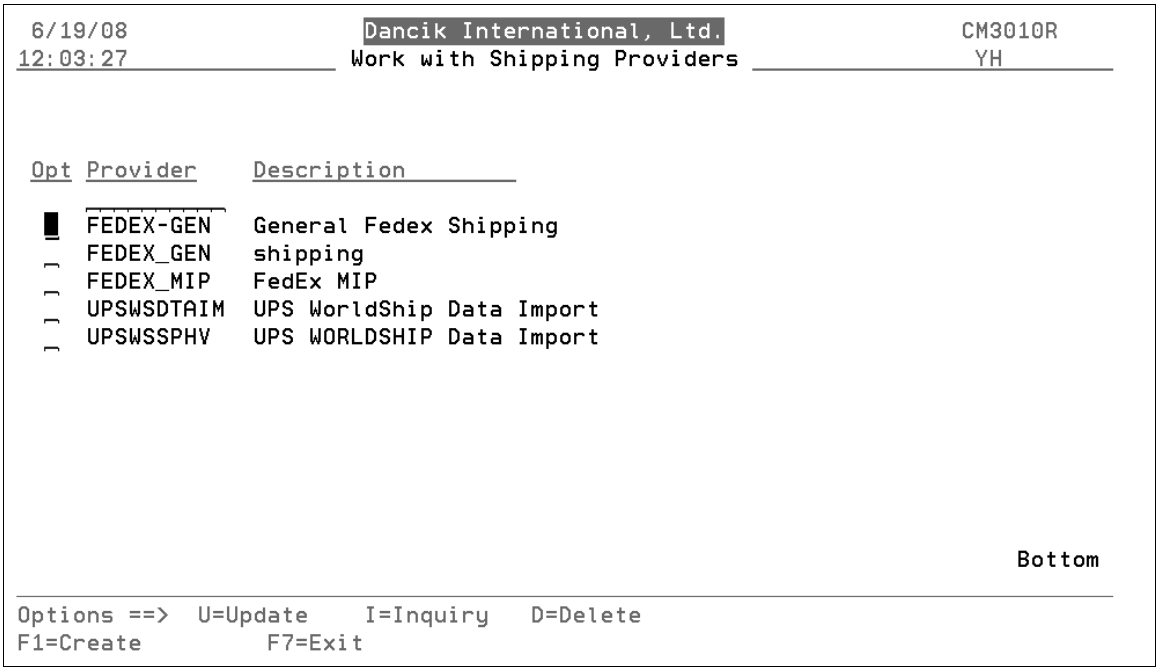
Set-Up

Before using these interfaces, you must perform the following set-up procedures:

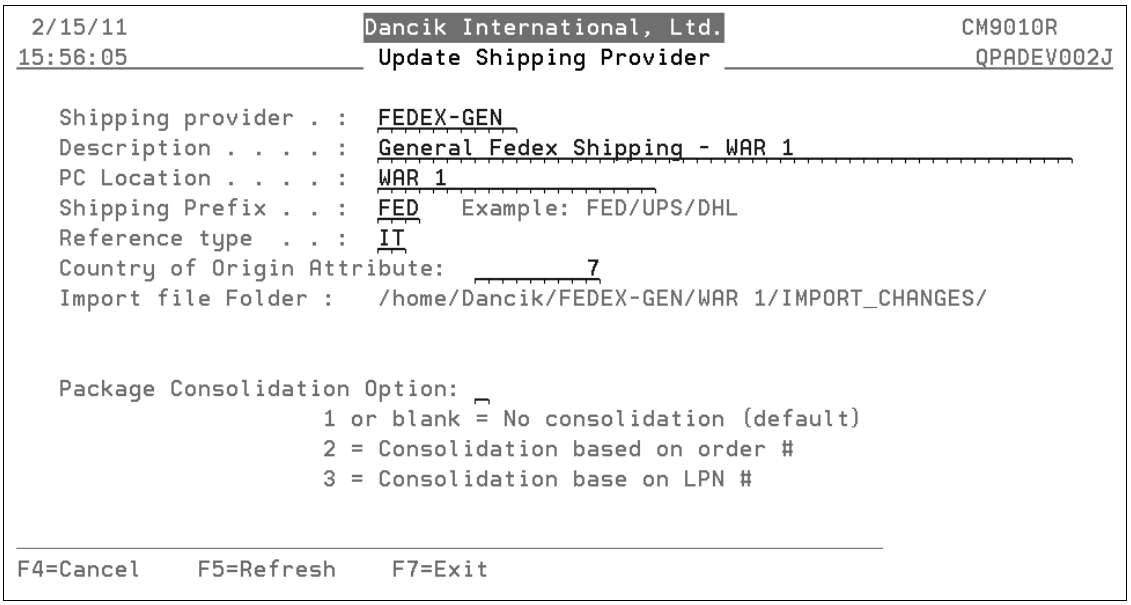
- Adding and Defining Shipping Providers (WSI 3)
- Establish Freight Charges (WSI 4)
- Setting up Shipping Providers Account X-Ref (WSI 5)
- Work with Shipping Provider Defaults Charges (WSI 6)

Adding and Defining Shipping Providers (WSI 3)

Using option **WSI 3** - **Work with Shipping Providers** you can add, update, or delete shipping providers.

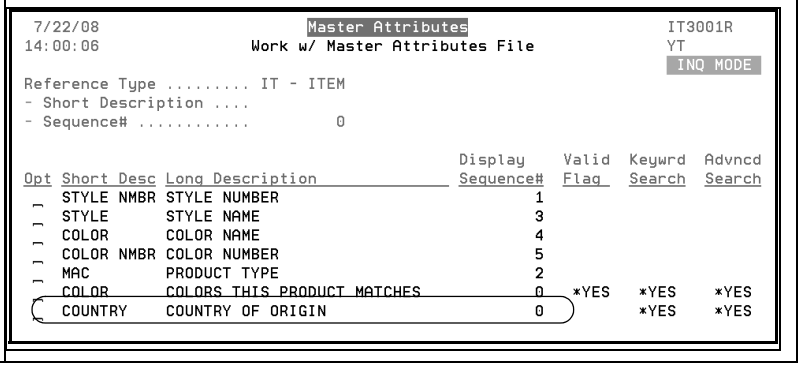


From the screen shown above, you can update, inquire on, delete, or add another shipping provider.



Field	Description
Shipping provider	The third party shipping provider and the type of service. For example, FEDEX_Ground or UPS_Overnight.

Field	Description
Description	An expanded description of the shipping provider and type of service.
PC Location	The location of the computer where the information is being passed back and forth between the Dancik system and the shipping provider (i.e.,UPS, Fedex) application. If you have both software applications (Dancik and shipping provider) loaded on multiple machines, you can use this field to differentiate between locations. An IFS directory is created for each PC location. This directory is where imported and exported information is kept. Assigning multiple locations provides flexibility and autonomy. For example, if you have three warehouses that have PCs loaded with the Dancik and Fedex applications, but you did not assign multiple PC locations, all three of the warehouse's information is placed into a single IFS directory. However, if you assigned a PC location to each warehouse (i.e. WAR 1, WAR 2, and WAR 3) each warehouse would have its own IFS directory for its shipping information. For every PC location a new shipping provider is created and displayed on the Work with Shipping Provider screen. It is recommended that if you use multiple PC locations you make the shipping provider description very clear and understandable. For example: *Note: The IFS directory address for both imported and exported information is shown on the Adding Shipping Provider Screen.*

Field	Description
Shipping Prefix	This three character code references back to the system tables (SET 5) established for the shipping provider. The following system tables should be set-up to cross reference information such as shipvia codes and types of freight collection. — XXXBILLING — XXXSERVICE — XXXBILLFOB Where XXX is the shipping provider (i.e. UPS or FED). This information is used by options 1 and 2 on the WSI menu to import and export shipping charges, ship via information and other data.
Reference type **Country of Origin Attribute**	These fields relate to the Item Attributes system, where you can define countries of origin. This entry tells the system where to go to retrieve country of origin information for printing on shipping documents. *Note: This optional field is used mainly for international shipments.* To determine the value to place in this field follow these steps. • Access the Item Attribute System (SET 31). • Enter a Reference Type. At the current time, the only Reference Type supported is IT (item). • Press **Enter** and find **Country of Origin** in the list. • Count down to the **Country of Origin** entry. In the screen shown below, the Country of Origin is the 7th entry in the list so you would enter a 7 in this field. 

```
 7/22/08                        Master Attributes                        IT3001R
14:00:06                 Work w/ Master Attributes File                  YT
                                                                         INQ MODE

Reference Type ......... IT - ITEM
- Short Description ....
- Sequence# ............          0

                                                        Display    Valid  Keywrd  Advncd
Opt  Short Desc  Long Description                       Sequence#  Flag   Search  Search
     STYLE NMBR  STYLE NUMBER                                  1
     STYLE       STYLE NAME                                    3
     COLOR       COLOR NAME                                    4
     COLOR NMBR  COLOR NUMBER                                  5
     MAC         PRODUCT TYPE                                  2
     COLOR       COLORS THIS PRODUCT MATCHES                   0   *YES   *YES    *YES
     COUNTRY     COUNTRY OF ORIGIN                             0          *YES    *YES
```

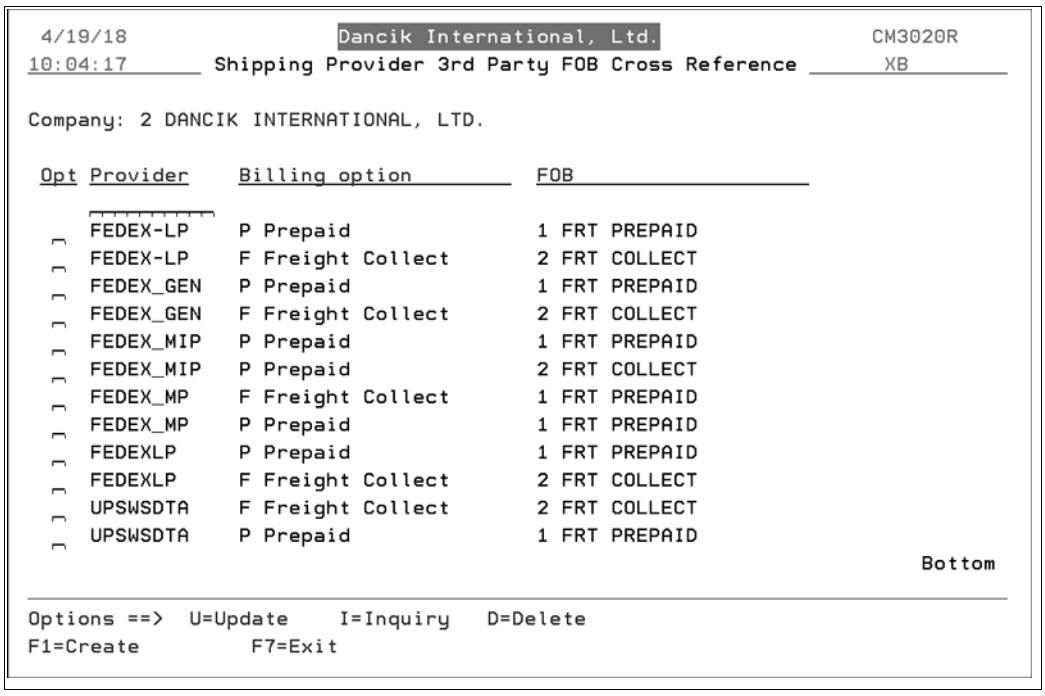
Field	Description

Export File Folder
Import file Folder
	When all the input fields on the Work with Shipping Providers screen are populated (all the fields are mandatory except Description) and **Enter** is pressed, the system automatically creates import and export folders on the IFS.
	These folders are used to import or extract shipping information for a specific shipping provider.
	Keep in mind that a folder is created for each shipping provider (UPS, Fedex), type of service (ground, air), and machine location (warehouse, dock door) that is created.
	Sample directories are shown below:
	`/home/Dancik/FEDEX_GEN/DOCK8/EXPORT_CHANGES/`
	`/home/Dancik/FEDEX_GEN/DOCK8/IMPORT_CHANGES/`
	You will need these paths when creating profiles using some of the shipping provider's applications (i.e. Fedex Integration Assistant). For an example, refer to "Fedex Shipping Manager" on page –19.

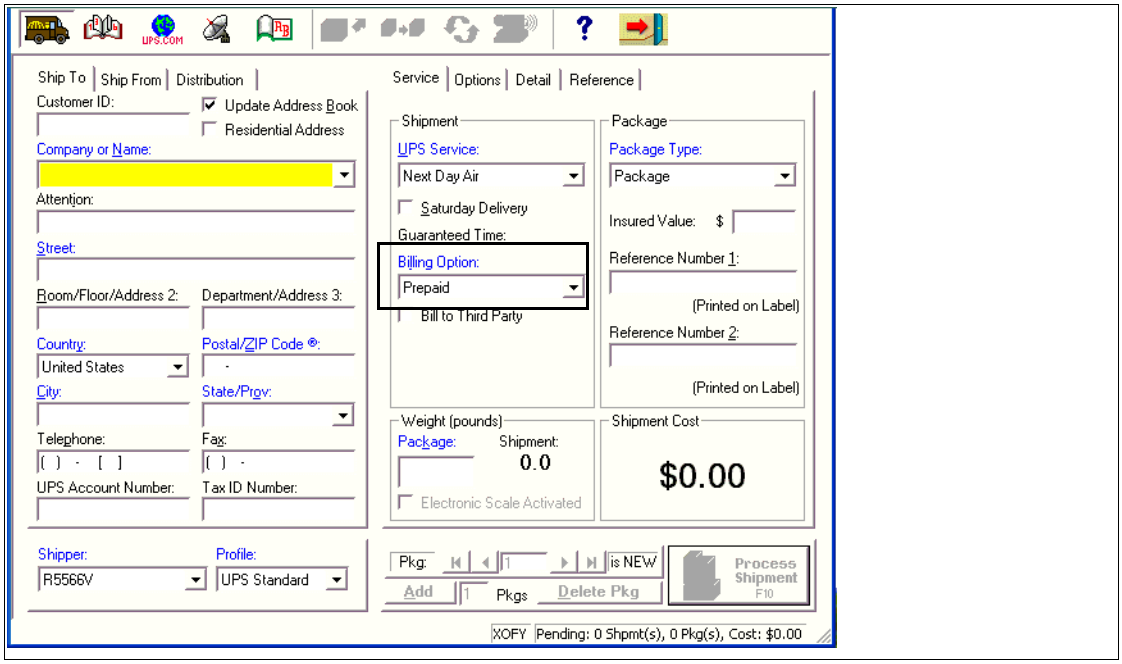
Package Consolidation Option	Use this option to bring the packaging in line with the order lines. Leaving this option blank directs the system to list every order line individually. You can choose to consolidate by order or LPN number.

Establish Freight Charges (WSI 4)

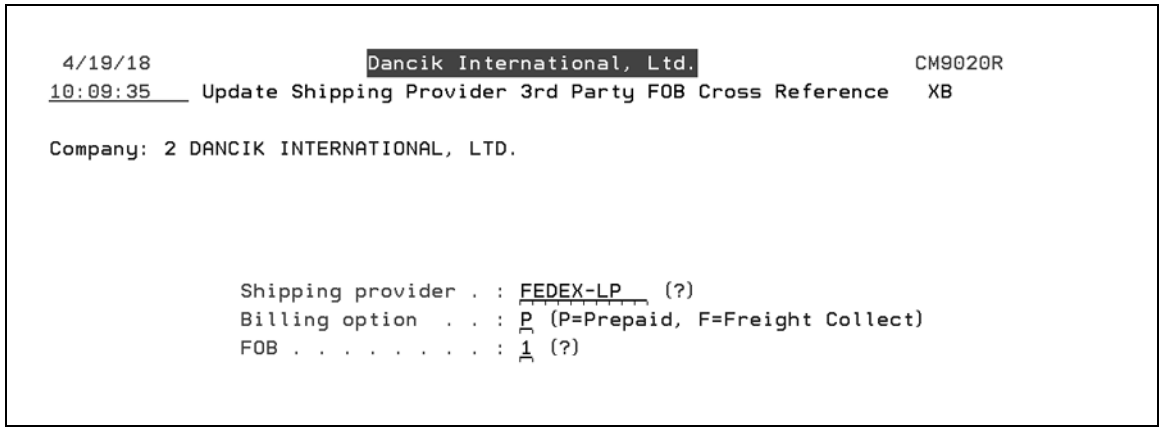
1. Option WSI **4** - **3rd Party FOB Xref** lets the Dancik software and the third party application interchange information about how shipping charges are going to be paid.



UPS WorldShip picks these options up and makes them available in a drop down menu.



2. To update an entry, enter a “U” in its Opt field and press Enter.

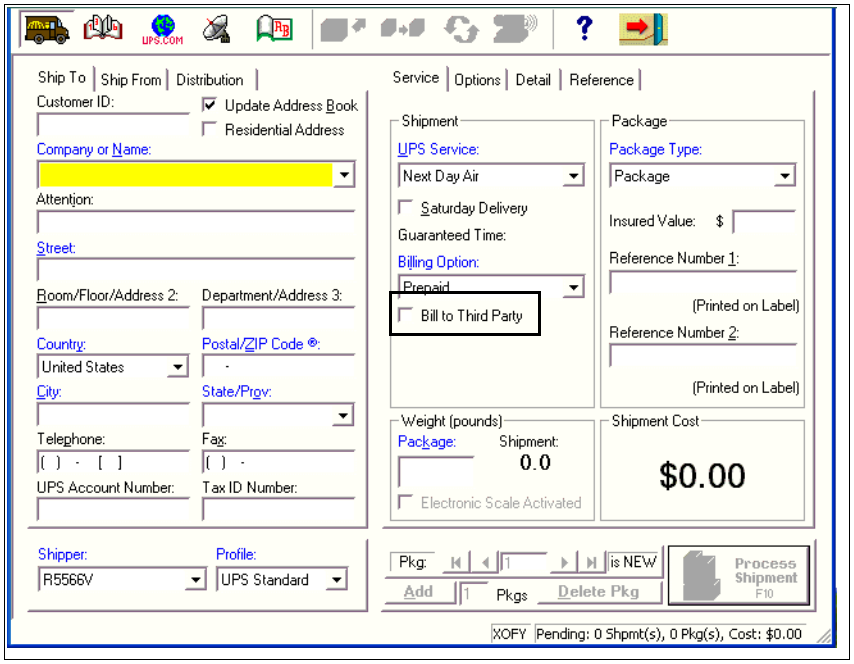


Field	Description
Shipping provider	The company providing the shipping services. To see a listing of all the established shipping providers, enter a “**?**” and press **Enter**. To create a new entry, you can use an existing shipping provider and then change the Billing and FOB options.

Field	Description
Billing option	Establishes payment information for this shipping provider. The two available options are Freight Collect (customer who receives the material and pays the shipping costs at time of delivery) or Prepaid (shipping charges are paid before delivery). Select an option to use as the default for the company and the shipping provider.
FOB	FOB is an abbreviation for Free On Board. The term FOB is commonly used when shipping goods, to indicate who pays loading and transportation costs, and/or the point at which the responsibility of the goods transfers from shipper to buyer. For example, if a C (customer's warehouse) is entered into this field, the shipping provider is responsible for the goods until the shipment reaches the customer's warehouse where the customer takes responsibility. *Note: FOB codes are created and maintained in the Classification Codes File (FIL 19).*

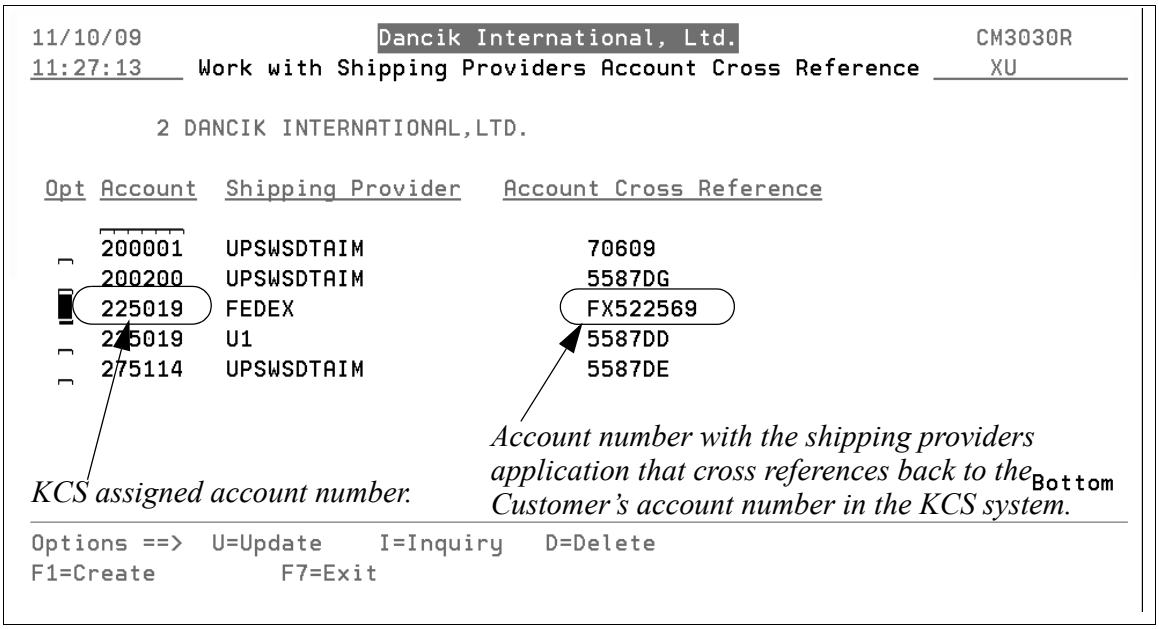
Setting up Shipping Providers Account X-Ref (WSI 5)

This step is optional. It is required if you are going to use your customer's shipping provider account number to charge for shipping. The KCS system is set-up to bill by customer account number. This step allows you to cross reference KCS Billto accounts to an account number provided by the shipping provider. This ensures that the person actually receiving the package is the one paying for the shipping.



1. Select option **5 - Shipping Providers Account X-Ref** and then select a company to work with on the Company Search screen that appears.

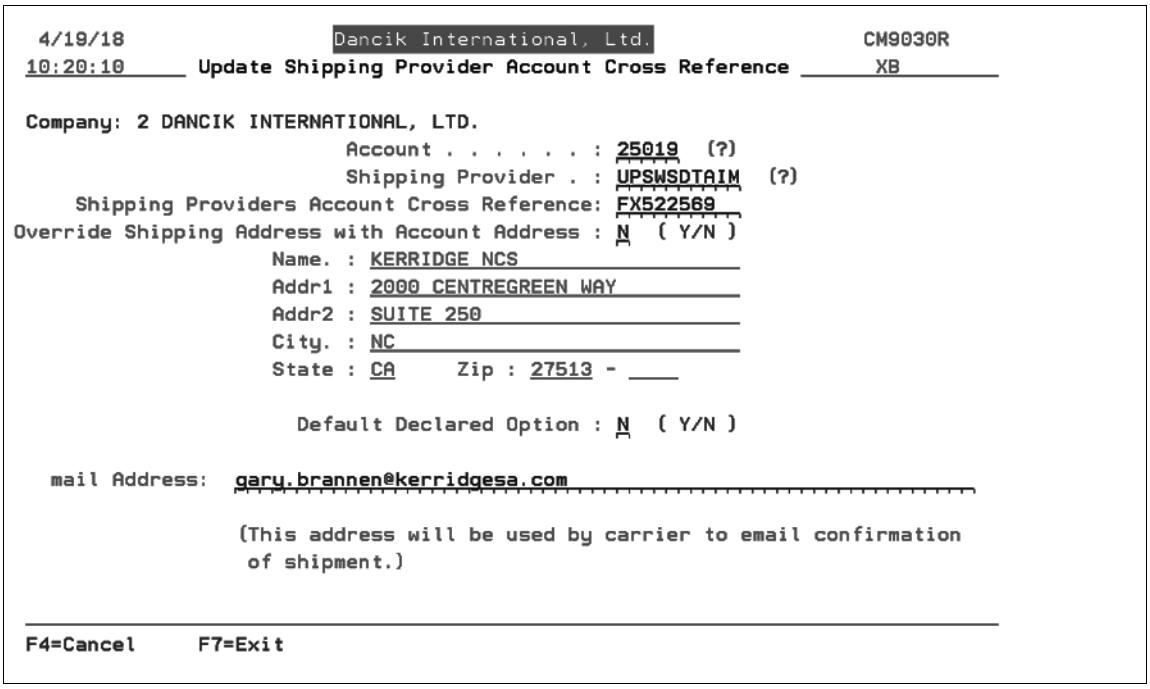
2. The Work with Shipping Providers Account X-Ref screen is where the third party account information is established.



3. The first account number (in this example **225019**) is the Billto account number in the KCS software that cross references to the account number provided by the shipping provider (listed under Account Cross Reference).

   Note: Multiple account numbers can be cross referenced to the same shipping provider account cross reference number.

4. To update an entry, enter a "**U**" in its **Opt** field and press **Enter**.



The **E-mail Address** field can help improve customer service through email confirmation at the time of shipment.

5. In the example shown above, the FEDEX shipping charges are going to be applied to customer account 25019, KSC's Billto account number, which cross references to the account number provided by the customer for use with this shipping provider; FX522589.

6. A confirmation email will be sent to the email address provided.

   Note: The email address is also included in the SHIPDATA_IMPORT.CSV file; which is generated via WSI 1.

Work with Shipping Provider Defaults Charges (WSI 6)

This option lets you establish defaults for shipping provider charges. Once these defaults are set-up, the system automatically codes the charges as defined on the order. The fields that can have defaults assigned are: General Ledger account number, cost center, and 9966 message.

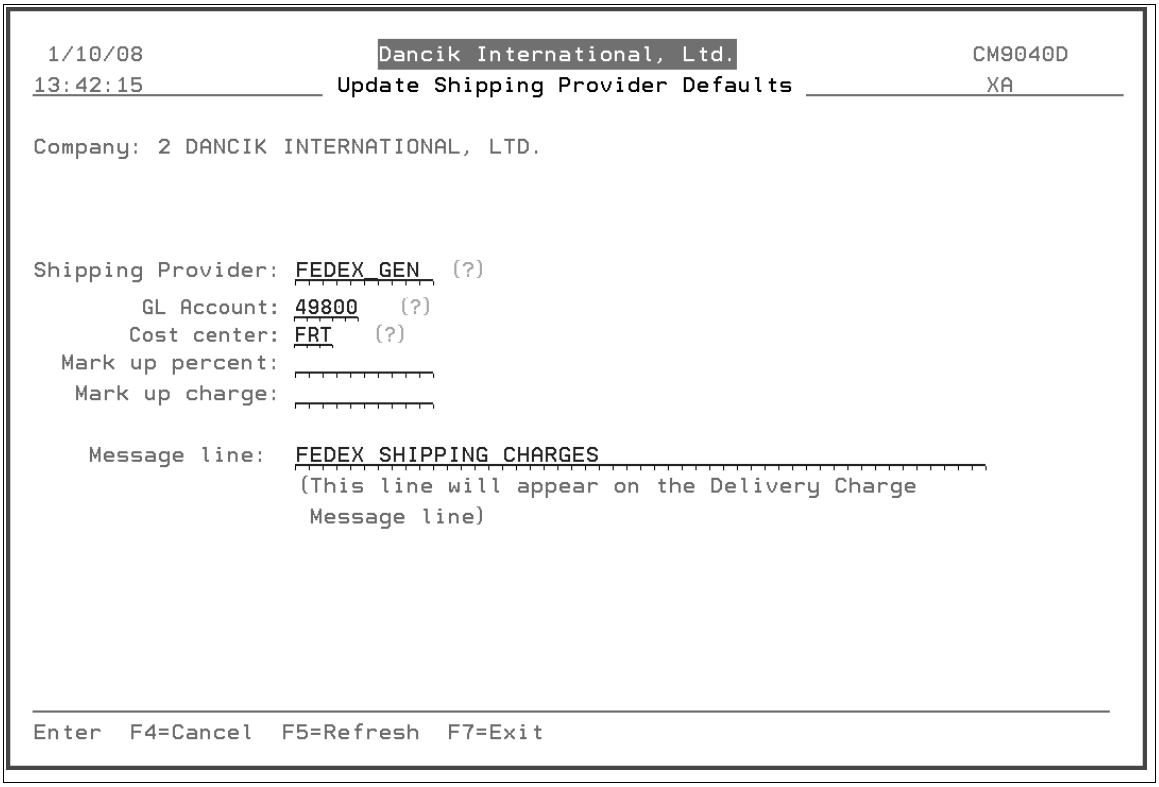
1. Select option **6** - **Shipper Provider Handling Defaults** from the Warehouse Shipping Interfaces Menu. A Company Search screen appears.

2. Select a company and press **Enter**. The Work with Shipping Provider Defaults screen for the selected company appears.

```
 1/10/08                  Dancik International, Ltd.                  CM3040R
11:52:27              Work with Shipping Provider Defaults              XX

Company: 2 DANCIK INTERNATIONAL, LTD.

     Shipping                  Cost
 Opt Provider     GL Acct     Center 9966 Message line

  _  FEDEX_GEN    30010        DEL   FEDEX SHIPPING CHARGES
  _  UPSWSDTA     30010        DEL   SHIPPING CHARGES
  _  UPSWSDTAIM   49800        FRT   UPS SHIPPING CHARGES

                                                                    Bottom
Options ==>  U=Update    I=Inquiry   D=Delete
F1=Create         F7=Exit
```

3. From this screen, you can add defaults for a new or existing shipping provider, inquire, delete, or update existing ones shipping providers.

4. To update existing defaults, enter a **U** in the appropriate **Opt** field and press **Enter**.



Field	Description
Shipping Provider	The shipping provider for this order. Enter a "**?**" in the field to display a list of all the shipping providers.
GL Account	This is the general ledger account where the shipping charge is applied. To access a listing of all the available GL accounts, enter a **"?"** in the field. In this example, GL Account **49800** is for freight out.
Cost Center	Establishes the cost center for the incoming shipping charges. To view a list of all the available cost centers, enter a "**?**" in the field and press **Enter**. In this example, **FRT** applies the charges to a freight cost center.
Mark up Percent **Mark up Charge**	Use these fields to add an additional fee to the shipping charges. You can use one by itself or use them in combination. If used in combination, the percentage is calculated and added first, then the mark up charge. For example, if $100 of shipping charges were being registered, and there was a mark up of 10 percent and a mark up charge of $5 the total shipping costs would be $115 (100 + 10 + 5).

Field	Description
Message Line	Use this line to enter the default text on the order message line that relates to this shipping charge. Per the example, **Fedex Shipping Charges** would appear on the 9966 message line for the order.

Using the Dancik Shipping & Routing Interfaces Menu

These steps include:

- Creating a Test Order.
- Using **Extracting Data to Send - WSI 1** to load at least one transaction into the file created using **WSI 3** - **3rd Party FOB Cross Reference**.
- Using **Import Shipping Provider Charges - WSI 2** to add shipping costs as needed.
- Establishing a connection between the third party software application and the KCS System.

Creating a Test Order

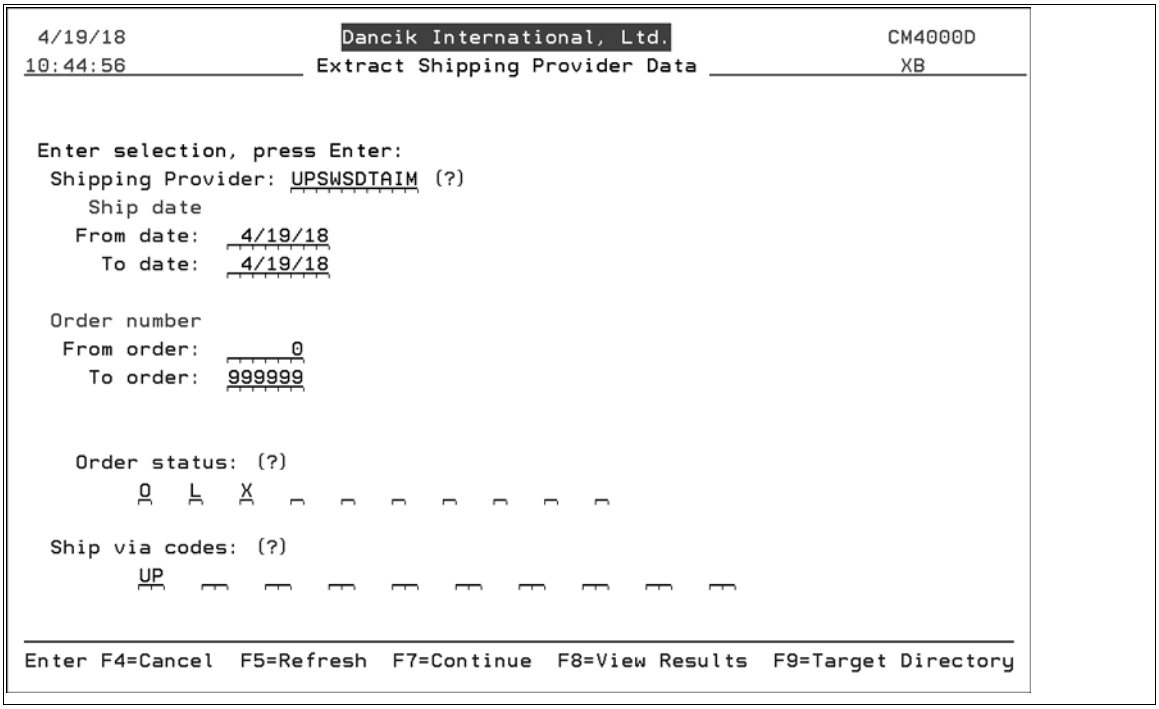
Create a test order for each type of service (air, ground, next day) for every shipping provider (UPS, Fedex, etc.). This creates and exports a .txt file to the folder set up when shipping provider details were created using **WSI 3**. This .txt file is necessary when mapping fields from Dancik to the shipping provider application.

A couple of notes about creating test orders:

- Use CUS 1 or ORD 1 to create orders.
- The entry in the **Ship-Via** field cross-references the order back to the shipping provider.
- Order any item. The intent of these test orders is to send the order headings to the export folder as a .csv file.

Extracting Data to Send - WSI 1

1. From the WSI menu, select option **1**- **Export Shipping Provider Data**. The Shipping Provider Extract screen appears..



Note: This Export sends the information to a folder on the IFS. For UPS the folder is /home/Dancik/UPS_GROUND/WAREHOUSE/EXPORT_CHANGES/DES_SHIP_FEES.csv.

2. Make entries as needed.

   - **Shipping Provider -** The company providing the shipping services. For example, the **Shipping Provider** code shown in the figure above, **FEDX_GEN**, represents general Fedex Shipping.

   Note: To add new Shipping Provider codes, use WSI menu option **3** - **Work with Shipping Providers**. *For more information on this feature, refer to Adding and Defining Shipping Providers (WSI 3).*

   - **Ship date -** Enter the date range to be extracted. The dates must be valid and in a MMDDYY format. Furthermore, the **To** date cannot be less than the **From** date. If 99/99/99 is entered in the **To** date the system assumes you want all orders from the **From** date on. This date range cannot be left blank.

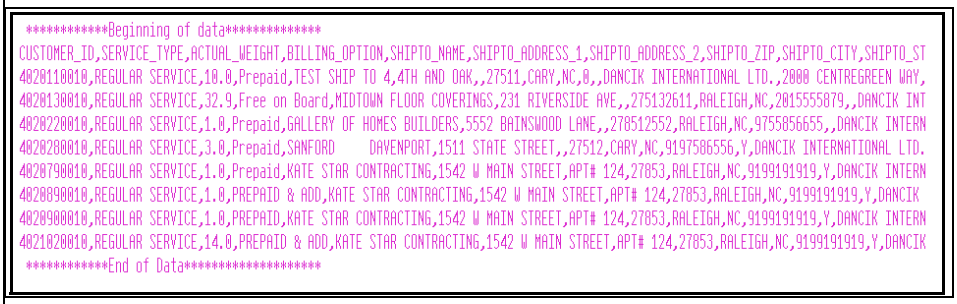
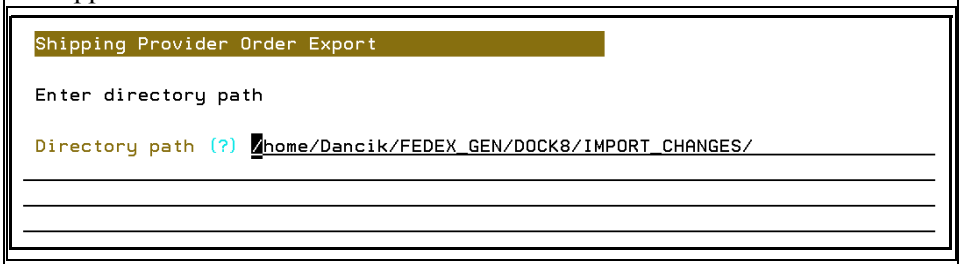
   - **Order number** - Enter the range of orders to extract. All order numbers must be in this range, and have ship dates that match the ship date range. The order numbers is the range must have a ship date within the range specified in the **Ship Date** fields. This range can be left blank.

   - **Order status** - To qualify the extract by order status, you may enter up to ten order status codes. At least one order status code must be entered. To access a list of all the existing status codes enter a "**?**" and press **Enter**. Usually you will enter the status code(s) used to represent

"picked" or "staged", or "shipped" as you will have the material ready to label with shipping labels.

- **Ship via codes -** To qualify the extract by ship via codes, enter up to ten ship via codes. At least one ship via code must be entered. Make sure the ship via code(s) entered require shipment. To access a list of all the existing ship via codes, enter a "**?**" and press **Enter**.

Function Keys

Function Key	Description
F4	Cancels the request and returns to the Warehouse Shipping & Routing Interfaces Menu (WSI) menu.
F5	Returns the input fields to the values displayed when the program was initially called.
F7	Accepts the screen inputs and creates the data extract. Don't press **F7** until the screen fields have been validated by first pressing **Enter**.
F8	Displays the contents of the current extract file. The file name is ShipDataImport.csv and is contained in the target directory.  **********Beginning of data********** CUSTOMER_ID,SERVICE_TYPE,ACTUAL_WEIGHT,BILLING_OPTION,SHIPTO_NAME,SHIPTO_ADDRESS_1,SHIPTO_ADDRESS_2,SHIPTO_ZIP,SHIPTO_CITY,SHIPTO_ST 4020110010,REGULAR SERVICE,10.0,Prepaid,TEST SHIP TO 4,4TH AND OAK,,27511,CARY,NC,0,,DANCIK INTERNATIONAL LTD.,2000 CENTREGREEN WAY, 4020130010,REGULAR SERVICE,32.9,Free on Board,MIDTOWN FLOOR COVERINGS,231 RIVERSIDE AVE,,275132611,RALEIGH,NC,2015555879,,DANCIK INT 4020220010,REGULAR SERVICE,1.0,Prepaid,GALLERY OF HOMES BUILDERS,5552 BAINSWOOD LANE,,278512552,RALEIGH,NC,9755856655,,DANCIK INTERN 4020280010,REGULAR SERVICE,3.0,Prepaid,SANFORD DAVENPORT,1511 STATE STREET,,27512,CARY,NC,9197586556,Y,DANCIK INTERNATIONAL LTD. 4020790010,REGULAR SERVICE,1.0,Prepaid,KATE STAR CONTRACTING,1542 W MAIN STREET,APT# 124,27853,RALEIGH,NC,9199191919,Y,DANCIK INTERN 4020890010,REGULAR SERVICE,1.0,PREPAID & ADD,KATE STAR CONTRACTING,1542 W MAIN STREET,APT# 124,27853,RALEIGH,NC,9199191919,Y,DANCIK 4020900010,REGULAR SERVICE,1.0,PREPAID,KATE STAR CONTRACTING,1542 W MAIN STREET,APT# 124,27853,RALEIGH,NC,9199191919,Y,DANCIK INTERN 4021020010,REGULAR SERVICE,14.0,PREPAID & ADD,KATE STAR CONTRACTING,1542 W MAIN STREET,APT# 124,27853,RALEIGH,NC,9199191919,Y,DANCIK **********End of Data********** This is only available after you press **F7**.
F9	To establish a target directory, press F9 and enter the directory path on the screen that appears. This is where the extracted information is sent.  Shipping Provider Order Export Enter directory path Directory path (?) /home/Dancik/FEDEX_GEN/DOCK8/IMPORT_CHANGES/ This function can only be completed after a target directory has been created using the WRKLNK command. *Note: The directory must exist and it cannot be a folder that is in the QDLS path. QDLS is the old AS400 method to store documents from a PC. It was enhanced by the IBM integrated file system (IFS). This interface only works with IFS.*

3. Press **Enter** and then **F7** to generate an extract. This is the information that is imported into the shipping provider's application.

4. The figure below presents an example of extracted information in a .CSV format located in the specified target directory.

CUSTOMER_ID	SERVICE_TYPE	ACTUAL_WEIGHT	BILLING_OPTION	SHIPTO_NAME	SHIPTO_ADDRESS_1	SHIPTO_ADDRESS_2	SHIPTO_ZIP
4132640010	Ground	20	Prepaid	WILLIAMS FLOORS INC.	952 MAIN STREET		404431234
4132710010	Ground	123.8	Prepaid	WILLIAMS FLOORS INC.	952 MAIN STREET		404431234
4132710020	Ground	123.8	Prepaid	WILLIAMS FLOORS INC.	952 MAIN STREET		404431234

SHIPTO_STATE	SHIPTO_TELEPHONE	RESIDENTIAL_INDICATOR	SHIP_FROM_NAME	SHIP_FROM_ADDRESS_1	SHIP_FROM_ADDRESS_2
NY	9196770005		OPM INTERNATIONAL	2000 CENTREGREEN WAY	SUITE 101
NY	9196770005		OPM INTERNATIONAL	2000 CENTREGREEN WAY	SUITE 101
NY	9196770005		OPM INTERNATIONAL	2000 CENTREGREEN WAY	SUITE 101

SHIP_FROM_TELEPHONE	PACKAGE_TYPE	PACKAGE_REFERENCE_1	PACKAGE_REFERENCI	INSURED_VALUE_OPTION	INSURED_VALUE_AMOUNT
0	Package	PO#:TEST	Order/Line#:413264/10	Y	176.92
0	Package	PO#:TEST-UPS	Order/Line#:413271/10	Y	172.75
0	Package	PO#:TEST-UPS	Order/Line#:413271/20	Y	172.75

Note: See your system administrator on how to set-up shipping provider's software to use the extracted info.

5. Once this information is passed into the shipping provider's system, control is passed to that program. Then you will utilize their programs as needed, and as documented by the shipping provider. When you are finished generating labels, freight charges, etc. you can optionally upload that data to the KCS system.

6. The optional data upload can create F6 order lines with freight charges, and can update the order notepad with tracking information.

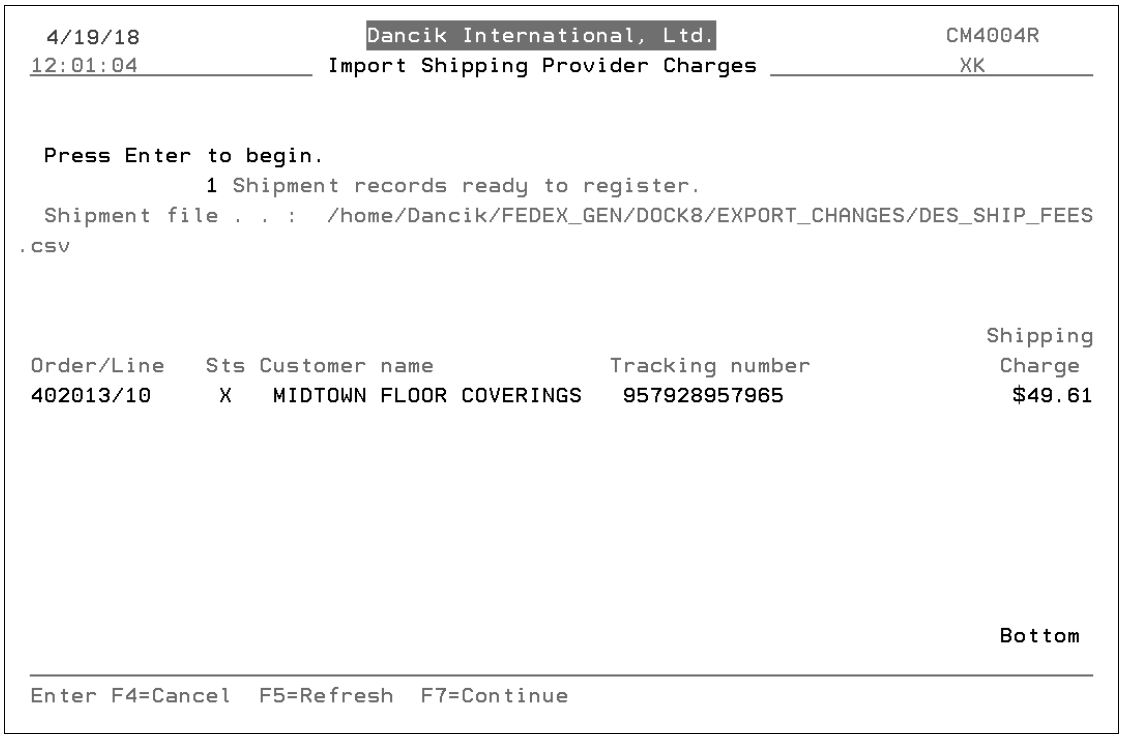
Import Shipping Provider Charges - WSI 2

After the shipping information is sent to a shipping agency (UPS, Fedex, etc.) using option **1** - **Export Shipping Provider Data**, the system automatically calculates and adds the applicable shipping charges to the total cost of the order. The next step is to import that information back into the KCS system.

Note: For UPS shipping charges, the directory to the folder is: /home/Dancik/UPS_GROUND/WAREHOUSE/IMPORT_CHANGES/ShipDataImport.csv.

1. Select option **2** - **Import Shipping Provider Charges**. A company search screen appears.

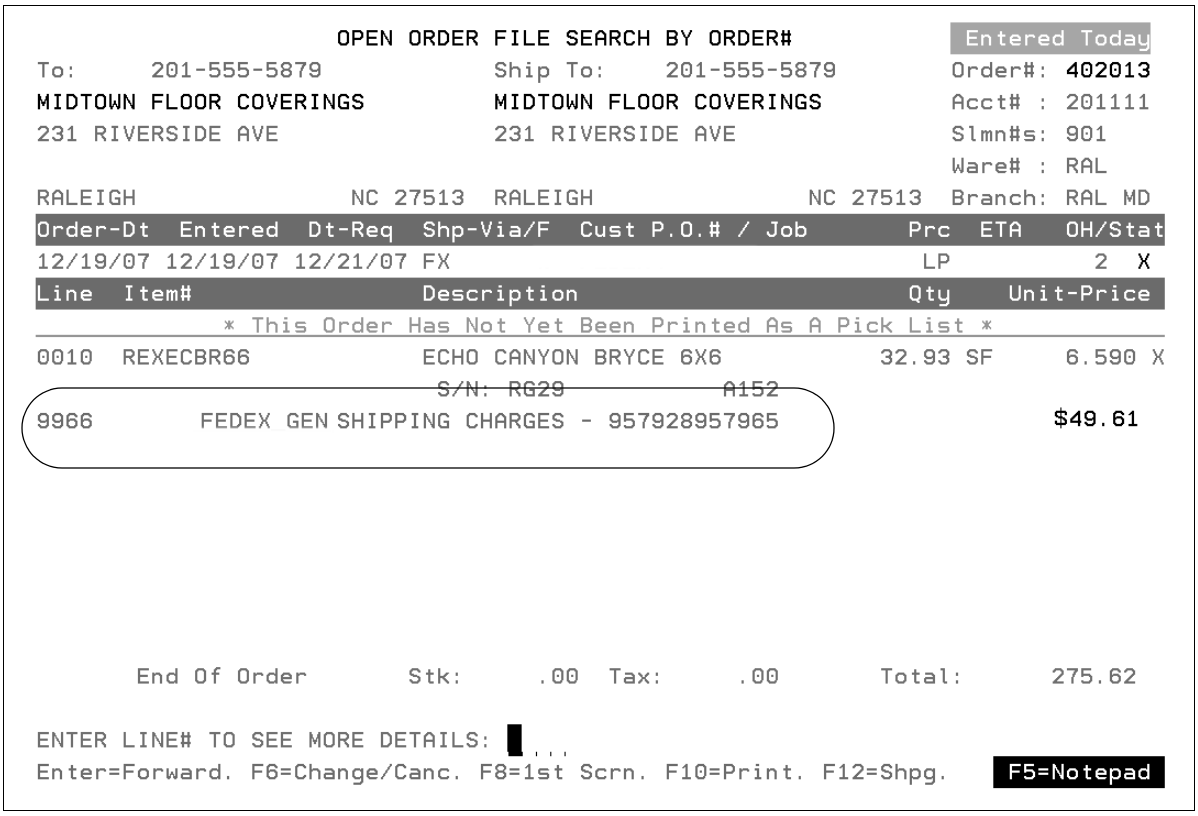
2. Select a company to work with, and press **Enter** and then **F7**. The next screen to appear shows the shipping charges that are ready to be registered to a customer.



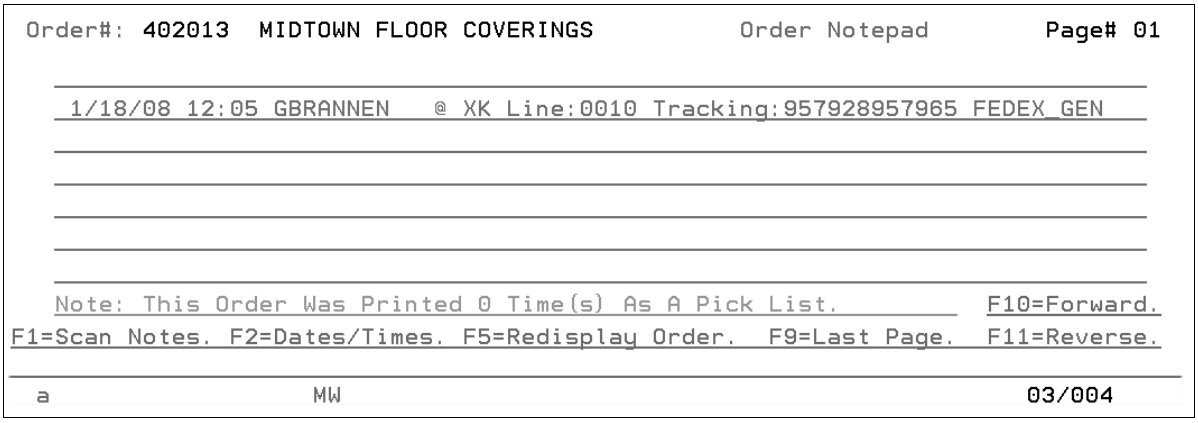
3. The screen above is telling us that Fedex Gen has returned 1shipment record (and related charges) via a CSV file located at:

   HOME/DANCIK/FEDEX_GEN/DOCK8/EXPORT_CHARGES/DES_SHIP_FEES.csv.

4. Press **Enter** to register the charges. A message line entry (F6 line) for each shipping charge is assigned to each order.



5. The tracking number is registered in the F5 notepad screen.



Establishing a connection between the third party software application and the KCS System

Before using options 1 and 2 on the WSI menu to receive and send information to/from a shipping provider's application there are some set-up steps that have to be performed.

UPS Worldship

1. From the Windows Explorer, go to the directory where the ODBC Registration file is located. This path will change depending on your set-up, but it should be something like:

   `S:\home\Dancik\UPS\Data linkage\DES Ship Charges DES UPS WS shipments.`

2. Double click the ODBC Registration file and then click **Yes** at the next prompt. You will then receive a confirmation message that the import was successful.

3. Confirm the ODBC DSN imports by running the Client Access ODBC administration program. To do this, from the **Start** menu, select **Run**, then enter C:\WINDOWS\system32\odbcad32.exe. The ODBC Data Source Administrator window appears. You should see two entries related to UPS Worldship: **DES Ship Charges** and **UPS Shipment Import**.

4. Exit out of the ODBC Data Source Administrator.

5. Go back to the directory where your UPS files are, and double click on the file **Setup.bat**.

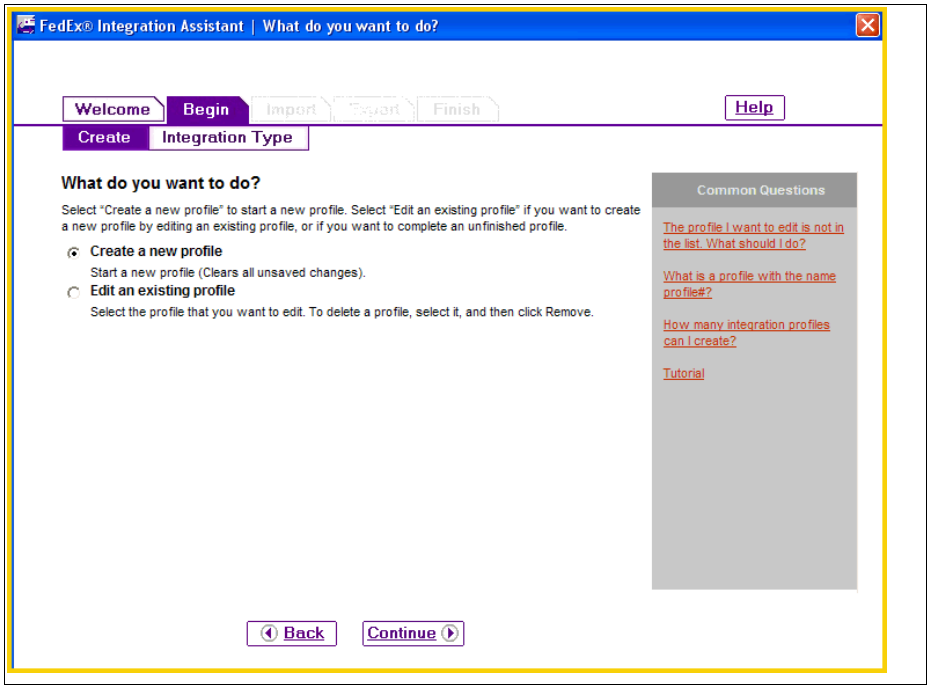
   Note: *For the ODBC connection to be active, the files* **DES_SHIP_FEES.csv** *and* **schema.ini** *must be in the* **DES Ship Charges** *directory. And the* **ShipDataImport.csv** *and* **schema.ini** *files must be in the* **DES UPS WS Shipments** *folder.*

Fedex Shipping Manager

Set-up Required for Sending Information from Dancik to Fedex

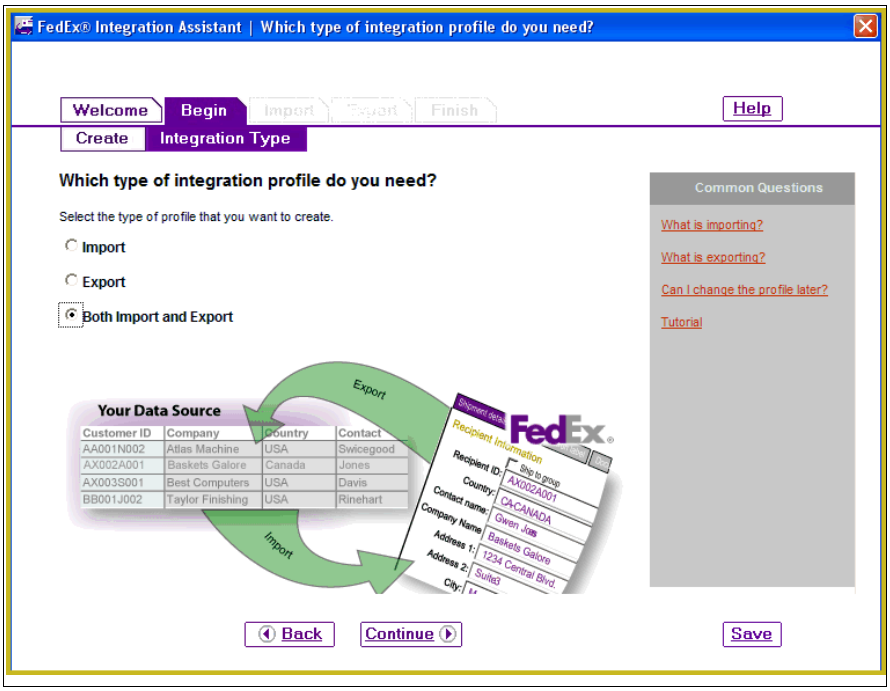
1. Within the Fedex application, click the Integration tab and then select Fedex Integration Assistance.

2. On the screen that appears, select the **Begin** tab. Select to create a new profile.

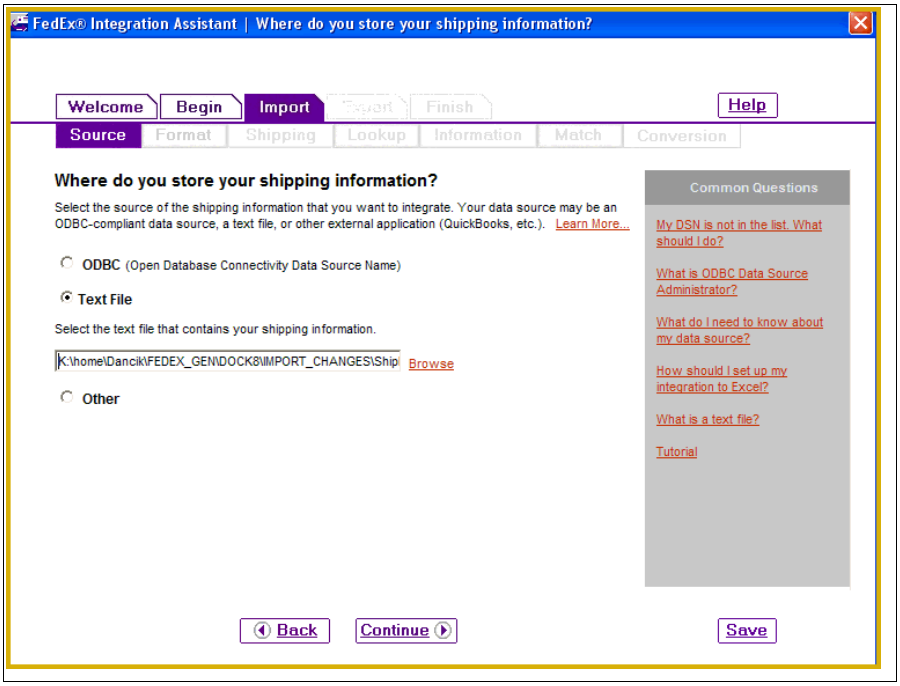


A profile has to be created for each location, type of service (air, ground, etc.).

3. Click **Continue**. On the next screen, select **Both Import and Export**. This allows this profile to send to and receive information from Fedex.



4. The next step is to tell the application what kind of file you will be exchanging and where the host file is.

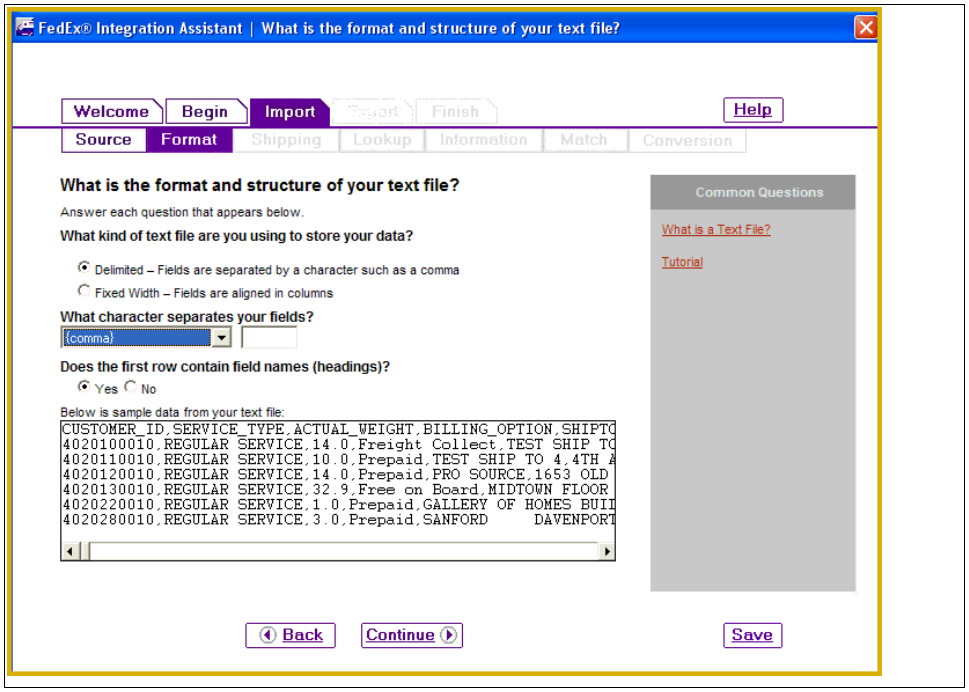


The text files for the profiles are automatically created when you add shipping providers via option **WSI 3 - Work with Shipping Providers**. For more information, refer to “Adding and Defining Shipping Providers (WSI 3)” on page –4. When browsing for these text files, follow the

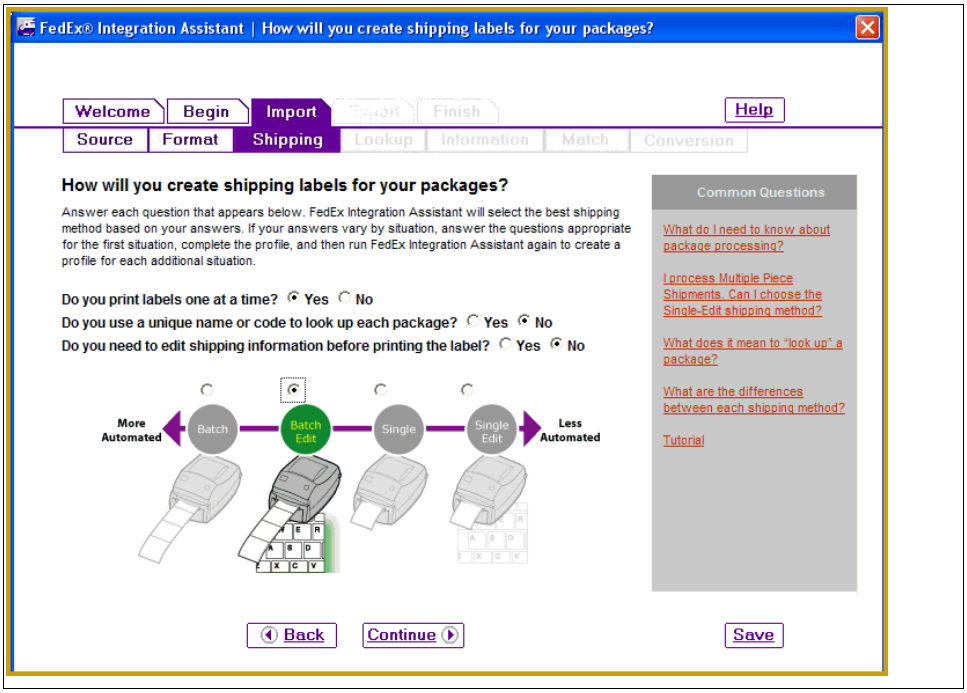
same paths as defined when Shipping Providers are added using WSI 3 (make sure you change the filter type to all files (*.*).

5. Next assign a structure to this profile. Make the following selections:

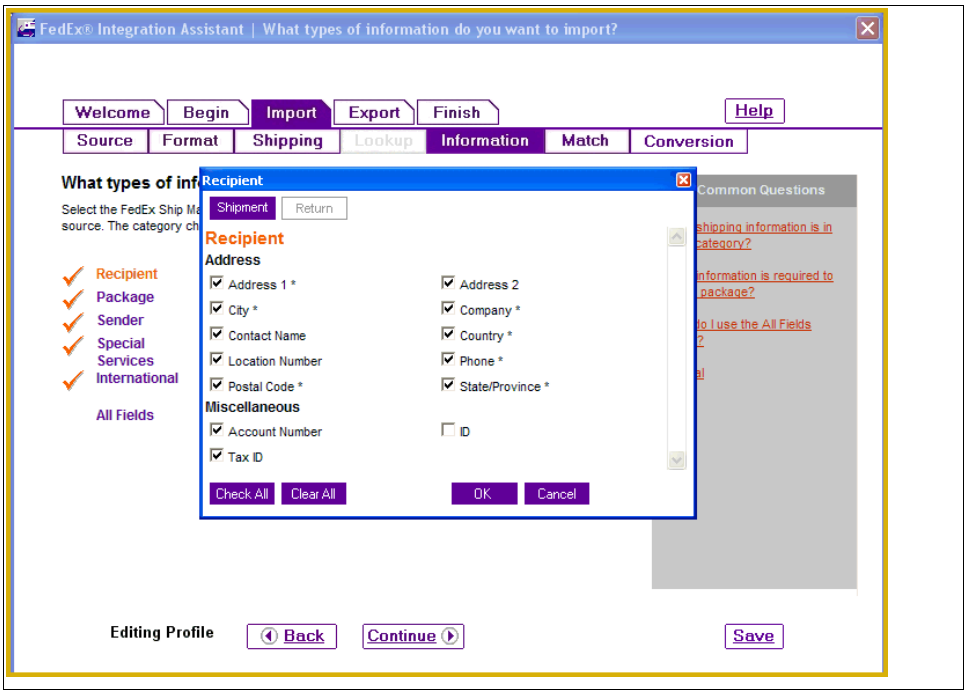
   - Delimited
   - **What character separates your fields?** - comma
   - **Does the first row contain field names (headings)?** - Yes



6. On the next screen, select to print shipping labels in batch mode.



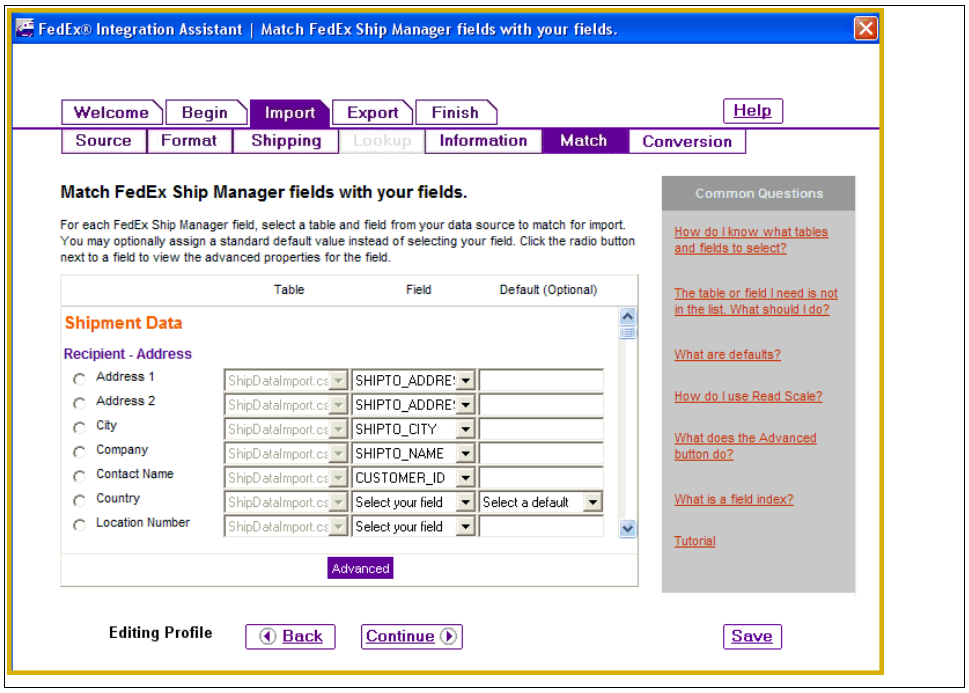
7. The next series of screens show which fields to map between systems.



Go through all the areas (Recipient, Package, Sender, Special Services, and International) and select the applicable fields. It is recommended that you select all the fields except ID in the Recipient area.

8. Map the fields that you want/need. For example, if you do not need to map the Location Number do not select it. The next, and last, step is to select the file (usually a .csv file) within the Dancik

system that contains the information required by the Fedex application. In the screen below, the Dancik information is shown under the heading **Table** and where that information is inserted into the Fedex application is listed under **Field**.



Set-up Required to Import Information from Fedex into Dancik

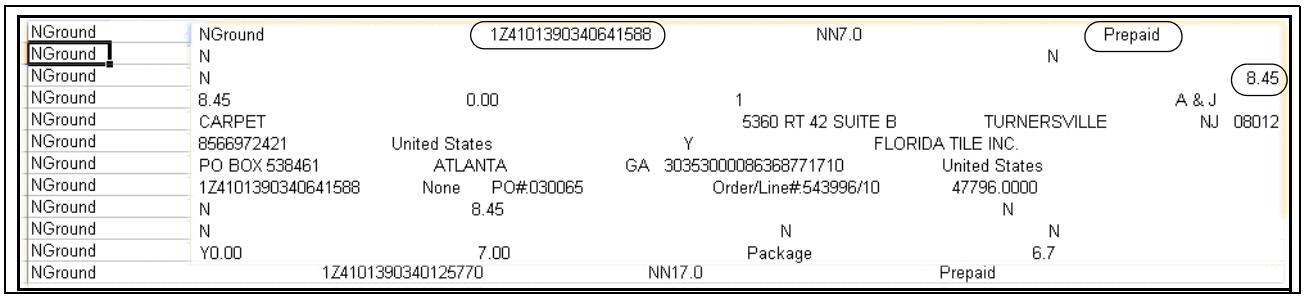
On the Dancik System

Fedex Set-up

On the Dancik System

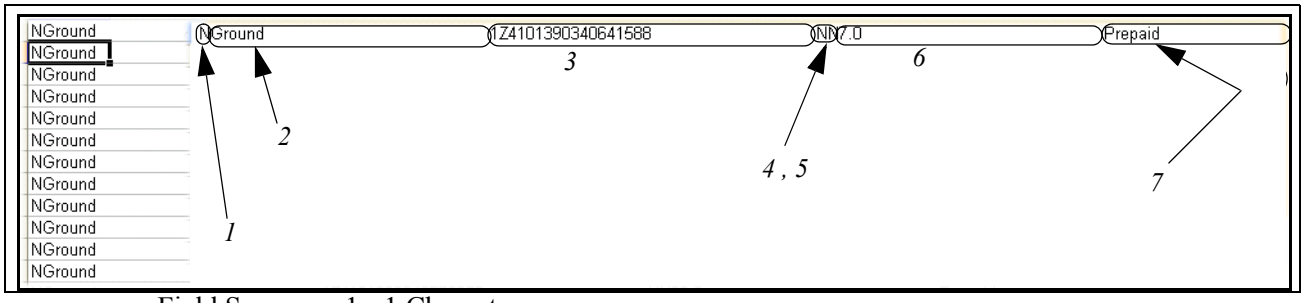
When a service is set-up using option **WSI 3 - Work with Shipping Providers**, a .txt file is automatically created and inserted into an export folder on the IFS. This text file maps the information coming in from Fedex to specific fields in the Dancik system. It contains the field layout/sequence and size/number of characters.

An example of the spreadsheet sent from Fedex to Dancik is shown below. Although all the fields are mapped into the Dancik system, the only ones that are currently used are the shipment ID/tracking number, billing option, and cost information.



NGround	NGround	1Z4101390340641588			NN7.0			Prepaid		
NGround	N							N		
NGround	N									8.45
NGround	8.45		0.00		1				A & J	
NGround	CARPET				5360 RT 42 SUITE B		TURNERSVILLE		NJ	08012
NGround	8566972421	United States		Y		FLORIDA TILE INC.				
NGround	PO BOX 538461	ATLANTA		GA	30353000086368771710		United States			
NGround	1Z4101390340641588	None	PO#:030065		Order/Line#:543996/10		47796.0000			
NGround	N		8.45				N			
NGround	N				N			N		
NGround	Y0.00		7.00		Package		6.7			
NGround	1Z4101390340125770			NN17.0			Prepaid			

The following table shows the how the text file is laid out. You can use this table to determine exactly what is on the text file. As an example of how this lay out works consider the first line from the figure above.

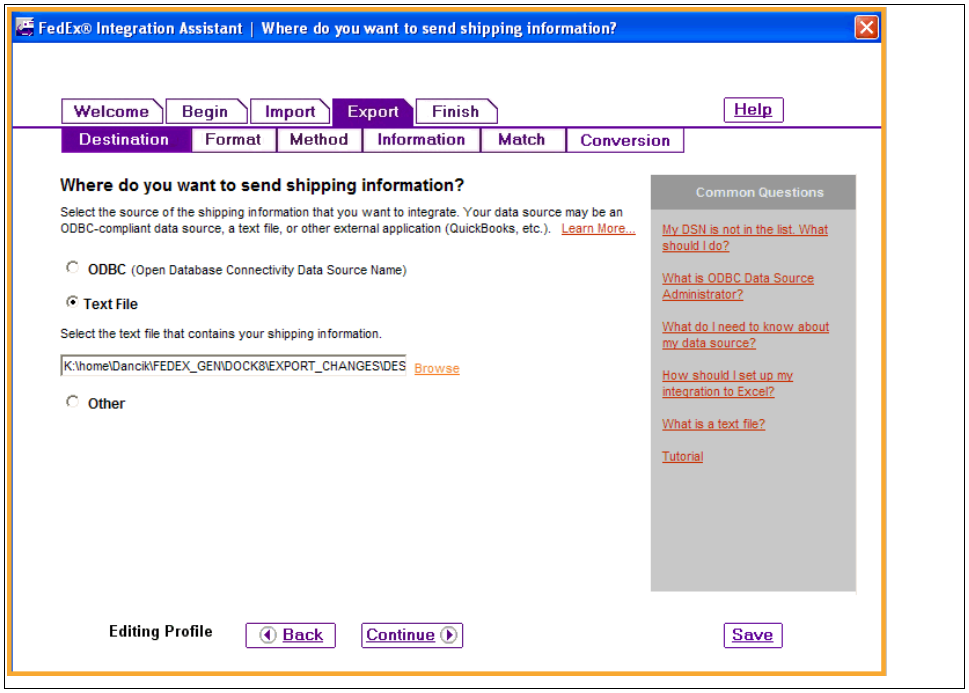


- Field Sequence 1 - 1 Character
- Field Sequence 2 - 50 Characters - Description: Service Type
- Field Sequence 3 - 50 Characters - Description: Shipment ID
- Field Sequence 4 and 5 - 1 Character each - Description - 4: HundredWeight, 5: Extended Area
- Field Sequence 6- 50 Characters - Description: Billable Weight
- Field Sequence 7- 50 Characters - Description: Billing Option

Fedex Set-up

1. Access the Fedex Integration Assistant and select the **Export** tab.

Click **Text File** and enter the location of the export file.

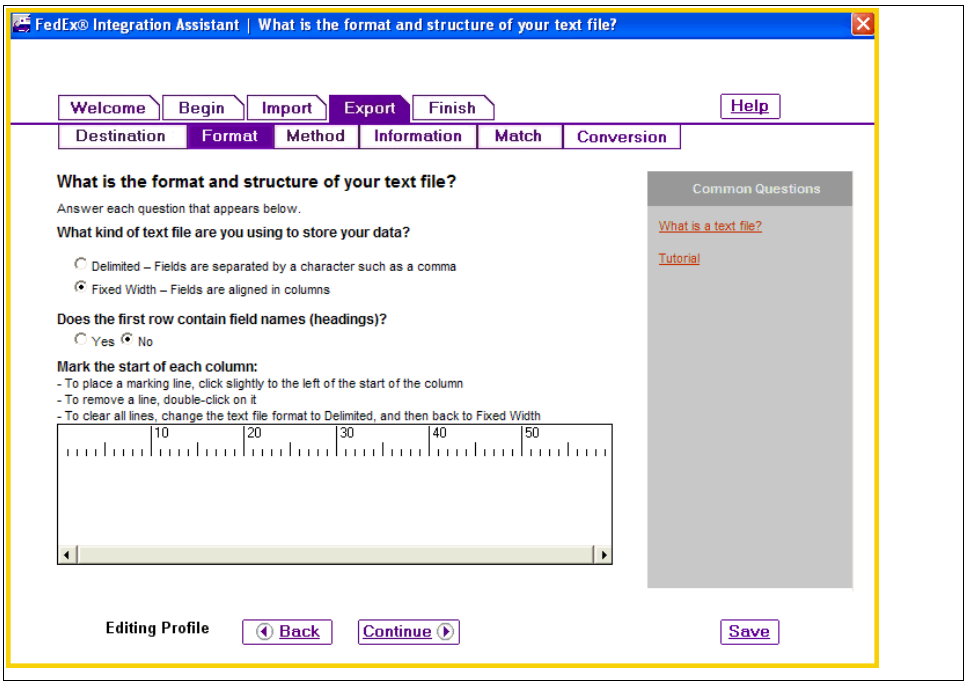


Note: If you are not sure where the export file is located, use option WSI 3 - Work with Shipping Providers to inquire where the folder for each provider is located.

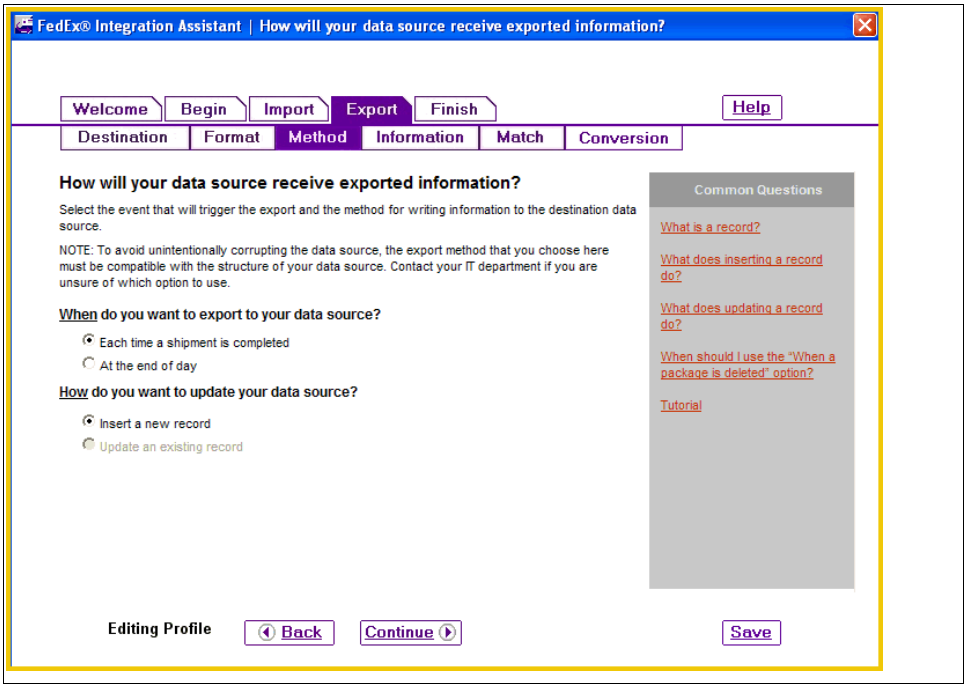
2. Click **Continue** to proceed to the next screen where you identify the format and structure of your text file.

   - Select **Fixed Width**
   - Select **No** for the question **Does the first row contain names (headings).**

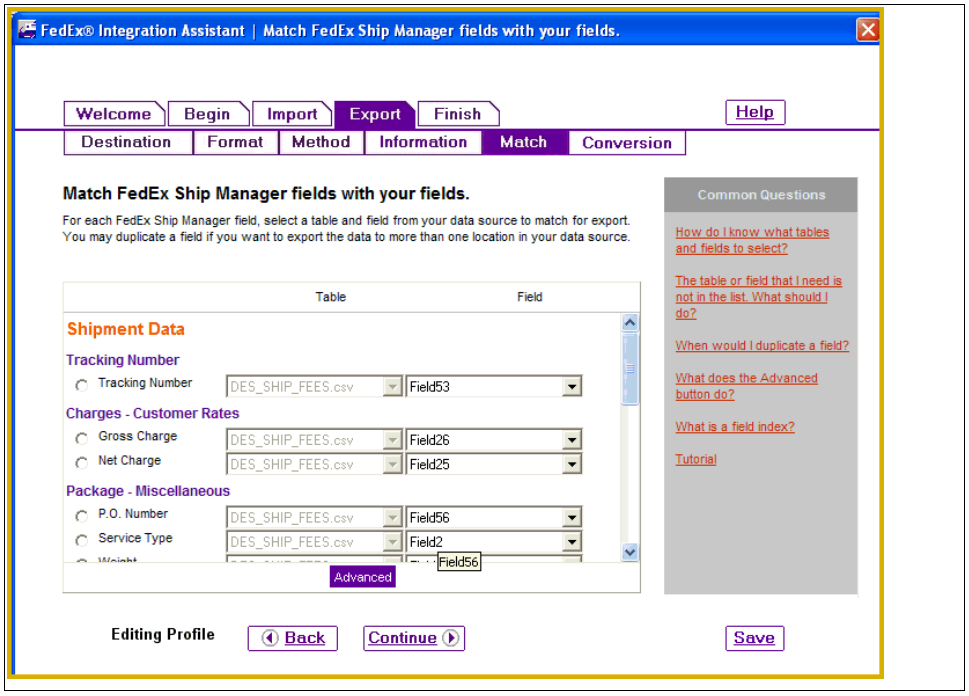
- The ruler near the bottom of the screen shows the verbiage and spacing contained in the text file. If we already had a text file loaded up, the information mapped from the Fedex application into the Dancik system appears here.



3. The next screen gives you options on when you want to export the data and if you want to insert/create a new record or update an existing one.

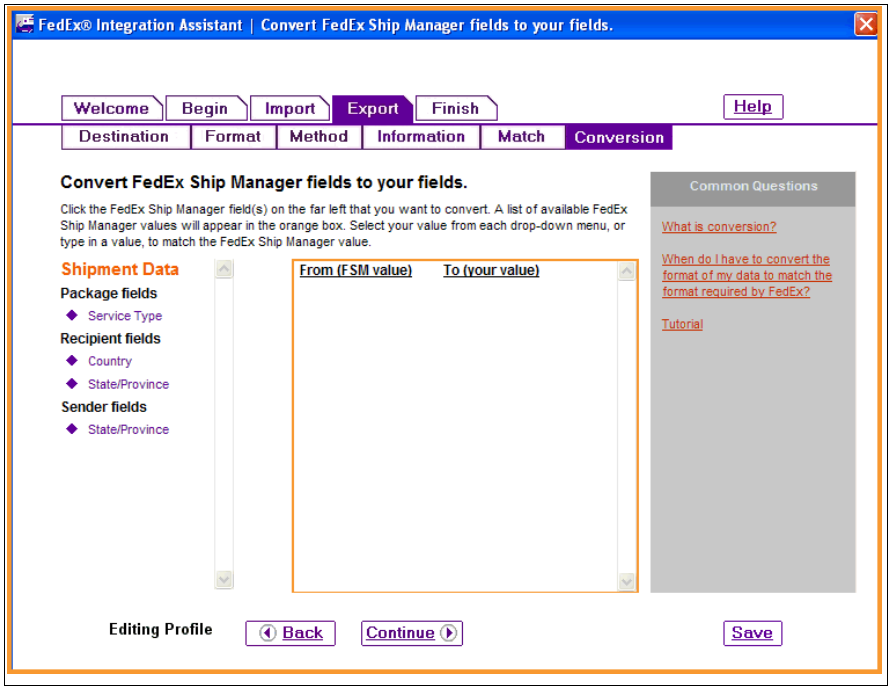
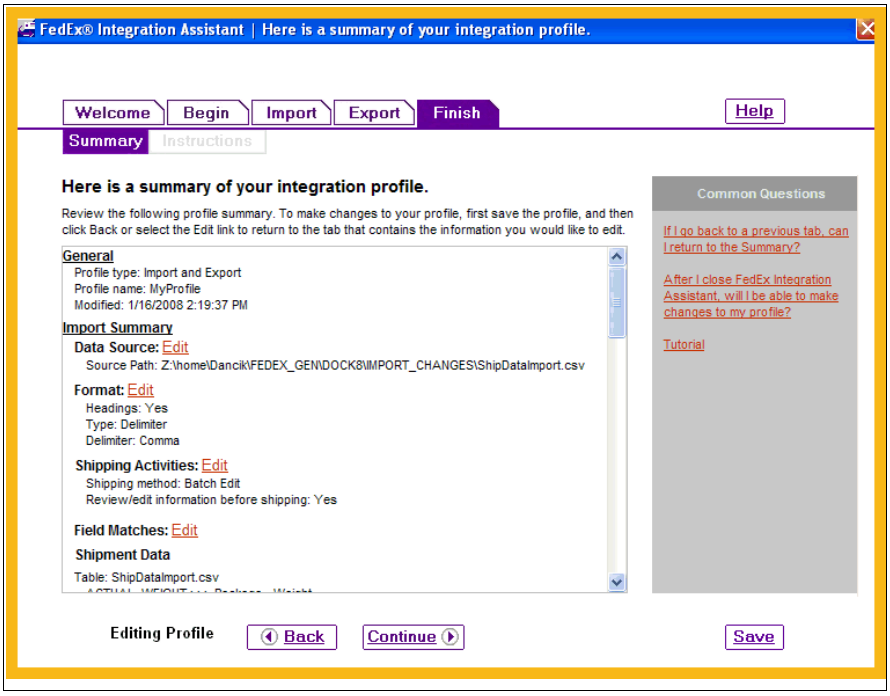


4. The next screen displays how the fields are mapped between the two systems.



5. Check these over for accuracy. To see the information actually contained in the field, click the toggle button to the let of the Shipment data (i.e. Tracking number, Gross Charge, Net Charge, etc.).

6. The next screen allows you to change field mappings if needed.



7. The last screen in the process presents a summary of your settings.