

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.

INQUIRE System Cross	Reference Table File Maintenance
Table Name: UPSSERVICE Position To:	Desc: UPS WORLDSHIP SERVICE TYPES Comm: UPS WORLDSHIP SERVICE TYPES
"From" Description:	"To" Description: Allow Duplicate Values
SHIP VIA	UPS SERVICE TYPE "From": N (Y/N)
"From" Values:	"To" Values:
R1	GROUND
TR	UPST
UP	UPS GROUND

• **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.

UPDATE System Cr	oss Reference Table File	Maintenance
Table Name: FEDBILLFOB Position To:	Desc: <u>FEDEX FO</u> Comm:	B BILLING CODES < DES
"From" Description:	"To" Description:	Allow Duplicate Values
FOB CODE	BILL CUST Y/N	"From": <u>N</u> (Y/N) "To": Y
"From" Values:	"To" Values:	
<u>A</u> P	<u>BILLABLE</u> NOT BILLABLE	

• **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.

INQUIRE System Cross	Reference Table File Maintenance
Table Name: UPSBILLING Position To:	Desc: UPS WORLDSHIP BILLING OPTION Comm:
"From" Description:	"To" Description: Allow Duplicate Values
FOB CODE	BILLING OPTION "From": N (Y/N)
	"То": Ү
<u>"From" Values:</u>	<u>"To" Values:</u>
С	CUSTOMERS WAREHOUSE
D	DELIVERED
F	PREPAID
L	FREIGHT COLLECT
м	MILL
Р	PORT OF ENTRY
W	OUR WAREHOUSE
3	THIRD PARTY BILLING
4	FREIGHT TO FOLLOW

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.

6/19/08 12:03:27	Dancik International, Ltd. Work with Shipping Providers	CM3010R YH
Opt Provider FEDEX-GEN FEDEX_GEN FEDEX_MIP UPSWSDTAIM UPSWSSPHV	Description General Fedex Shipping shipping FedEx MIP UPS WorldShip Data Import UPS WORLDSHIP Data Import	
		Bottom
Options ==> U=U F1=Create	pdate I=Inquiry D=Delete F7=Exit	

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

2/15/11	Dancik International, Ltd.	CM9010R
15:56:05	_ Update Shipping Provider	QPADEV002J
Shipping provider . : Description : PC Location : Shipping Prefix : Reference type : Country of Origin Attu Import file Folder :	FEDEX-GEN General Fedex Shipping - WAR 1 WAR 1 FED Example: FED/UPS/DHL IT ribute:7 /home/Dancik/FEDEX-GEN/WAR 1/IMPORT	_CHANGES/
Package Consolidation	Option:	
1 0	or blank = No consolidation (default)	
2 =	= Consolidation based on order #	
3 =	= Consolidation base on LPN #	
F4=Cancel F5=Refresh	F7=Exit	

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.		
	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.		
PC Location	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:		
	7/22/08 Dancik International, Ltd. CM9010R 13:34:06 Update Shipping Provider YT		
	Shipping provider . : EEDEX-GEN Description : General Fedex Shipping - WAR 1 PC Location : WAR 1 Shipping Prefix : FED Example: FED/UPS/DHL Reference type : IT Country of Origin Attribute: 2 Export File Folder : /home/Dancik/FEDEX-GEN/WAR 1/EXPORT_CHANGES/ Import file Folder : /home/Dancik/FEDEX-GEN/WAR 1/IMPORT_CHANGES/		
	<i>Note:</i> The IFS directory address for both imported and exported information is shown on the Adding Shipping Provider Screen.		

Field	Description		
	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 		
Shipping Prefix	— 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.		
	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.		
	<i>Note: This optional field is used mainly for international shipments.</i>		
	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).		
Reference type	• Press Enter and find Country of Origin in the list.		
Country of Origin Attribute	• 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 Reference Type IT - ITEM INQ MODE - Short Description 0		
	Opt Short Desc Long Description Display Valid Keywrd Advncd STYLE NUMBR STYLE NUMBER 1 STYLE NAMBR 1 STYLE NAME 3 COLOR COLOR NUMBER 4 COLOR NUMBR 5 MAC PRODUCT TYPE 2 COLOR COLORS THIS PRODUCT MATCHES 0 XYES XYES		

Field	Description
	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.
Export File Folder Import file Folder	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.

4/19/18 10:04:17 Sh	Dancik Internat ipping Provider 3rd Par	ional, Ltd. ty FOB Cross Reference	CM3020R XB
Company: 2 DANCIK	INTERNATIONAL, LTD.	FOB	
FEDEX-LP FEDEX_GEN FEDEX_GEN FEDEX_GEN FEDEX_MIP FEDEX_MP FEDEX_MP FEDEXLP UPSWSDTA UPSWSDTA	P Prepaid F Freight Collect P Prepaid F Freight Collect P Prepaid F Freight Collect P Prepaid P Prepaid F Freight Collect F Freight Collect P Prepaid	1 FRT PREPAID 2 FRT COLLECT 1 FRT PREPAID 2 FRT COLLECT 1 FRT PREPAID 2 FRT COLLECT 1 FRT PREPAID 1 FRT PREPAID 2 FRT COLLECT 2 FRT COLLECT 1 FRT PREPAID	Bottom
Options ==> U=Up F1=Create	date I=Inquiry D=D F7=Exit	elete	

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Ship To Ship From Distribution Customer ID: V Update Address Book Company or Name: Attention: Street: Boom/Floor/Address 2: Department/Address 3: Country: Postal/ZIP Code ©: United States City: State/Prov:	Service Options Detail Refe Shipment UPS Service: Next Day Air Saturday Delivery Guaranteed Time: Billing Option: Prepaid Bill to Third Party	Package Package Type: Package Type
Telephone: [() · [] UPS Account Number: [] [] [] [] [] [] [] [] [] []	Weight (pounds) Package: Shipment: 0.0 □ Electronic Scale Activated	\$hipment Cost
Shipper: Profile: R5566V VUPS Standard V	Pkg: H I Add 1 Pkgs Deleter XOFY Pending: C	is NEW e Pkg Process Shipment F10 0 Shpmt(s), 0 Pkg(s), Cost: \$0.00 //

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.

 4/19/18
 Dancik International, Ltd.
 CM9020R

 10:09:35
 Update Shipping Provider 3rd Party FOB Cross Reference
 XB

 Company: 2 DANCIK INTERNATIONAL, LTD.
 Shipping provider . : FEDEX-LP (?) Billing option . . : P (P=Prepaid, F=Freight Collect) FOB : 1 (?)

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 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.			
FOB	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.			
	<i>Note:</i> 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.

🏬 🖄 👷 🔏 💷 🖉	🕶 🕤 🗶 🤶
Ship To Ship From Distribution Customer ID: Vupdate Address Book Company of Name: Attention: Street Boom/Floor/Address 2: Department/Address 3: Country: Postal/ZIP Code @: United States V	Service Options Detail Reference Shipment UPS Service: Rext Day Air Saturday Delivery Guaranteed Time: Billing Option: Prepaid Bill to Third Party Bill to Third Party (Printed on Label) Reference Number <u>2</u> : (Printed on Label)
Image: Image	Weight (pounds) Package: Shipment: 0.0 Electronic Scale Activated
R5566V VUPS Standard V	Add Pkgs Delete Pkg Process Shipment Fi0 XOFY Pending: 0 Shpmt(s), 0 Pkg(s), Cost: \$0.00 //

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.

11/10/09 Dancik <u>11:27:13</u> Work with Shipping P	International, Ltd. CM3030R Providers Account Cross Reference XU
2 DANCIK INTERNATIONAL,	LTD.
<u>Opt Account</u> <u>Shipping Provider</u>	Account Cross Reference
200001 UPSWSDTAIM 200200 UPSWSDTAIM 225019 FEDEX 225019 U1 275114 UPSWSDTAIM KCS assigned account number:	70609 5587DG FX522569 5587DD 5587DE Account number with the shipping providers application that cross references back to the _{Bottom} Customer's account number in the KCS system.
Options ==> U=Update I=Inqui F1=Create F7=Exit	ry D=Delete

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**.

4/19/18 Dancik International, Ltd. CM9030R 10:20:10 Update Shipping Provider Account Cross Reference XB
Company: 2 DANCIK INTERNATIONAL, LTD. Account : 25019 (?) Shipping Providers Account Cross Reference: FX522569 Override Shipping Address with Account Address : N (Y/N) Name. : <u>KERRIDGE NCS</u> Addr1 : 2000 CENTREGREEN WAY Addr2 : <u>SUITE 250</u> City. : <u>NC</u> State : <u>CA</u> Zip : 27513
Default Declared Option : <u>N</u> (Y/N)
mail Address: <u>gary.brannen@kerridgesa.com</u>
(This address will be used by carrier to email confirmation of shipment.)
F4=Cancel F7=Exit

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 <u>11:52</u>	/08 :27	Danc: Work with	ik Inte Shippi	rnational, Ltd. ng Provider Defaults	CM3040R XX
Compa	ny: 2 DANCIK	INTERNATION	AL, LTD		
<u>Opt</u>	Shipping <u>Provider</u>	<u>GL Acct</u>	Cost <u>Center</u>	<u>9966 Message line</u>	
	FEDEX_GEN UPSWSDTA UPSWSDTAIM	30010 30010 49800	DEL DEL FRT	FEDEX SHIPPING CHARGES SHIPPING CHARGES UPS SHIPPING CHARGES	
					Bottom
Optio F1=Cr	ns ==> U=Upc eate	ate I=Ind F7=Exit	quiry	D=Delete	

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**.

1/10/08 <u>13:42:15</u>	Dancik International, Ltd. Update Shipping Provider Defaults	CM9040D XA
Company: 2 DANCIK 1	INTERNATIONAL, LTD.	
Shipping Provider: GL Account: Cost center: Mark up percent: Mark up charge: Message line:	FEDEX_GEN_ (?) 49800 (?) FRT (?) FEDEX SHIPPING CHARGES (This line will appear on the Delivery Charge Message line)	· · · · · · · · · · · · · · · · · · ·
Enter F4=Cancel F	-5=Refresh F7=Exit	

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.

4/19/18Dancik International, Ltd.10:44:56Extract Shipping Provider Data	CM4000D XB
Enter selection, press Enter: Shipping Provider: <u>UPSWSDTAIM</u> (?) Ship date From date: <u>4/19/18</u> To date: <u>4/19/18</u>	
Order number From order: <u>999999</u> To order: <u>999999</u>	
Order status: (?) X	
Ship via codes: (?) UP	
Enter F4=Cancel F5=Refresh F7=Continue F8=View Results	F9=Target Directory

- *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_FEE S.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 .					
	Displays the contents of the current extract file. The file name is ShipDataImport.csv and is contained in the target directory.					
F8	**************************************					
	This is only available after you press F7 .					
	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.					
F9	Shipping Provider Order Export Enter directory path Directory path (?) Image: A complete the state of the					
	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_I	YPE AC	TUAL_W	EIGHT	BILLING_OPTION	SHIPTO_NAME	SHIPTO_ADDRESS_1	SHIPTO	_ADDRESS_2	SHIPTO_ZIP
4132640010	Groun	d	20		Prepaid	WILLIAMS FLOORS INC.	952 MAIN STREET			404431234
4132710010	Groun	d	123.8		Prepaid	WILLIAMS FLOORS INC.	952 MAIN STREET			404431234
4132710020	Groun	d	123.8		Prepaid	WILLIAMS FLOORS INC.	952 MAIN STREET			404431234
SHIPTO_STATE	SHIPTO_T	ELEPHON 770005	NE RES	BIDENT	IAL_INDICATOR	SHIP_FROM_NAME	SHIP_FROM_ADDRES	5_1 WAY		ADDRESS_2
NY	9196	5770005				OPM INTERNATIONAL	2000 CENTREGREEN	WAY	SUITE	101
NY	9196	196770005				OPM INTERNATIONAL	2000 CENTREGREEN	WAY	SUITE	101
SHIP_FROM_TE	LEPHONE	PACKAGE	E_TYPE	PACKA	GE_REFERENCE_1	PACKAGE_REFERENCI	INSURED_VALUE_OPTIC	N INS	URED_VALUE_/	AMOUNT
0		Packa	age		PO#.TEST	Order/Line#.413264/10			176.92	
0		Packa	age	F	O#TEST-UPS	Order/Line#.413271/10	Y		172.75	
0		Package		F	O#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.

4/19/18 12:01:04	Dancik Inter Import Shipping	rnational, Ltd. g Provider Charges	CM4004R XK
Press Enter Shipment fi .csv	<pre> to begin. 1 Shipment records readu le : /home/Dancik/FE</pre>	y to register. EDEX_GEN/DOCK8/EXPORT_CHAM	NGES/DES_SHIP_FEES
Order/Line 402013/10	Sts Customer name X MIDTOWN FLOOR COVER	Tracking number RINGS 957928957965	Shipping Charge \$49.61
 Enter F4=Car	ncel F5=Refresh F7=Conti	inue	Bottom

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.

To: 201-555 Midtown Floor C(231 Riverside A ^v	OPEN ORDER F -5879 S OVERINGS N /E 2	FILE SEARCH BY Ship To: 201 MIDTOWN FLOOR C 231 RIVERSIDE A	ORDER# -555-5879 COVERINGS	Entere Order#: Acct# : Slmn#s: Ware# :	d Today 402013 201111 901 RAL
RALEIGH	NC 27513 F	RALEIGH	NC 275	13 Branch:	RAL MD
Order-Dt Entere 12/19/07 12/19/0 Line Item#	ed Dt-Req Shp-V 07 12/21/07 FX Descr	ia/F Cust P.O. iption	# / Job	Prc ETA LP Qty Uni	OH/Stat 2 X t-Price
0010 REXECBR66	<u>This Order Has No</u> ECHO (S/N:	t Yet Been Prir CANYON BRYCE 6> RG29	(6 3: A152	<u>List *</u> 2.93 SF	6.590 X
9966 FEDE	X GEN SHIPPING CH	ARGES - 9579289	957965		\$49.61
End Of Or	rder Stk:	.00 Tax:	.00 T	otal:	275.62
ENTER LINE# TO S Enter=Forward. F	SEE MORE DETAILS: F6=Change/Canc. F8	B=1st Scrn. F10)=Print. F12=SI	hpg. F5 =	Notepad

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

Or	der#	402	913	MIDTOW	N FL	OOR	C0\	/ERINGS	0	rder	Notepad	Page‡	‡ 01
	1/18	3/08	12:05	GBRAN	NEN	0	ΧК	Line:0010	Trackin	<u>g:95</u>	7928957965	FEDEX_GEN	
	Note	Thi		er Was	Pri	nteo	0	Time(s) A	s A Pick	Lis	t.	F10=Forwa	ard.
<u>F1=</u>	Scan	Note	<u>s. F2</u>	=Dates	/Tim	es.	F5=	Redisplay	Order.	F9=L	ast Page.	F11=Rever	se.
а				ММ								03/004	

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.

🚝 FedEx® Integrati	on Assistant	Which typ	e of integration profile do you need?	×
Welcome	Begin	Import	Tryat Finish	Help
Create	Integration T	уре		
Which type of	of integration	ı profile c	do you need?	Common Questions
Select the type of	profile that you wa	ant to create.	L	What is importing?
C Import				What is exporting?
C Export				Can I change the profile later?
Both Import	and Export			Tuto dal
				Tutonal
			Export	
Your Dat	a Source	5		
Customer ID	Company	Country	Contact Contact	
AA001N002	Atlas Machine	USA	Swcegood Regine Regine	
AX002A001	Baskets Galore	Canada	Jones In ID: Allo to any	
AX003S001	Best Computers	USA	Davis Contraction Contraction	
	The second state of the second state of the	TUSA	Indiant la ada (Ac	
BB001J002	Taylor Finishing		Company CANADI	
BB001J002	Taylor P misning		Company Name Over Jose	
BB0013002	T dylot P misning	11700	Company Name Given Jose Address 1:	
B8001J002		Inport	Contract Mana Generation Address 1/ 124 Category	
880013002	Taylor Finaning	117Ront	Company Many Civilia Address 1/ Table Cantral Birly Address 2/ Solid Contral Birly	
B8001J002	Taylor Finanting	11100rt	Constany time Constant Actives to Catalog Catalog Actives 2 Statistics Catalog Actives 2 Statistics Catalog Actives 2 Statistics Carl Line	
B8001J002		1 Back	Construct the Construction of	Save
B80013002		Back	Continue ()	Save

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

FedEx ${f D}$ Integration Assistant Where do you store your shipping information?	×
Welcome Begin Import Swart Finish Source Format Shipping Lookup Information Match	Help Conversion
Where do you store your shipping information? Select the source of the shipping information that you want to integrate. Your data source may be an ODBC-compliant data source, a text file, or other external application (QuickBooks, etc.). Learn More C ODBC (Open Database Connectivity Data Source Name) Image: Text File Select the text file that contains your shipping information. K:home/Dancik/FEDEX_GEN/DOCK8/IMPORT_CHANGESIShip Browse	Common Questions My DSN is not in the list. What should I do? What is ODBC Data Source Administrator? What do I need to know about my data source? How should I set up my interaction to Excel?
C Other	What is a text file? Tutorial

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

edEx® Integration Assistant What is the format and structure of your text file?	×
Welcome Begin Import Sweet Finish	Help
Source Format Shipping Lookup Information Match	Conversion
what is the format and structure of your text file?	Common Questions
Answer each question that appears below.	What is a Taxt File?
What kind of text file are you using to store your data?	What is a reachine:
Oplimited – Fields are separated by a character such as a comma	Tutorial
O Fixed Width – Fields are aligned in columns	
What character separates your fields?	
(comma)	
Does the first row contain field names (headings)?	
⊙ Yes C No	
Below is sample data from your text file:	
CUSTOMER_ID,SERVICE_TYPE,ACTUAL_WEIGHT,BILLING_OPTION,SHIPTQ 4020100010.REGULAR SERVICE.14.0.Freight Collect.TEST SHIP TO	
4020110010, REGULAR SERVICE, 10.0, Prepaid, TEST SHIP TO 4, 4TH A	
4020120010, REGULAR SERVICE, 14.0, Frepaid, FRO SOURCE, 1653 OLD 4020130010, REGULAR SERVICE, 32.9, Free on Board, MIDTOWN FLOOR	
4020220010, REGULAR SERVICE, 1.0, Prepaid, GALLERY OF HOMES BUIL	
4020200010, REGULAR SERVICE, S. 0, Frepard, Sanford DAVENFORI	
۲. ()	
Back Continue	Save

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.

FedEx® Integration	Assistant What types of i	nformation do you want to import	
Welcome Source Fo What types of in Select the FedEx Ship source. The category Recipient Package Sender Special Services International All Fields All Fields	Begin Import Ex rmat Shipping Lo nf Recipient Return Address Import Return Import Recipient Address Import Address Import Import Recipient Address Import City* Import Import Contact Name Import Import Postal Code * Miscellaneous Import Tax ID Check All Check All Clear All	port Finish Nokup Information Match Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image: Company * Image:	Conversion Common Questions shipping information is in category? nformation is required to package? to Luse the All Fields 2 al
Editing Pr	ofile <u>Back</u> (Continue 🕑	Save

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**.

Welcome	Begin	Import	Export	Finis	h			1	lelp
Source	Format	Shipping	Lookup	Info	rmation	Match	С	onversion	
Match FedI For each FedEx You may option next to a field to	Ex Ship Ma Ship Manager t ally assign a sta view the adva	field, select a table andard default valu nced properties for	with your fi and field from yo e instead of sele the field.	elds. our data ecting yo	source to mat our field. Click t	ch for imp he radio bi	ort. utton	Comm How do I kn and fields to	on Questions ow what tables o select?
		Table	Field	I	Default (C	Optional)		The table or	field I need is not
Shipment I	Data						^	in the list. W	'hat should I do?
Recipient - Ad	Idress							What are de	faults?
C Address	1 s	ihipD ataImport.cs	SHIPTO_ADI	DRE: 🔻					
C Address	2 5	i hipD atal mport. cs	SHIPTO_ADI	DRE: 🔻				How do lus	e Read Scale?
C City	S	ihipDataImport.cs	SHIPTO_CIT	Y 🔽				What does	the Advanced
C Company	s	ihipD atal mport.cs	SHIPTO_NA	ME 🔽				button do?	
C Contact N	lame s	hipDataImport.cs	CUSTOMER	ID 🔽					
C Country	s	hipD ataImport.cs	Select your fi	eld 💌	Select a defa	ault 💌		What is a fi	eld index?
C Location I	Number	hipD ataImport.cs	Select your fi	eld 💌			*	Tutorial	
		A	dvanced					Internal	

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	(1Z41013903408	641588	NN7.0	Pr	repaid)	
NGround	N				N —		\neg
NGround	N					(8.4	45)
NGround	8.45	0.00	1			A&J 🔶	_
NGround	CARPET		536	0 RT 42 SUITE B	TURNERSVILLE	NJ 0801	112
NGround	8566972421	United States	Y	FLOR	IDA TILE INC.		
NGround	PO BOX 538461	ATLANTA	GA 303530000863	368771710	United States		
NGround	1Z4101390340641588	None PO#030065	Order/Li	ine#.543996/10	47796.0000		
NGround	N	8.45			N		
NGround	Ν			N	N		
NGround	Y0.00	7.00	Pa	ckage	6.7		
NGround	1Z4101	390340125770	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.

edEx \odot Integration Assistant \mid Where do you want to send shipping information?	×
Welcome Begin Import Export Finish	Help
Destination Format Method Information Match Convers	ion
Where do you want to send shipping information? Select the source of the shipping information that you want to integrate. Your data source may be an ODBC-compliant data source, a text file, or other external application (QuickBooks, etc.). Learn More	Common Questions
C ODBC (Open Database Connectivity Data Source Name) Text File	What is ODBC Data Source Administrator?
Select the text file that contains your shipping information. K:home\Dancik\FEDEX_GEN\DOCK8\EXPORT_CHANGES\DES Browse	my data source?
C Other	integration to Excel? What is a text file?
	Tutorial
Editing Profile () Back	Save

- *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.

Welcome Begin Import Export	Finish Match	Conversion	пер
What is the format and structure of your term Answer each question that appears below. What kind of text file are you using to store your data C Delimited – Fields are separated by a character such as To bloce and first row contain field names (headings)? O yes No Mark the start of each column: - To place an amking line, click slightly to the left of the start of - To remove a line, double-click on it - To clear all lines, change the text file format to Delimited, and Image: The start of the star	ext file ? a? s a comma f the column d then back to Fixed Width 40 50 11 50	Uthat i Tutoris	Common Questions s a text file?
Editing Profile Back Cont	inue 🕑		Save

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.

FedEx ${\otimes}$ Integration Assistant \mid How will your data source receive exported informatio	n? 🗙
Welcome Begin Import Export Finish	Help
Destination Format Method Information Match Conversi	on
How will your data source receive exported information?	Common Questions
Select the event that will trigger the export and the method for writing information to the destination data source.	What is a record?
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.	What does inserting a record do?
When do you want to export to your data source?	What does updating a record
Each time a shipment is completed	<u></u>
C At the end of day	When should I use the "When a package is deleted" option?
How do you want to update your data source?	Tutadat
Insert a new record	Tutoriai
Update an existing record	
Editing Profile (Back Continue)	Save

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

Welcome Be	egin Import E	xport Finish			Help
Destination	Format Method	Information	Match	Conversion	
Match FedEx Shi for each FedEx Ship Mai You may duplicate a field	p Manager fields with nager field, select a table and I if you want to export the da	th your fields. field from your data s ta to more than one lo	source to match cation in your d	for export. ata source.	Common Questions
	Table		Field		The table or field that I need is not in the list. What should I
Shipment Data Tracking Number C Tracking Number	DES_SHIP_FEES.csv	Field53			10 <u>7</u> When would I duplicate a field? What does the Advanced auton do?
Charges - Customer	Rates				What is a field index?
 Gross Charge Net Charge 	DES_SHIP_FEES.csv DES_SHIP_FEES.csv	Field26		• •	<u>Futorial</u>
Package - Miscellan	eous	,		- 11	
P.O. Number Service Type Weight	DES_SHIP_FEES.csv DES_SHIP_FEES.csv Adve	Field56 Field2		•	

- 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.

🖉 FedEx® Integration Assistant Convert FedEx Ship Manager fields to your fields. 🛛 🛛 🔀		
Welcome Begin Import Export Finish Help		
Destination Format Method Information Match Conversion	on	
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. What is conversion?		
Shipment Data From (FSM value) To (your value) Package fields • Service Type Recipient fields • Country • State/Province Sender fields • State/Province	When do I have to convert the format of my data to match the format required by FedEx? Tutorial	
Editing Profile (Back Continue)	Save	

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

∰ FedEx® Integration Assistant Here is a summary of your integration profile.	Þ
Welcome Begin Import Export Finish	Help
Summary Instructions	
Here is a summary of your integration profile.	Common Questions
click Back or select the Edit link to return to the tab that contains the information you would like to edit.	If I go back to a previous tab, can
General Profile type: Import and Export Profile in anne: MyProfile Modified: 1/16/2008 2:19:37 PM	Ireturn to the Summary? After I close FedEx Integration Assistant, will I be able to make changes to my profile?
Import Summary Data Source: Edit Source Path: Zhhome/Danck/FEDEX_GEN/DOCK8/IMPORT_CHANGES/ShipDataImport.csv	Tutorial
Format: <u>Edit</u> Headings: Yes Type: Delimiter Delimiter: Comma	
Shipping Activities: <u>Edit</u> Shipping method: Batch Edit Review/edit information before shipping: Yes	
Field Matches: Edit	
Shipment Data	
Table: ShipDataImport.csv	
Editing Profile	Save