



**SHIPPING SOLUTIONS**

# **SHIPPING SOLUTIONS<sup>®</sup>**

export documentation software

## **PARCEL SHIPPING INSTRUCTIONS**



export documentation software





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## Shipping Solutions Professional



## About Shipping Solutions®

Congratulations on your decision to use Shipping Solutions, America's #1 selling export documentation and compliance software. Shipping Solutions is used by thousands of exporters who save time and money every time they prepare a new export shipment.

We are proud to offer three versions of Shipping Solutions: Classic, Professional and Enterprise. Shipping Solutions Classic is a great tool for small companies to begin preparing their export documents faster, easier and cheaper than they ever thought possible.

In addition to providing all the same features as the Classic version, Shipping Solutions Professional gives you more—more forms, more ways to share data and forms, and more ways to ensure that your exports comply with export regulations.

Shipping Solutions Enterprise includes all the features and functionality of the Professional version along with the ability to install the client software on an unlimited number of user's computers.

This User Guide explains the installation and use of the Shipping Solutions Classic, Shipping Solutions Professional, and Shipping Solutions Enterprise software.

The features described in this User Guide that are only found in the Shipping Solutions Professional and Shipping Solutions Enterprise versions are clearly marked as Shipping Solutions Professional version only. All screenshots are taken from Shipping Solutions Professional.

# Software Overview

Whether you are an experienced exporter, an experienced computer user, or inexperienced at both, Shipping Solutions is the easy way to enter your export orders and complete your standard export documents.

By utilizing the program's extensive databases and the EZ Start screens, you can reduce the time it takes to enter your export information by up to or more than 80 percent. And because the software allows you to print standard export forms on plain paper from your inkjet or laser printer, it eliminates the need to purchase and stock expensive pre-printed forms.

With Shipping Solutions, you simply enter your export information on the EZ Start screens, select the documents you need to print, and in a matter of just a few minutes your paperwork is done and your products are ready to ship.

To make the program even easier to use, Shipping Solutions allows you to key in or import your product information, customer information, and all the intermediate consignees, forwarding agents and other miscellaneous contacts you ever use into separate databases. For even more efficient use, you can import orders into Shipping Solutions Professional from almost any accounting, order entry, or ERP system.

Current subscribers to the Shipping Solutions Professional Annual Maintenance Program (AMP) can also check to see what documents they need to produce for exporting to specific countries, check the parties in their transaction against the various government and United Nations restricted party lists, and check their products against U.S. Export Regulations to determine if they need to apply for an export license.

**Please Note:** After completing your export documents, you must carefully review the printed form(s) before use. Because Shipping Solutions does not restrict or limit the way you enter information into each field, InterMart, Inc. cannot and does not in any way guarantee the accuracy of the completed forms. InterMart strongly recommends that everyone involved in export documentation get thorough and complete training from government or private training companies.

## Parcel Shipping Screen (Professional Only)

Shipping Solutions Professional allows you to transfer your shipment data to either the UPS WorldShip software and/or the FedEx Ship Manager software so you can create shipping labels without having to retype the information. Once you've submitted the data to UPS or FedEx, you can also track your shipments from within the Shipping Solutions Professional software.

To use this feature, you first need to set up the connection between Shipping Solutions and the UPS WorldShip and/or FedEx Ship Manager depending on which parcel shipping options you use. The Parcel Shipping screen includes two tabs—one for UPS and one for FedEx. Click on the tab you wish to use for this shipment.

## The UPS Tab on the Parcel Shipping Screen in EZ Start

### Setting Up the UPS Connection

Begin by copying the data map files included with the Shipping Solutions Professional software to the appropriate folder located on the computer on which you are running UPS WorldShip. If you have installed Shipping Solutions in the default installation location, navigate to **C:\ProgramData\InterMart\SSProfessional\_9\miscdata\ship\UPS** on the computer running Shipping Solutions. Copy all four of the files located in this folder.

Now navigate to the UPS WorldShip folder **C:\ProgramData\UPS\WSTD\ImpExp\Shipment** on the computer running the WorldShip software. Paste the four files you copied into this folder. If UPS WorldShip was installed on a server, even if you are accessing the program from your desktop computer, the WorldShip folder will reside on that server.

Next, you must establish an ODBC connection between the Shipping Solutions database and UPS WorldShip. On the computer hosting UPS WorldShip, open the **Control Panel**. Depending on which version of Windows you are using, you may be able to click on **Administrative Tools**; if not search for **ODBC** in the search box located in the upper-right corner of this screen.

From here you'll find an option called **Data Sources (ODBC)** or **Set up Data Sources (ODBC)**. Double-click on this option. If you are given a choice between a 32-bit and 64-bit version, choose the 32-bit version. This will open an **ODBC Data Source Administrator** window. Click the **System DSN** tab, click **Add**, choose **SQL Server** and click **Finish**. In the **Name** box type **ShippingSolutionsRemote**. You must use this name for the connection to work. The Description is optional. You may want to use it to describe this as the UPS connection. Type your SQL Server name in the **Server** box or choose it from the drop-down list.

If you don't know the name of your SQL Server, you can find it in Shipping Solutions on the **Admin** tab=> **Set Database Connection** screen. Now click **Next**. Choose either Windows authentication or SQL Server authentication. Using SQL Server authentication will require a user name and password. On the **Admin** tab=> **Set Database Connection** screen in Shipping Solutions, if you have the trusted connection box checked you can probably use Windows authentication for this as well. Click **Next**. Change the default database, if needed. The default Shipping Solutions database is **ssdata\_sql\_01**. Click **Next** and **Finish**. Then click **Test Data Source**. When the test completes successfully click **OK** until you have exited all the setup screens.

Open **UPS WorldShip**. Click the **Import-Export** tab. Click **Automatic Export** and then **Export After Shipment Processing**. Choose **Multiple Maps**. Click the check box next to the two Shipping Solutions maps (**SSPro Header Only Export** and **SSPro Header and Shipment Export**) and then click the **Export** button. This will allow UPS



WorldShip to send the tracking number back to Shipping Solutions when you process a shipment. The maps will not be visible until the ODBC connection is properly configured.

## Sending Shipment Data to UPS WorldShip

You are now ready to start using the Parcel Shipping feature in Shipping Solutions, and you will not need to complete the steps above again. The steps below need to be completed for each UPS shipment.

Prepare your shipment in Shipping Solutions as you normally would. To make it available to UPS WorldShip, click on the **EZ Start** tab and click **Parcel Shipping**. Click the **UPS** tab. Click the check box that says **Make shipment available to UPS WorldShip**. Select the **UPS Service** and **Package Type**. Choose who to bill the transportation cost to. If it is someone other than the shipper, enter the UPS account number. Enter a general **Description of Goods**. **Save** and **Close** the screen.

Open UPS WorldShip. Click the **Import-Export** tab and then **Batch Import**. Choose the proper profile. If you have created a Packing List for this shipment in Shipping Solutions, choose the **SSPro Header and Shipment Import** map. Otherwise, choose the **SSPro Header Only Import** map. UPS will then tell you how many shipments are ready to import. Click **Next** and **Save**.

To see your imported shipments, click **Home** and then **History**. Expand the **Imported Shipments** and shipper number trees. Click on the shipment you want to work on and click **Edit/Reconcile**. Fill in any missing information. When you click **Process Shipment**, the tracking number will be sent back to the Parcel Shipping screen in Shipping Solutions.

**Please Note:** If you are sending a multi-package shipment, WorldShip will only send the first tracking number back to Shipping Solutions. You will need to manually copy and paste any additional tracking numbers you want to keep in Shipping Solutions.

If UPS WorldShip says there are no records to import, go back to Shipping Solutions and make sure the **Make shipment available to UPS WorldShip** box is checked. Also, make sure there is no tracking number shown on the Parcel Shipping screen. Shipments with tracking numbers in Shipping Solutions will not be visible to UPS WorldShip to avoid duplicate shipments.

Another reason UPS WorldShip may not be able to find your shipment is if you have chosen the wrong map. If you have clicked the **Add New Package** button on the EZ Start-Packing List screen, you must use the **SSPro Header and Shipment Import** map. If not, you must use the **SSPro Header Only Import** map.

## ODBC Connection to Cloud Database

If you are using a cloud database hosted by Shipping Solutions, contact us for instructions for setting up the ODBC connection.

## The FedEx Tab on the Parcel Shipping Screen in EZ Start

Parcel Shipping - Shipment Number: 1

Save Close

UPS FedEx

☒ Make available to FedEx Ship Manager. Lookup Number: 1

Service Type: International Economy

Package Type: FedEx 10kg Box Tracking Number:

[Track Package](#)

## Setting Up the FedEx Connection

Begin by copying the data profile files included with the Shipping Solutions Professional software to the appropriate folder located on the computer on which you are running FedEx Ship Manager. If you have installed Shipping Solutions in the default installation location, navigate to **C:\ProgramData\InterMart\SSProfessional\_9\miscdata\ship\FedEx** on the computer running Shipping Solutions. Copy both files located in this folder.

Now navigate to the **C:\ProgramData\FedEx\Integration\Profiles** folder on the computer running the Ship Manager software. Paste the two files you copied into this folder.

Next, you must establish an ODBC connection between the Shipping Solutions database and FedEx Ship Manager. On the computer hosting Ship Manager open the **Control Panel**. Depending on which version of Windows you are using, you may be able to click on **Administrative Tools**; if not search for **ODBC** in the search box located in the upper-right corner of this screen.

From here you'll find an option called **Data Sources (ODBC)** or **Set up Data Sources (ODBC)**. Double-click on this option. If you are given a choice between a 32-bit and 64-bit version, click on the 32-bit version. This will open an **ODBC Data Source Administrator** window. Click the **System DNS** tab, click **Add**, choose **SQL Server** and click **Finish**. In the **Name** box type **SSEXPORTRemote**. You must use this name for the connection to work. The Description is optional. You may want to use it to describe this as the FedEx connection. Type your SQL Server name in the **Server** box or choose it from the drop-down list.

If you don't know the name of your SQL Server, you can find it in Shipping Solutions on the **Admin** tab=> **Set Database Connection** screen. Now click **Next**. Choose either Windows authentication or SQL Server authentication. Using SQL Server authentication will require a user name and password. On the **Admin** tab=>**Set Database Connection** screen in Shipping Solutions, if you have the trusted connection box checked you can probably use Windows authentication for this as well. Click **Next**. Change the default database, if needed. The default Shipping Solutions database is **ssdata\_sql\_01**. Click **Next** and **Finish**. Then click **Test Data Source**. When the test completes successfully click **OK** until you have exited all the setup screens.

## Sending Shipment Data to FedEx Ship Manager

You are now ready to start using the Parcel Shipping feature in Shipping Solutions, and you will not need to complete the steps above again. The steps below need to be completed for each FedEx shipment.

Prepare your shipment in Shipping Solutions as you normally would. To make it available to FedEx Ship Manager, click on the **EZ Start** tab and click **Parcel Shipping**. Click the **FedEx** tab. Click the check box that says **Make**



**shipment available to FedEx Ship Manager.** Select the **Service Type** and **Package Type**. These fields are optional. Make note of the **Lookup Number**. You will need to know this to pull the correct shipment into FedEx Ship Manager. **Save** and **Close** the screen.

Open FedEx Ship Manager. Click **Integration**. Choose the proper profile. If you have created a Packing List for this shipment in Shipping Solutions, choose **SSProHeaderPackageImportExport**. Otherwise, choose **SSProHeaderOnlyImportExport**. The program will now prompt you for the **Lookup Value**. (If the Lookup Value box does not pop up, click **Integration**, choose **None**, and then click **Integration** again and select the proper profile). Enter the number from the Parcel Shipping screen in Shipping Solutions. The appropriate data will be pulled from Shipping Solutions into FedEx Ship Manager. Review your shipment and complete any missing information. When you click **Ship**, the tracking number will be sent back to Shipping Solutions and stored on the Parcel Shipping screen.

**Please Note:** If you are sending a multi-package shipment, Ship Manager will only send the first tracking number back to Shipping Solutions. You will need to manually copy and paste any additional tracking numbers you want to keep in Shipping Solutions.

If FedEx Ship Manager says it cannot find your lookup number, go back to Shipping Solutions and make sure the **Make shipment available to FedEx Ship Manager** box is checked. Also, make sure there is no tracking number shown on the Parcel Shipping screen. Shipments with tracking numbers in Shipping Solutions will not be visible to FedEx Ship Manager to avoid duplicate shipments.

Another reason FedEx Ship Manager may not be able to find your shipment is if you have chosen the wrong profile. If you have clicked the **Add New Package** button on the EZ Start-Packing List screen, you must use the **SSProHeaderPackageImportExport** profile. If not, you must use the **SSProHeaderOnlyImportExport** profile.

## ODBC Connection to Cloud Database

If you are using a cloud database hosted by Shipping Solutions, contact us for instructions for setting up the ODBC connection.

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