

# WorldShip® Import Customer Addresses



Go to the appropriate page for a discussion of the following import customer addresses procedures:

Procedure	Page
Import Customer Addresses using the Import/Export Wizard	2
Import Customer Addresses using the Connection Assistant	9

## Import Customer Addresses using the Import/Export Wizard

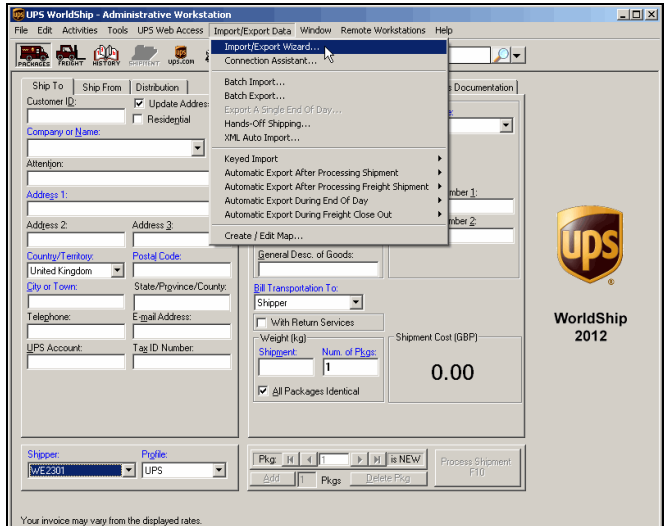
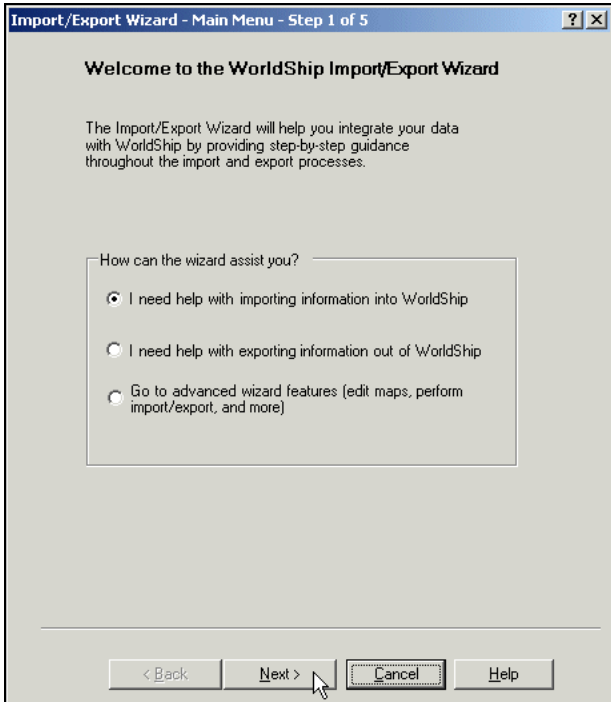
**Note:** Customer addresses stored in a previous version of WorldShip are automatically added to your address book. If you do not see your addresses, call UPS Technical Support

# WorldShip® Import Customer Addresses



## Import Customer Addresses using the Import/Export Wizard

To import your address book (stored in a Microsoft® Access database) into WorldShip:

Step	Window (if available)
<p>1. On the Import/Export Data menu, click Import/Export Wizard.</p>	
<p>2. The Import/Export Wizard – Main Menu – Step 1 of 5 window appears.</p> <ul style="list-style-type: none"> <li>• Select I need help with importing information into WorldShip.</li> <li>• Click the Next button.</li> </ul>	

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## Import Customer Addresses



### Import Customer Addresses using the Import/Export Wizard

3. The Import/Export Wizard – Select Data Type – Step 2 of 5 window appears.

- Select Addresses.
- Click the Next button.

4. The Import/Export Wizard – Connect Data to WorldShip – Step 3 of 5 window appears.

- Type a name for the data connection in the Data Connection Name box.
- Click the Browse button.

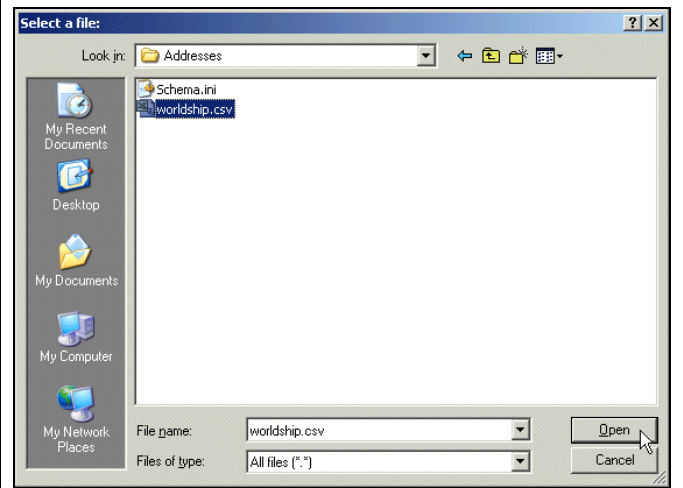
# WorldShip®

## Import Customer Addresses

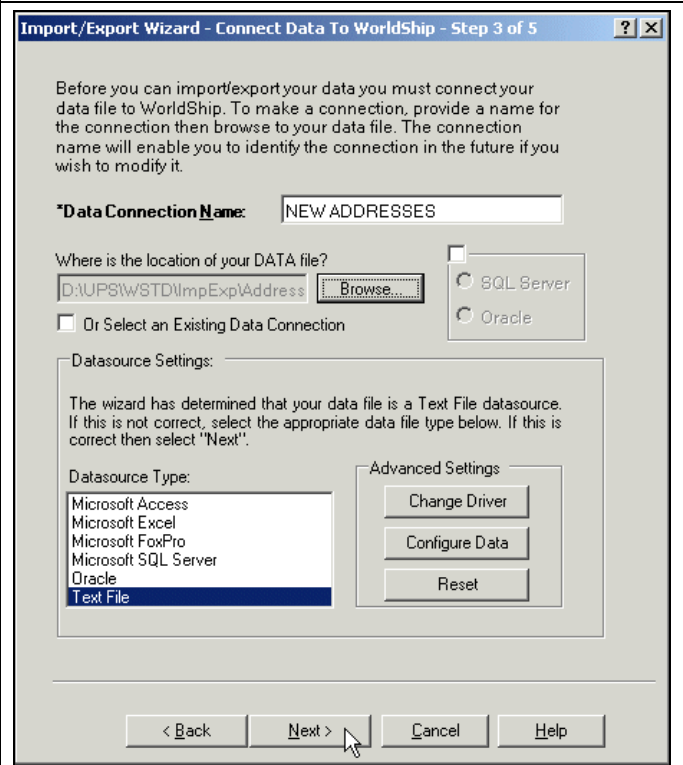


### Import Customer Addresses using the Import/Export Wizard

5. The Select a File window appears.
- Browse to and select your data file.
  - Click the Open button.



6. The Import/Export Wizard – Connect Data to WorldShip – Step 3 of 5 window appears again and shows the Datasource Type as determined by the Import/Export Wizard under Datasource Settings.
- If the Datasource Type is not correct, select the type.
  - Click the Next button.

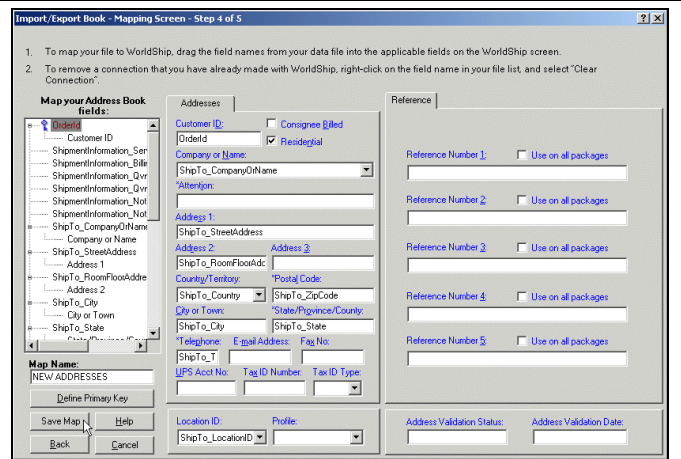




### Import Customer Addresses using the Import/Export Wizard

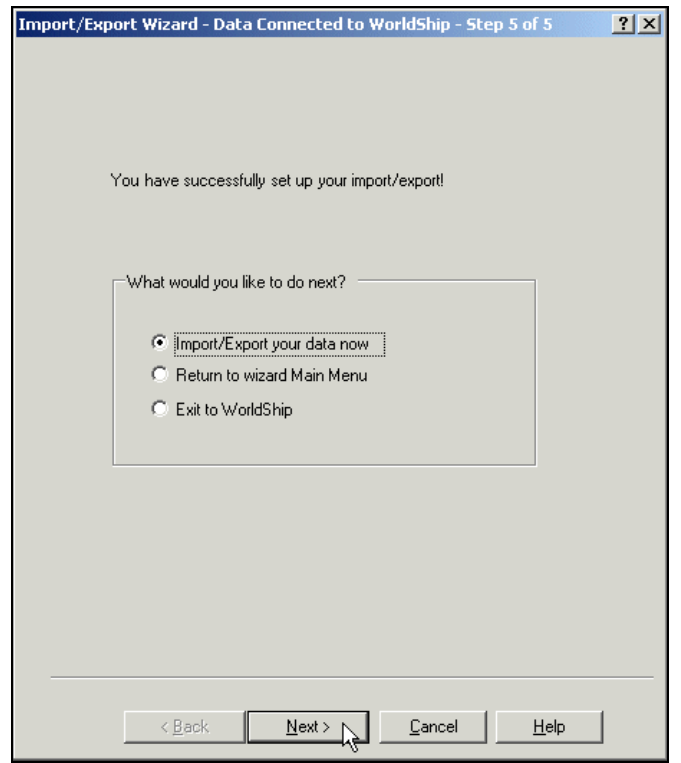
7. The Import/Export Book – Mapping Screen – Step 4 of 5 window appears.

- Map your file to WorldShip by dragging and dropping each field name in the Map Your Address Book Fields box to the applicable field box on the WorldShip side on the right.
- In the Map Your Address Book Fields box, select the field that uniquely identifies each customer and click the Define Primary Key button. A key appears next to the field name.
- Enter a name for the map in the Map Name box.
- Click the Save Map button.



8. The Import/Export Wizard – Data Connected to WorldShip – Step 5 of 5 window appears.

- Select Import/Export your data now.
- Click the Next button.



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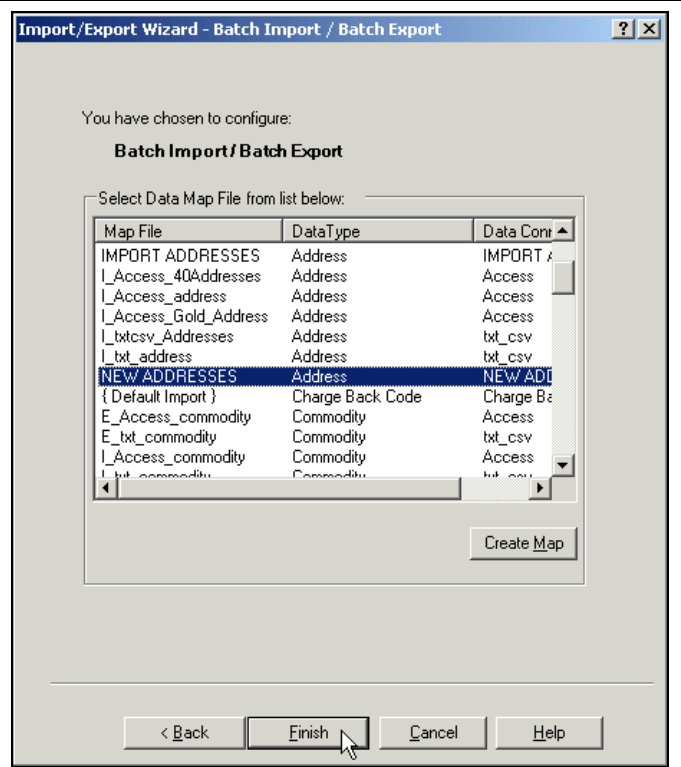
## Import Customer Addresses



### Import Customer Addresses using the Import/Export Wizard

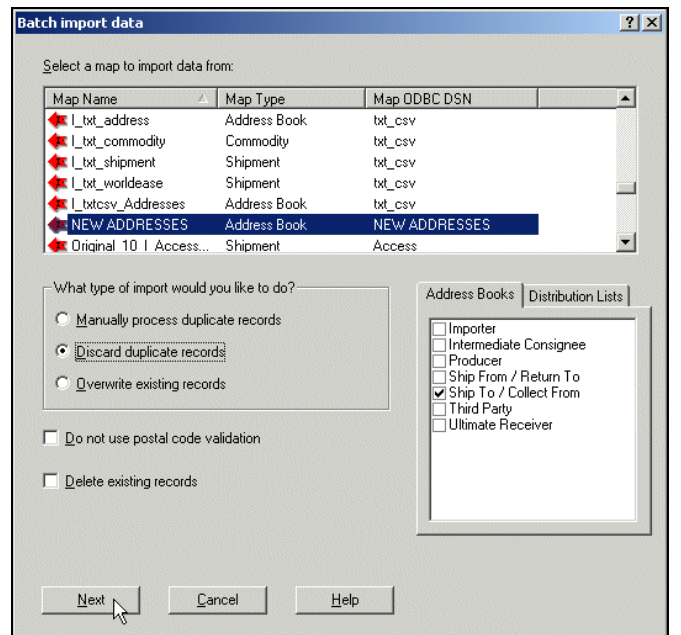
9. The Import/Export Wizard – Batch Import/Batch Export window appears.

- Select your data map file name.
- Click the Finish button



10. The Batch Import Data window appears. This window shows all the available maps, including the map that you created.

- Under Select a Map to Import Data From, select the map name that you created.
- Under What Type of Import Would You Like to Do, select Discard Duplicate Records.
- Click the Next button.



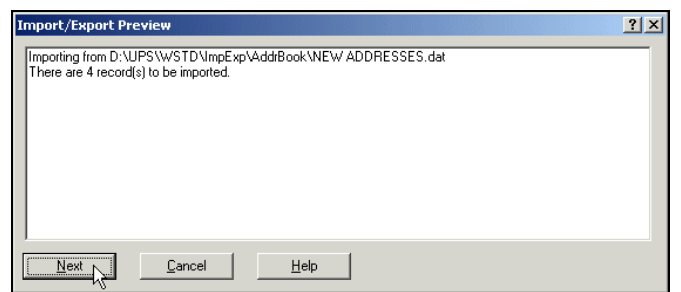
# WorldShip® Import Customer Addresses



## Import Customer Addresses using the Import/Export Wizard

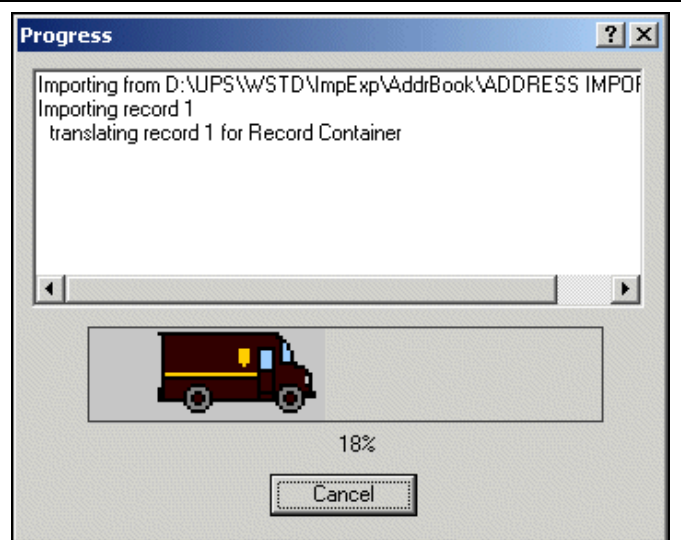
11. The Import/Export Preview window appears.

Click the Next button.



12. The Progress window appears.

Continue with step 13.

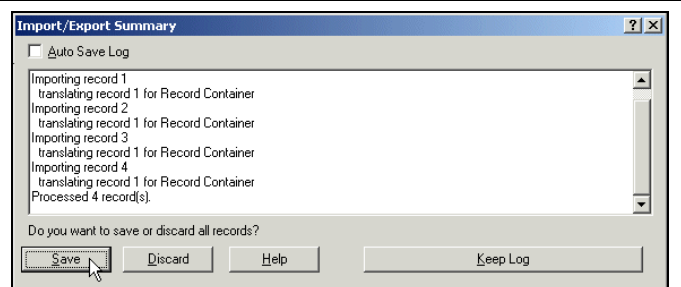


13. The Progress window appears, followed by the Import/Export Summary window.

**Tip:** To view the Import/Export Summary listing, click the up and down arrows or move the scroll bar.

Options in this window include:

- Click the Save button to save the imported addresses.
- Click the Discard button to discard the imported addresses.
- Click the Keep Log button to save the log to a specified directory.



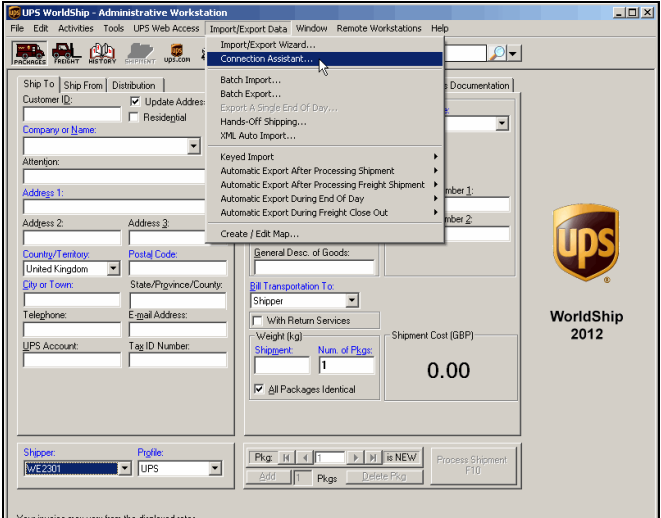
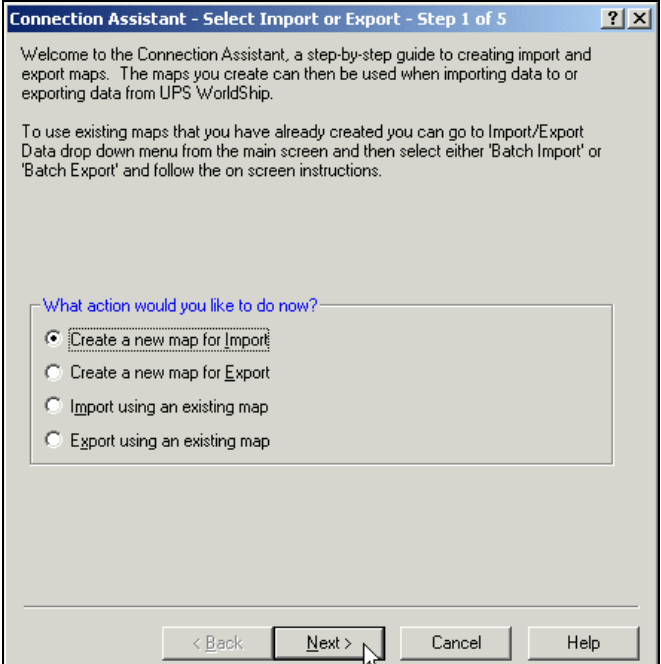


# WorldShip® Import Customer Addresses



## Import Customer Addresses using the Connection Assistant

To import your address book (stored in a Microsoft® Access database) into UPS WorldShip:

Step	Window (if available)
<p>1. On the Import/Export Data menu, click Connection Assistant.</p>	
<p>2. The Connection Assistant – Select Import or Export – Step 1 of 5 window appears.</p> <ul style="list-style-type: none"> <li>• Select Create a New Map for Import.</li> <li>• Click the Next button.</li> </ul>	

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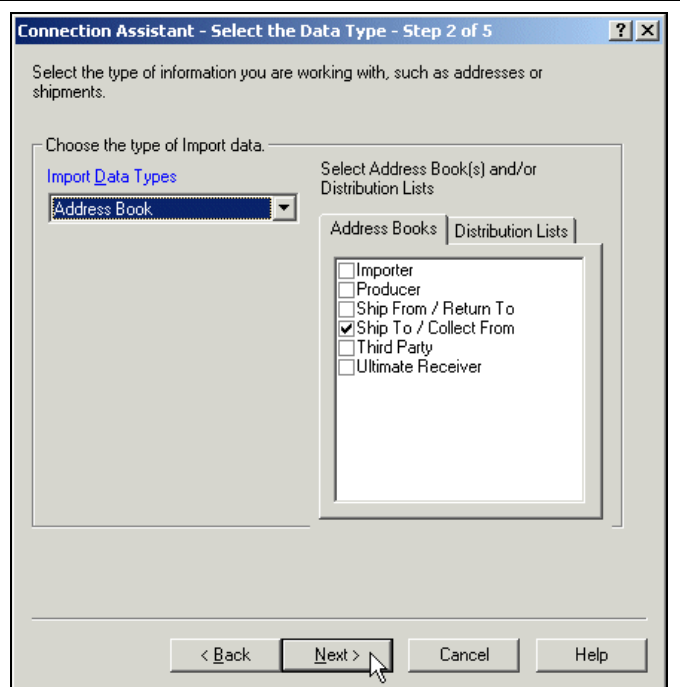
## Import Customer Addresses



### Import Customer Addresses using the Connection Assistant

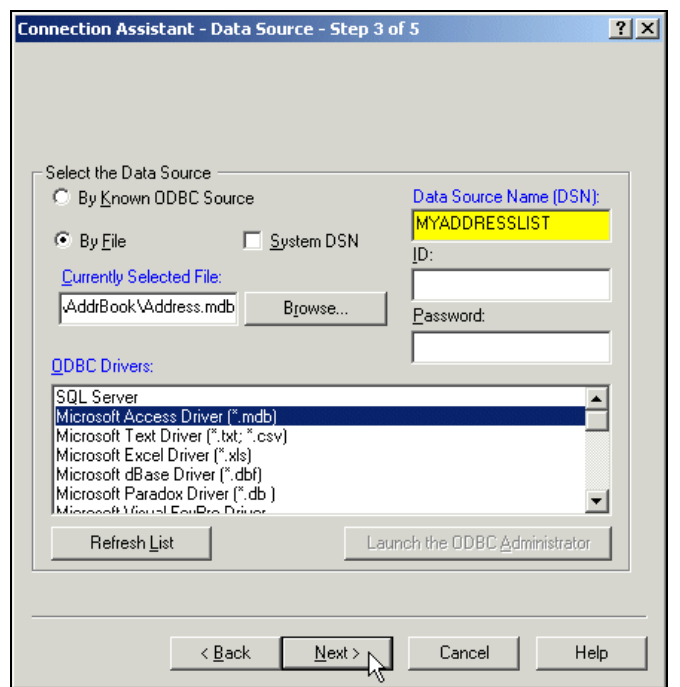
3. The Connection Assistant – Select the Data Type – Step 2 of 5 window appears.

- Check for the following defaults: Address Book in the Import Data Types box and Ship To/Collect From on the Address Books tab.
- Click the Next button.



4. The Connection Assistant – Data Source – Step 3 of 5 window appears.

- Select By File.
- Enter the location of the file in the Currently Selected File box, or click the Browse button and locate and select your file.
- Select Microsoft Access Driver (\*.mdb) in the ODBC Drivers box.
- Enter the name for the new file in the Data Source Name (DSN) box.
- Click the Next button.



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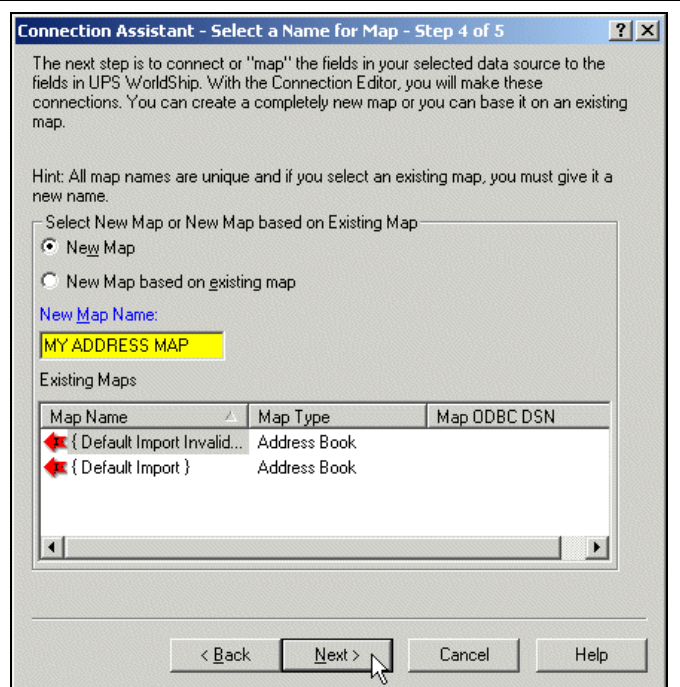
## Import Customer Addresses



### Import Customer Addresses using the Connection Assistant

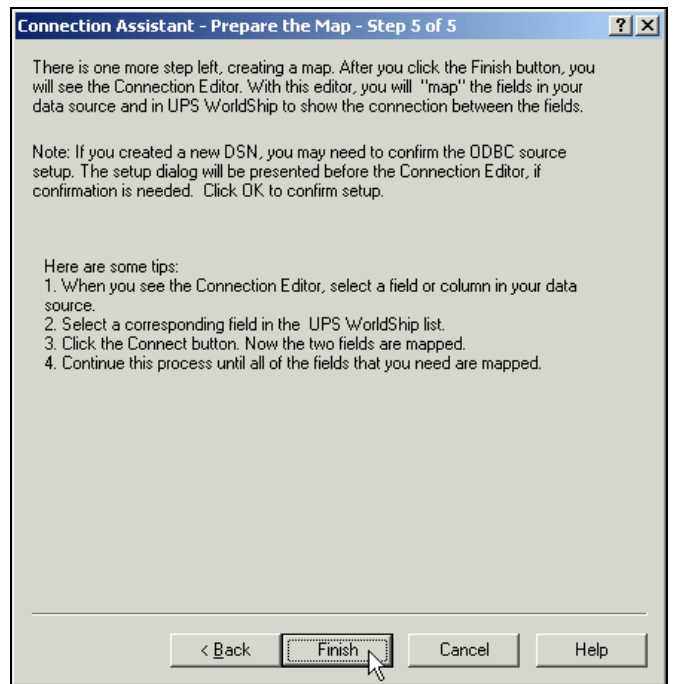
5. The Connection Assistant – Select a Name for Map – Step 4 of 5 window appears.

- Select New Map.
- Enter a name for the map in the New Map Name box.
- Click the Next button.



6. The Connection Assistant – Prepare the Map – Step 5 of 5 window appears.

- Review the instructions.
- Click the Finish button.

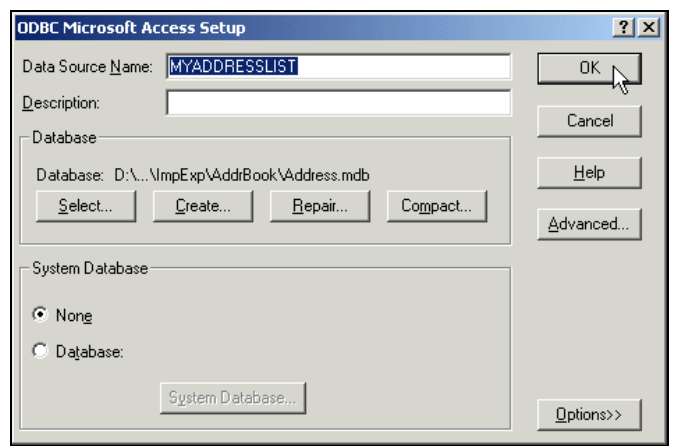


# WorldShip® Import Customer Addresses

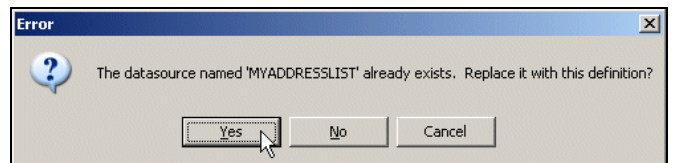


## Import Customer Addresses using the Connection Assistant

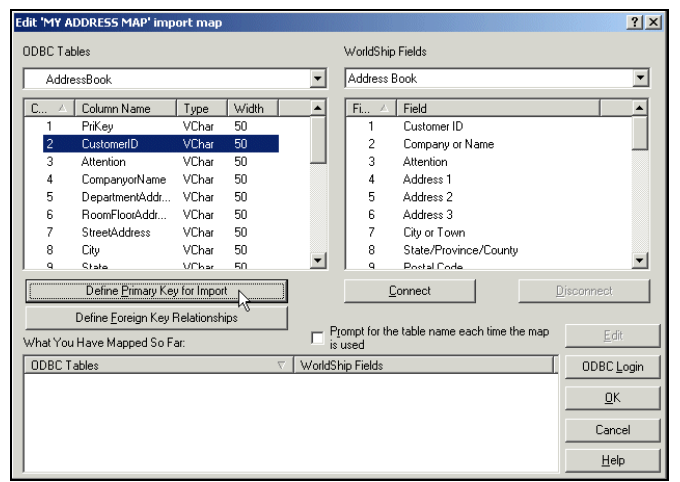
7. The ODBC Microsoft Access Setup window appears.
- Check for the following: the DSN name that you entered appears in the Data Source Name box, and the file name that you entered appears for Database.
  - Select None under System Database.
  - Click the OK button



8. If the Data Source Name (DSN) already exists, a message asks you to confirm your choice.
- Click the Yes button to replace the existing DSN with your new DSN.
  - Click the No button to rename your DSN.



9. The Edit Import Map window appears.
- Under ODBC Tables, click the down arrow and select the table that contains the Primary Key for Import, a field that uniquely identifies each customer.
  - Select the field in the table that uniquely identifies each customer.
  - Click the Define Primary Key for Import button.



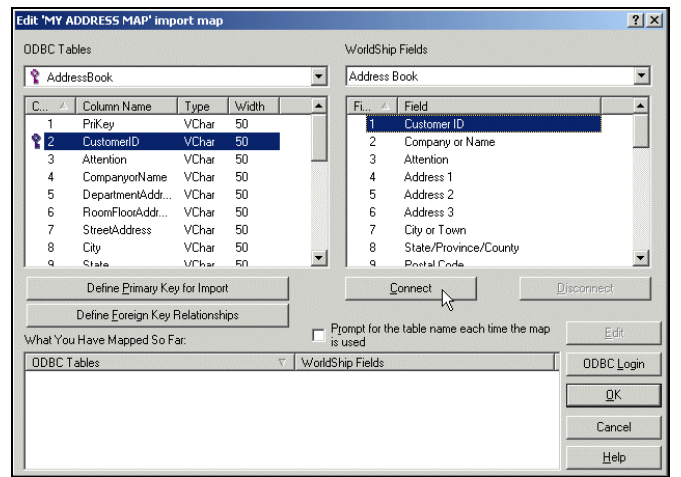
# WorldShip® Import Customer Addresses



## Import Customer Addresses using the Connection Assistant

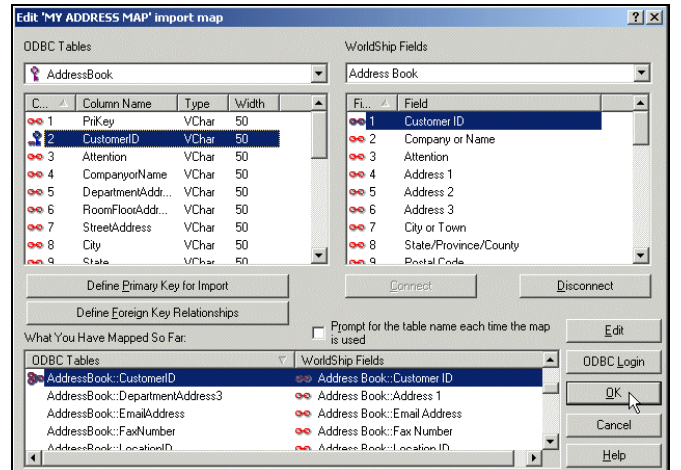
10. A key appears next to the ODBC Tables name and next to the selected field to indicate the Primary Key for Import.

- Select the field under WorldShip Fields that best matches your selection under ODBC Tables.
- Click the Connect button.



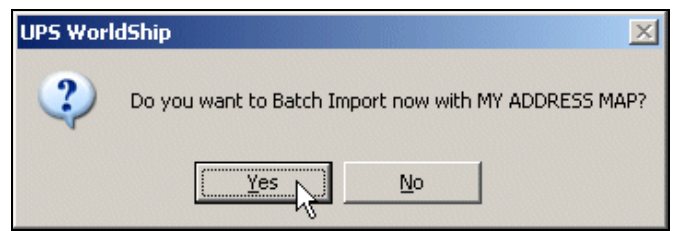
11. The mapped fields appear under What You Have Mapped So Far.

- Continue to map the rest of the ODBC Tables names to the WorldShip Fields names.
- Click the OK button.



12. A message asks you to confirm your batch import.

Click the Yes button.

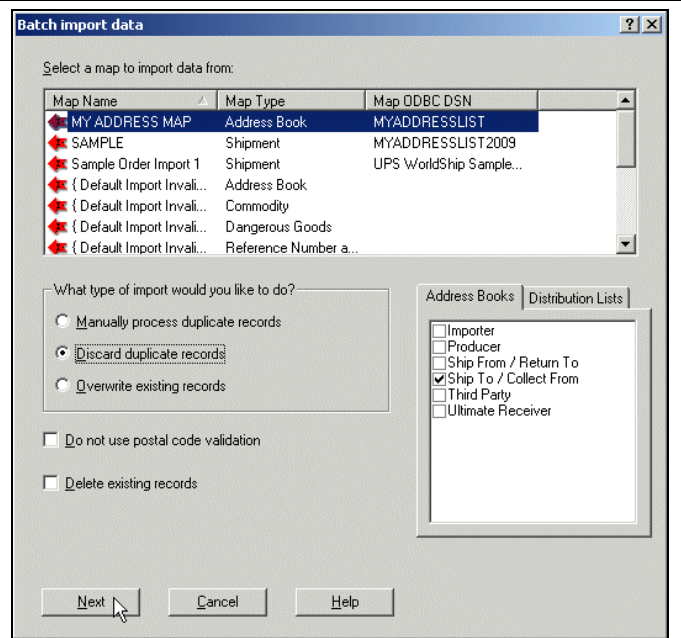




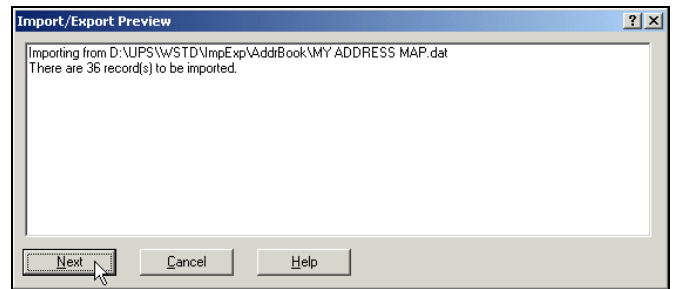
### Import Customer Addresses using the Connection Assistant

13. The Batch Import Data window appears. This window shows all the available maps, including the map that you created.

- Under Select a Map to Import Data From, select the map name that you created.
- Under What Type of Import Would You Like to Do, select Discard Duplicate Records.
- Click the Next button.



14. The Import/Export Preview window appears. Click the Next button.

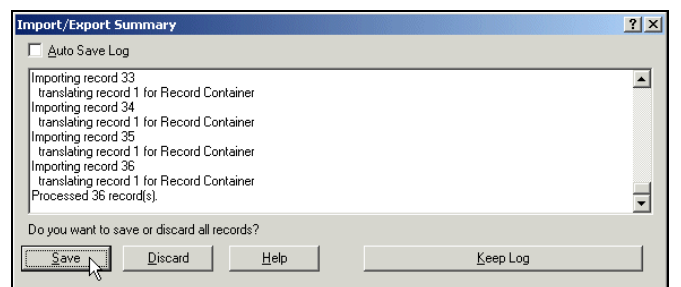


15. The Progress window appears, followed by the Import/Export Summary window.

**Tip:** To view the Import/Export Summary listing, click the up and down arrows or move the scroll bar.

Options in this window include:

- Click the Save button to save the imported addresses.
- Click the Discard button to discard the imported addresses.
- Click the Keep Log button to save the log to a specified directory.



# WorldShip® Import Customer Addresses



## Import Customer Addresses using the Connection Assistant

16. The Shipping window appears.

Click the down arrow in the Company or Name box to see the imported addresses.

The screenshot shows the 'UPS WorldShip - Administrative Workstation' window. The 'Ship To' tab is active, and the 'Company or Name' dropdown menu is open, showing a list of imported addresses:

- DEF Company 9 Apple Road
- MIM Company 2322 York Road
- UPS Company 2355 York Road
- XYZ Company 555 Old Mill Road

Other visible fields include:

- Customer ID: [Empty]
- Update Address Book:
- Residential:
- Address 2: [Empty]
- Address 3: [Empty]
- Country/Territory: United Kingdom
- Postal Code: [Empty]
- City or Town: [Empty]
- State/Province/County: [Empty]
- Telephone: [Empty]
- Email Address: [Empty]
- UPS Account: [Empty]
- Tax ID Number: [Empty]
- Shipper: WE2301
- Profile: UPS
- Weight (kg): [Empty]
- Shipper: [Empty]
- Num. of Pkgs.: 1
- Ship Cost (GBP): 0.00
- Package Type: Package
- Reference Number 1: [Empty]
- Reference Number 2: [Empty]
- Documents Only:
- General Desc. of Goods: [Empty]
- With Return Services:
- All Packages Identical:

The bottom right corner of the window displays the UPS logo and the text 'WorldShip 2012'. At the bottom of the window, there is a note: 'Your invoice may vary from the displayed rates.'