

WorldShip® Import Shipment Data



Go to the appropriate page for a discussion of the following import shipment data procedures:

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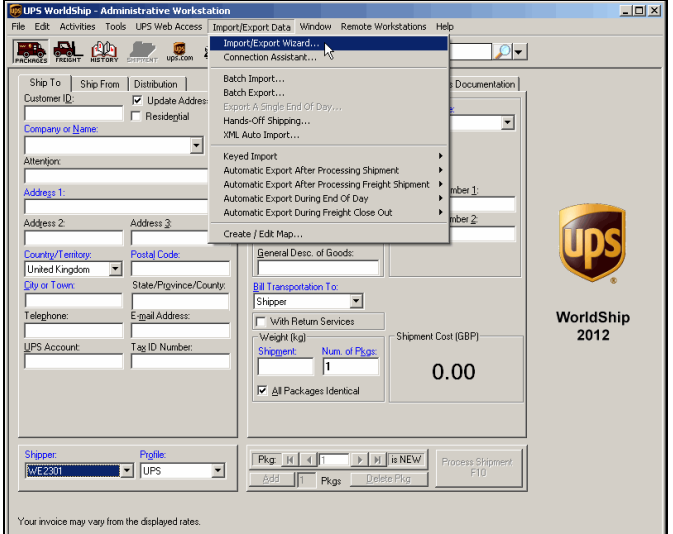
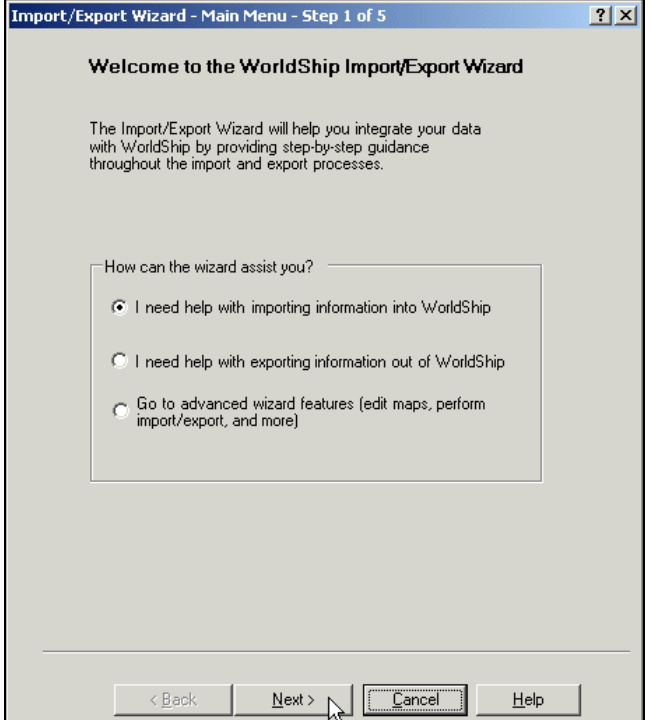
WorldShip® Import Shipment Data



Import Shipment Data using the Import/Export Wizard

Use the Import/Export Wizard for address book, commodity and other simple import types. For more complex import types, see Import Shipment Data using the Connection Assistant.

To import shipment data using the Import/Export Wizard and Keyed Import:

Step	Window (if available)
<p>1. On the Import/Export Data menu, click Import/Export Wizard.</p>	 <p>The screenshot shows the 'UPS WorldShip - Administrative Workstation' window. The 'Import/Export Data' menu is open, and the 'Import/Export Wizard...' option is highlighted. The main window displays various fields for shipment information, including 'Ship To', 'Ship From', 'Distribution', 'Customer ID', 'Company or Name', 'Address 1', 'Address 2', 'Country/Territory', 'Postal Code', 'City or Town', 'State/Province/Country', 'Telephone', 'Email Address', 'UPS Account', and 'Tax ID Number'. The 'Shipment Cost (GBP)' is displayed as 0.00. The 'Shipper' is set to 'UPS'.</p>
<p>2. The Import/Export Wizard – Main Menu – Step 1 of 5 window appears.</p> <ul style="list-style-type: none"> • Select I Need Help With Importing Information into WorldShip. • Click the Next button. 	 <p>The screenshot shows the 'Import/Export Wizard - Main Menu - Step 1 of 5' window. The title bar reads 'Import/Export Wizard - Main Menu - Step 1 of 5'. The main text says 'Welcome to the WorldShip Import/Export Wizard' and 'The Import/Export Wizard will help you integrate your data with WorldShip by providing step-by-step guidance throughout the import and export processes.' Below this, there is a question 'How can the wizard assist you?' with three radio button options: <ul style="list-style-type: none"> <input checked="" type="radio"/> I need help with importing information into WorldShip <input type="radio"/> I need help with exporting information out of WorldShip <input type="radio"/> Go to advanced wizard features (edit maps, perform import/export, and more) At the bottom, there are four buttons: '< Back', 'Next >', 'Cancel', and 'Help'. The 'Next >' button is highlighted with a mouse cursor. </p>

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Import Shipment Data using the Import/Export Wizard

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

- Select Small Package Shipments.
- Click the Next button.

Import/Export Wizard - Select Data Type - Step 2 of 5

Select the type of Data you would like to Import:

- Addresses
- Small Package Shipments
- Freight Shipments
- Small Package Commodities for International Shipments
- Freight Commodities
- Custom Package Types
- Charge Back Codes

< Back Next > Cancel Help

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.

Import/Export Wizard - Connect Data To WorldShip - Step 3 of 5

Before you can import/export your data you must connect your data file to WorldShip. To make a connection, provide a name for the connection then browse to your data file. The connection name will enable you to identify the connection in the future if you wish to modify it.

*Data Connection Name:

Where is the location of your DATA file?

Or Select an Existing Data Connection

SQL Server
 Oracle

< Back Next > Cancel Help

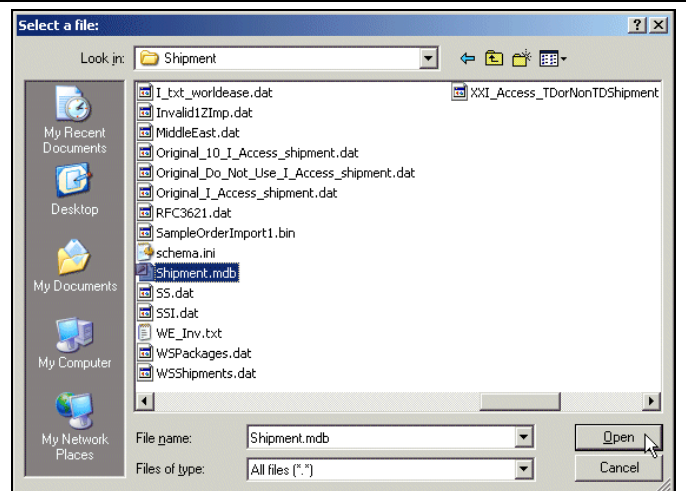
WorldShip® Import Shipment Data



Import Shipment Data using the Import/Export Wizard

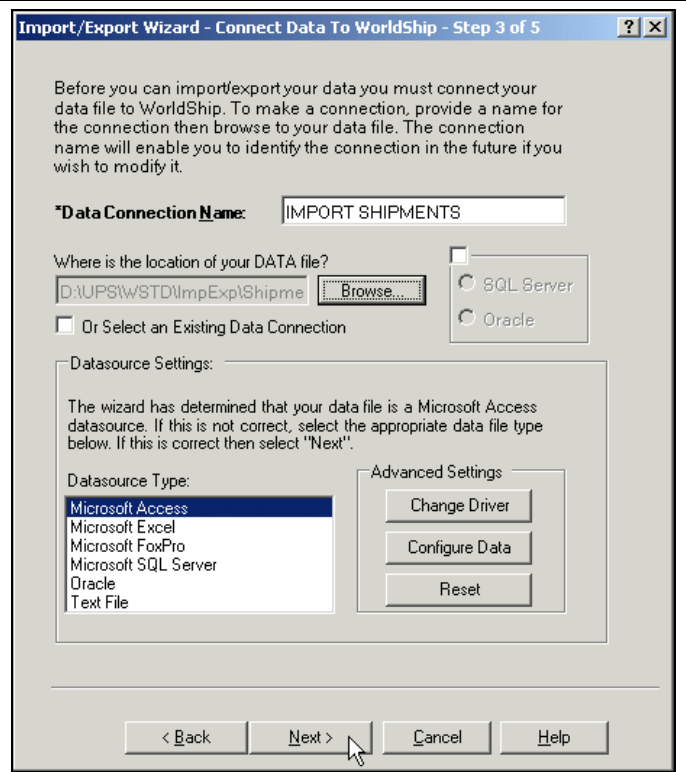
5. The Select a File window appears.

- 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.
 - For .csv, use Text File.
 - For .xls, use Microsoft® Excel.
 - For .mdb, use Microsoft® Access.
- Click the Next button.



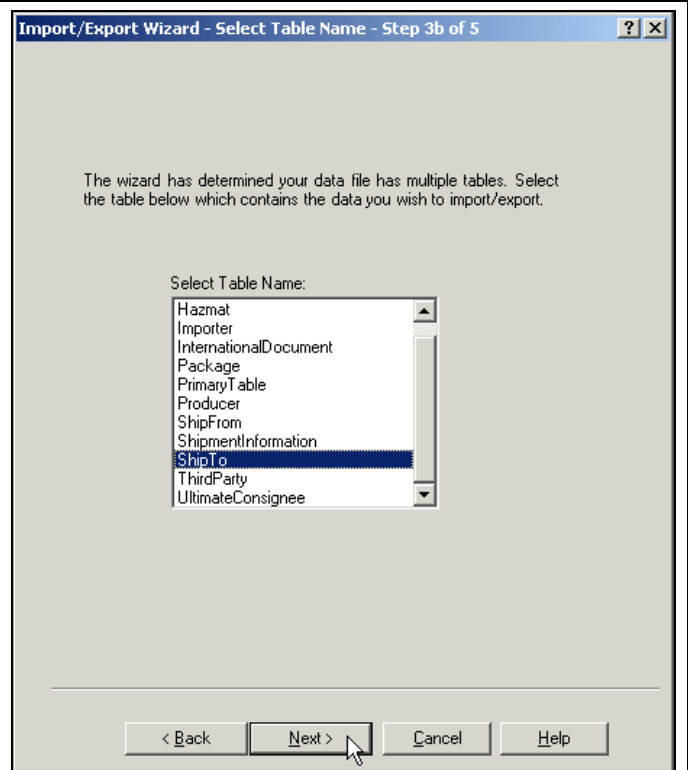
WorldShip® Import Shipment Data



Import Shipment Data using the Import/Export Wizard

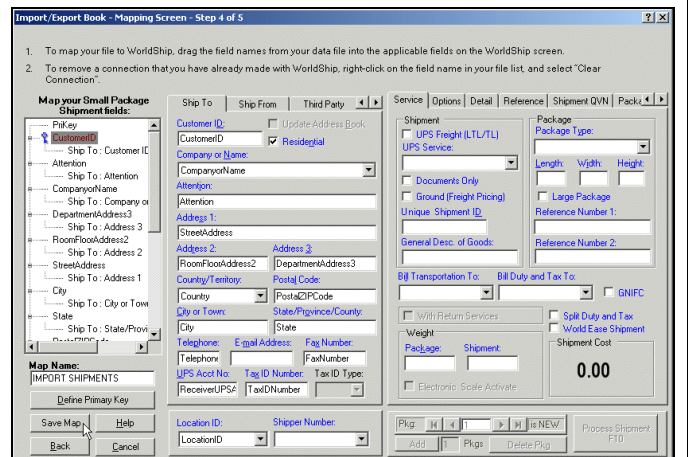
7. The Import/Export Wizard – Select Table Name – Step 3b of 5 window appears if the data file that you selected contains multiple tables.

- Select the appropriate table that contains the data you wish to import in the Select Table Name box.
- Click the Next button.



8. 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 Small Package Shipment Fields box to the applicable field box on the WorldShip side on the right.
- In the Map Your Small Package Shipment 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.



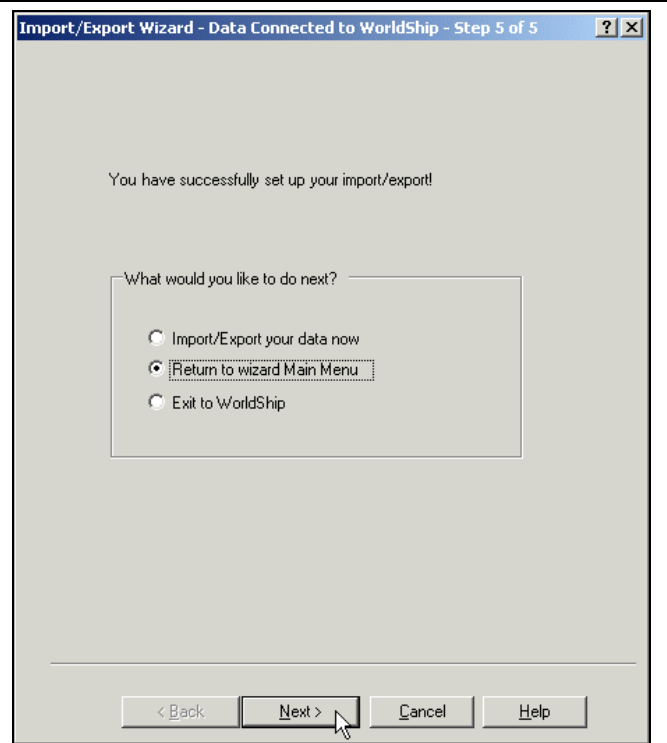
WorldShip® Import Shipment Data



Import Shipment Data using the Import/Export Wizard

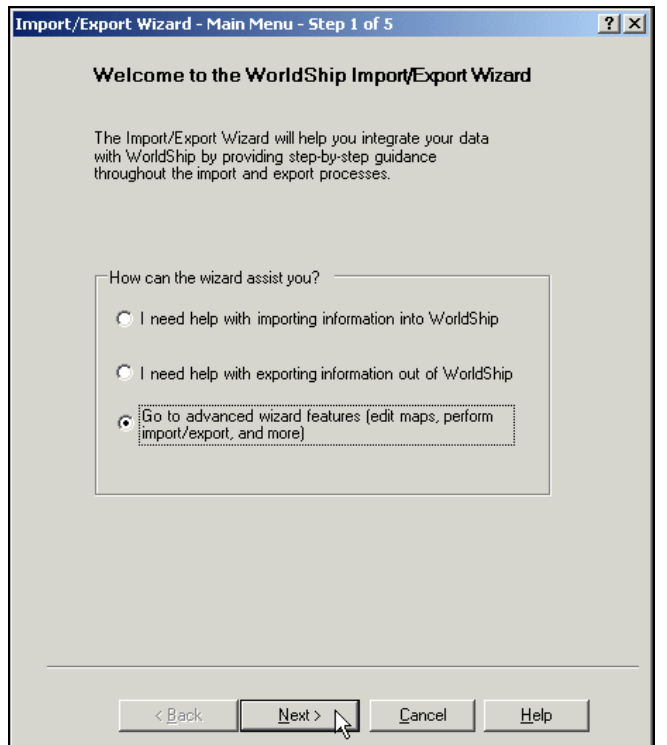
9. The Import/Export Wizard – Data Connected to WorldShip – Step 5 of 5 window appears.

- Select Return to Wizard Main Menu.
- Click the Next button.



10. The Import/Export Wizard – Main Menu – Step 1 of 5 window appears.

- Select Go to Advanced Wizard Features (edit maps, perform import/export, and more).
- Click the Next button.



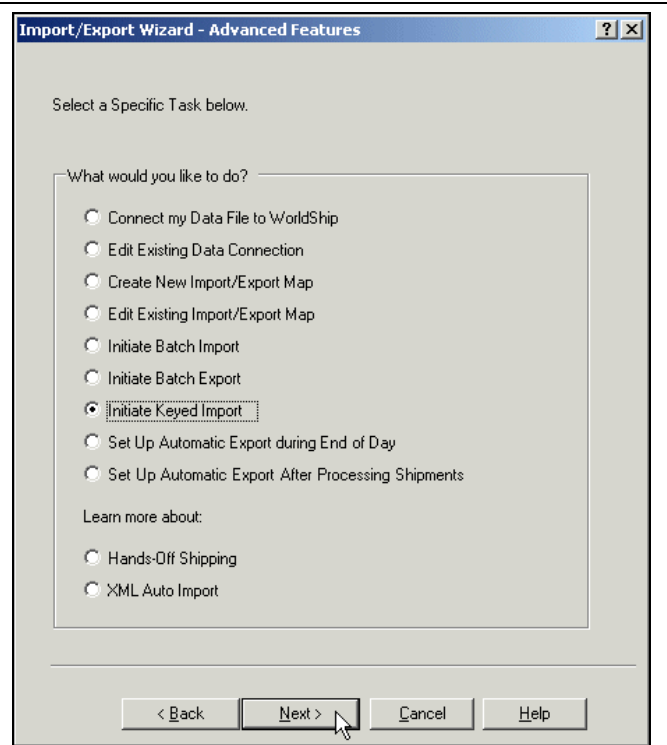
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Import Shipment Data using the Import/Export Wizard

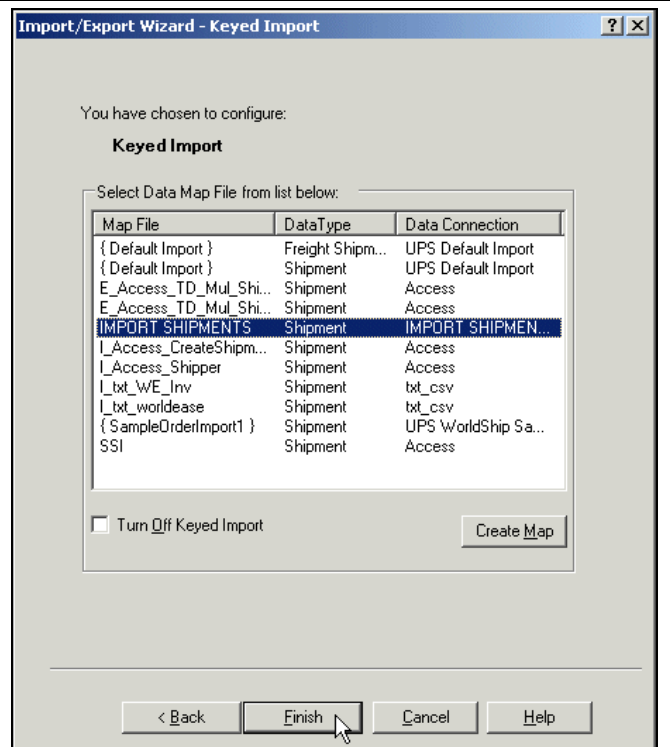
11. The Import/Export Wizard – Advanced Features window appears.

- Select Initiate Keyed Import.
- Click the Next button.



12. The Import/Export Wizard – Keyed Import window appears.

- Clear the Turn Off Keyed Import check box.
- Under Select Data Map File From List Below, select the map name that you created.
- Click the Finish button.



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Import Shipment Data using the Import/Export Wizard

13. The Enter Import Key window appears.

- Type the appropriate key for the shipment you want to import.


Note: The Primary Key field defined in step 8 shows the available import keys.

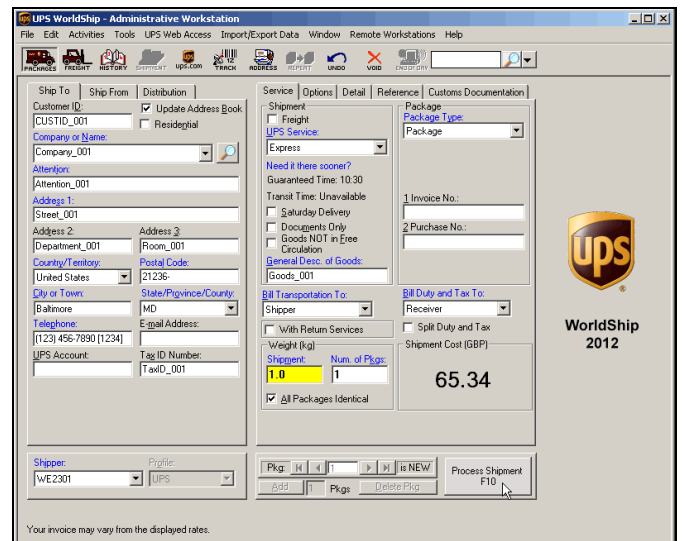
- Click the Close button.



14. The Shipping window appears and shows the imported shipment information.

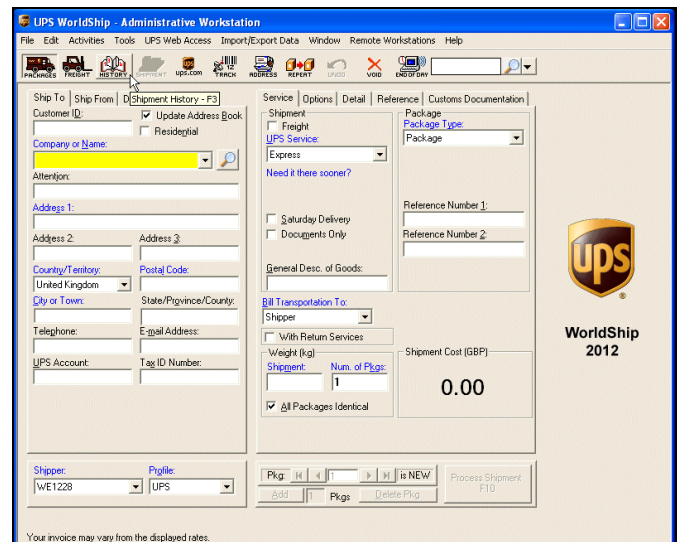
- Complete the shipment information (such as weight).

- Click the  button.



15. A blank Shipping window appears.

- Click the  button.



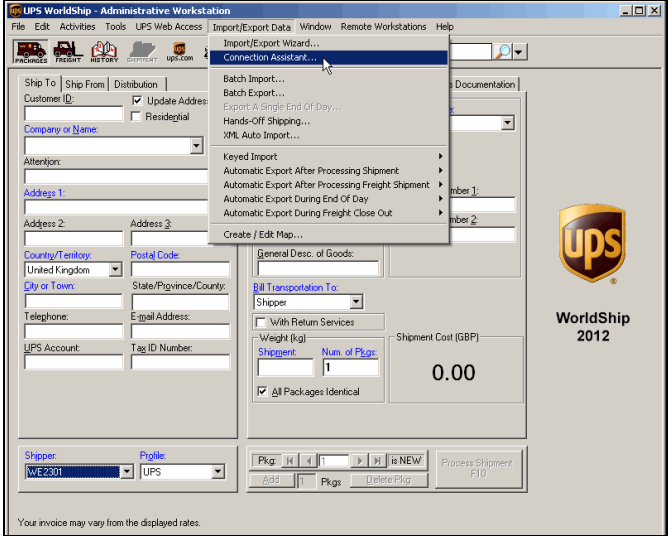
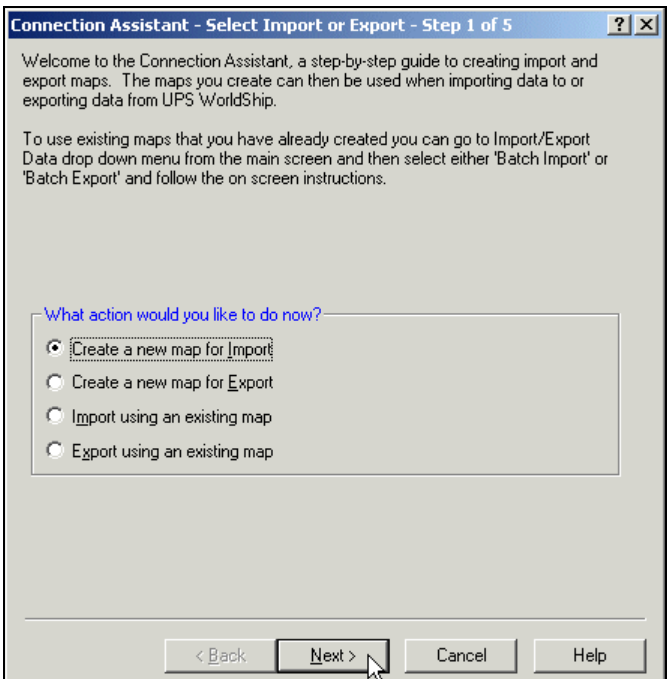
WorldShip® Import Shipment Data



Import Shipment Data using the Connection Assistant

Use the Connection Assistant to import multiple table databases and other complex import types. For simple import types, see Import Shipment Data using the Import/Export Wizard.

To import shipment data using the Connection Assistant and Keyed Import:

Step	Window (if available)
<p>1. On the Import/Export Data menu, click Connection Assistant.</p>	 <p>The screenshot shows the 'UPS WorldShip - Administrative Workstation' window. The 'Import/Export Data' menu is open, and 'Connection Assistant...' is highlighted. Other options include 'Batch Import...', 'Batch Export...', 'Export: A Single End Of Day...', 'Hands-Off Shipping...', 'XML Auto Import...', 'Keyed Import', 'Automatic Export After Processing Shipment', 'Automatic Export After Processing Freight Shipment', 'Automatic Export During End Of Day', 'Automatic Export During Freight Close Out', and 'Create / Edit Map...'. The main window displays various shipping details like 'Ship To', 'Ship From', 'Distribution', 'Customer ID', 'Company or Name', 'Address 1', 'Address 2', 'Country/Territory', 'Postal Code', 'City or Town', 'State/Province/Country', 'Telephone', 'Email Address', 'UPS Account', 'Tax ID Number', 'General Desc. of Goods', 'Bill Transportation To', 'Shipper', 'Weight (kg)', 'Num of Pkgs', 'Shipment Cost (GBP)', and 'Packages Identical'.</p>
<p>2. The Connection Assistant – Select Import or Export – Step 1 of 5 window appears.</p> <ul style="list-style-type: none"> • Select Create a New Map for Import. • Click the Next button. 	 <p>The screenshot shows the 'Connection Assistant - Select Import or Export - Step 1 of 5' dialog box. It contains the following text: 'Welcome to the Connection Assistant, a step-by-step guide to creating import and export maps. The maps you create can then be used when importing data to or exporting data from UPS WorldShip. To use existing maps that you have already created you can go to Import/Export Data drop down menu from the main screen and then select either 'Batch Import' or 'Batch Export' and follow the on screen instructions.' Below this text is a section titled 'What action would you like to do now?' with four radio button options: 'Create a new map for Import' (selected), 'Create a new map for Export', 'Import using an existing map', and 'Export using an existing map'. At the bottom, there are buttons for '< Back', 'Next >', 'Cancel', and 'Help'.</p>

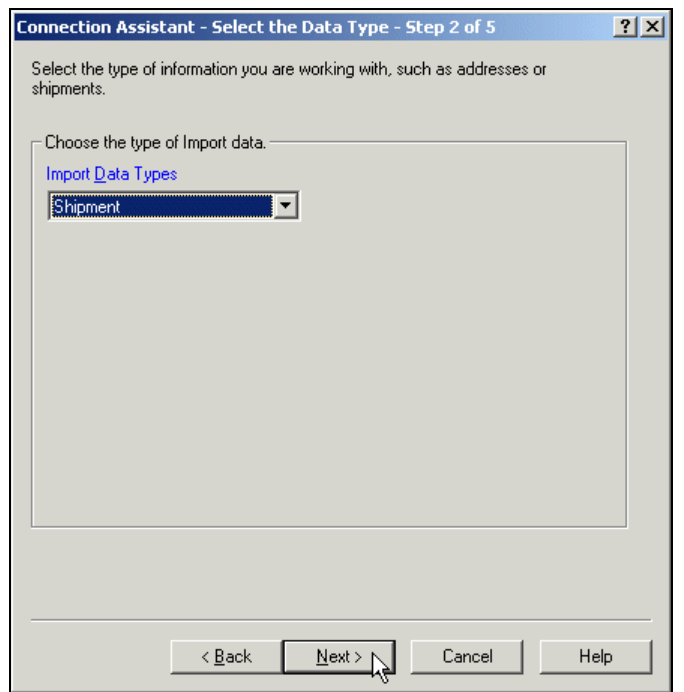
WorldShip® Import Shipment Data



Import Shipment Data using the Connection Assistant

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

- Click the down arrow in the Import Data Types box and select Shipment.
- Click the Next button.

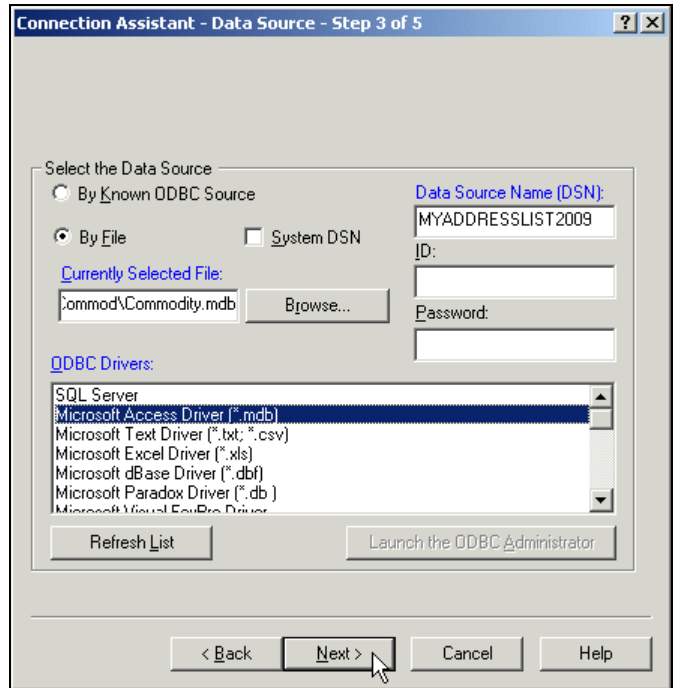


4. The Connection Assistant – Data Source – Step 3 of 5 window appears.

- 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.
- Enter the Data Source Name (DSN) in the Data Source Name (DSN) box. WorldShip saves the DSN for future reference.

Tip: Write down this name.

- Select the appropriate ODBC driver in the ODBC Drivers box.
- Click the Next button.



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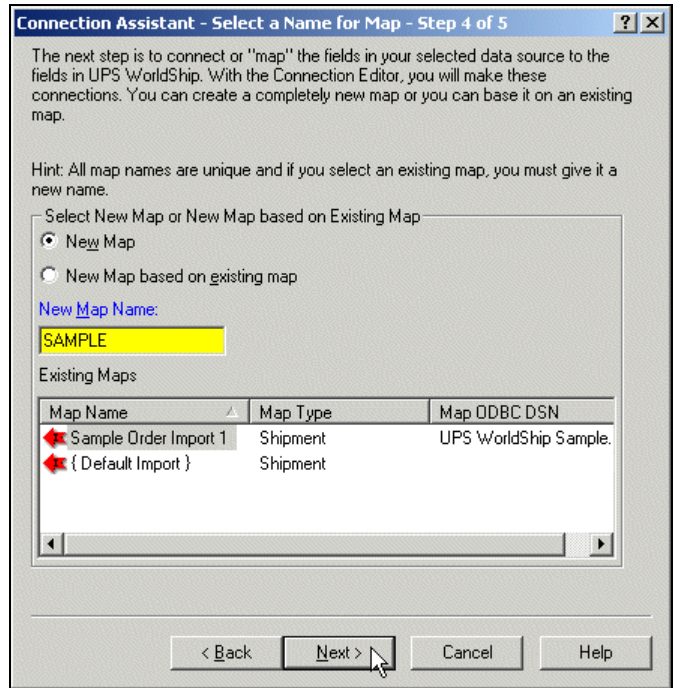
Import Shipment Data using the Connection Assistant

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.

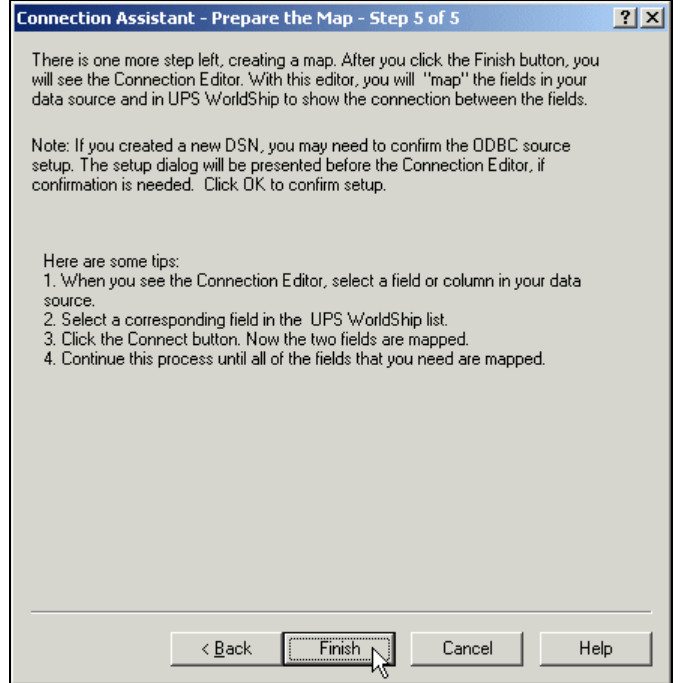
Tip: Write down this name.

- Click the Next button.



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

- Review the instructions.
- Click the Finish button.

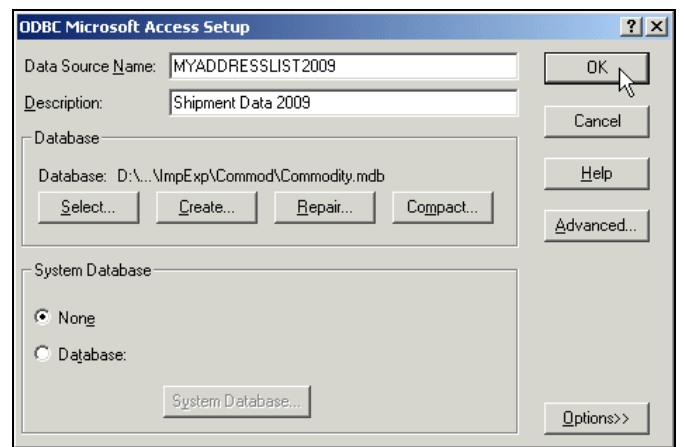


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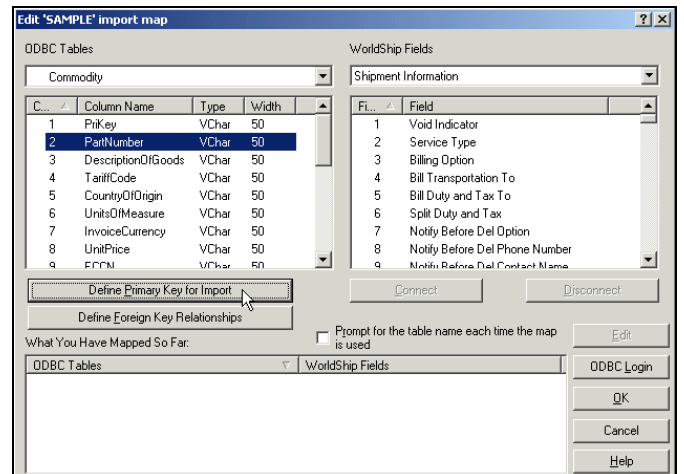


Import Shipment Data using the Connection Assistant

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.
 - Enter a description in the Description box (optional).
 - Click the OK button.



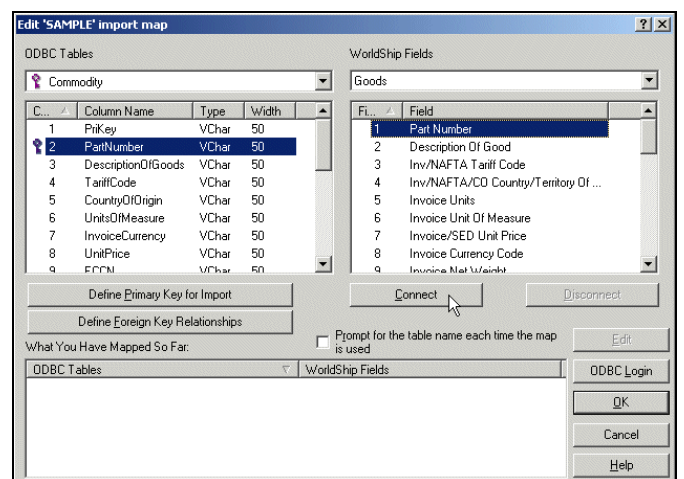
8. The Edit Import Map window appears.
- Under ODBC Tables, click the down arrow and select the table that contains the Primary Key for Import, a field that uniquely identifies each shipment.
 - Select the field in the table that uniquely identifies each shipment.
 - Click the Define Primary Key for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



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

Map the data from your data source to WorldShip:

- Select the ODBC Tables name and field containing the data you want to import.
- Select the corresponding WorldShip Fields table and field that best matches your selection under ODBC Tables.
- Click the Connect button.
- Continue to map the rest of the ODBC Tables names to the WorldShip Fields names.



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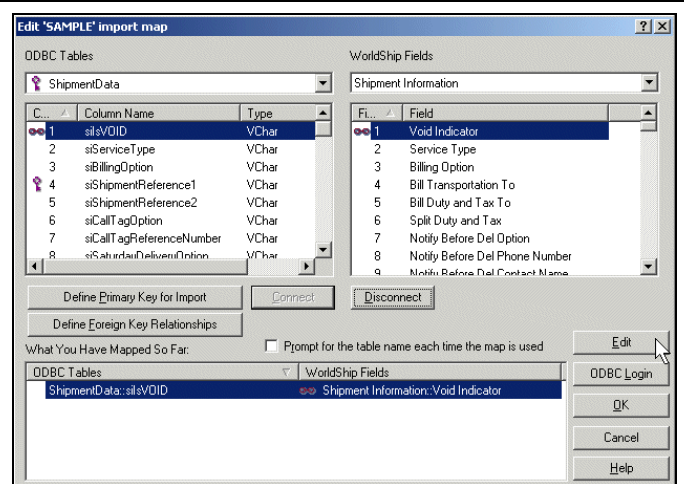
Import Shipment Data using the Connection Assistant

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

If your data source contains information that WorldShip does not recognise, define translations for connected fields. For example, if you use internal codes for UPS services, you must create a translation for your company's internal codes to standard UPS service names.

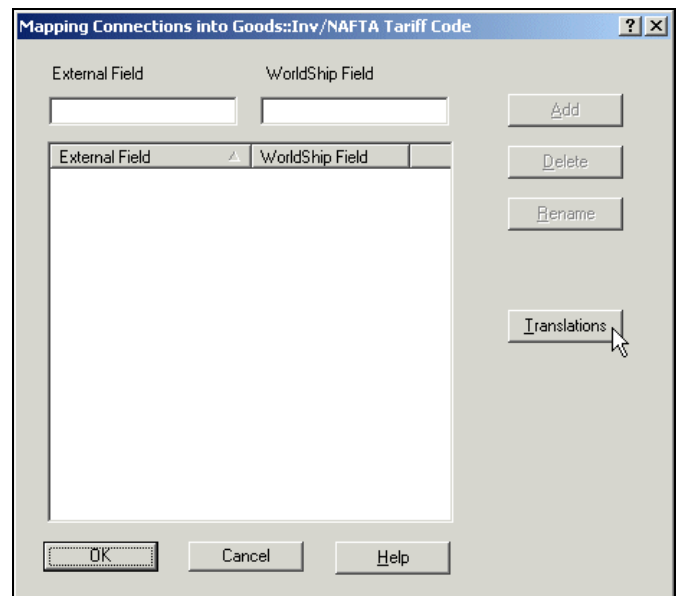
Note: If you do not need to translate data, skip to step 14.

- Select the connection that requires a translation in the What You Have Mapped So Far box.
- Click the Edit Button.



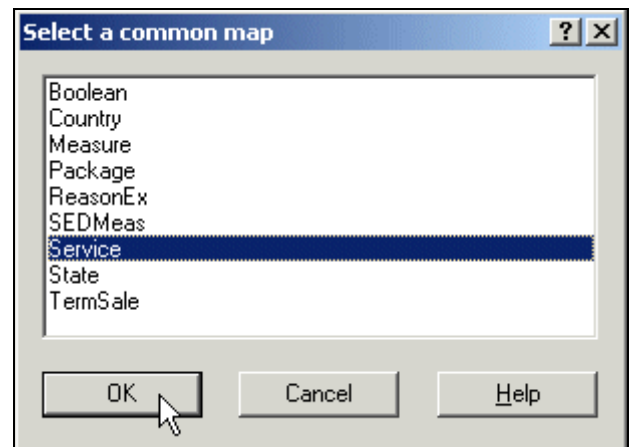
11. The Mapping Connections into Shipment Information window appears.

Click the Translations button.



12. The Select a Common Map window appears and lists the predefined translation maps included with WorldShip.

- Select a map.
- Click the OK button.



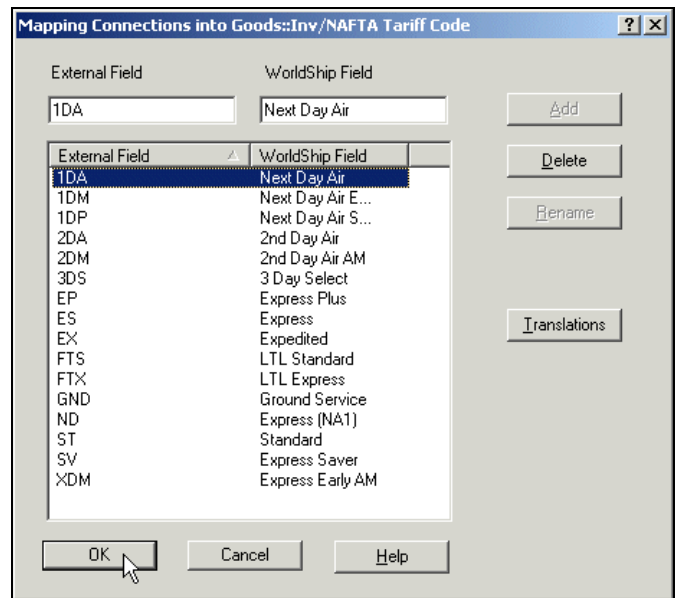
WorldShip® Import Shipment Data



Import Shipment Data using the Connection Assistant

13. The Mapping Connections into Shipment Information window appears.

- Select the external field name that you want to translate. That name appears in the External Field box.
- Enter the WorldShip field name in the WorldShip Field box and click the Rename button. The list is updated with your change.
- Repeat the process for any additional translations.
- Click the OK button.



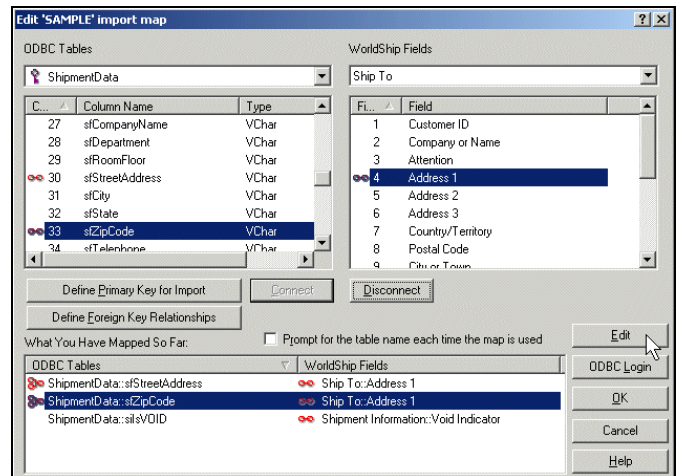
14. The Edit <filename> Import Map window appears.

If you need to map multiple fields in your data source to a single field in the WorldShip database, define the way that WorldShip combines this information in its database.

Note: If you do not need to map multiple fields to a single field, skip to step 16.

Assuming that you store the street address in one field and the postcode in a separate field and you want to combine these fields into a single street address field, do the following:

- Select StreetAddress under ODBC Tables, select Address 1 under WorldShip Fields, and click the Connect button.
- Select ZipCode/Post Code under ODBC Tables, select Address 1 under WorldShip Fields, and click the Connect button. A special icon indicating multiple connections appears beside the connection in the What You Have Mapped So Far box.
- Select either of the connections in the What You Have Mapped So Far box.
- Click the Edit button.



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Import Shipment Data using the Connection Assistant

15. The Modify Connections window appears.

- Select the field that you want to appear first in the Street Address and click the Up button to move it to the top.
- Click the Translate button to define any translations that should be applied to this connection during import. (See step 11.)
- Click the OK button.

16. The Edit Import Map window appears.

After you have finished connecting your tables to the WorldShip database, you must define the relationships between the tables in your data source. Click the Define Foreign Key Relationships button.

Note: If you have not mapped fields from more than one table in your data source, skip to step 18.

17. The Edit Relationships for Import Map window appears.

Note: This window has four selection boxes. The Relate From boxes on the left contain the tables and fields from which you can create relationships. When this window first appears, only the primary table is available in the Relate From boxes. The Relate To boxes on the right list all the tables and fields in your data source. The bottom boxes only display the fields available in the tables selected in the top boxes.

- Select the table and field in the Relate From selection boxes and the corresponding table and field in the Relate To selection boxes.
- Click the Add Relationship button. The relationship appears in the What You Have Related So Far box.

Note: Tables do not have to be mapped directly to the primary table. For example, let's assume you have created an import map that connects information from tables A, B, and C in your data source to the WorldShip database. Table A contains the Primary Key for Import and is

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Import Shipment Data using the Connection Assistant

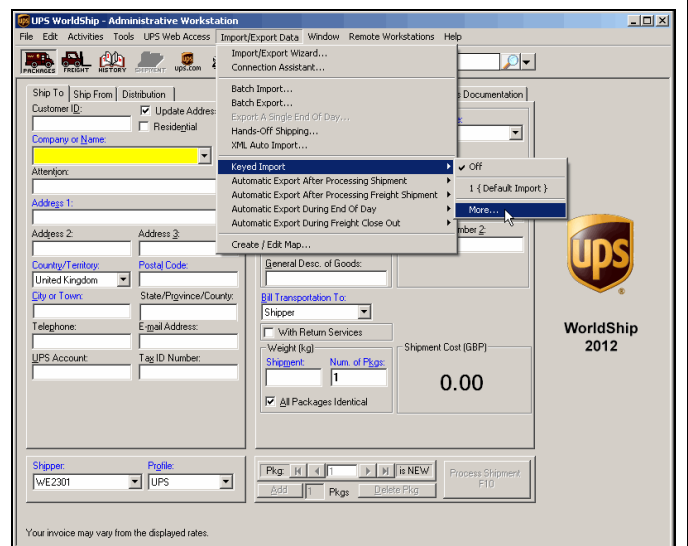
<p>therefore the primary table. Create a relationship between Table A and Table B. You can now create a relationship between Table B and Table C. Because Table B is already linked to Table A, Table C has an indirect link to Table A.</p>	
<ul style="list-style-type: none"> Continue to define the relationships between tables until all the tables mapped in the Edit Import Map window are related directly or indirectly to the primary table. Click the OK button. 	
<p>18. The Edit Import Map window appears.</p> <p>Click the OK button.</p> <p>Note: If you have any connections from the WorldShip database to a table in your data source that does not have a defined foreign key relationship, a message appears and lists the tables in your data source without relationships to the primary table. In order to continue, you must correct this condition. (See step 16.)</p>	
<p>19. A message asks you to confirm your selection.</p> <p>Click the No button.</p>	

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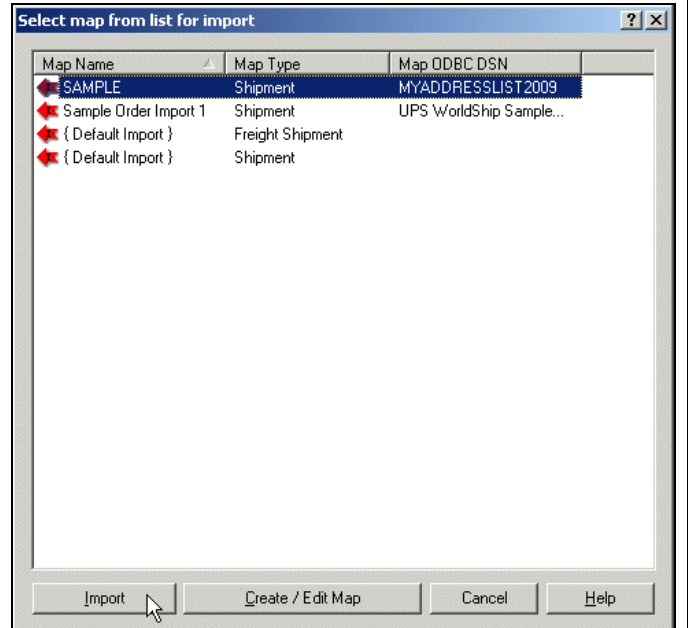
Import Shipment Data using the Connection Assistant

20. On the Import/Export Data menu, point to Keyed Import and click More.



21. The Select Map From List for Import window appears.

- Select your newly created map from the list of maps.
- Click the Import button.



22. The Enter Import Key window appears.

- Enter the number of the record you wish to import from your data source.
- Tip:** This number is the unique identifier you defined as the Primary Key for Import.
- Press the Enter key on your keyboard.



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Import Shipment Data using the Connection Assistant

23. The Shipping window appears.

Verify that your mappings are correct:

- The address information shows properly. If you connected multiple fields in your data source to a single field in WorldShip, verify that the data is imported in the proper order.
- All connections requiring translation were translated properly.
- Any special services, such as COD or Quantum View Notify, were imported correctly.

UPS WorldShip - Administrative Workstation

File Edit Activities Tools UPS Web Access Import/Export Data Window Remote Workstations Help

PACKAGES FREIGHT HISTORY IMPORT/EXPORT ADDRESS TRACK SERVICES REPEAT UNDO VOID END OF DAY

Ship To Ship From Distribution

Customer ID: Update Address Book
 Residential

Company or Name:
AAA Universal Suppliers

Attention:
Shipment Department

Address 1:
541 Coopers Lane

Address 2: Address 3:

Country/Territory: Postal Code:
United States 21093

City or Town: State/Province/County:
HERVILLE TIMONIUM MD

Telephone: E-mail Address:
(410) 555-1212

UPS Account: Tag ID Number:

Shipper: Profile:
WE2301 UPS

Service | Options | Detail | Reference | Customs Documentation

Shipment
Freight
UPS Service
Express

Package
Package Type:
Package

Need it there sooner?
Guaranteed Time: 10:30
Transit Time: Unavailable

1 Invoice No.:
2 Purchase No.:

General Desc. of Goods:
Goods

Bill Transportation To:
Shipper

Bill Duty and Tax To:
Receiver

Weight (kg):
22.7

Num of Pkgs:
1

Shipment Cost (GBP):
228.74

With Return Services
 Split Duty and Tax

All Packages Identical

Process Shipment F10

Your invoice may vary from the displayed rates.