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ShipTo Bill Transportation Setup

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Overview

The following instructions are to set up a user defined field that will hold the billing party (who to bill) after import to UPS/FedEx from ShipTo.

SalesPad User Defined Field Setup

In SalesPad, go to Modules > User Field Editor and create the user field uf_Bill_Transportation_To, shown here:

Bus. Object	Seq	Field	Disabled
Assembly	0	check_test2	<input type="checkbox"/>
Assembly Line	0	checktest	<input checked="" type="checkbox"/>
BOM	0	checktest2	<input type="checkbox"/>
BOM Line	0	checktest3	<input type="checkbox"/>
Customer	0	make	<input type="checkbox"/>
Customer Addr	0	svEquipmentID	<input type="checkbox"/>
Inventory Lot Number	0	svEquipmentItemDescription	<input type="checkbox"/>
Inventory Serial Number	0	svEquipmentItemNumber	<input type="checkbox"/>
Item Master	0	uf_Bill_Transportation_To	<input type="checkbox"/>
Purchase Line Item	0	uf_billto	<input type="checkbox"/>
Purchase Order	0	uf_ShipTo_SenderID	<input type="checkbox"/>
Purchase Receipt	0	ufAccountNumber	<input type="checkbox"/>
Purchase Receipt Line Item	0	ufWrightBack	<input type="checkbox"/>
Sales Document	0	uf_Bill_Transportation_To	<input checked="" type="checkbox"/>
Sales Line Item	0	xclear_test1	<input type="checkbox"/>
Vendor	0	xclear_test2	<input type="checkbox"/>
Vendor Addr	0	xclear_test3	<input type="checkbox"/>
	0	xcost	<input type="checkbox"/>
	0	xDiscountUsed	<input type="checkbox"/>

Field Properties
Table Name: Sales Document
Field Name: uf_Bill_Transportation_To
Map To:
Screen Label: Bill Transportation
Field Type: Text Length: 30
Blank Value:
Value Options: Shipper;
Options:
Quick Report:
Show on Sales Document:
☒ Quote ☒ Order ☒ Invoice ☒ Return

The Value Options must be entered as follows: Shipper;Receiver; Third Party; Collect;

In SalesPad, Modules > User Field Editor, create the user field uf_BillTo, shown here:

User Field Editor

Close Save Update Database Table Design Layout Export Import

Bus. Objects User Fields New Delete Copy Field Properties

Bus. Object	Seq	Field	Disabled
Assembly	0	check_test2	<input type="checkbox"/>
Assembly Line	0	checktest	<input checked="" type="checkbox"/>
BOM	0	checktest2	<input type="checkbox"/>
BOM Line	0	checktest3	<input type="checkbox"/>
Customer	0	make	<input type="checkbox"/>
Customer Addr	0	svEquipmentID	<input type="checkbox"/>
Inventory Lot Number	0	svEquipmentItemDescription	<input type="checkbox"/>
Inventory Serial Number	0	svEquipmentItemNumber	<input type="checkbox"/>
Item Master	0	uf_Bill_Transportation_To	<input type="checkbox"/>
Purchase Line Item	0	uf_billto	<input type="checkbox"/>
Purchase Order	0	uf_ShipTo_SenderID	<input type="checkbox"/>
Purchase Receipt	0	ufAccountNumber	<input type="checkbox"/>
Purchase Receipt Line Item	0	ufWrightBack	<input type="checkbox"/>
Sales Document	0	USDAT01	<input checked="" type="checkbox"/>
Sales Line Item	0	xdeartest1	<input type="checkbox"/>
Vendor	0	xdeartest2	<input type="checkbox"/>
Vendor Addr	0	xdeartest3	<input type="checkbox"/>
	0	xcost	<input type="checkbox"/>
	0	xDiscountUsed	<input type="checkbox"/>

Field Properties

Table Name: Sales Document

Field Name: uf_billto

Map To:

Screen Label: billto

Field Type: Text Length: 100

Blank Value:

Value Options:

Options

☐ Field is Read Only ☐ Field is Required (Returns Only)

☐ Field is a File Attachment ☐ Field is Rich Text Memo

☐ Field is a Customer Lookup Cust. Class Lookup

☐ Field is a Hyperlink ☐ Field is an Image

Quick Report:

Show on Sales Document Types

☒ Quote ☒ Order ☒ Invoice ☒ Return

In SalesPad, Modules > User Field Editor, create the user field uf_AccountNumber, shown here:

User Field Editor

Close Save Update Database Table Design Layout Export Import

Bus. Objects User Fields New Delete Copy Field Properties

Bus. Object	Seq	Field	Disabled
Assembly	0	check_test2	<input type="checkbox"/>
Assembly Line	0	checktest	<input checked="" type="checkbox"/>
BOM	0	checktest2	<input type="checkbox"/>
BOM Line	0	checktest3	<input type="checkbox"/>
Customer	0	make	<input type="checkbox"/>
Customer Addr	0	svEquipmentID	<input type="checkbox"/>
Inventory Lot Number	0	svEquipmentItemDescription	<input type="checkbox"/>
Inventory Serial Number	0	svEquipmentItemNumber	<input type="checkbox"/>
Item Master	0	uf_Bill_Transportation_To	<input type="checkbox"/>
Purchase Line Item	0	uf_billto	<input type="checkbox"/>
Purchase Order	0	uf_ShipTo_SenderID	<input type="checkbox"/>
Purchase Receipt	0	ufAccountNumber	<input type="checkbox"/>
Purchase Receipt Line Item	0	ufWrightBack	<input type="checkbox"/>
Sales Document	0	USDAT01	<input checked="" type="checkbox"/>
Sales Line Item	0	xdeartest1	<input type="checkbox"/>
Vendor	0	xdeartest2	<input type="checkbox"/>
Vendor Addr	0	xdeartest3	<input type="checkbox"/>
	0	xcost	<input type="checkbox"/>
	0	xDiscountUsed	<input type="checkbox"/>

Field Properties

Table Name: Sales Document

Field Name: ufAccountNumber

Map To:

Screen Label: Account Number

Field Type: Text Length: 100

Blank Value:

Value Options:

Options

☐ Field is Read Only ☐ Field is Required (Returns Only)

☐ Field is a File Attachment ☐ Field is Rich Text Memo

☐ Field is a Customer Lookup Cust. Class Lookup

☐ Field is a Hyperlink ☐ Field is an Image

Quick Report:

Show on Sales Document Types

☒ Quote ☒ Order ☒ Invoice ☒ Return

ShipTo Setup

In ShipTo, go to Main Window > Application Settings > Import Options, set Bill Transportation To and Bill To Account Number # respectively as the User Fields created in the User Field Editor.

Close Save

Filter:

Import Options

Already Exported	
Bill To Account #	ufAccountNumber
Bill Transportation To	uf_Bill_Transportation_To
COD Amount	
Declared Value	
Email Source	
Required Batch	
Residential	
Sender ID	
Threshold for signature required	
Tracking Number	
Use delivery confirmation options	False

In ShipTo, go to Main Window > Application Settings > Write Options, set *Collection Destination Field*, *Receiver Destination Field* and *Third Party Destination Field* respectively as the User Field created in the User Field Editor. The standard *Freight Destination Field* will write back to the Freight Field set on the Sales Document header.

Settings

Close Save

Filter:

WriteBack Options

COD Amount Destination Field	
Collect Destination Field	uf_billto
FedEx Handling Charge Type	Fixed
FedEx Rate	Customer
Freight Destination Field	Freight Field
Handling Charge Destination Field	
Move to Batch	SHIPPED
Named Note	
Prompt To Writeback	True
Receiver Destination Field	uf_billto
Shipped Date Destination Field	Actual Ship Date Field
Third Party Destination Field	uf_billto
UPS Rate	Published
Writeback By Document	False
Writeback By Document Indicator Field	
Writeback Enabled	True
Writeback Freight	True
Writeback Sales Document Note	True
Writeback Tracking Numbers	True
WriteBack_Weight_And_Dimensions_To_Note	True

Collect Destination Field
The user field that will take freight if Bill Transportation To is Collect
Defaults to ".

Ready

Usage

Create a Sales Document. Add the newly created user fields to the User Field tab. Make a selection from the options of the Bill Transportation To user field. Give the Account number if the Bill Transportation To Setting is marked as Third Party or Receiver. When you create a shipment on an order and send the information through ShipTo to UPS, it will read the Bill Transportation To user field and write back the freight amount into the Bill To field if the Third Party or Receiver is to be billed.

The account number in the Bill To Account # is the account number that UPS WorldShip will bill for the freight. This can be set per Sales Document and should populate in the appropriate UPS Account Number field based on the Bill Transportation To selection.

UPS WorldShip

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

PACKAGES FREIGHT HISTORY SHIPMENT UPS.COM TRACK ADDRESS REPORT UNDO VOID END OF DAY

Ship To | Ship From | Distribution |

Customer ID: AARONFIT0001:DSFSC ☐ Update Address Book
Company or Name: TTest ☐ Residential
Attention: gfgfg
Address 1: One Microsoft Way
Address 2: lin2 Address 3: line 3
Country/Territory: United States Postal Code: 98052-6399
City or Town: Redmond State/Province/County: WA
Telephone: (425) 555-0101 E-mail Address:
UPS Account Number: 123456 Tax ID Number:

Service | Options | Detail | Reference |

Shipment
☐ Freight
UPS Service: Next Day Air Early AM
Need it there sooner?
☐ Saturday Delivery

Package
Package Type: Package
Length: Width: Height: in
Declared Value:
Reference Number 1: ORDST3610
Reference Number 2:

Bill Transportation To: Third Party ...
☐ With Return Services
Weight (lb) Package: Shipment: 0.0
☐ Electronic Scale Activated

Shipment Cost (USD)
0.00

Shipper: 48825X Profile: UPS

Pkg: 1 of 1 Repeat 1 Pkgs Modify Shpmt Process Shipment F10

Your invoice may vary from the displayed rates.

Ver: 16.0.25 XOFY Pending: 2 Shpmt(s), 2 Pkg(s), C

When the Sales Document is brought from ShipTo to UPS/FedEx, the Setting Bill Transportation To should be marked accordingly. When Third Party is listed, a small box (ellipsis) will appear next to it. Click on this and fill out the form to complete the shipment. This form MUST be filled out to proceed.

At this time there is no user field in SalesPad that will import the additional information into UPS WorldShip for this form, aside from the Account Number.

After the shipping is completed, the Bill To Field should be filled in for the Third Party and Receiver options for the freight amount. Freight billed to the shipper is written back to the Freight field (as assigned in Settings).

Customer Search

Customer: [AARONFIT0001] Aaron Fitz Electrical

(ORDER) ORDST3610

Close

Save

Print

Delete

Copy

Allocate

Un Allocate

Dynamics GP

Document Properties

Document #:

ORDST3610

Customer #:

AARONFIT0001

Cust PO:

Req Ship:

11/23/2013

Ship Method:

LOCAL DELIVERY

Whse:

WAREHOUSE

Currency:

Z-US\$

ORDER (STDORD)

Aaron Fitz Electrical

Sales Rep:

JC

Sales Terr:

TERRITORY 1

Pay Terms:

NET 30

Doc Date:

11/23/2013

Created By:

sa

Line Items

Notes

Addresses

Holds

User Fields

Audit

Related Documents

Purchases

Sales Document Quick Reports

FedEx Quote

Email Audit

Bill Transportation

Third Party

Bill To

90.980000000

Account Number

123456