

Knowledgebase > ShipTo > Miscellaneous > ShipTo Bill Transportation Setup

ShipTo Bill Transportation Setup

Megan De Freitas - 2024-11-22 - Miscellaneous

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:

| | Database | Table Design Layout 📑 Ex | port 💓 Impor | t | | | |
|----------------------------|---|------------------------------|--------------|------------------|---|--------|--|
| 📓 Bus. Objects | 🛛 📓 User Fields 🛛 🕈 New 🙎 Delete 🖓 Copy | | | Field Propertie | | | |
| Bus. Object | Seq 🔺 | Field | Disabled | | | | |
| Assembly | 0 | check_test2 | | Table Name: | Sales Document | | |
| Assembly Line | θ | checktest | \checkmark | Field Name: | uf_Bill_Transportation_To | | |
| BOM | 0 | checktest2 | | Map To: | | + X | |
| BOM Line | 0 | checktest3 | | Screen Label: | Bill Transportation | | |
| Customer | 0 | make | | | | | |
| Customer Addr | 0 | svEquipmentID | | Field Type: | Text Tength: | 30 | |
| Inventory Lot Number | 0 | svEquipmentItemDescription | | Blank Value: | | | |
| Inventory Serial Number | 0 | svEquipmentItemNumber | | Value Options: | Shipper; | | |
| Item Master | 0 | uf_Bill_Transportation_To | | Ontions | Shipper; Receiver; Third Party; Collect; rns Onl | | |
| Purchase Line Item | 0 | uf_billto | | opuons | | | |
| Purchase Order | 0 | uf_ShipTo_SenderID | | Field is Read | | | |
| Purchase Receipt | 0 | ufAccountNumber | | Field is a File | | | |
| Purchase Receipt Line Item | 0 | ufWrightBack | E Field is a | | | | |
| Sales Document | θ | USRDAT01 | \checkmark | Field is a Hyp | р | | |
| Sales Line Item | 0 | xcleartest1 | | Quick Report: | | | |
| Vendor | 0 | xcleartest2 | | | | | |
| Vendor Addr | 0 | xcleartest3 | | Show on Sales Do | OK Cancel | 1. | |
| | 0 | xcost | | - Ouete | | Deture | |
| | 0 | xDiscountUsed | | W Quote | A order A tuyote A | 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 🕃 Exp | ort 阙 Impor | t | | | |
| Bus. Objects | 🚺 🕑 User | Fields 🛛 🗢 New 🙎 Delete 🗅 | Сору | Field Propertie | es | | |
| Bus. Object | Seq 🔺 | Field | Disabled | | · · · · · · · · · · · · · · · · · · · | | |
| Assembly | 0 | check_test2 | | Table Name: | Sales Document | | |
| Assembly Line | Ð | checktest | | Field Name: | uf_billto | | |
| BOM | 0 | checktest2 | | Map To: | - × | | |
| BOM Line | 0 | checktest3 | | Screen Label: | billto | | |
| Customer | 0 | make | | | | | |
| Customer Addr 0 | | svEquipmentID | | Held Type: | Text Length: 100 | | |
| Inventory Lot Number 0 | | svEquipmentItemDescription | | Blank Value: | | | |
| Inventory Serial Number | 0 | svEquipmentItemNumber | | Value Options: | | | |
| Item Master | 0 | uf_Bill_Transportation_To | | Ontions | | | |
| Purchase Line Item | 0 | uf_billto | | Opuons | | | |
| Purchase Order | 0 | uf_ShipTo_SenderID | | Field is Read | nly 📃 Field is Required (Returns Only) | | |
| Purchase Receipt | 0 | ufAccountNumber | | Field is a File | e Attachment 🛛 Field is Rich Text Memo | | |
| Purchase Receipt Line Item | 0 | ufWrightBack | | Field is a Cu | stomer Lookup Cust, Class Lookup | | |
| Sales Document | θ | USRDAT01 | | Field is a Hy | perlink 🗌 Field is an Image | | |
| Sales Line Item | 0 | xdeartest1 | | Quick Report: | | | |
| Vendor | 0 | xdeartest2 | | | | | |
| Vendor Addr | 0 | xdeartest3 | | Show on Sales D | ocument Types | | |
| | 0 | xcost | | 1 Quete | | | |
| | 0 | xDiscountUsed | | a Quote | W order W monce W Return | | |

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

| 🔁 Close 🛛 🛃 Save 🔹 Updati | e Database | Table Design Layout 🐻 Exp | oort 阙 Impor | t | | | | |
|----------------------------|-----------------|-------------------------------|--------------|----------------|-----------------------------|-------------------|---------------------|--|
| 📓 Bus. Objects | 🚺 Use | r Fields 🛛 🕈 New 📕 Delete 🖓 | Copy | Field Propert | ties | | | |
| Bus. Object | Seq 🔺 | Field | Disabled | â | | | | |
| Assembly | 0 | check_test2 | | Table Name: | Sales Document | | | |
| Assembly Line | θ | checktest | \checkmark | Field Name: | Field Name: ufAccountNumber | | | |
| BOM | 0 | checktest2 | | Map To: | | | • | |
| BOM Line | 0 | checktest3 | | Screen Label: | Account Number | | | |
| Customer | 0 | make | | | - | | | |
| Customer Addr | 0 svEquipmentID | | | Field Type: | lext | 100 | | |
| Inventory Lot Number | 0 | svEquipmentItemDescription | | Blank Value: | | | | |
| Inventory Serial Number | 0 | svEquipmentItemNumber | | Value Options: | | | | |
| Item Master | 0 | uf_Bill_Transportation_To | | Options | | | | |
| Purchase Line Item | 0 | uf_billto | | opuons | | | | |
| Purchase Order | 0 | uf_ShipTo_SenderID | | Field is Rea | ad Only | 🔲 Field is Requ | ired (Returns Only) | |
| Purchase Receipt | 0 | ufAccountNumber | | Field is a F | ile Attachment | Field is Rich | Text Memo | |
| Purchase Receipt Line Item | 0 | ufWrightBack | | Field is a C | ustomer Looku | Cust, Class Looku | p | |
| Sales Document | θ | USRDAT01 | \checkmark | Field is a H | lyperlink | 🔲 Field is an Im | nage | |
| Sales Line Item | 0 | xcleartest1 | | Quick Report: | | | | |
| Vendor | 0 | xcleartest2 | | | | | | |
| Vendor Addr | 0 | xcleartest3 | | Show on Sales | Document Type | S | | |
| | 0 | xcost | | Quete | Order | Invoice | Z Patura | |
| | 0 | xDiscountUsed | | V Quote | W Order | A THYOICE | Neturn | |

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 | | | | | | |
|-------|-----------------------------------|---------------------------|---|--|--|--|--|
| Filte | er: | | | | | | |
| |] ≵↓ 🖻 | | | | | | |
| ۵ | Import Options | | * | | | | |
| | Already Exported | | | | | | |
| | Bill To Account # | ufAccountNumber | | | | | |
| | Bill Transportation To | uf_Bill_Transportation_To | | | | | |
| | COD Amount | | | | | | |
| | Declared Value | | | | | | |
| | Email Source | | E | | | | |
| | Required Batch | | | | | | |
| | Residential | | | | | | |
| | Sender ID | | | | | | |
| | Threshold for signature required | | | | | | |
| | Tracking Number | | | | | | |
| | Use delivery confirmation options | False | | | | | |
| 125 | | | | | | | |

In ShipTo, go to Main Window > Application Settings > Write Options, set *Collection Destination Field*, *Receive 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.

| Close Save | | |
|---|------------------------|---|
| lter: | | |
| | | |
| ₽2↓ @ | | |
| 4 WriteBack Options | | A |
| 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 Defaults to ". | To is Collect | |

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 | |
| Ship To Ship From Distribution Customer ID: Update Address Book AARONFIT0001:DSFSC Residential Company or Name: Image: Company or Name: TTest Image: Company or Name: gfgfgf Address 1: One Microsoft Way Address 3: Address 2: Address 3: Jin2 Jine 3 Country/Temitory: Postal Code: United States 98052-6399 | Service Options Detail Reference Shipment Package Preight UPS Service: Next Day Air Early AM Image: Comparison of the service of |
| City or Town: State/Province/County: Redmond WA Telephone: Email Address: [(425) 555-0101 []] | Bill Transportation To: Third Party With Return Services Weight (b) Package: Shipment: 0.0 Electronic Scale Activated |
| Shipper: Profile 48825X UPS | Pkg: H I M of 1 Repeat 1 Pkgs Modify Shpmt 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).

| Document Pro | perties | | | | | | | | |
|--------------|----------------|--|---|-------------|-----------------------|-------------|------------|--|---|
| Document #: | ORDST3610 | | | | ORDER | t (ST | DORD) | | |
| Customer #: | AARONFIT0001 | | | | Aaron Fitz Electrical | | | | |
| Cust PO: | D: | | | | | lep: JC | | | • |
| Req Ship: | 11/23/2013 | | - | Sales Terr: | : 1 | TERRITORY 1 | | | |
| Ship Method: | LOCAL DELIVERY | | | | | : 1 | NET 30 | | |
| Whse: | WAREHOUSE | | | - | Doc Date: | [| 11/23/2013 | | |
| Currency: | Z-US\$ | | | Y | Created By: sa | | | | |
| | | | | | | | | | |

| Ente recento 11 | otes riddresses | Tionad | ricicite | Treated bocaments | 1 Grandocu | bales bocameric quierriceporta | 1 can guon | |
|---------------------|-----------------|--------|----------|-------------------|------------|--------------------------------|------------|--|
| Bill Transportation | n Third Party | | | | | | | |
| Bill To | 90.980000000 | | | | | | | |
| Account Number | 123456 | | | | | | | |
| | | | | | | | | |