



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

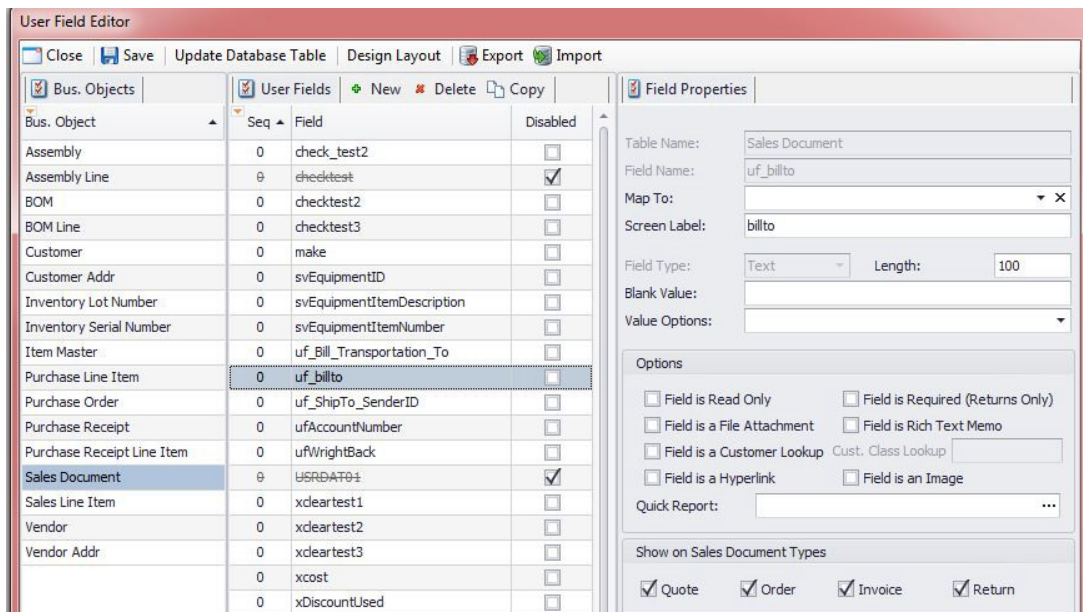
In SalesPad, go to Modules > User Field Editor and create the user field uf_Bill_Transportation_To, shown here:

The screenshot shows the 'User Field Editor' window. The 'User Fields' tab is active, displaying a list of fields. The field 'uf_Bill_Transportation_To' is selected. The 'Field Properties' pane on the right shows the following configuration:

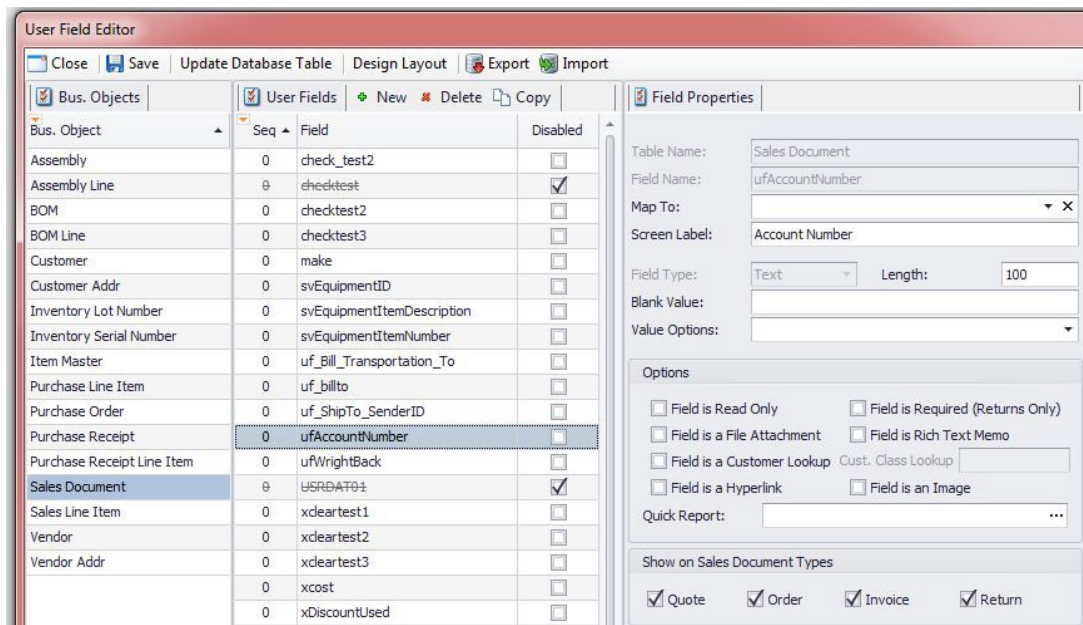
- Table Name: Sales Document
- Field Name: uf_Bill_Transportation_To
- Map To: (empty)
- Screen Label: Bill Transportation
- Field Type: Text
- Length: 30
- Blank Value: (empty)
- Value Options: Shipper; Receiver; Third Party; Collect;
- Options: Field is Read Only, Field is a File, Field is a Customer, Field is a Hypertext
- Quick Report: (empty)
- Show on Sales Documents: 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:



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



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.

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*, *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.

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 ".

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.

The screenshot shows the UPS WorldShip software interface. The 'Bill Transportation To' dropdown menu is highlighted with a red box and set to 'Third Party'. The interface includes various fields for customer information, shipping details, and package information. The 'Ship To' tab is active, showing fields for Customer ID, Company Name, Attention, Address 1, Address 2, Address 3, Country/Territory, Postal Code, City or Town, State/Province/Country, Telephone, E-mail Address, UPS Account Number, and Tax ID Number. The 'Service' tab is also visible, showing 'Next Day Air Early AM' and 'Saturday Delivery' options. The 'Package' tab shows 'Package Type' and 'Package' fields. The 'Reference' tab shows 'Reference Number 1' and 'Reference Number 2' fields. The 'Weight (lb)' field is set to '0.0' and the 'Shipment Cost (USD)' is '0.00'. The 'Shipper' field is set to '48825X' and the 'Profile' is 'UPS'. The 'Process Shipment' button is visible at the bottom right.

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 Properties

Document #:	ORDST3610	ORDER (STDORD)
Customer #:	AARONFIT0001	Aaron Fitz Electrical
Cust PO:		Sales Rep: JC
Req Ship:	11/23/2013	Sales Terr: TERRITORY 1
Ship Method:	LOCAL DELIVERY	Pay Terms: NET 30
Whse:	WAREHOUSE	Doc Date: 11/23/2013
Currency:	Z-US\$	Created By: sa

Bill Transportation	Third Party
Bill To	90.980000000
Account Number	123456