



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 'Bus. Objects' tab is selected, and the 'Sales Document' object is highlighted. The 'User Fields' tab is also active, showing a list of fields. The field 'uf_Bill_Transportation_To' is selected. The 'Field Properties' tab is open, showing the following details:

- Table Name: Sales Document
- Field Name: uf_Bill_Transportation_To
- Map To: (dropdown menu)
- Screen Label: Bill Transportation
- Field Type: Text
- Length: 30
- Blank Value: (empty)
- Value Options: Shipper; Receiver; Third Party; Collect;
- Options: ☐ Field is Read, ☐ Field is a File, ☐ Field is a Cus, ☐ Field is a Hyp
- Quick Report: (empty)
- Show on Sales Doc: ☒ 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

| 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 | ufAccountNumber | <input checked="" type="checkbox"/> |
| Sales Line Item | 0 | xcleartest1 | <input type="checkbox"/> |
| Vendor | 0 | xcleartest2 | <input type="checkbox"/> |
| Vendor Addr | 0 | xcleartest3 | <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

| 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 | ufAccountNumber | <input checked="" type="checkbox"/> |
| Sales Line Item | 0 | xcleartest1 | <input type="checkbox"/> |
| Vendor | 0 | xcleartest2 | <input type="checkbox"/> |
| Vendor Addr | 0 | xcleartest3 | <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*, *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.

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
☐ Residential
Company or Name: TTest
Attention: gfgfgf
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 Tag 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 | | | | 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 | | | |
| 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 | | | | | |