



ShipTo Residential Shipments

Megan De Freitas - 2024-11-22 - Miscellaneous

Overview

ShipTo – UPS Residential Shipping Flag

Follow the instructions below to have UPS mark an address as residential so the extra charge is added to the document shipping costs.

Note: This feature is available on ShipTo 4.0.0.2 and above and is only for UPS at this time.

Setup

1. Create a User Defined Field in SalesPad on the Sales Document object. It should be a true/false (Boolean) field (You can import the attached .xml into the User Field Editor – refer to the SalesPad User Defined Fields document for more information)

The screenshot shows the 'User Field Editor' window with the following configuration:

- Table Name:** Sales Document
- Field Name:** uf_ShipTo_Residential
- Map To:** (Empty dropdown)
- Screen Label:** ShipTo - Residential
- Field Type:** True/False
- Length:** (Empty input)
- Default Value:** (Empty input)
- Value Options:** (Empty dropdown)
- 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
 - ☐ Field is an Image
 - ☐ Field is a Hyperlink
- Quick Report:** (Empty input)
- Show on Sales Document Types:**
 - ☒ Quote
 - ☒ Order
 - ☒ Invoice
 - ☒ Return

2. Open ShipTo and go to the Options Manager. Find the ShipTo Import Options and set the Residential dropdown to the UDF created in step 1 (uf_ShipTo_Residential)

Options Manager

Options

- ShipTo COD Terms
- ShipTo Import Options**
- ShipTo Sales Line Options
- ShipTo Shipping Method Map
- ShipTo User Options
- ShipTo Writeback Options

ShipTo Import Options

Import Source Fields

Declared Value:

Bill Transportation To:

Bill To Account #:

Email Source:

Already Exported:

Sender ID:

Residential:

Import Options

Required Batch:

OK Cancel

3. Click **OK**. Log out and back in to ShipTo to save the settings

Use

When the order is being entered in SalesPad, the user will check the ShipTo – Residential box on the User Fields tab to mark the shipment as a residential shipment.

Customer Search Card: [AARONFIT0001] Aaron Fitz Electrical (ORDER) ORDST2237

Close Save Print Delete Copy Allocate Dynamics GP

Document Properties

Document #: ORDST2237

Customer #: AARONFIT0001

Cust PO: DWH-IDDKD

Req Ship: 2/9/2011

Ship Method: LOCAL DELIVERY

Whse: WAREHOUSE

Currency: Z-US\$

ORDER (STDORD)

Aaron Fitz Electrical

Sales Rep: PAUL W.

Pay Terms: NET 30

Doc Date: 2/9/2011

Created By: sa

Shipping Address

Aaron Fitz Electrical
Bob Fitz
One Microsoft Way
Redmond, WA 98052-6399
P:(425) 555-0101
F:(312) 555-0101

☐ Ship Complete

Line Items Notes Addresses Holds **User Fields** Audit Related Documents Purchases FedEx Quote Quick Report Tracking Numbers

ShipTo - Residential ☒

When the document is imported from ShipTo to UPS WorldShip, a checked box will mark the UPS setting. Load UPS to see that **Residential** is checked:

UPS WorldShip

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

PACKAGES

FREIGHT

HISTORY

SHIPMENT

UPS.COM

TRACK

ADDRESS

REPORT

UNDO

VOID

END OF DAY

Ship To

Ship From

Distribution

Customer ID:

AARONFIT0001:WARE

☐ Update Address Book

Company or Name:

Aaron Fitz Electrical

☒ Residential

Attention:

Bob Fitz

Address 1:

11403 45 St. South

Address 2:

Address 3:

Country/Territory:

United States

Postal Code:

60603-0776

City or Town:

Chicago

State/Province/County:

IL

Telephone:

(312) 555-0102 []

E-mail Address:

UPS Account Number:

Tax ID Number:

Shipper:

48825X

Profile:

UPS

Service

Options

Detail

Reference

Shipment

☐ Freight

UPS Service:

3 Day Select

☐ Saturday Delivery

Package

Package Type:

Package

Length:

Width:

Height:

in

Declared Value:

Reference Number 1:

ORDST2239

Reference Number 2:

Bill Transportation To:

Shipper

☐ With Return Services

Weight (lb)

Package:

Shipment:

0.0

☐ Electronic Scale Activated

Shipment Cost (USD)

0.00

Pkg:

1

of 1

Repeat

1

Pkgs

Modify Shpmt

Process Shipment

F10

Your invoice may vary from the displayed rates.

Ver: 14.0.17 XOFY Pen