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### UPS Address Validation REST API Configuration

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## **Overview**

UPS has deprecated access key authentication in favor of an OAuth 2.0 security model and REST API. Beginning Aug 5, 2024, access keys will no longer be supported for authentication to any UPS APIs. After this date, all integrations must utilize OAuth 2.0 authentication and REST API to continue to transact with UPS services.

For more information, please see UPS's <u>Access Key to OAuth 2.0 Migration Guide</u>.

## **Required Modules**

The following modules are required to use the new UPS REST API:

Module	Replaces	Requires
SalesPad.Module.UPS	SalesPad.Module.UPSValidation	N/A
SalesPad.Module.ShippingV2	SalesPad.Module.Shipping	SalesPad.Module.UPS

## **Access Token Maintenance**

#### Overview

The Access Token Maintenance screen allows you to generate new access tokens for the UPS REST API.

Access	Token N	laintena	nce X						
Close	ಿ R	efresh	🔏 Ge	enerate Token	1	ୡ Revoke Token	样 Dele	te Token	
All Tokens	UPS								
Service								Endp	pint Ty
UPS						Test			

Security

Enable the Access Token Maintenance screen by going to the Security Editor (Modules -> System -> Security Editor) and making sure the Access Token Maintenance checkmark is checked.

Se	curity	
•	Select All Select None 🗊 Copy From	
Ăc	ce Name	
	access token maintenance	
	Access Token Maintenance*	
×	Image: Name         Contains         access token maintenance         Image: Name         Image: Nam </td <td></td>	
Acc	ess Token Maintenance	
~	Misc	
	Can Delete Tokens	True
	Can Generate Tokens	True
	Can Revoke Tokens	True
	Can View Token Properties	True

Can Generate Tokens - Can generate new access tokens.

Can Revoke Tokens - Can revoke access tokens.

*Can Delete Tokens* - Can delete access tokens. This action will not revoke tokens from service.

Can View Token Properties - Can view access token properties.

Generate Token

1. To generate a new access token, click the Generate Token button.

2. A New Access Token window will open. Select the endpoint type and click OK to start the token generation process. Note that production and test environments require separate access tokens.

Rew Access T	oken	▣	23
Service	UPS		-
Endpoint Type	Test		-
	ОК	ancel	

3. The UPS login screen will open and request that you log in using your UPS credentials. Enter your UPS username and password and click the Log In button to continue.



A prompt should display that the token was generated successfully.

**NOTE**: If there are any issues with the built-in UPS login, a manual login method is available. Hold the ALT key when clicking the Generate Token button and a separate browser window will open. After logging in, copy the resulting URL from the browser's address bar into the prompt in SalesPad and click OK. SalesPad will parse out the authorization code and generate an access token.

Retrieve Authorization Code		23
After successful UPS web login, copy an from your browser's address bar here a	d paste the resu and click OK to co	lting URL Intinue:
	ОК	Cancel

Revoke Token

UPS access tokens cannot be revoked. The following message will appear if a user attempts to revoke an existing access token.



#### Delete Token

To delete an access token, click the Delete Token button. Click Yes on the following prompt

to confirm deletion.



#### **View Token Properties**

To view token properties, click the Key Information button.

Access	Token I	Maintenar	nce X					
Close	ಿ R	lefresh	🚑 Gener	ate Token	凝 Revoke Token	🔀 De	elete	Token
All Tokens	UPS							
Service		En	dpoint Type	Properties				Created On
UPS		Test		{"EndpointT	ype":0,"RefreshTokent	Expires	4	11/9/2023

This will open the Token Properties window which displays various token properties, such as issue date, expiration date, and status.

🔏 Token Properties			23
Access Token Type	Bearer		
Access Token Status	approved		
Access Token Issued	11/21/2023 10:54:38 AM		
Access Token Expires	11/21/2023 2:54:37 PM		
Access Token Scope			
Refresh Token Issued	11/21/2023 10:54:38 AM		
Refresh Token Expires	1/20/2024 10:54:37 AM		
Refresh Count			
Refresh Token Status	approved		
		ОК	

#### Access Token

The access token must be refreshed every four hours for SalesPad to continue interacting with the UPS REST API. SalesPad will refresh this token automatically when making an API call. Further action from the user is not required.

Refresh Token

The refresh token is returned when a new access token is generated. It is used to refresh the access token. Unlike the access token, **the refresh token lasts three months and must be refreshed manually**. A refresh token expired error will appear if a transaction is attempted to be processed with an expired refresh token.

① UPS Address Validation	23
Error 10400: Refresh Token expired	
	ОК

A new refresh token can be obtained by generating a new access token after the refresh token expires.

#### Token Expiration Reminder

When a user logs into SalesPad, and a UPS access token will expire in the next 7 days or is already expired, then an alert will appear in the Log Messages. This will display information on whether the token is already expired, or when it expires, in order to notify that the manual token refresh step must be handled soon.

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Application CRM Distribution BC	0M Equipment Management Inven	ntory Purchasing	Reporting Sale	les Setup / Utilities	Square	۰ 🎲 م	📑 Submit Feedback 🔞
SalesPad Today	uments ales Chi Sales Line Mass ument Mass Update Sales	Update Sales Batch Processing	Inventory Lookup	Inventory Analysis Inventory Transfers Sales Transfers wentory	Purchasing *	Reporting *	
Q Log Messages							
Log Messages	Detail						ψ
Log Messages     Message     Access Token Expiration Alert: Action Needed	Detail UPS access token expires on 3/30/2024	10:52:18 AM. Contact yo	our SalesPad admini	istrator to refresh the to	oken before the	e expiration dat	ب te to avoid service interruptions.
Log Messages     Message     Access Token Expiration Alert: Action Needed	Detail UP5 access token expires on 3/30/2024	10:52:18 AM. Contact yo	our SalesPad admini	istrator to refresh the to	oken before the	e expiration dat	ņ

Note that token expiration reminders are available as of SalesPad 5.4.6.

## **Address Validation**

#### Overview

Address validation is part of the SalesPad.Module.UPS module. This module replaces the legacy SalesPad.Module.UPSValidation module.

#### Settings

Go to Settings (Modules -> System -> Settings). Set the Address Query Handlers setting to

"UPSAddressQueryHandler".

P Settings ×	
👕 Close 🛛 📙 Save 🛛 🕃 Export Settings	Import Settings Export Settings List
ter:	
ddress query handlers	
📱 🛃 🛛 📲 Expand 📑 Collapse	
<ul> <li>Address Tools</li> </ul>	
Address Query Handlers	UPSAddressOuervHandler

Filter to "UPS" and configure the following settings.

$\sim$	UPS	
	Automatically Apply Address Recommendations In Workflow	True
	Endpoint Type	Production
	UPS Shipper Number	

Automatically Apply Address Recommendations In Workflow - Specify whether to automatically apply changes in workflow when UPS address validation responds with a valid recommendation.

Endpoint Type - Set the endpoint type to 'Test' or 'Production.'

UPS Shipper Number - A UPS account number is a six-digit number that is unique to each individual/corporation that holds an account with UPS.

#### Customer Address Card

1. Navigate to the Customer Address Card.

Contact: PRIMARY/	Bob Fitz 🗙						
Close 📙 Save							
Customer							
Customer ID: AARC	2NFIT0001 Customer Name: Aaron Fitz Electrical						
Address							
Code:	PRIMARY						
Alt Comp. Name:	Aaron Fitz Electrical						
Contact Name:	Bob Fitz						
Address:	One Microsoft Way						
Zip:	98052-6399						
State:	WA						
City:	Redmond						
Country Code:	US						
Country:	United States						

2. Click the Save button when the customer address is ready to be saved and validated. If an address is ambiguous, SalesPad will allow the user to choose which one they would like to use.

Original Address	s:	Suggested Add	ress:
Address:	1600 Amphitheatre Parkway	Address:	1600 AMPHITHEATRE PKWY
City:	Mountain View	City:	MOUNTAIN VIEW
State:	CA	State:	CA
Zip:	94043	Zip:	94043-1351
Country Code:	US	Country Code:	US
Classification:		Classification:	Commercial 🗸
	Use Original		Use Suggestion

Sales Document Entry Addresses

1. Navigate to the Addresses formlet on the Sales Document Entry screen.

2. Click the Save button when the sales document is ready to be saved and have its Ship To address validated. If an address is ambiguous, SalesPad will allow the user to choose which one they would like to use.

# **Freight Calculator**

#### Overview

The freight calculator is part of the SalesPad.Module.ShippingV2 module. This module replaces the legacy SalesPad.Module.Shipping module.

#### Security

Go to the Security Editor (Modules -> System -> Security Editor) and make sure that Sales Document Freight Rates and Sales Document Simple Freight Rates are enabled.

Security						
✓ Select All 🔲 Select None 🚔 Copy From						
Ăc	Acce Name					
	so freight rates					
[	Sales Document Freight Rates* (Beta)					
Sales Document Simple Freight Rates*						
× ☑ Name Contains freight rates ▼						
Sal	es Document Freight Rates					
Sal	es Document Freight Rates Misc					
Sal	es Document Freight Rates Misc Custom Shipper Country	US				
Sal	es Document Freight Rates Misc Custom Shipper Country Custom Shipper State/Province	US				
Sal	es Document Freight Rates Misc Custom Shipper Country Custom Shipper State/Province Custom Shipper Zip Code	US				
Sal ✓	es Document Freight Rates Misc Custom Shipper Country Custom Shipper State/Province Custom Shipper Zip Code Default Shipping Rate Restriction	US				
Sal	es Document Freight Rates Misc Custom Shipper Country Custom Shipper State/Province Custom Shipper Zip Code Default Shipping Rate Restriction Import Single Package Script	US				
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Sal	es Document Freight Rates Misc Custom Shipper Country Custom Shipper State/Province Custom Shipper Zip Code Default Shipping Rate Restriction Import Single Package Script Prompt For Large Queries Ship From Custom Location	US True True				
Sal V	Misc Custom Shipper Country Custom Shipper State/Province Custom Shipper Zip Code Default Shipping Rate Restriction Import Single Package Script Prompt For Large Queries Ship From Custom Location Shipping Warehouses	US True True				

# Security ✓ Select All ✓ Name Contains ✓ Name ✓ Name ✓ Name ✓ Select All

#### Sales Document Simple Freight Rates

An automated Freight Calculator. Automatically pulls package dimensions and weight from UDFs, and

~	Misc			
	Cheapest Rate Line Color			
	Custom Shipper Country	US		
	Custom Shipper State/Province			
	Custom Shipper Zip Code			
	Default Shipping Rate Restriction			
	Import Single Package Script			
	Package Dimension Units	IN		
	Package Weight Units	LB		
	Prompt For Large Queries	True		
	Run On Load	False		
	Ship From Custom Location	True		
	Shipping Warehouses			
	Use Label To Update Shipping Method	False		

**NOTE**: Sales Document Freight Rates has the same functionality as the Sales Document Freight Calculator, and the Sales Document Simple Freight Rates has the same functionality

as the Sales Document Simple Freight Calculator from the legacy Shipping module.

#### Settings

Go to Settings (Modules -> System -> Settings) and filter to "Shipping Tools V2", then configure the following settings.

~	Shipping Tools V2 - Misc		
	Customer Address Residential UDF		
	Display Shipping Request Input Values	False	
	Item Number Exclusion		
	Item Package Height Smart Field		
	Item Package Insured Amount Smart Field	Extended_Price	
	Item Package Length Smart Field		
	Item Package Weight Smart Field	Item_Shipping_Weight	
	Item Package Width Smart Field		
	Location Upcharge Amount	0	
	Shipping Carrier Query Handlers	UPSQueryHandler	
	Shipping Restriction Smart Field		
	Single Document Package	False	
	Single Document Package Height	0	
	Single Document Package Length	0	
	Single Document Package Width	0	
	Upcharge Locations		
	Upcharge Percent	0	
*	Shipping Tools V2 - UPS		
	Calculate UPS Time In Transit	True	
	UPS Max Weight	150	
	UPS Pickup Type	Daily Pickup	
	Use Negotiated Rates	False	

UPS Max Weight - Max weight allowed for calculating UPS rates. Defaults to 150.

UPS Pickup Type - Specify a pickup type for UPS. Defaults to 'Daily Pickup'.

*Use Negotiated Rates* - Use 'Negotiated Rates' as opposed to 'Published Rates' from the UPS API. Defaults to false.

*Shipping Carrier Query Handlers* - Specify the carriers that can be used. Set this setting to 'UPSQueryHandler' to obtain UPS rates.