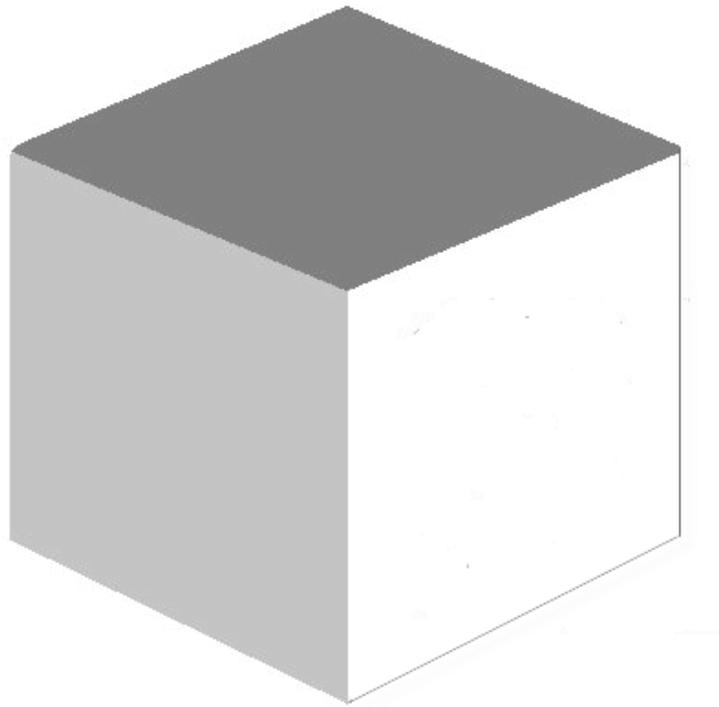


# ShipExec Batch Processing Guide



**August 31, 2020**

**Version 2.1**

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## Batch Manager Overview

Batch Manager allows you to ship a group of shipments at one time without user intervention. The shipments do not have to be similar to be part of a Batch.

**Batch:** With a Batch, you have to define each shipment attributes for each item in the batch.

**Distribution List:** With a Distribution List, you have a list of addresses with a single shipment attribute for all the addresses.

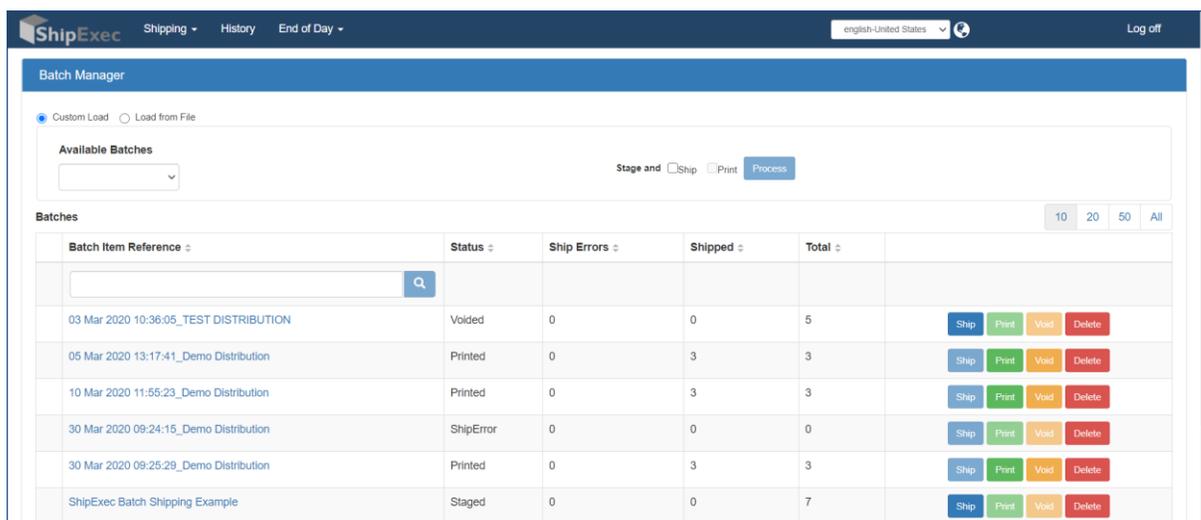
## Custom Load

A Custom Load means you are loading a Batch based on an external data source.

**Note:** Some systems refer to Custom Load as Wave Shipping because it's similar to a surge of shipping.

To create a custom load:

1. Open the *ShipExec Thin Client* application.



Batch Item Reference	Status	Ship Errors	Shipped	Total	
03 Mar 2020 10:36:05_TEST DISTRIBUTION	Voided	0	0	5	Ship Print Void Delete
05 Mar 2020 13:17:41_Demo Distribution	Printed	0	3	3	Ship Print Void Delete
10 Mar 2020 11:55:23_Demo Distribution	Printed	0	3	3	Ship Print Void Delete
30 Mar 2020 09:24:15_Demo Distribution	ShipError	0	0	0	Ship Print Void Delete
30 Mar 2020 09:25:29_Demo Distribution	Printed	0	3	3	Ship Print Void Delete
ShipExec Batch Shipping Example	Staged	0	0	7	Ship Print Void Delete

2. From the **Shipping** tab, click **Batch Manager**.
3. Click the **Custom Load** option button. (**Note:** If you are using Custom Load, a LoadBatch Business Rule on the Server or a PreBatchLoad Client Business Rule must be configured by your system administrator for you to use this option.)

**(Note:** Batch Reference is a key that notifies ShipExec which Batch you are loading from your system. The Batch Selection option you see in Step 4 depends on the GetBatchReferences Business Rule set up in Management Studio. This is configured by your system administrator.)

4. Do *one* of the following:
  - If your system shows the **Available Batches** drop-down list, select the batch you want.
  - If your system shows the **Enter Batch Reference** box, enter your Batch number in the provided box.
5. Select the actions you want to perform with this Batch:
  - Select the **Ship** check box if you want to stage and ship the Batch.
  - Select the **Print** check box if you want to stage and print the Batch.

*Note: If you do not select the Ship or Print check boxes, ShipExec will only stage the Batch.*

6. Click **Process**.  
Your processed Batch displays in the Batches panel. You can ship, print, void, or delete your Batch as needed.

## Load from File

Load Batch File lets you select multiple file types:

### **Custom:**

Uses a Business Rule that allows you to import a file in your format. This requires additional coding in ShipExec to allow you to read your own data.

### **CompleteView Shipping:**

This is a set csv format that allows for simple shipment options. You have the option to download this template.

### **ShipExec XML:**

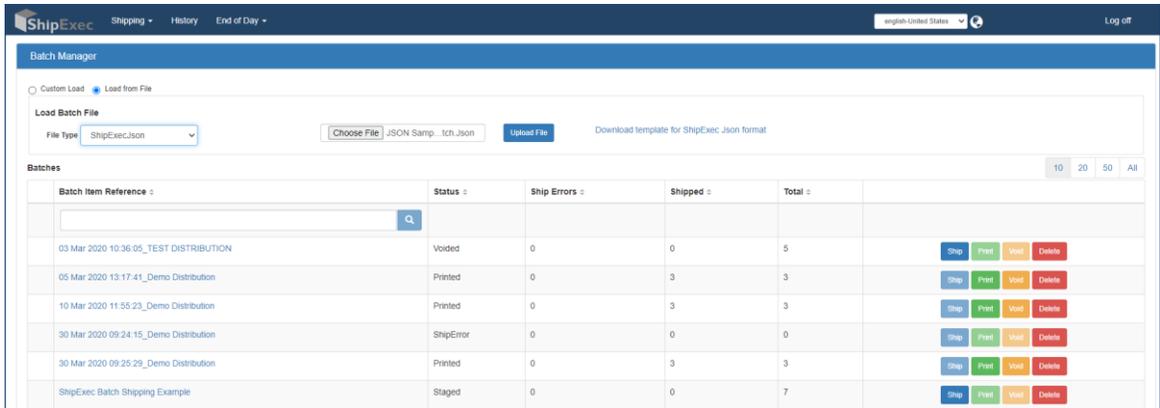
The XML format allows for complex shipments for multiple packages and allows for most fields to be populated. Allows for an XML formatted Batch List. You have the option to download this template.

### **ShipExec JSON:**

The JSON format allows for complex shipments for multiple packages and allows for most fields to be populated. Allows for a JSON formatted Batch List. You have the option to download this template.

To load a Batch from file:

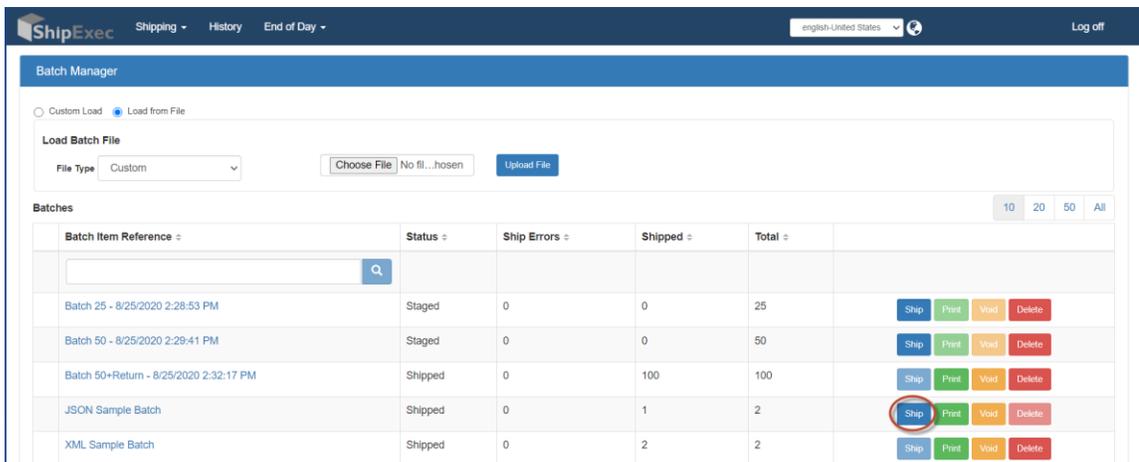
1. From the **Shipping** tab, select **Batch Manager**.



2. Select the **Load from File** option.
3. From the **File Type** drop-down list, select the file type you want to load. (**Note:** This illustration uses the *ShipExecJSON* file type.)
4. Click **Choose File**, navigate to your file location and click **Open**.
5. Click **Upload File**.
6. Browse through the **Batches** page to find your uploaded file. (**Note:** It will be on the last page).
7. Do any of the following:
  - Click the **Ship** button to ship the Batch.
  - Click the **Print** button to print the Batch.
  - Click the **Void** button to cancel the Batch.
  - Click the **Delete** button to remove the Batch.

## Shipping the Batch

1. In the **Batches** list, search for the Batch Item Reference you want to ship.



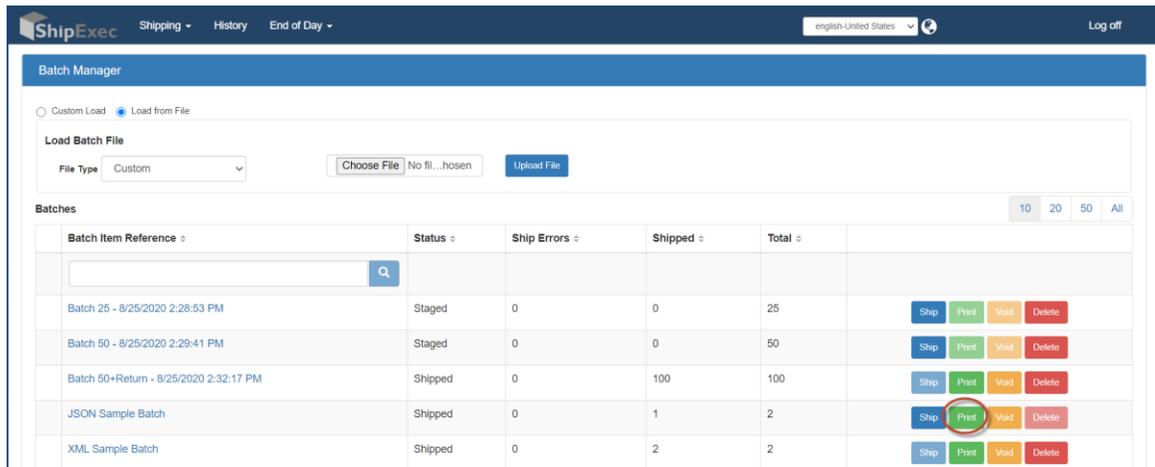
2. Click the **Ship** button for the Batch you want to ship.

**Note:** If you want to ship individual Batch items, refer to *Managing Individual Batch Shipments* on page 6.

**Note:** After you ship the Batch, the Print and Void buttons become available.

## Printing the Batch

1. In the **Batches** list, search for the Batch Item Reference you want to print.



The screenshot shows the ShipExec Batch Manager interface. At the top, there are navigation tabs for 'Shipping', 'History', and 'End of Day', along with a language dropdown set to 'english-United States' and a 'Log off' link. Below this is a 'Batch Manager' header with radio buttons for 'Custom Load' and 'Load from File'. The 'Load from File' section includes a 'Load Batch File' area with a 'File Type' dropdown set to 'Custom', a 'Choose File' button, and an 'Upload File' button. Below this is a 'Batches' table with a search bar and pagination controls (10, 20, 50, All). The table has columns for 'Batch Item Reference', 'Status', 'Ship Errors', 'Shipped', and 'Total'. The 'JSON Sample Batch' row is highlighted, and its 'Print' button is circled in red.

Batch Item Reference	Status	Ship Errors	Shipped	Total	
Batch 25 - 8/25/2020 2:28:53 PM	Staged	0	0	25	Ship Print Void Delete
Batch 50 - 8/25/2020 2:29:41 PM	Staged	0	0	50	Ship Print Void Delete
Batch 50+Return - 8/25/2020 2:32:17 PM	Shipped	0	100	100	Ship Print Void Delete
JSON Sample Batch	Shipped	0	1	2	Ship <b>Print</b> Void Delete
XML Sample Batch	Shipped	0	2	2	Ship Print Void Delete

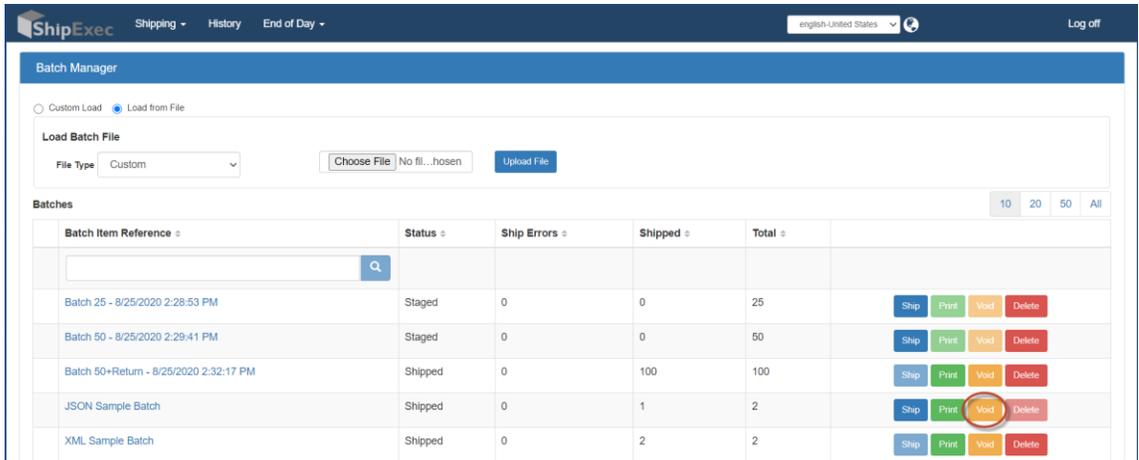
2. Click the **Print** button for the Batch you want to print.

**Note:** If you want to print individual Batch items, refer to *Managing Individual Batch Shipments* on page 6.

**Note:** To print a Batch, you must first ship the Batch, then return to the Batch screen to print.

## Voiding the Batch

1. In the **Batches** list, search for the Batch Item Reference you want to void.



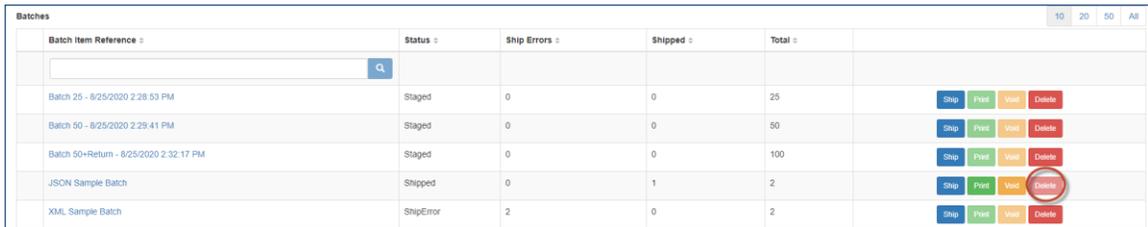
2. Click the **Void** button.
3. Click **OK** to confirm voiding the Batch.

**Note:** If you want to void individual Batch items, refer to *Managing Individual Batch Shipments* on page 6.

**Note:** You can only void a Batch after it has been shipped. You can ship a voided Batch again.

## Deleting the Batch

1. In the **Batches** list, search for the Batch Item Reference you want to delete.



2. Click the **Delete** button.
3. Click **OK** to confirm deleting the Batch.

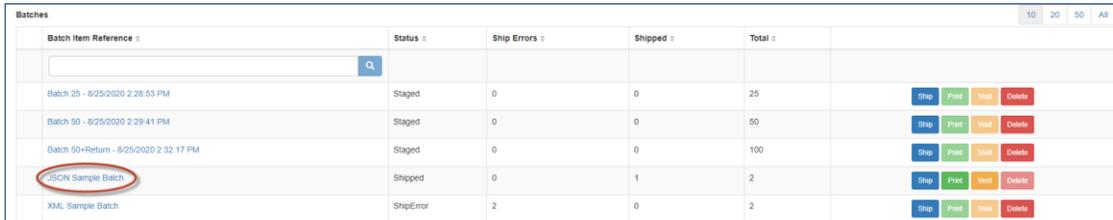
**Note:** If you want to delete individual Batch items, refer to *Managing Individual Batch Shipments* on page 6.

**Note:** You can delete a Batch before or after it ships. If you delete a shipped Batch, you can still print documents from the History page prior to the shipments being manifested.

## Managing Individual Batch Shipments

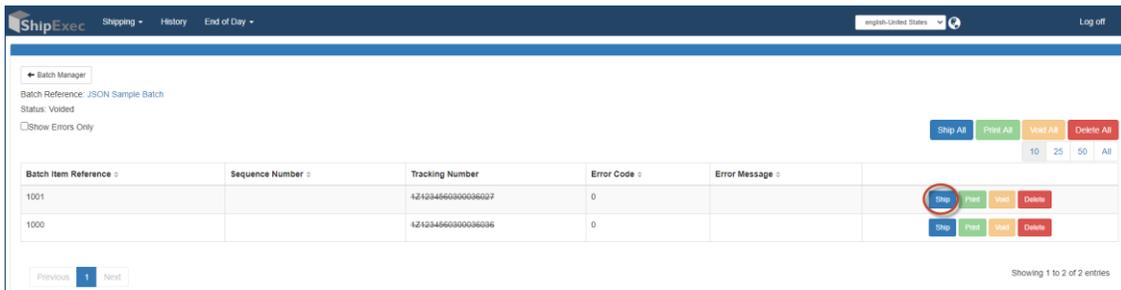
This section illustrates how to manage individual Batch Shipments using the Ship Batch example. You can manage individual Print, Void and Delete Batch items using the same approach.

1. In the **Batches** list, search for the Batch Item Reference you want to manage.



Batch Item Reference	Status	Ship Errors	Shipped	Total	
Batch 25 - 8/25/2020 2:28:53 PM	Staged	0	0	25	Ship Print Void Delete
Batch 50 - 8/25/2020 2:29:41 PM	Staged	0	0	50	Ship Print Void Delete
Batch 50+Return - 8/25/2020 2:32:17 PM	Staged	0	0	100	Ship Print Void Delete
<b>JSON Sample Batch</b>	Shipped	0	1	2	Ship Print Void Delete
XML Sample Batch	ShipError	2	0	2	Ship Print Void Delete

2. Click the Batch Reference name for which you want to manage the shipment.

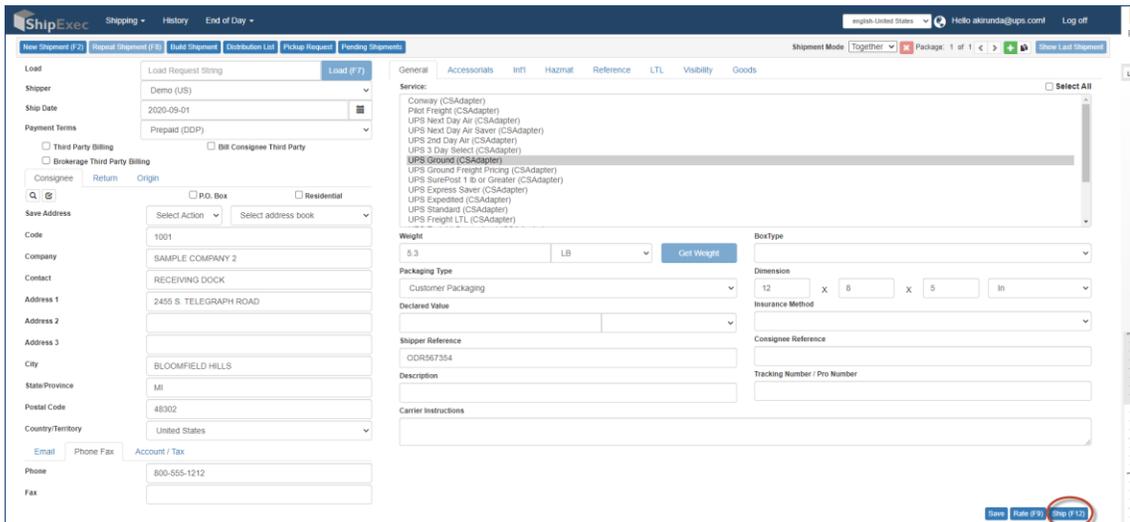


Batch Reference: JSON Sample Batch  
Status: Voided  
 Show Errors Only

Batch Item Reference	Sequence Number	Tracking Number	Error Code	Error Message	
1001		421234560300036027	0		Ship Print Void Delete
1000		421234560300036036	0		Ship Print Void Delete

Showing 1 to 2 of 2 entries

3. Click the **Ship** button. ShipExec opens the Shipping page.



ShipExec Shipping History End of Day

Shipper: Demo (US)  
Ship Date: 2020-09-01  
Payment Terms: Prepaid (DDP)

Consignee: RECEIVING DOCK  
Address 1: 2455 S. TELEGRAPH ROAD  
City: BLOOMFIELD HILLS  
State/Province: MI  
Postal Code: 48302  
Country/Territory: United States

Weight: 5.3 LB  
Packaging Type: Customer Packaging  
Declared Value: ODR567354  
Shipper Reference: ODR567354  
Description: ODR567354

Service: UPS Next Day Air (C/Adapter)  
UPS Next Day Air Saver (C/Adapter)  
UPS 2nd Day Air (C/Adapter)  
UPS 3 Day Select (C/Adapter)  
UPS Ground (C/Adapter)  
UPS SurePost 1 lb or Greater (C/Adapter)  
UPS Express Saver (C/Adapter)  
UPS Expedited (C/Adapter)  
UPS Standard (C/Adapter)  
UPS Freight LTL (C/Adapter)

Dimension: 12 x 6 x 5 in  
Insurance Method: [Select]

Tracking Number / Pro Number: [Field]

Buttons: Save Bulk (F8) **Ship (F1)**

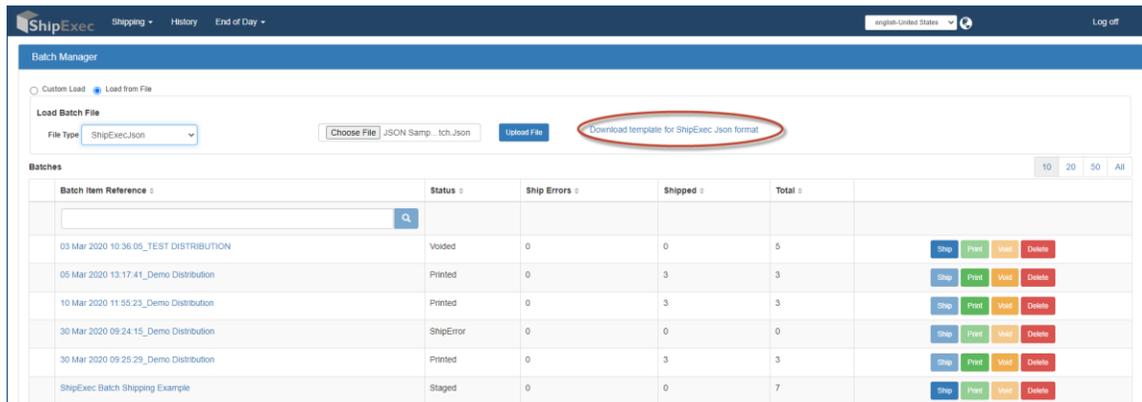
4. Make any necessary changes to the Batch, then click **Ship**.

**Note:** After you ship the Batch, the Print and Void buttons become available.

## Downloading a Batch Template

You can download the template for the file type you want, modify the content, and then upload the template to the Batch Manager. *See sample templates on pages 9 and 10.*

1. From the **Shipping** tab, select **Batch Manager**.



2. Select the **Load from File** option.
3. From the **File Type** drop-down list, select the file type you want to load. (**Note:** *This illustration uses the ShipExecJSON file type.*)
4. Click the *Download template for ShipExec xxx format* link.
5. Save the template in your desired location and modify the content as needed.
6. Click **Choose File**, navigate to your file location and click **Open**.
7. Click **Upload File**.

## Viewing Batch Ship Errors

1. In the **Batches** list, search for the Batch Item Reference for which you want to view errors.

ShipExec Batch Shipping Example	Staged	0	0	7	Ship Print Void Delete
ShipExec Batch Shipping Example	Staged	0	0	7	Ship Print Void Delete
Batch 25 - 6/10/2020 3:52:31 PM	Shipped	0	24	25	Ship Print Void Delete
Batch 25 - 7/8/2020 5:53:28 AM	Printed	0	25	25	Ship Print Void Delete
123	ShipError	2	0	2	Ship Print Void Delete

2. Click the Batch item for which you want to view shipping errors.

The screenshot shows the ShipExec Batch Manager interface. At the top, there are navigation links for 'Shipping', 'History', and 'End of Day'. The user is logged in as 'Hello aktrondaj@ups.com'. The main content area displays a table with the following columns: 'Batch Item Reference', 'Sequence Number', 'Tracking Number', 'Error Code', 'Error Message', and a set of action buttons. The table contains two rows, both with an error code of '220' and the message 'Sequence contains no elements'. The 'Error Message' cell for the first row is circled in red. Action buttons for each row include 'Ship', 'Print', 'View', and 'Delete'. A 'Previous' button is visible at the bottom left, and a 'Showing 1 to 2 of 2 entries' indicator is at the bottom right.

Batch Item Reference	Sequence Number	Tracking Number	Error Code	Error Message	Ship	Print	View	Delete
DE001			220	Sequence contains no elements	Ship	Print	View	Delete
DE002			220	Sequence contains no elements	Ship	Print	View	Delete

- Review the ship error message. For example, “Sequence contains no elements” means that some of the data fields are missing. You can fix the error by clicking the **Ship** button and fixing the error in the Shipment page.

# Appendix A

## Sample ShipExec Complete View Shipping Template

Label Type	Ship-From First Name	Ship-From Last Name	Ship-From Phone	Ship-From Addr Line1	Ship-From Addr Line2	Ship-From Addr Line3	Ship-From City	Ship-From State	Ship-From Postal Code	OnCallAir Earliest Time Ready	OnCallAir Latest Time Ready	OnCallAir Suite/RoomID	OnCallAir FloorID	OnCallAir Location	OnCallAir Contact Name	OnCallAir Contact Phone	E-mail Sender	E-mail Address
GIF	,UPS	,4408266559	,17940	Englewood Drive,,	Middleburg Heights,OH,44130,US,,,,,,,,,,,,,	First,Roxi,4408266559,7900 Kennard Road,Suite 3,,	Lodi,OH,44254,US,,,,,,,,,,,,,	Shipper,UPS	Acct,,,,,									
GIF	,UPS	,4408266559	,17940	Englewood Drive,,	Middleburg Heights,OH,44130,US,,,,,,,,,,,,,	Second,Riot,4408266559,7900 Kennard Road,Suite 3,,	Lodi,OH,44254,US,,,,,,,,,,,,,	Shipper,UPS	Acct,,,,,									
GIF	,UPS	,4408266559	,17940	Englewood Drive,,	Middleburg Heights,OH,44130,US,,,,,,,,,,,,,	Third,Rowdy,4408266559,7900 Kennard Road,Suite 3,,	Lodi,OH,44254,US,,,,,,,,,,,,,	Shipper,UPS	Acct,,,,,									
GIF	,UPS	,4408266559	,17940	Englewood Drive,,	Middleburg Heights,OH,44130,US,,,,,,,,,,,,,	Fourth,Ruckus,4408266559,7900 Kennard Road,Suite 3,,	Lodi,OH,44254,US,,,,,,,,,,,,,	Shipper,UPS	Acct,,,,,									
GIF	,UPS	,4408266559	,17940	Englewood Drive,,	Middleburg Heights,OH,44130,US,,,,,,,,,,,,,	Fifth,Reisling,4408266559,7900 Kennard Road,Suite 3,,	Lodi,OH,44254,US,,,,,,,,,,,,,	Shipper,UPS	Acct,,,,,									
GIF	,UPS	,4408266559	,17940	Englewood Drive,,	Middleburg Heights,OH,44130,US,,,,,,,,,,,,,	Sixth,Skipper,4408266559,7900 Kennard Road,Suite 3,,	Lodi,OH,44254,US,,,,,,,,,,,,,	Shipper,UPS	Acct,,,,,									
GIF	,UPS	,4408266559	,17940	Englewood Drive,,	Middleburg Heights,OH,44130,US,,,,,,,,,,,,,	Seventh,Boo,4408266559,7900 Kennard Road,Suite 3,,	Lodi,OH,44254,US,,,,,,,,,,,,,	Shipper,UPS	Acct,,,,,									

# Appendix B

## Sample ShipExec XML Template

```
<?xml version="1.0" encoding="UTF-8"?>
<BatchRequest>
  <BatchReference>Order 101</BatchReference>
  <BatchItems>
    <BatchItem>
      <BatchItemReference>1001</BatchItemReference>
      <BatchReference>Order 101</BatchReference>
      <CreateDate>04/03/2019</CreateDate>
      <ShipmentRequest>
        ...
      </ShipmentRequest>
    </BatchItem>
  </BatchItems>
</ProcessBatchSequential />
</BatchRequest>
```

## Appendix C

### Sample ShipExec JSON Template

```
{
  "BatchReference": "Order 101",
  "Status": "Staged",
  "BatchItems": [{
    "BatchItemReference": 1001,
    "BatchReference": "Order 101",
    "CreateDate": "04/03/2019"
  },
  {
    "BatchItemReference": 1002,
    "BatchReference": "Order 101",
    "CreateDate": "04/03/2019"
  }
]
}
```