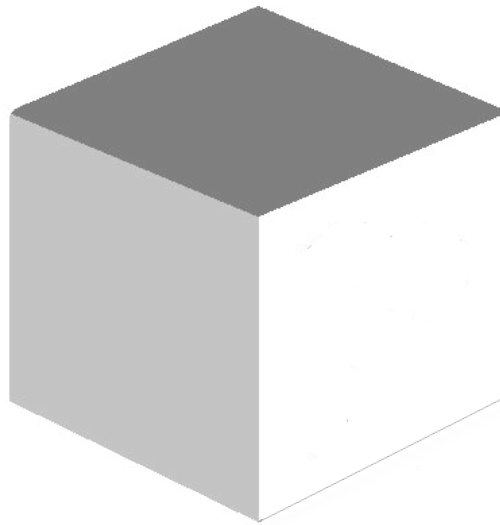


ShipExec New Site Configuration Quick Start Guide



July 15, 2020

Version 2.1

Table of Contents

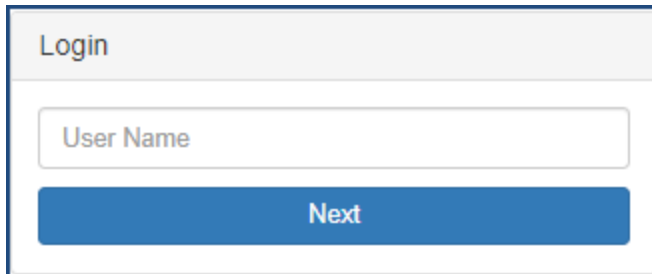
- Introduction 1
 - Logging on to Management Studio 1
- Adding a New Shipper 2
- Configuring a UPS Adapter Registration 5
- Adding a New Site 9
- Adding Users to a Site 14
- Importing Users to a Site 18

Introduction

The *ShipExec New Site Configuration Quick Start Guide* is intended for system, enterprise and company administrators. You must have a role other than *user* to access the site. This quick start guide describes a basic site configuration. If you need in-depth site configuration, refer to your *ShipExec Management Studio User Guide*.

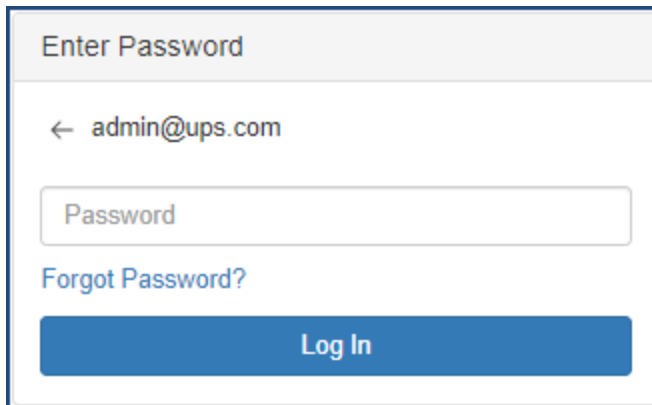
Logging on to Management Studio

1. Click the ShipExec Management Studio URL link sent to you by your company administrator. The Management Studio Login page displays.



The screenshot shows a login form with a title bar labeled "Login". Below the title bar is a text input field with the placeholder text "User Name". Below the input field is a blue button with the text "Next".

2. Type your email ID in the **Email ID** box.
3. Click **Next**.



The screenshot shows a password entry form with a title bar labeled "Enter Password". Below the title bar, the email address "admin@ups.com" is displayed with a back arrow. Below this is a text input field with the placeholder text "Password". Below the input field is a link labeled "Forgot Password?". At the bottom is a blue button with the text "Log In".

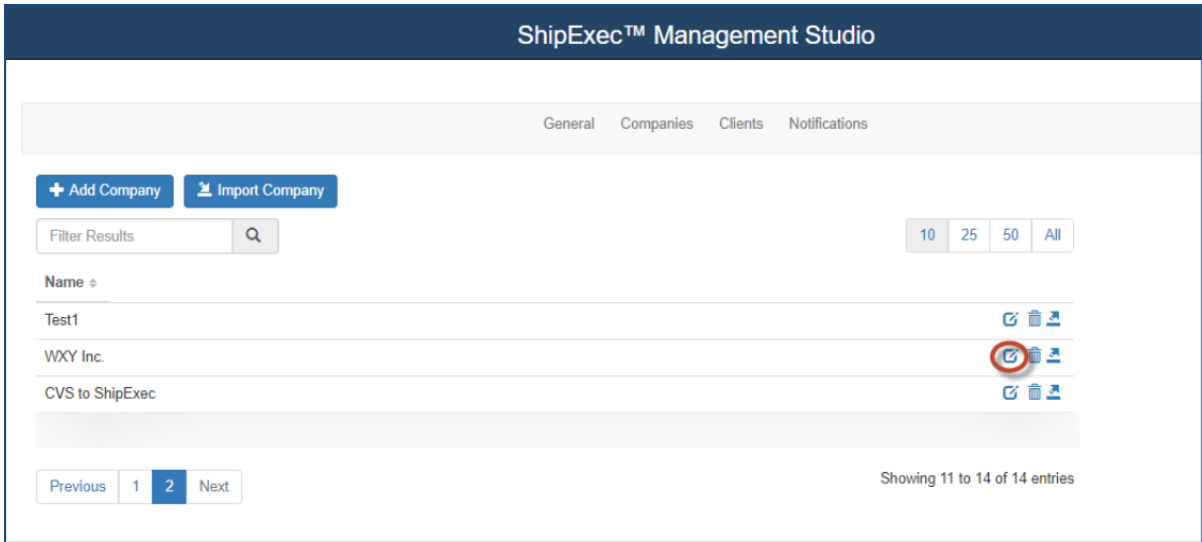
4. Type your password in the **Password** box.
5. Click **Log In**.


Adding a New Shipper

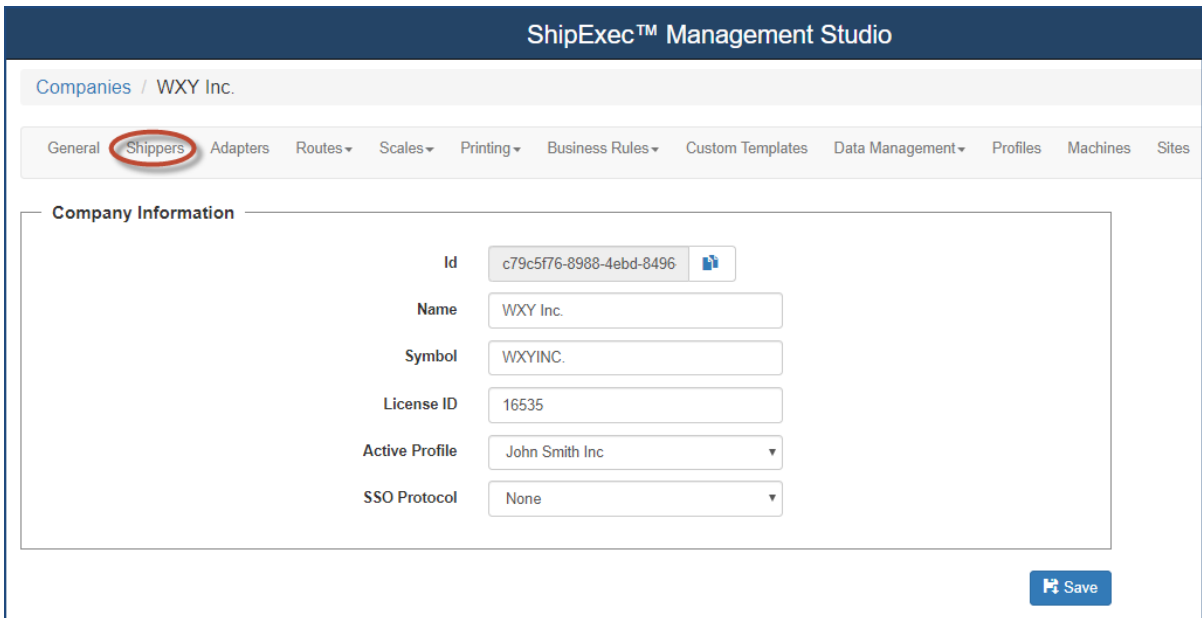
This topic describes how to add a new shipper to an existing company. You must have a shipper in order to configure adapters and perform any shipping functions. You will need a shipper for every account from which you will be shipping.

Note: Upon logging on, enterprise and system administrators are presented with a list of companies to choose from. Company administrators do not have this privilege.

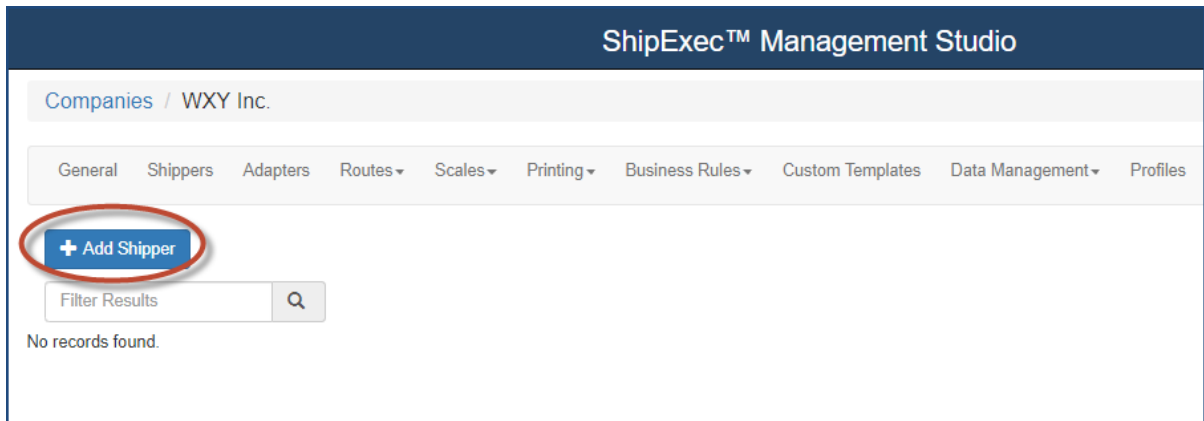
1. On the ShipExec Management Studio home page, click **Companies**. The Companies page displays.



2. Click the  icon for the company to which you want to add a shipper. The Company Information page displays.



3. Click the **Shippers** tab. The Company page displays.



4. Click **Add Shipper**. The Add/Update Shipper page displays.

Add/ Update Shipper x

Shipper

Name

Symbol

Company

Contact

Address 1

Address 2

Address 3

City

State/Province

Postal Code

Country/ Territory

Phone

Email Address

Optional

Site

Shipper/Account. This is the name that displays in the application.

Unique ID used to designate this address. Symbol is the name business rules use to specify to the shipper.

If you are adding a shipper and want to restrict the shipper to a specific site that is not yet available in the drop-down list, you can update this shipper later when the site is available, and restrict the shipper to that site.

Note: Name and Symbol are the only required fields.

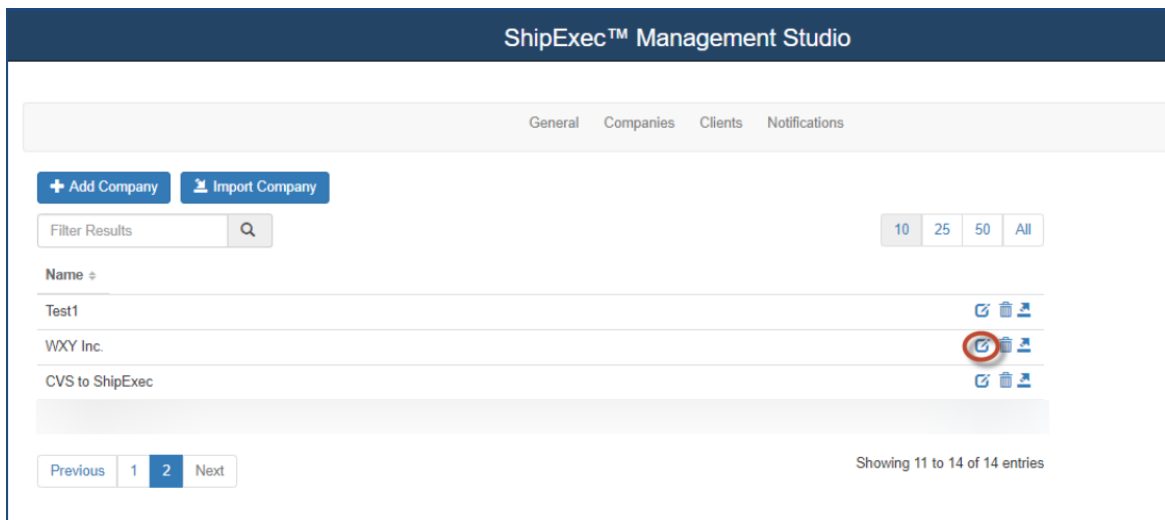
5. Complete the **Name** and **Symbol** boxes.
6. Click **Save**.


Configuring a UPS Adapter Registration

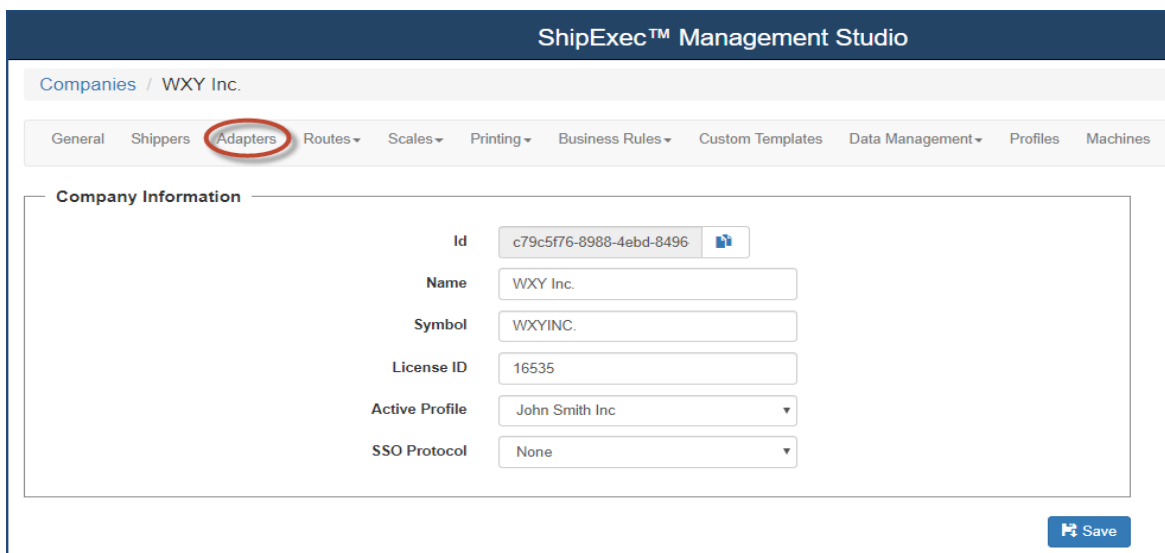
This topic describes how to configure the UPS Adapter for a new shipper. The UPS Adapter provides a simple way of connecting to the UPS Shipping API. The UPS Adapter is set up based on your shipping requirements.

Note: Upon logging on, enterprise and system administrators are presented with a list of companies to choose from. Company administrators do not have this privilege.

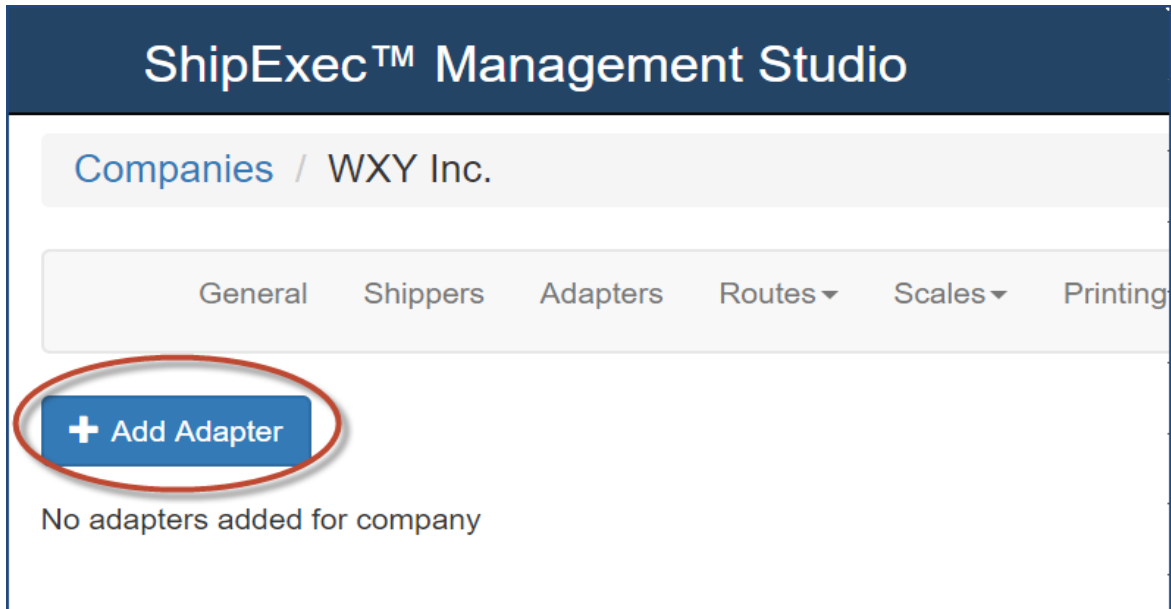
1. On the ShipExec Management Studio home page, click **Companies**. The Companies page displays.



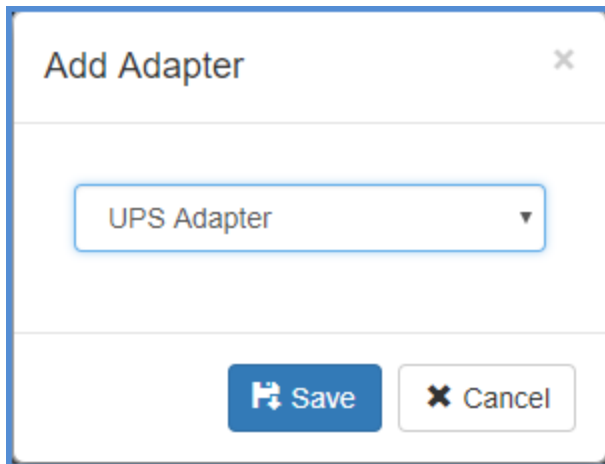
2. Click the  icon for the company to which you want to add a UPS Adapter. The Company Information page displays.



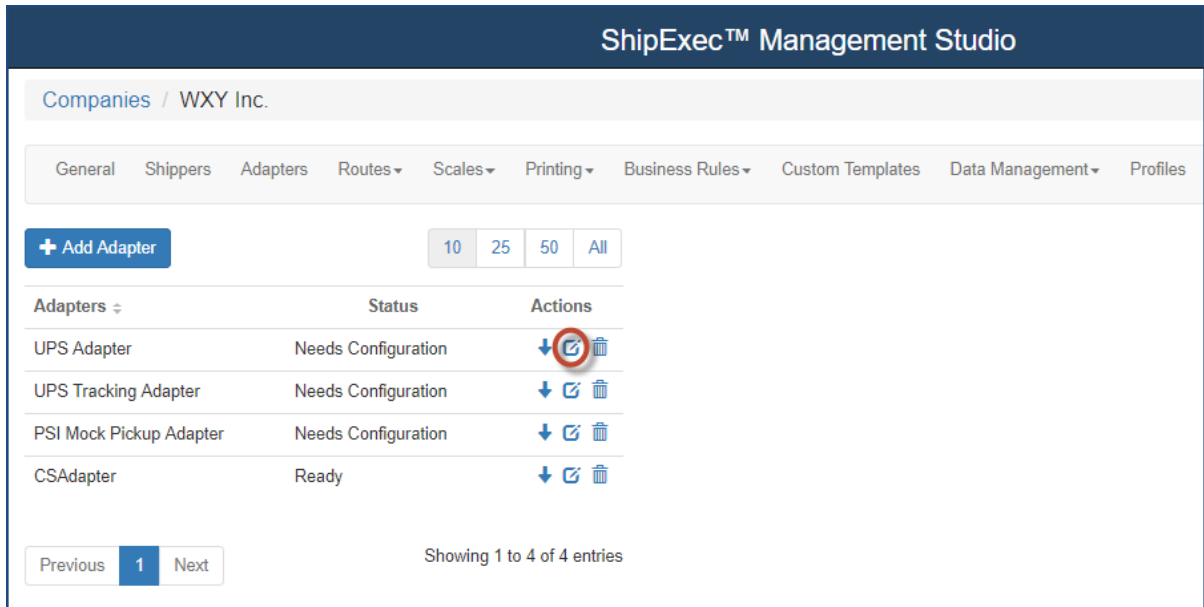
3. Click the **Adapters** tab. The Add Adapter page displays.




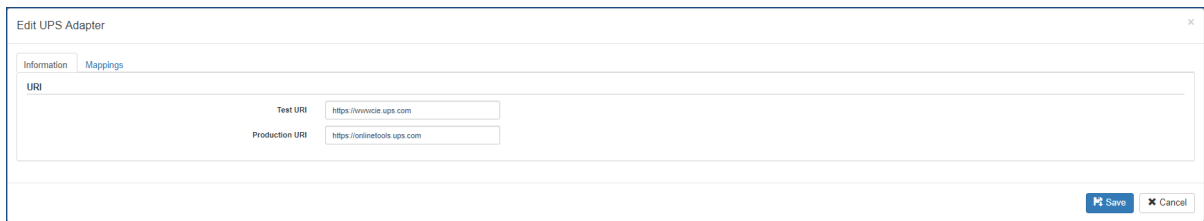
4. Do *one* of the following:
 - If you already have the UPS Adapter in your drop-down list, proceed to step 7.
 - If you do not have the UPS Adapter, click **Add Adapter**. The Add Adapter dialog box displays.



5. Select UPS Adapter from the drop-down list.
6. Click **Save**. The UPS Adapter page displays.

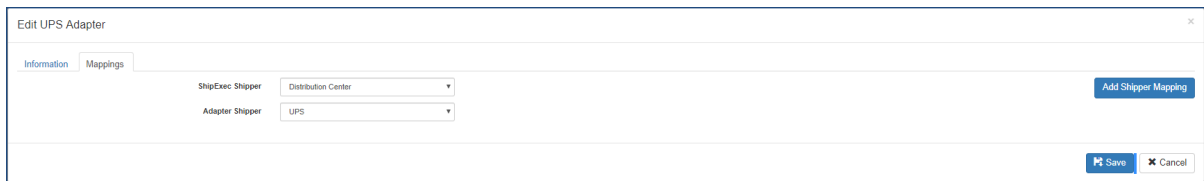


7. Click the  icon to modify the Adapter. The Edit UPS Adapter dialog box displays.



8. Configure the **Test** and **Production URIs**. *Note: Do not change these URIs without permission from the UPS Support team.*

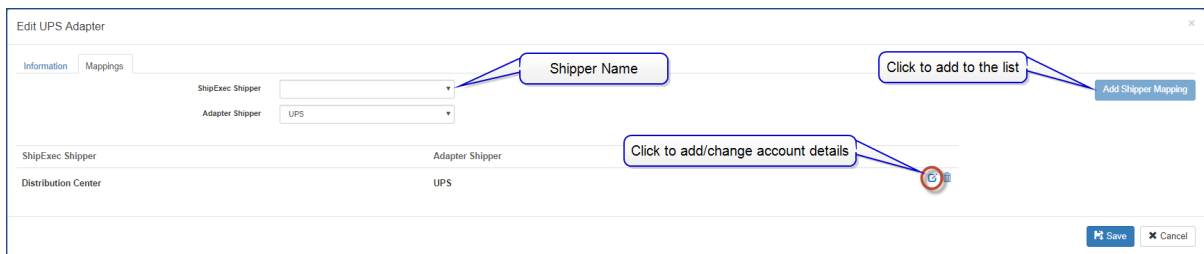
9. Click the **Mappings** tab. The Mappings dialog box displays.




10. Select the shipper from the **ShipExec Shipper** drop-down list.

11. Select UPS from the **Adapter Shipper** drop-down list.

12. Click **Add Shipper Mapping**. The Edit UPS Adapter dialog box displays.



- Click the  icon to edit the shipper information. The Edit Shipper Mapping page displays.










The screenshot shows the 'Edit Shipper Mapping' form with the following fields and callouts:

- login** section: Access Key, Password, User name. Callout: "This information must match your UPS.com account. The account number must be assigned to the user ID being used. Please consult with your UPS account executive or the ShipExec support team regarding the correct access key, username, and password."
- Account Number field.
- Enable Negotiated Rates:
- Label Format: dropdown menu set to ZPL. Callout: "ZPL should be the default unless indicated otherwise by UPS."
- Enable Logging:
- Mail Innovations Cost Center: Mail Innovations Cost Center
- Ship Request Option: dropdown menu set to nonvalidate. Callout: "This should be set to nonvalidate."
- Tax Identification Number: Tax Identification Number
- Test Mode: . Callout: "Set the system into production and remove the sample watermark."


Buttons: Save, Cancel

- Enter the mapping information in the provided boxes.
- Click **Save**.
- If necessary, repeat steps 10 - 15 for additional shippers.
- Click **Save**. Management Studio displays a *Ready* status.

The screenshot shows the 'ShipExec™ Management Studio' interface for 'Companies / WXY Inc.'. The 'Adapters' tab is selected. A table lists the adapters:


Name	Status	Actions
UPS Adapter	Ready	  
UPS Tracking Adapter	Needs Configuration	  
CSAdapter	Needs Configuration	  

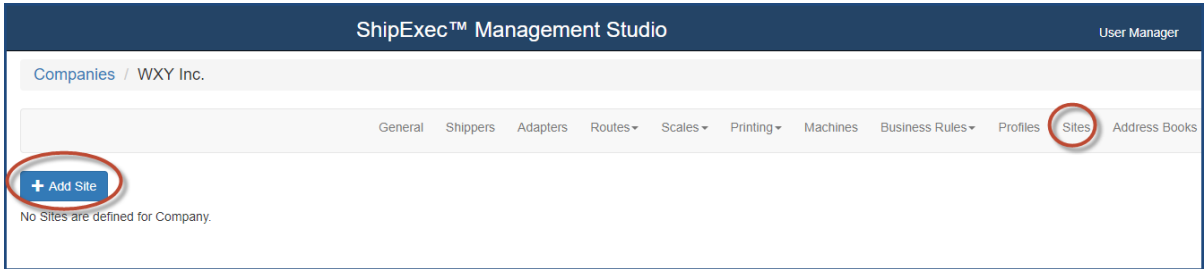
Showing 1 to 3 of 3 entries

- Click the  icon to update the Adapter information. The *Adapter Information Updated Successfully* message displays at the bottom of the page.

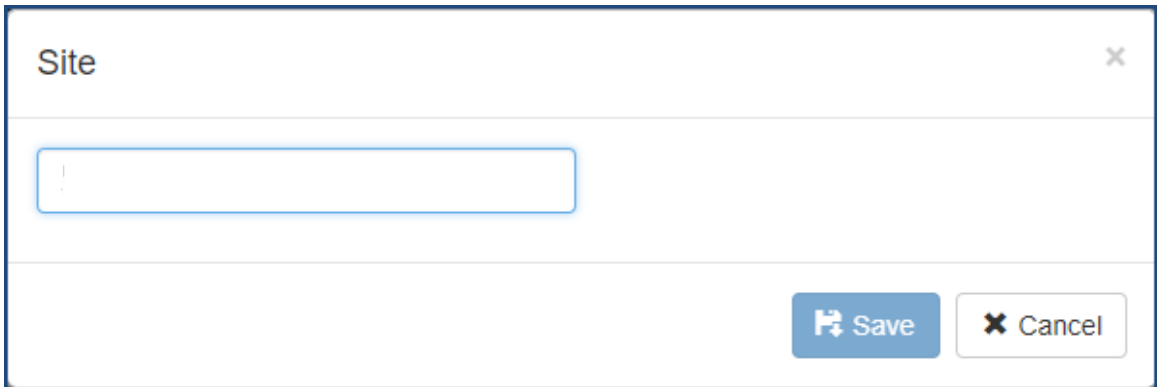
Adding a New Site

This topic describes how to add a new site to a company. A site allows you to create a second level of security and configuration for a company.

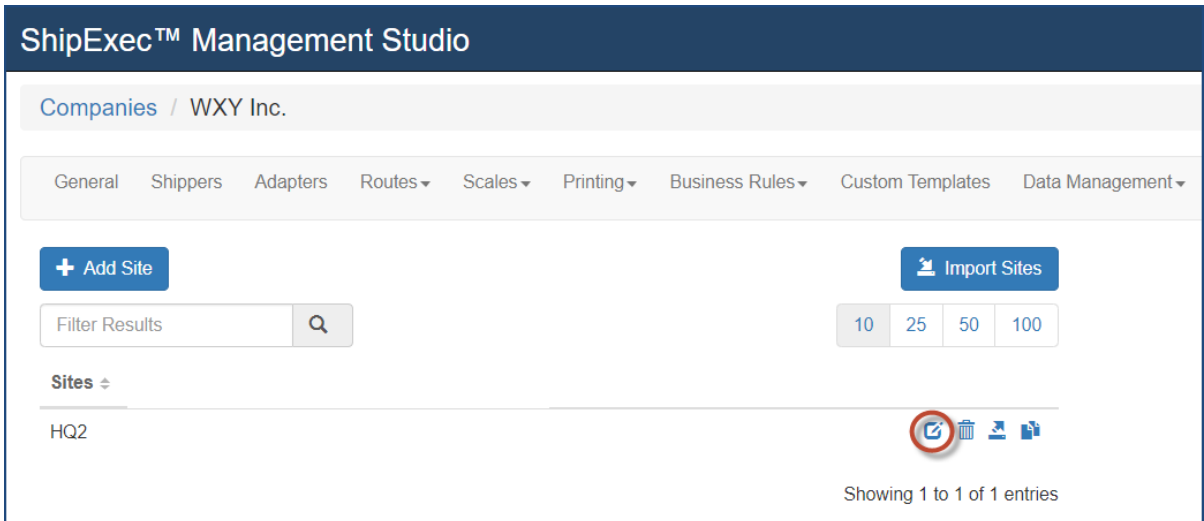
1. If you are an enterprise administrator, click the  icon for the company to which you want to add a site; otherwise, proceed to step 2.
2. Click the **Sites** tab. The Site page displays.




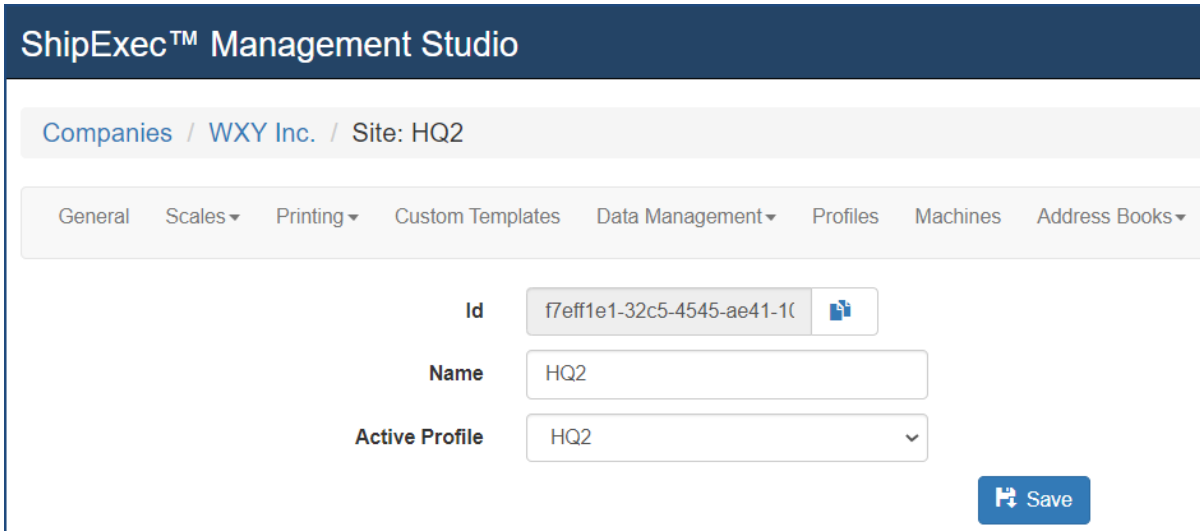
3. Click **Add Site**. The Site dialog box opens.



4. Type the site name in the **Site** box, then click **Save**. The Site page displays.



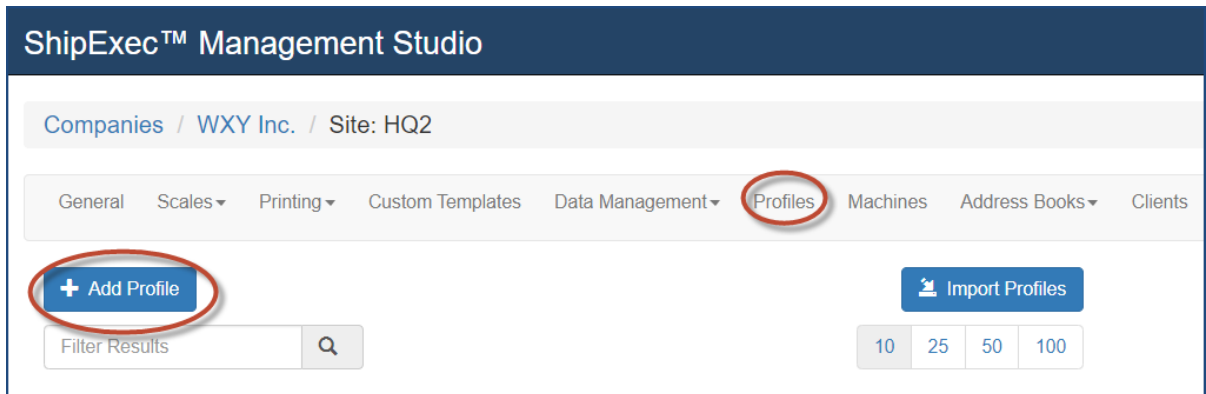
5. Click the site  to manage the site. The Site page displays.



The screenshot shows the 'ShipExec™ Management Studio' interface. At the top, there is a breadcrumb trail: 'Companies / WXY Inc. / Site: HQ2'. Below this is a navigation menu with items: 'General', 'Scales', 'Printing', 'Custom Templates', 'Data Management', 'Profiles', 'Machines', and 'Address Books'. The main content area contains three fields: 'Id' with the value 'f7eff1e1-32c5-4545-ae41-1c' and a copy icon, 'Name' with the value 'HQ2', and 'Active Profile' with a dropdown menu showing 'HQ2'. A blue 'Save' button is located at the bottom right.

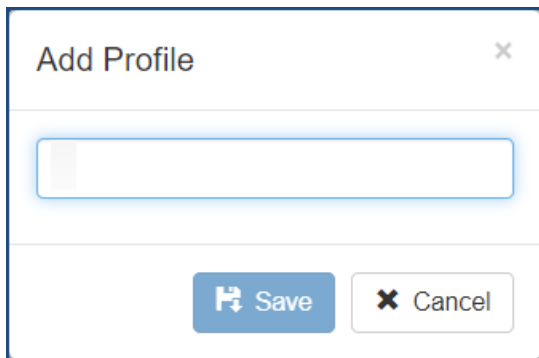
6. Click the **Profiles** tab. The Add Profiles page displays.

(Note: The configuration in the next few steps is for a basic profile configuration. If you want to perform a complete profile configuration, refer to the ShipExec Management Studio User Guide.)



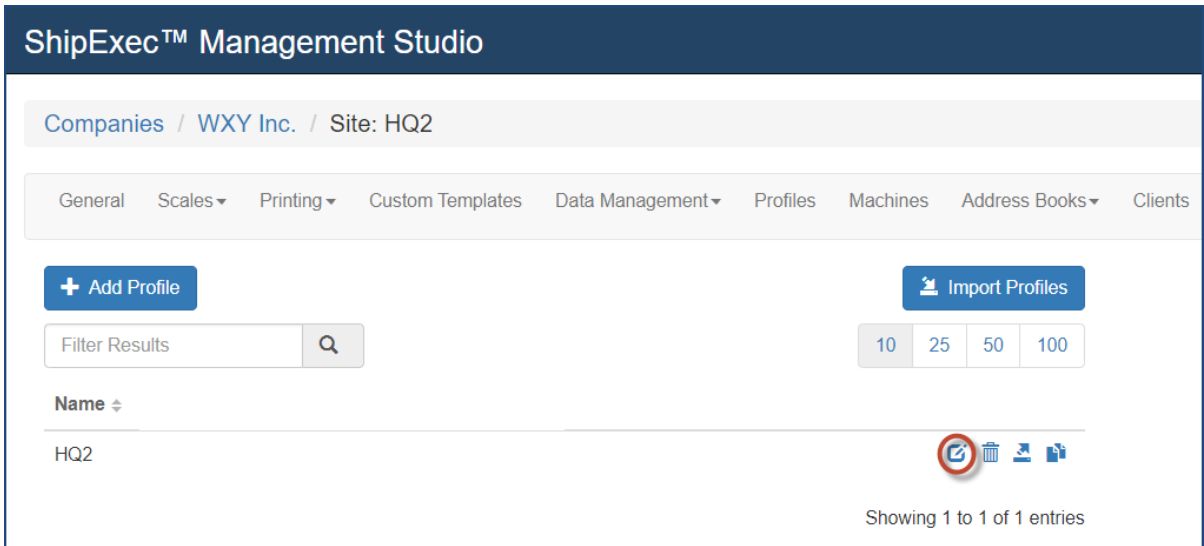
The screenshot shows the 'ShipExec™ Management Studio' interface with the 'Profiles' tab selected. The breadcrumb trail is 'Companies / WXY Inc. / Site: HQ2'. The navigation menu includes 'General', 'Scales', 'Printing', 'Custom Templates', 'Data Management', 'Profiles' (circled in red), 'Machines', 'Address Books', and 'Clients'. Below the navigation menu, there is a '+ Add Profile' button (circled in red) and an 'Import Profiles' button. A search bar labeled 'Filter Results' is on the left, and a pagination control with options '10', '25', '50', and '100' is on the right.

7. Click **Add Profile**. The Add Profile dialog box displays.

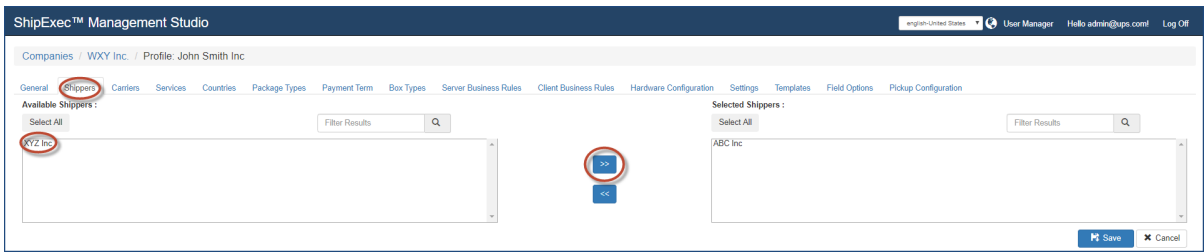



The screenshot shows the 'Add Profile' dialog box. It has a title bar with 'Add Profile' and a close button (X). Below the title bar is a text input field. At the bottom of the dialog, there are two buttons: 'Save' and 'Cancel'.

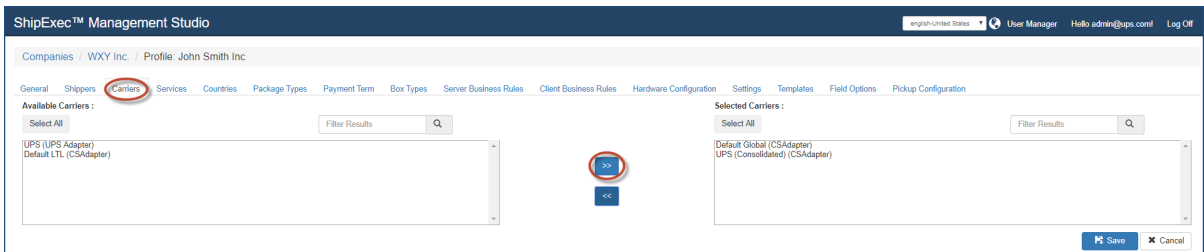
8. Type the profile name in the provided box and click **Save**. The Profile page displays.




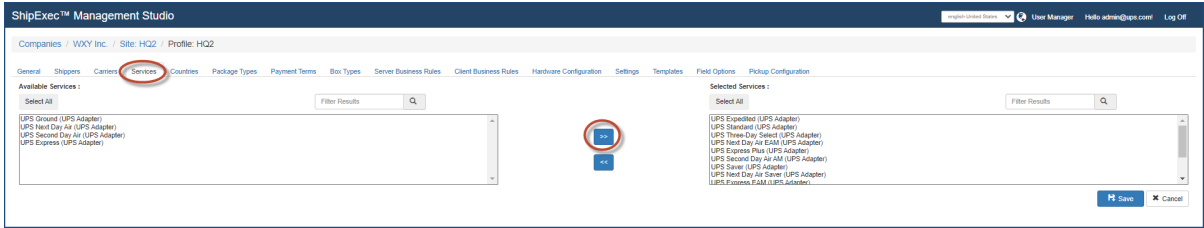
9. Click the  icon to edit the profile.



10. Click the **Shippers** tab.
11. In the **Available Shippers** panel, select the shipper(s) you want to add to this profile and click the  icon to move the shipper(s) to the **Selected Shippers** panel. (*Note: Shippers that appear in this list at the site-level profile are shippers for whom the Site option was selected in the Add/Update Shipper dialog box.*)
12. Click the **Carriers** tab.

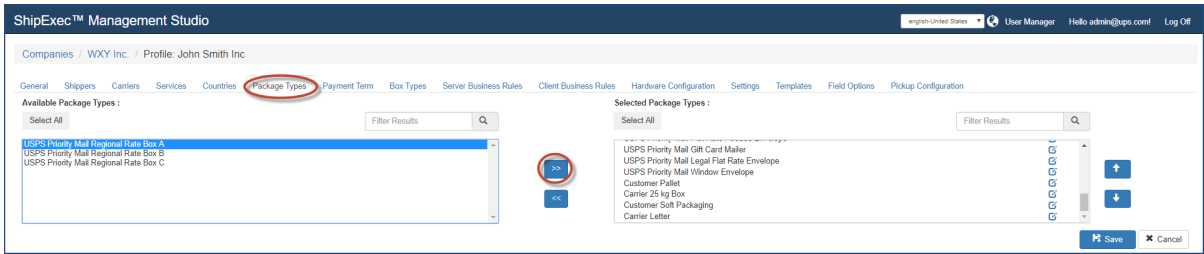



13. In the **Available Carriers** panel, select the carrier(s) you want to add to this profile and click the  icon to move the carrier(s) to the **Selected Carriers** panel.
14. Click the **Services** tab.



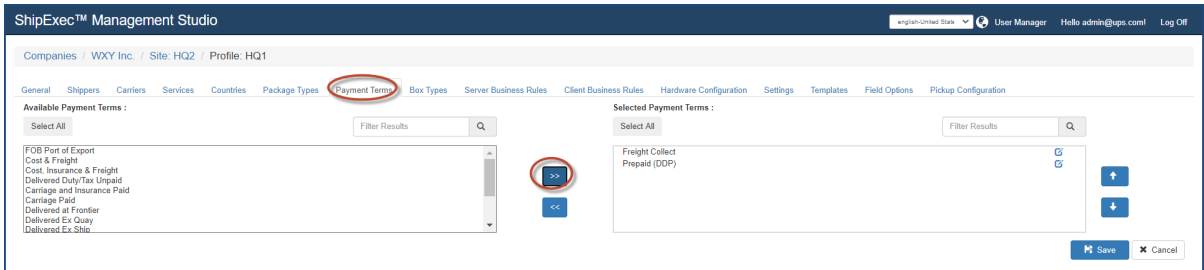
15. In the **Available Services** panel, select the service(s) you want to add to this profile and click the **>>** icon to move the service(s) to the **Selected Services** panel.


16. Click the **Package Types** tab.



17. In the **Available Package Types** panel, select the package type(s) you want to add to this profile, then click the icon to move the package types to the **Selected Package Types** panel. **(Note: Use the up and down arrows to rearrange the package types hierarchy. Click the  icon to update the package type with a custom name.)**

18. Click the **Payment Terms** tab.



19. In the **Available Payment Terms** panel, select the payment term(s) you want to add to this profile, then click the icon to move the payment terms to the **Selected Payment Terms** panel. **(Note: Use the up and down arrows to rearrange the payment terms hierarchy. Click the  icon to update the payment terms with a custom name.)**

20. Click **Save**. The Sites page displays.

ShipExec™ Management Studio

Companies / WXY Inc. / Site: HQ2

General Scales Printing Custom Templates Data Management Profiles Machines Address Books

Id f7eff1e1-32c5-4545-ae41-10
Name HQ2
Active Profile HQ2

Save

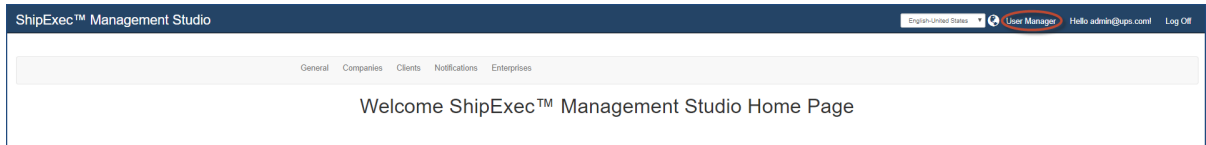
21. Click the **General** tab.
22. From the **Active Profile** drop-down list, select the profile to which you want to assign the site.
23. Click **Save**.

Adding Users to a Site

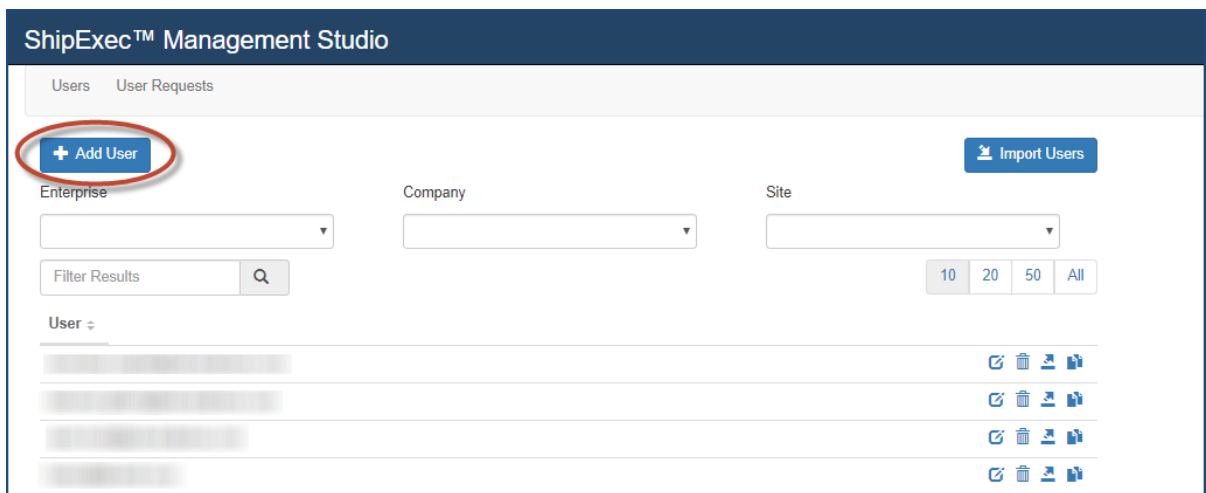
This topic describes how to add a user, typically, the company administrator, to a site.

Note: You can only create, modify, and delete users at the same or lower level as your role.

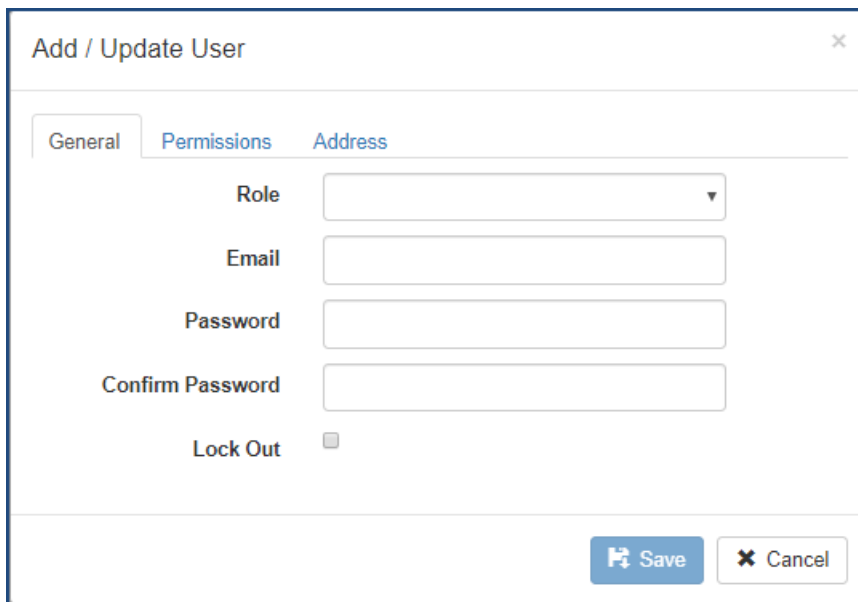
1. On the ShipExec Management Studio home page, click **User Manager** in the upper right corner.



The User Manager page displays.



2. Click **Add User**. The Add/Update User dialog box displays.



3. From the **Role** drop-down list, select the user's role. Management Studio displays additional fields depending on the role you select.

The screenshot shows a dialog box titled "Add / Update User" with a close button (X) in the top right corner. The dialog has three tabs: "General", "Permissions", and "Address". The "General" tab is selected. The fields are as follows:

Field	Value
Role	Site Administrator
Company	WXY Inc.
Site	HQ2
Profile	John Smith Inc
Email	johndoe@wxy.com
Password
Confirm Password
Lock Out	<input type="checkbox"/>

At the bottom right, there are two buttons: "Save" (with a floppy disk icon) and "Cancel" (with an X icon).

4. From the **Company** drop-down list, select the company with which you want to associate the user. (You must select a company for all roles except administrator and enterprise administrator.)
5. From the **Site** drop-down list, select the site you want to associate with the user. (For the user role, site is optional.)
6. From the **Profile** drop-down list, select the user profile (Optional).
7. Type the user's email address in the **Email** box.
8. Type the user's password in the **Password** box. (Password must have a minimum of 6 characters, 1 capital letter, and 1 non-alpha/numeric character.)
9. Type the user's password again in the **Confirm Password** box.
10. Click the **Permissions** tab.

The screenshot shows a dialog box titled "Add / Update User" with a close button (X) in the top right corner. Below the title bar are three tabs: "General", "Permissions", and "Address". The "Permissions" tab is selected. Inside the dialog, there is a "Select All" checkbox. Below it is a list of 14 permissions, each with an unchecked checkbox:

- Can view Address Book
- Can view Batch Manager
- Can view Closeout
- Can view Create Batch
- Can view Distribution List
- Can view Group Manager
- Can view History
- Can view Manage Data
- Can view Manifest Documents
- Can view Pickup Request
- Can view Scan and Ship
- Can view Shipping and Rating
- Can view Transmit

At the bottom right of the dialog are two buttons: "Save" (with a floppy disk icon) and "Cancel" (with an X icon).

11. Select the check boxes for the permissions you want to grant the user.
12. Click the **Address** tab.
13. Complete the user's address.
14. Click the **Custom Data** vertical tab.

Add / Update User ×

General Permissions **Address**

Address

Add Custom Data

Please enter key value for custom data.

Key	Value	
<input type="text"/>	<input type="text"/>	×

Custom Data

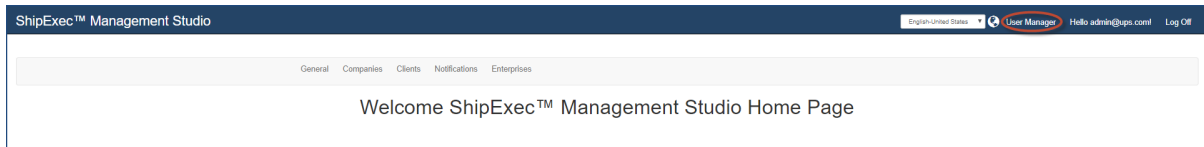
Save **Cancel**

15. Click the **Add Custom Data** button.
16. Complete the **Key** and **Value** boxes.
17. Click **Save**.

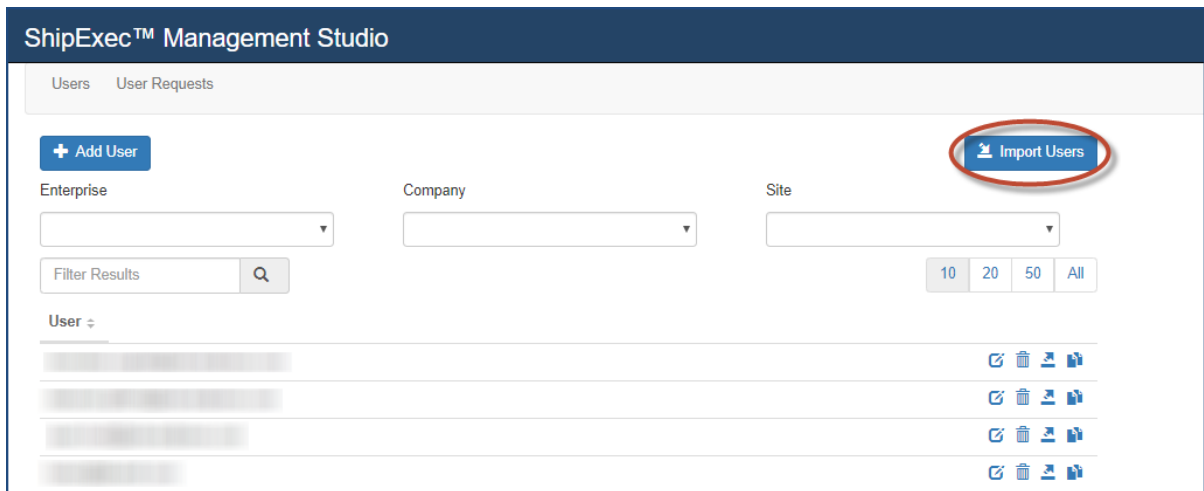
Importing Users to a Site

This topic describes how to import users into Management Studio for a new site.

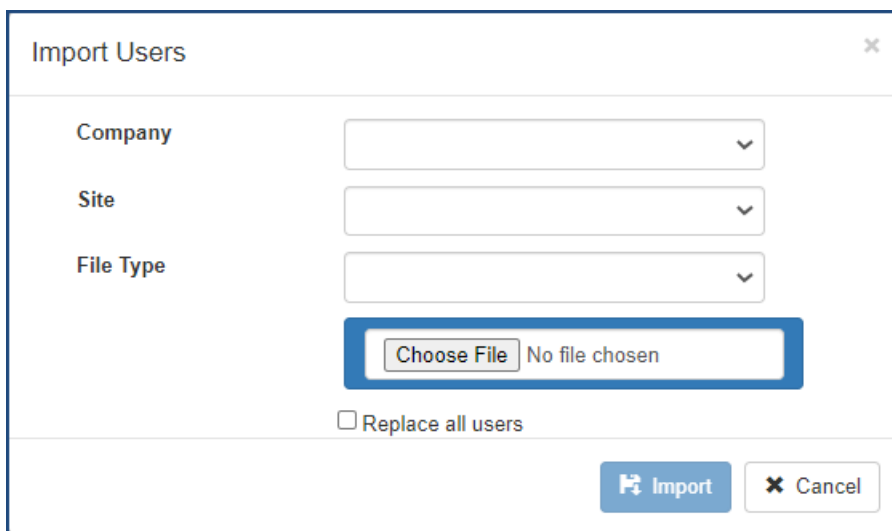
1. On the ShipExec Management Studio home page, click **User Manager** in the upper right corner.



The User Manager page displays.



2. Click **Import Users**. The Import Users dialog box displays.



3. Select the company name from the **Company** drop-down list.
4. Select the site name from the **Site** drop-down list.
5. Select the file type from the **File Type** drop-down list.

6. Click **Choose File**, navigate to your user's location and click **Open**.
7. Do *one* of the following:
 - If you leave the **Replace all users** check box unselected, ShipExec will leave all existing users intact and will only add new users in the input file not found in ShipExec.
 - If you select the **Replace all users** check box, the following will happen:
 - ShipExec will remove any existing users that are not included in the input file.
 - ShipExec will update any existing users in the input file, but their passwords and roles will remain the same.
 - ShipExec will add any new users contained in the input file.
8. Click **Import**.