![ShipExec]
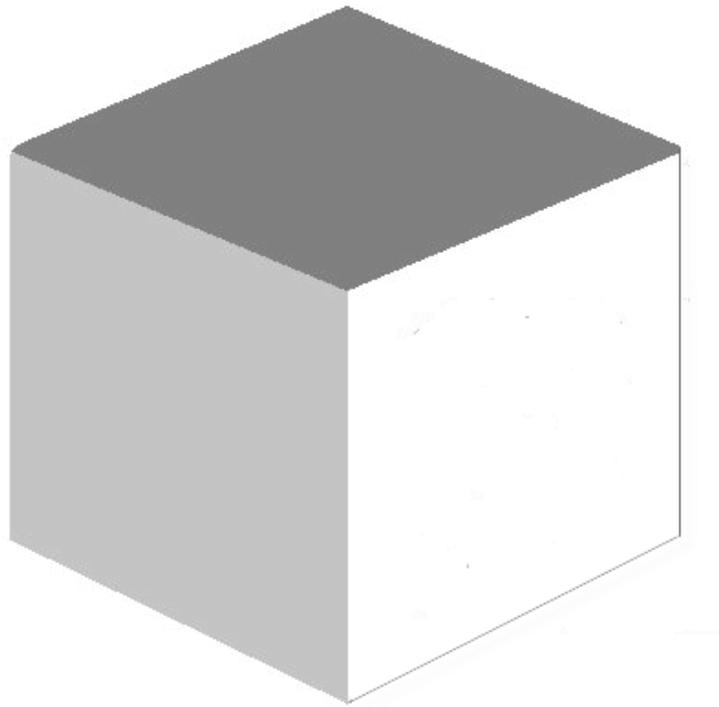
ShipExec Batch Processing Guide

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.
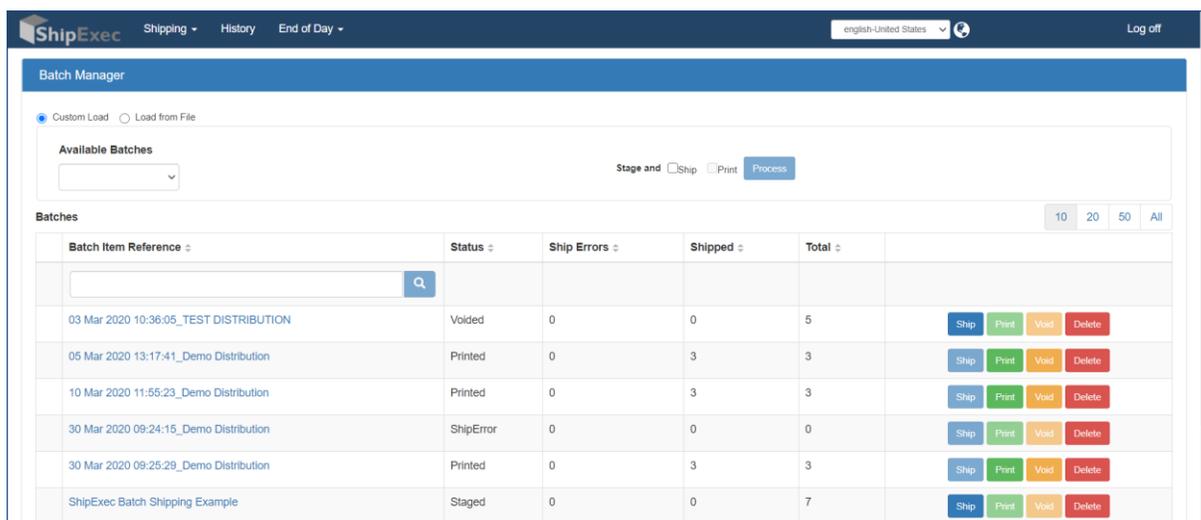
Custom Load

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.

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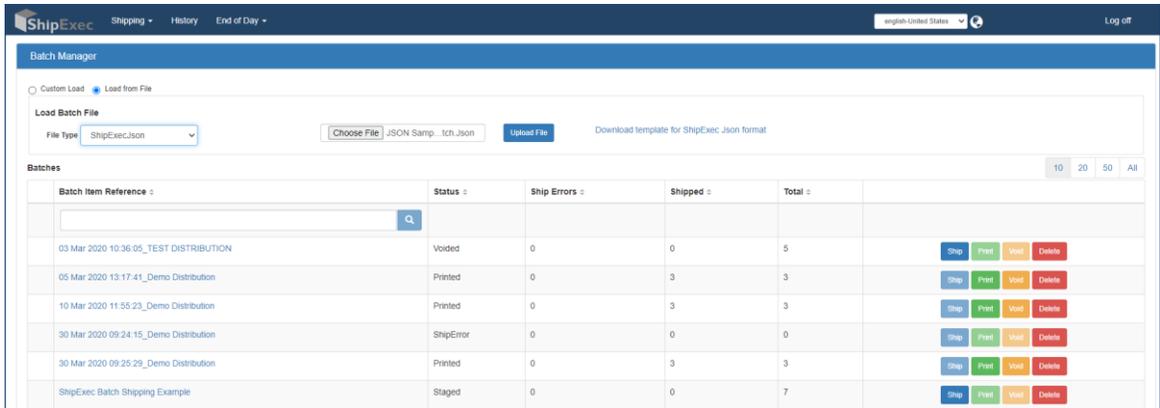
ShipExec XML:
The XML format allows for complex shipments for multiple packages and allows for most fields to be populated. Allows for an XML formatted Batch List. You have the option to download this template.

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

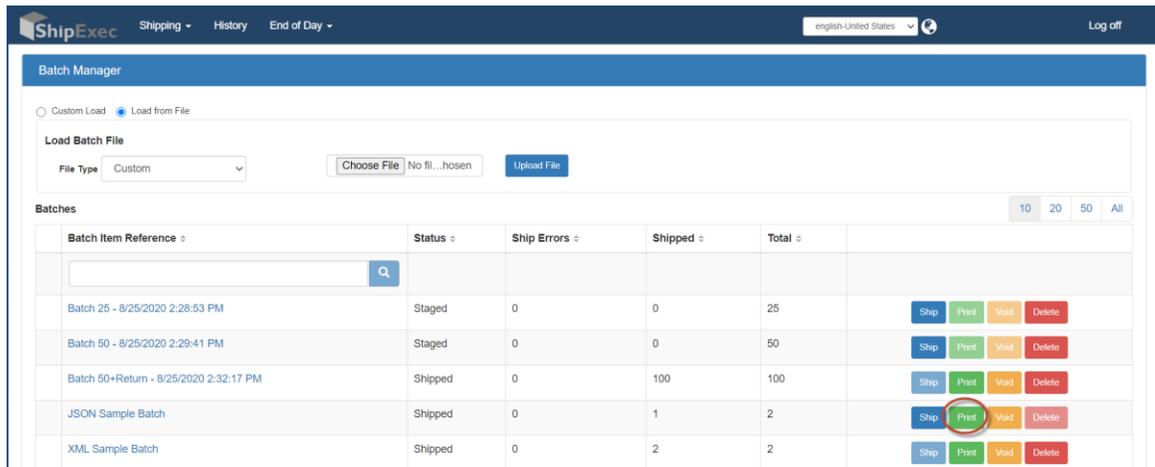1. In the **Batches** list, search for the Batch Item Reference you want to ship.
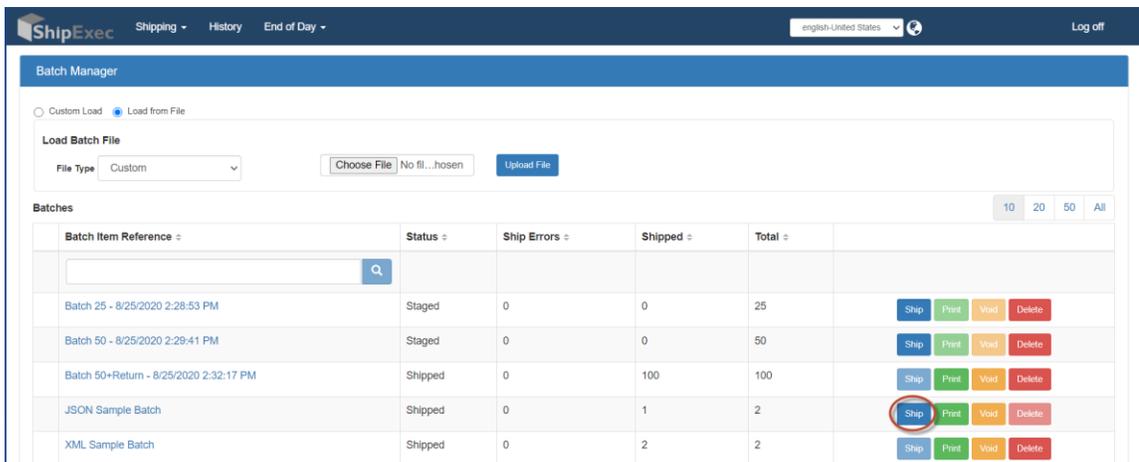
2. Click the **Ship** button for the Batch you want to ship.

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

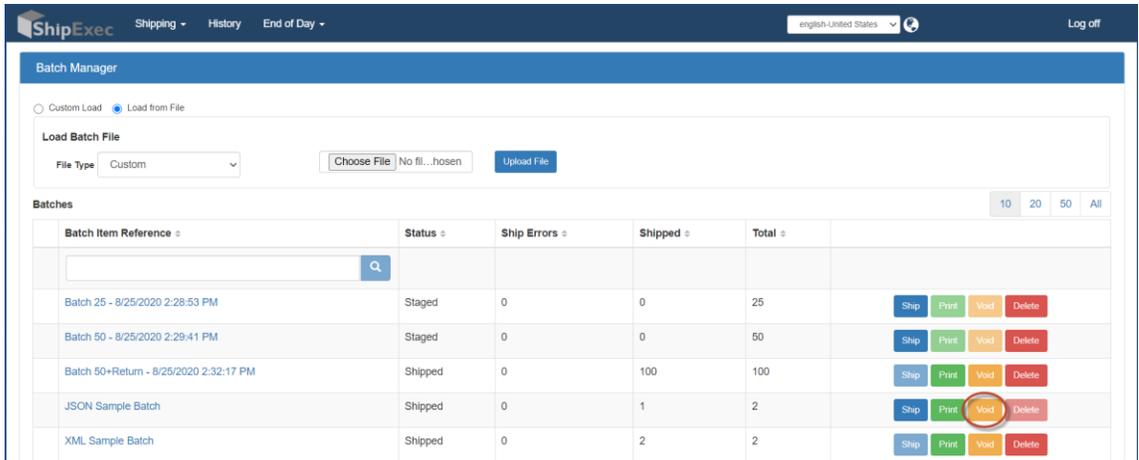1. In the **Batches** list, search for the Batch Item Reference you want to print.

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

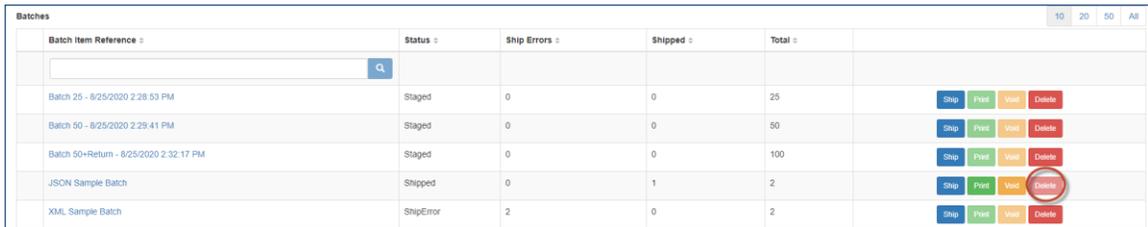1. In the **Batches** list, search for the Batch Item Reference you want to void.

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.
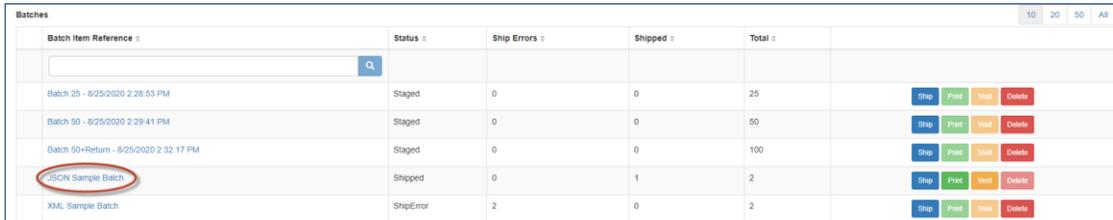3. Click **OK** to confirm deleting the Batch.

   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.
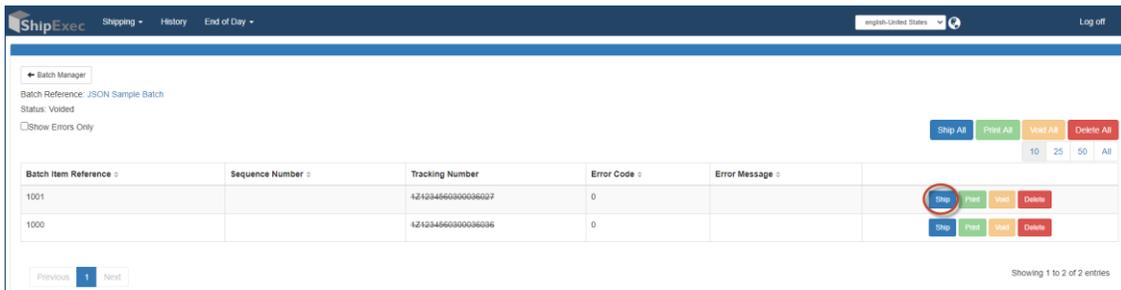
Managing Individual Batch Shipments

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.

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

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

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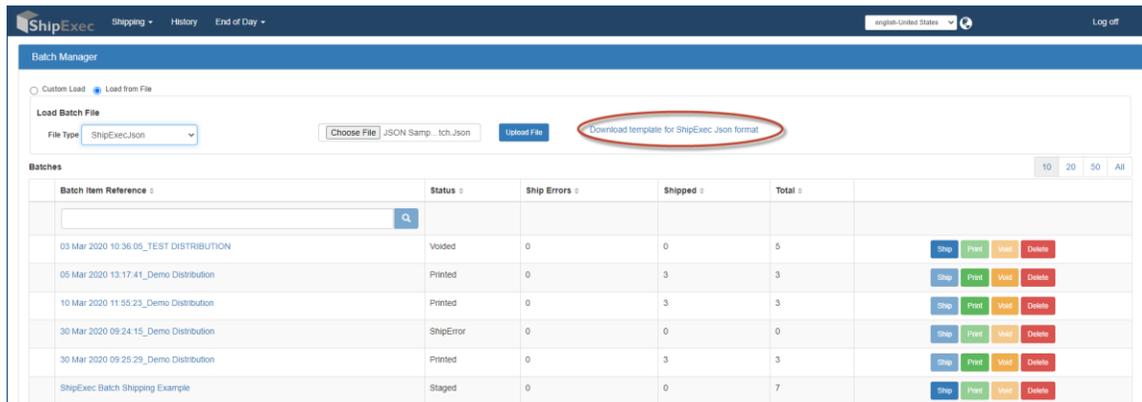
2. Select the **Load from File** option.
3. From the **File Type** drop-down list, select the file type you want to load. (***Note***: *This illustration uses the ShipExecJSON file type.*)
4. Click the *Download template for ShipExec xxx format* link.
5. Save the template in your desired location and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

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

3. 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-ma
GIF,,UPS,4408266559,17940 Englewood Drive,,,Middleburg Heights,OH,44130,US,,,,,,,,,,,,First,Roxi,4408266559,7900 Kennard Road,Suite 3,,Lodi,OH,44254,US,,,,,,,,,,,,,Shipper,UPSAcct,,,,
GIF,,UPS,4408266559,17940 Englewood Drive,,,Middleburg Heights,OH,44130,US,,,,,,,,,,,,Second,Riot,4408266559,7900 Kennard Road,Suite 3,,Lodi,OH,44254,US,,,,,,,,,,,,,Shipper,UPSAcct,,,
GIF,,UPS,4408266559,17940 Englewood Drive,,,Middleburg Heights,OH,44130,US,,,,,,,,,,,,Third,Rowdy,4408266559,7900 Kennard Road,Suite 3,,Lodi,OH,44254,US,,,,,,,,,,,,,Shipper,UPSAcct,,,
GIF,,UPS,4408266559,17940 Englewood Drive,,,Middleburg Heights,OH,44130,US,,,,,,,,,,,,Fourth,Ruckus,4408266559,7900 Kennard Road,Suite 3,,Lodi,OH,44254,US,,,,,,,,,,,,,Shipper,UPSAcct,,
GIF,,UPS,4408266559,17940 Englewood Drive,,,Middleburg Heights,OH,44130,US,,,,,,,,,,,,Fifth,Reisling,4408266559,7900 Kennard Road,Suite 3,,Lodi,OH,44254,US,,,,,,,,,,,,,Shipper,UPSAcct
GIF,,UPS,4408266559,17940 Englewood Drive,,,Middleburg Heights,OH,44130,US,,,,,,,,,,,,Sixth,Skipper,4408266559,7900 Kennard Road,Suite 3,,Lodi,OH,44254,US,,,,,,,,,,,,,Shipper,UPSAcct,
GIF,,UPS,4408266559,17940 Englewood Drive,,,Middleburg Heights,OH,44130,US,,,,,,,,,,,,Seventh,Boo,4408266559,7900 Kennard Road,Suite 3,,Lodi,OH,44254,US,,,,,,,,,,,,,Shipper,UPSAcct,,,
```

Appendix B

Sample ShipExec XML Template

```xml
<?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>
    <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"
            }
        ]

}
```