

# WorldShip<sup>®</sup> 2012

## User Guide



**WE ♥ LOGISTICS™**

The WorldShip software provides an easy way to automate your shipping tasks. You can quickly process all your UPS shipments, print labels and invoices, electronically transmit daily shipping information to UPS and track your shipments.

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# Shipping

## Processing Shipments

### Processing a Single-Piece Shipment

1. Specify the receiver's address.
2. Select a UPS service.
3. Select a package type.
4. Specify the bill-to information.
5. Enter the total shipment weight and the number of packages.
6. Select shipment and package options that apply to all packages.
7. Enter dimensional weight on the **Detail** tab, as needed.
8. Click **Process Shipment**.

### Processing a Multiple-Piece Shipment — Single Address/Consignee

1. Follow steps 1 through 5 under Processing a Single-Piece Shipment above.
2. To add another package to the shipment, click **Add** and type the weight of the package.
3. To add multiple packages with the same weight, type the number of packages in Pkgs. Click **Add**.
4. Click **Process Shipment**.

**Note:** Once you have processed all your packages and shipments, complete the *End of Day* process.

The screenshot displays the UPS WorldShip software interface. The window title is "UPS WorldShip" and the menu bar includes "File", "Edit", "Activities", "Tools", "UPS Web Access", "Import/Export Data", "Window", and "Help". The interface is divided into several sections:

- Ship To / Ship From / Distribution:** Fields for Customer ID, Company or Name (ABC Company), Attention, Receiving Department, Address 1 (Victoria Street), Address 2, Address 3, Country/Territory (United Kingdom), Postal Code (W14 1EZ), City or Town (Cheshire), State/Province/County, Telephone, Email Address, UPS Account, and Tax ID Number.
- Service / Options / Detail / Reference / Customs Documentation:** Includes checkboxes for "Freight", "Need it there sooner?", "Saturday Delivery", and "Documents Only". A "General Desc. of Goods" field is also present.
- Package Type:** A dropdown menu set to "Package".
- Reference Numbers:** Fields for Reference Number 1 and Reference Number 2.
- Weight (kg) / Num. of Pkgs:** A table with columns "Weight (kg)" and "Num. of Pkgs.". The "Weight (kg)" column contains "5.0" and the "Num. of Pkgs." column contains "1".
- Shipment Cost (GBP):** A large display showing "21.34".
- Buttons:** "Add", "Pkgs", "Delete Pkg", and "Process Shipment F10".

At the bottom of the window, a note states: "Your invoice may vary from the displayed rates."

# Shipping

## Processing Shipments *(continued)*

Switch to another processing mode using the **Shipping** tab in the **System Preferences Editor**, found on the **Tools** menu, as needed.

**Note:** This system preference is only available if your workstation includes one Trade Direct shipper with a destination CFS other than the United States, Puerto Rico, Canada or U.S. Virgin Islands or one non-Trade Direct shipper with an origin other than the United States, Puerto Rico, Canada or U.S. Virgin Islands.

### Processing a Shipment with Options

1. Follow steps 1 through 5 under Processing a Single-Piece Shipment on page 1.
2. In the Shipping window, select the **Options** tab.
3. Select the check box next to the option(s) you wish to apply and complete the additional fields as needed for the option(s).
4. Click **Process Shipment**.

**Note:** Once you have processed all your packages and shipments, complete the *End of Day* process.

The screenshot displays the UPS WorldShip software interface. The 'Options' tab is selected, showing various shipment options. The 'Ship To' section includes fields for Customer ID, Company or Name (ABC Company), Attention, Receiving Department, Address 1 (Victoria Street), Address 2, Address 3, Country/Territory (United Kingdom), Postal Code (WA14 1EZ), City or Town (Cheshire), State/Province/County, Telephone, E-mail Address, UPS Account, and Tag ID Number. The 'Service' section has 'Delivery Confirmation' checked. The 'Options' section has 'Signature Required' selected. The 'Total Cost' is 21.34 GBP, with an 'Option Cost' of 0.00 GBP. A 'Process Shipment F10' button is visible at the bottom right. A note at the bottom states: 'Your invoice may vary from the displayed rates.'

# Shipping

## Processing International Shipments

When you process a package to an international destination, WorldShip can generate the necessary export documentation.

### Processing a Package

1. Specify the receiver's address.
2. Select a UPS service.
3. Select a package type.
4. Specify the bill-to information.
5. Type a general description of the goods and the weight of the package.
6. Select the **Customs Documentation** tab to complete the necessary export documentation.
7. Click **Process Shipment**.

### Disabling Export Documentation

If you currently produce your own export documents, you can disable the export documentation feature in WorldShip by following these steps:

1. From the **Tools** menu, select **Shipper Editor**.
2. Click **Modify**, then select the **International** tab.
3. Clear the **Enable Invoice**, **Enable NAFTA CO** and **Enable CO** check boxes, or select **None** under **SED**, for the document(s) you do not wish to print.

During shipment processing, you can disable the creation of an invoice by doing the following:

1. In the Shipping window, select the **Customs Documentation** tab.
2. Clear the **Create an Invoice** check box.

**Note:** If you disable the invoice creation feature in WorldShip, you should type the customs value in order to speed up customs clearance.

**Note:** International Shipments whose contents are NOT documents must have three (3) copies of the invoice and any other required export documentation attached to the lead package.

# Shipping

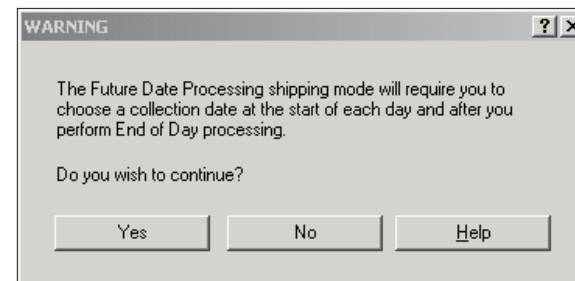
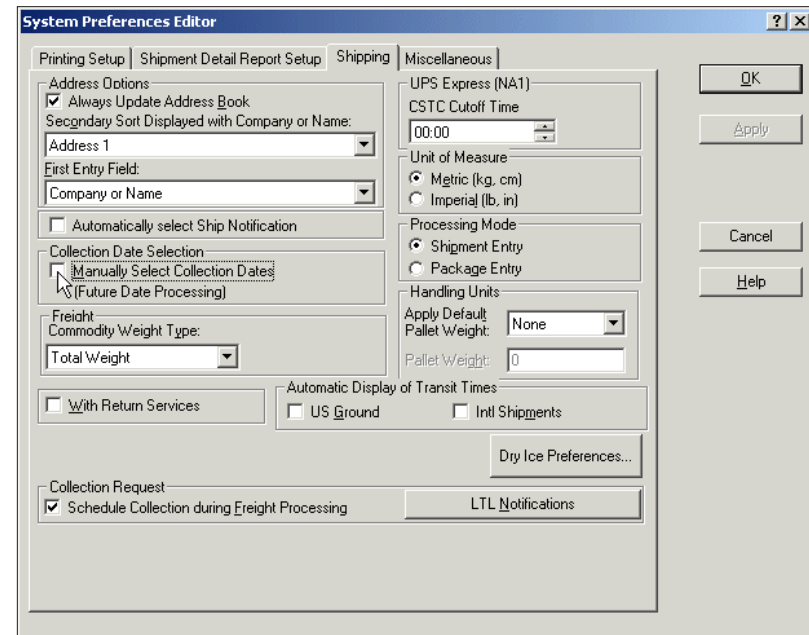
## Processing Shipments with Future Collection Dates

With WorldShip Future Date Processing, you can process shipments with a collection date of up to 183 calendar days in the future.

### Activating Future Date Processing

To process shipments with future collection dates, activate this feature by following these steps:

1. From the **Tools** menu, select **System Preferences Editor** and the **Shipping** tab.
2. Select the **Manually Select Collection Dates** check box under **Collection Date Selection**. A warning message asks you to confirm your selection.
3. Click **Yes** and then **OK**.



# Shipping

## Processing Shipments with Future Collection Dates *(continued)*

### Selecting an Active Collection Date

Once you have set this system preference, the Select Active Collection Date window asks you to choose a collection date.

If you want to select today's date as the active collection date, simply click **OK**. If you want to select a date in the future, click the down arrow, select the collection date on the calendar and click **OK**. The active collection date you select will appear on the title bar at the top of the Shipping and Shipment History windows.

As you process shipments, they will be listed, by active collection date, under Pending Collection in the Shipment History window. The letter "A" appears next to the active collection date.

**Note:** *If you do not require the ability to process shipments with a future date, no action is needed. Your system is already configured to process shipments for the current date.*

### Changing an Active Collection Date

To change an active collection date prior to processing shipments, follow these steps:

1. In the Shipping window, select **Activities**, then **Select Active Collection Date**.
2. In the Select Active Collection Date window, click the down arrow, select the collection date on the calendar and click **OK**.
3. Process your shipments as usual. They will appear in the Shipment History window under the Pending Collection group for that active collection date.

To change a collection date for shipments that have been processed:

1. In the Shipment History window, highlight the shipment or Pending Collection group for which you want to change the date.
2. From the **Activities** menu, select **Change Collection Date**.
3. In the Change Collection Date window, click the down arrow, select the collection date on the calendar and click **OK**. The shipment(s) appear under the Pending Collection group for that collection date.

For more information, select **WorldShip Help** from the **Help** menu, type *Future Date Processing Procedures*.

## Processing Returns

**UPS offers a comprehensive portfolio of return services to streamline your merchandise return process. Repeat a shipment in the Shipment History as a return or create a new return package in the Shipping window.**

### Creating a Return

1. Select a UPS service on the **Service** tab.
2. Select the **Options** tab and then select **Return Services** under **Shipment Options**.
3. Select the return service you want.
4. Specify the merchandise description for the package.
5. If you select Electronic Return Label, click **Details** and specify the Recipient's E-mail Address.
6. Specify the Collect From address.
7. Select the **Service** tab, then select a package type, specify the bill-to information and type the weight of the package.
8. Click **Process Shipment**.

**Note:** *Return Services may be limited in your area. Please visit [ups.com](http://ups.com)® for a complete list of valid services.*

### Processing a Forward Shipment with a Corresponding Return Shipment

1. Enter shipping information.
2. Select the **With Return Services** check box on the **Service** tab.
3. Click **Process Shipment**. The forward shipment label prints, and the Shipping window automatically fills in the address for the corresponding return shipment.
4. Select the **Options** tab. The Return Services option will be checked. Select the return service you want and enter a merchandise description.
5. Click **Process Shipment**.

**Note:** *To set a preference for the **With Return Services** check box, go to the **Shipping** tab in the System Preferences Editor.*

# Shipping

## Editing Packages and Shipments

**WorldShip allows you to edit packages and shipments you have already processed, but for which you have not yet run the End of Day process.**

### Editing a Package or Shipment

1. Under UPS Collections in the Shipment History window, select the individual package or shipment you wish to edit.
2. From the **Activities** menu, select **Edit/Reconcile Shipment**. Confirm which package/shipment you need to edit and then make the appropriate changes.
3. Click **Process Shipment**. (You will be prompted to reapply all the labels in the shipment.)

### Deleting a Single Package in a Multiple-Piece Shipment

1. Under UPS Collections in the Shipment History window, select the shipment containing the package you wish to delete.
2. From the **Activities** menu, select **Edit/Reconcile Shipment**. Confirm which package/shipment you need to edit.
3. Using the navigation arrows next to **Process Shipment**, display the package you wish to delete.
4. Click **Delete Pkg**. Confirm that you want to delete the package.
5. Click **Process Shipment**. (You will be prompted to reapply all the labels in the shipment.)

# Shipping

## Processing Air Freight Shipments

### Processing an Air Freight Shipment

To process an Air Freight shipment:

1. Select the **Freight** check box.
2. Specify the Ship To address.
3. Specify the Ship From address.
4. Specify the shipment-level and option details, such as UPS service and bill-to information, commodity information, shipping options, and shipper and receiver references and special instructions.
5. For an international shipment, record the export document and goods details.
6. Decide if you wish to complete your shipment now or later.
  - If you have not completed your shipment, you can save it as a draft by clicking **Save** (in the lower right-hand corner). The shipment is saved in Shipment History as a “Draft” with the date when it was saved. If you created a Packing List for the draft shipment, it will not be saved. When you are ready to continue working on it, select it from the Shipment History window and click **Edit/Reconcile Shipment** on the **Activities** menu.
  - If you have completed your shipment, click **Process**.

The screenshot displays the UPS WorldShip software interface. The window title is "UPS WorldShip". The menu bar includes File, Edit, Activities, Tools, UPS Web Access, Import/Export Data, Window, and Help. The toolbar contains icons for PROCESS, FACTORY, HISTORY, SHIPMENT, UPS.com, TRACK, ADDRESS, REPORT, UNDO, VOID, and EXPORT. The main interface is divided into several sections:

- Ship To / Ship From:** Fields for Customer ID, Company or Name (A Company), Attention, Receiving Department, Address 1 (123 Main Street), Address 2, Address 3/Store#, Country/Territory (United States), Postal Code (28201), City or Town (CHARLOTTE), State/Province/County (NC), Telephone ((704) 555-5555), and E-mail Address.
- Service / Options / Detail:** Includes checkboxes for Freight and Bill Transportation To (Shipper), UPS Service (Express Freight), and checkboxes for DDU and DDP.
- Commodity:** Fields for Description, Packaging Type, Pieces, Total Weight, Length, Width, and Height.
- Commodity Editor:** Includes checkboxes for Add New and Update, and a button for Add.
- Table:** A table with columns for Description, Type, Pieces, and Total Weight. It contains one row: Shoes, Pa..., 1000, 400.
- Shipment Totals:** Weight: 400.0 kg, Pieces: 1000, and a Get Rate... button.
- Buttons:** Shipper, Profile, Add, Update, Delete, Save, Labels, and Process F10.



# Shipping

## Processing Air Freight Shipments *(continued)*

### Scheduling a Collection or Delivery of an Air Freight Shipment

To automatically schedule a delivery during shipment processing for a House Account Air Freight shipper:

1. Select the **Delivery** check box on the **Service** tab.
2. Process the shipment as usual. When you click **Process**, the Delivery Request window appears.
3. In the Delivery Request window:
  - Under **Pieces Shipped As**, describe the handling units.
  - Under **Delivery**, select a delivery date and a delivery time.
  - Click **OK**.

To automatically schedule a Collection or delivery during shipment processing for an Occasional Air Freight shipper:

1. Enter the shipment as usual. When you click **Process**, the Collection/Delivery Request window appears.
2. In the Collection/Delivery Request window:
  - Under **Pieces Shipped As**, describe the handling units.
  - Under **Collection/Delivery**, select either Collection or Delivery.  
**Note:** Your selection determines the remaining active and inactive fields in this window.
  - Under **Delivery**, select a delivery date and a delivery time.
  - Under **Requester**, provide the appropriate information or use the Ship From information provided.
  - Provide the Collection date, Collection ready time and Collection location closing time.
  - Under **Collection Location**, provide any additional instructions.
  - Note:** All other fields show the Ship From address and cannot be updated.
  - Click **OK**.

**Pickup/Drop Off Request**

**Pieces Shipped As**  
Describe the Handling Units (moveable pieces) in this shipment:  
59 Pallet(s) Loose

**Pickup/Drop Off**  
 Collection  Drop Off

**Drop Off**  
Date: 04-Aug-2009  
Time: 01:36:41 PM

**Requester**  
 Third Party  
**Company Name:** WS Test Shipper  
**Attention:** Pat  
**Email Address:** jshipper@ups.com  
**Telephone Number:** 0800 4327375897


**Collection Date:** 04-Aug-2009  
**Collection Ready Time:** 01:41:41 PM  
**Collection Location Closing Time:** 05:00:00 PM

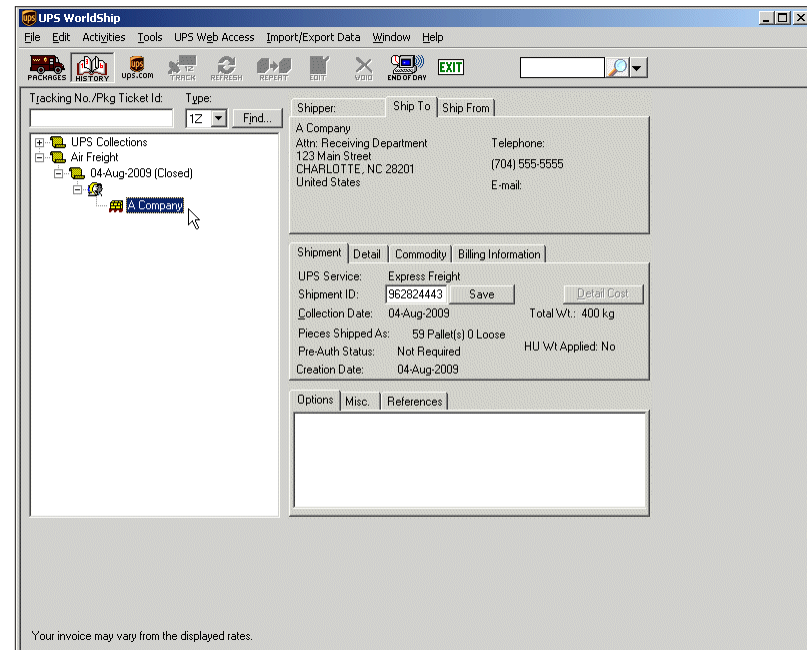
**Collection Location**  
**Address 1:** 123 Big Ben Lane  
**Address 2:**   
**Address 3:**   
**Country/Territory:** United Kingdom  
**Postal Code:** E1Y8SY  
**City or Town:** London  
**State/Province/Country:**   
**Additional Instructions:**   
  
**OK** **Cancel** **Help**

# Shipping

## Processing Air Freight Shipments *(continued)*

### Viewing Air Freight Shipment History

To view your Air Freight shipment(s), select the Shipment History window. An  icon represents an Air Freight shipment for a specific shipper.



# Profiles

## Profile Editor

Use the Profile Editor to add, delete or modify a profile, which is a saved collection of predefined preferences, including various service options, package options, shipment options and reference numbers. Then you can assign the profile to one or more shippers.

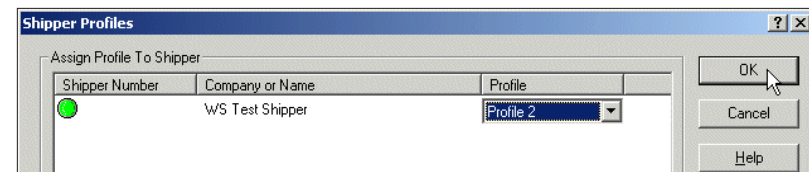
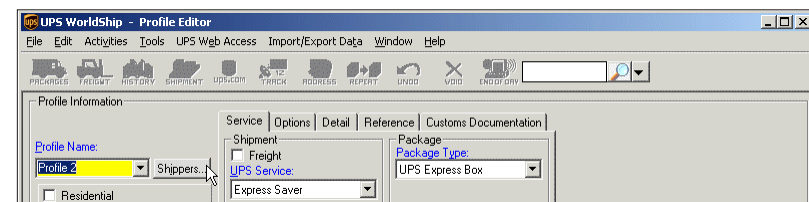
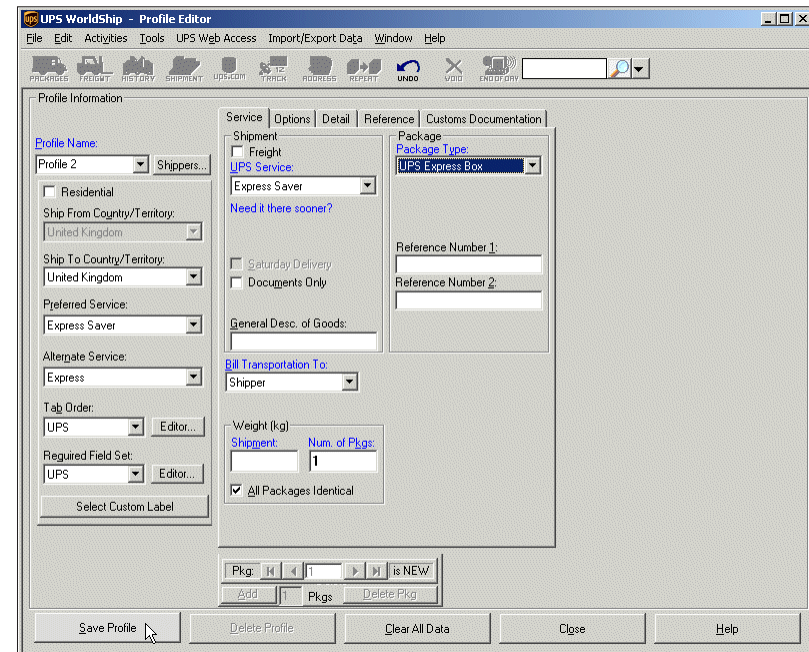
## Adding a Profile

1. From the **Tools** menu, click **Profile Editor**.
2. In the Profile Editor Welcome window, click **OK**.
3. Type a unique name, up to 35 alphanumeric characters, for the **Profile Name**.
4. Fill in or select the preferred values for the fields shown on all the tabs. Your choices appear as the defaults in the corresponding fields in the Shipping window.
5. Click **Save Profile**.

**Note:** If you want to base a new profile on an existing profile, select the existing profile name, modify the fields, type a unique name for the **Profile Name** and click **Save Profile**.


## Assigning a Profile to a Shipper

1. From the **Tools** menu, click **Profile Editor**.
2. In the Profile Editor window, click **Shippers**.
3. In the Shipper Profiles window:
  - To assign a profile to a specific shipper, select the desired profile for that shipper in **Profile** next to the shipper number.
  - To assign a particular profile to all shippers, select the desired profile in **Assign Profile To All Shippers** and click **Assign**.
4. Click **OK** and then **Close**.

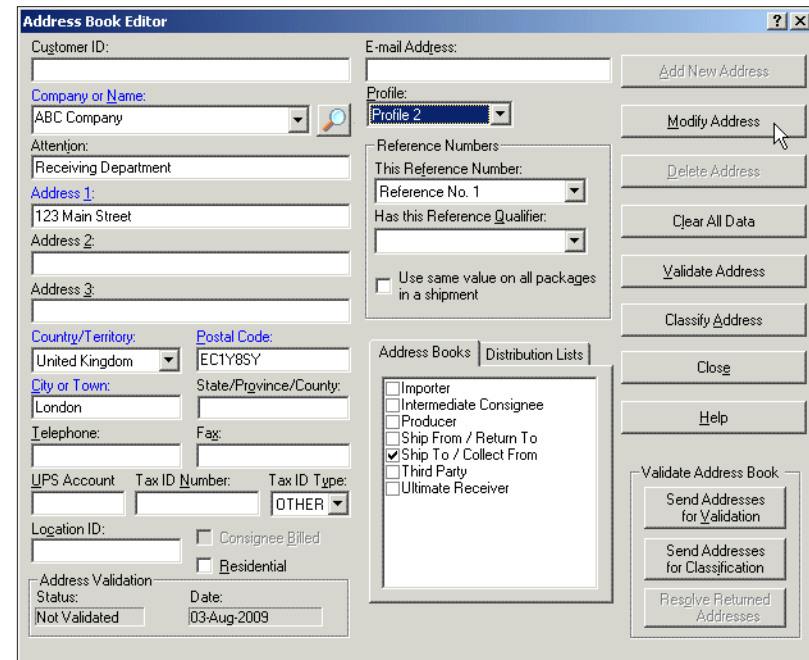


# Profiles

## Assigning a Profile to a Consignee

1. From the **Tools** menu, select **Address Book Editor**. The Address Book Editor window appears.
2. Type information about a new consignee or click the **Search** icon  next to the **Company or Name** box to search for a consignee in your address book.
3. Select a profile name in **Profile**.
4. Click **Add New Address** for a new consignee or click **Modify Address** for an existing consignee.
5. When you are finished, click **Close**.

**Note:** You can also assign a profile using the **Shipper Editor** or you can select the profile from the **Shipping** window.



The screenshot shows the 'Address Book Editor' window with the following fields and options:

- Customer ID:** [Empty text box]
- E-mail Address:** [Empty text box]
- Company or Name:** ABC Company [Dropdown menu]
- Profile:** Profile 2 [Dropdown menu]
- Attention:** Receiving Department [Text box]
- Address 1:** 123 Main Street [Text box]
- Address 2:** [Empty text box]
- Address 3:** [Empty text box]
- Country/Territory:** United Kingdom [Dropdown menu]
- Postal Code:** ECTY8SY [Text box]
- City or Town:** London [Text box]
- State/Province/County:** [Empty text box]
- Telephone:** [Empty text box]
- Fax:** [Empty text box]
- UPS Account:** [Empty text box]
- Tax ID Number:** [Empty text box]
- Tax ID Type:** OTHER [Dropdown menu]
- Location ID:** [Empty text box]
- Address Validation Status:** Not Validated [Text box]
- Date:** 03-Aug-2009 [Text box]
- Reference Numbers:** This Reference Number: Reference No. 1 [Dropdown menu]
- Has this Reference Qualifier:** [Dropdown menu]
- Use same value on all packages in a shipment:**
- Address Books:**  Importer,  Intermediate Consignee,  Producer,  Ship From / Return To,  Ship To / Collect From,  Third Party,  Ultimate Receiver
- Buttons:** Add New Address, Modify Address, Delete Address, Clear All Data, Validate Address, Classify Address, Close, Help, Send Addresses for Validation, Send Addresses for Classification, Resolve Returned Addresses

# Reports

## Printing Reports

**Each time you complete the End of Day process, the following reports may print automatically:**

### Daily Shipment Detail Report

Summarises all the packages processed since your last End of Day process and lists the recipient and shipping information for each package as well as summary totals. Using the **System Preferences Editor, Shipment Detail Report Setup** tab, you can choose whether to print this report automatically when you run End of Day.

### High Value Report

Automatically prints during the End of Day process only if you processed a package with a Declared Value exceeding a certain threshold. In addition, this report shows the tracking number, package ID, reference number and Declared Value of each high value package.

**Important:** Be sure to give this report to your UPS driver when he or she collects the high value packages. The UPS driver signs the report and records the collection time and the total number of high value packages on the last line of this report. Since these collection details are on the report the driver takes with the packages, make a copy of the driver's report with the collection details if you want collection confirmation for your records. Since collection details include driver's signature and handwritten information, it cannot be reprinted.

### UPS Manifest Summary (excluding U.S., Puerto Rico and Canada Origins)

Automatically prints during the End of Day process and summarises shipment information about the packages your UPS driver is to collect. This report includes:

- Your account information.
- A barcode that includes your account number, a unique shipping record identifier and the total number of packages to be collected.

- Summary information so the UPS driver can verify what is to be collected.
- An area to record the name of the UPS driver who collects the packages, the collection time and the total number of packages collected by the driver.

**Important:** Be sure to give both copies of the Manifest Summary Report to your UPS driver when he or she collects the packages. The UPS driver scans the barcode on the report. Then the UPS driver signs both copies of the report and records the collection time and the total number of packages on the bottom of the report. One of the copies is for your records. The UPS driver will take the other copy.

### UPS Manifest Detail (excluding U.S., Puerto Rico and Canada Origins)

Automatically prints during the End of Day process and during the close out of consolidated movements if the transmission of your shipment data to UPS fails. This report details shipment information about the packages your UPS driver is to collect.

**Important:** Be sure to give this report to your UPS driver when he or she collects your packages.

### UPS Driver Transmission Control (excluding U.S., Puerto Rico and Canada Origins)

Automatically prints during the End of Day process and during the close out of UPS Trade Direct consolidated movements only if the destination is other than the U.S. or Puerto Rico. This report verifies the successful transmission of shipment data to UPS during the close-out process.

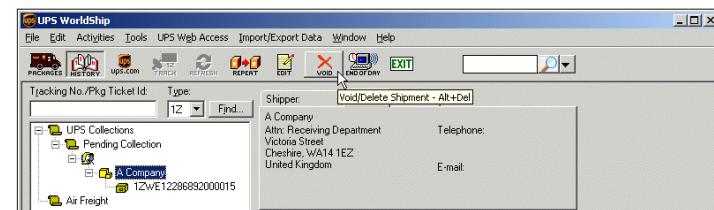
**Important:** Be sure to give this report to your UPS driver when he or she collects your packages.

# Voiding Packages or Shipments

## Voiding a Shipment from the Shipping Window

WorldShip allows you to void shipments you have already processed but for which you have not run the End of Day process. You can also void packages or shipments after you have run the End of Day process.

1. From the Shipping window, click **Void** to void or delete a package or shipment.
2. Read the instructions on how to void a shipment and click **OK**. The Shipment History window appears and the last shipment you processed is highlighted.
3. Confirm the correct shipment is highlighted. Select another shipment if needed.
4. Select **Void/Delete Shipment** from the **Activities** menu or click **Void**.
5. Once you confirm the void, a **Void** icon appears next to the shipment/packages.



For a demonstration on how to void a package, go to [www.ups.com/wsvoid](http://www.ups.com/wsvoid).

# Voiding Packages or Shipments

## Voiding a Shipment from the Shipping Window *(continued)*

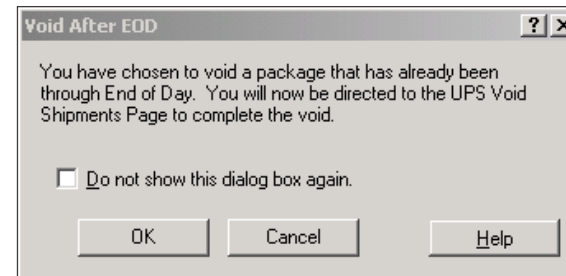
**Note:** If the package you are attempting to void has already gone through the End of Day process and the void portal supports voids for your country, you will be taken to the U.S. Void a Shipment application on ups.com® (English only). See *Voiding a Package or Shipment from the Shipment History window after End of Day* below.

## Voiding a Package or Shipment from the UPS Web Access Menu

1. From the **UPS Web Access** menu, select **UPS Void Shipments Page**.
2. Type the tracking number of the package or shipment you want to void and complete the void.
3. Return to WorldShip.

## Voiding a Package or Shipment from the Shipment History Window after End of Day

1. In the Shipment History window, highlight the tracking number of the package you want to void.
2. Select **Void/Delete Shipment** from the **Activities** menu or click **Void**.
3. Click **OK**. The **UPS Void Shipments Page** appears for you to complete the void.
4. When you are finished voiding the shipment, return to WorldShip.

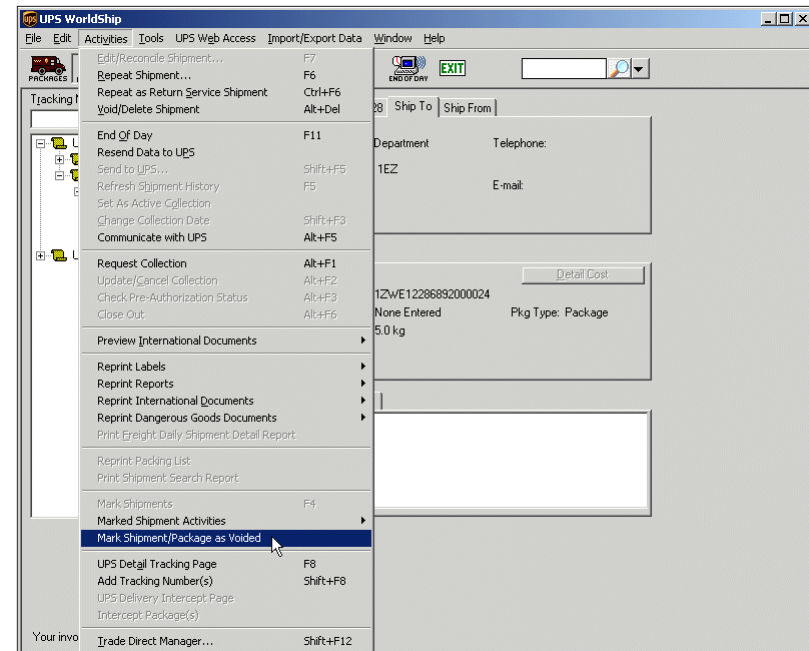


# Voiding Packages or Shipments

## Marking a Package or Shipment as Voided in the Shipment History Window

When you void a package or shipment from the **UPS Void Shipments Page**, WorldShip will not automatically update the Shipment History window to indicate you completed the void, but you can mark the package or shipment as voided. Since the actual status of the package or shipment will not change, you should complete the steps necessary to void the shipment or package on the **UPS Void Shipments Page** before using this procedure.

1. In the Shipment History window, highlight the package or shipment you voided from the **UPS Void Shipments Page**.
2. From the **Activities** menu, select **Mark Shipment/Package as Voided**. Once you confirm the void, a **Void** icon appears next to the shipment or package.



# End of Day

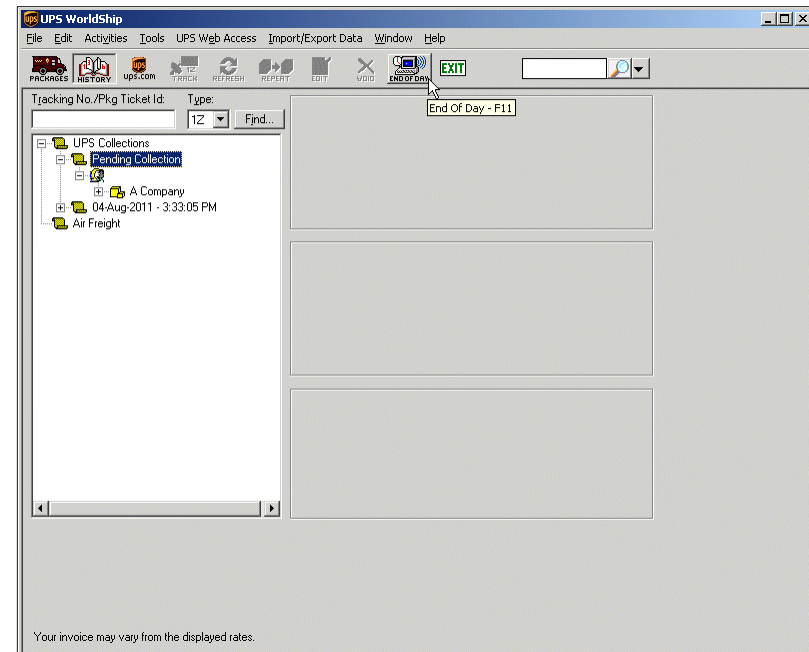
## Completing the Process

**WorldShip electronically transmits your shipment detail to UPS. Separate End of Day processes can be completed for the same collection day.**

Once you have finished processing packages for a Pending Collection group, complete the End of Day process. These steps should be completed prior to the time of collection.

### Completing the End of Day Process

1. Select the Pending Collection group in the Shipment History window and click **End of Day**.
2. Confirm you wish to proceed. WorldShip will print the End of Day reports. For more information, see *Printing Reports*.
3. If Future Date Processing has been activated, the Select Active Collection window appears. Click the down arrow to select the active collection date from the calendar (up to 183 days in the future). Click **OK**.
4. Provide applicable reports to your UPS driver. For more information, see *Printing Reports*.



# History and Tracking

## Finding Shipments

1. To find a shipment that you have processed in the past, click **History** on the tool bar.
2. Click **Find** in the Shipment History window.
3. Fill in the appropriate information you need to find the shipment you are looking for, then click **Find**.

For more information about how to find shipments, select **WorldShip Help** from the **Help** menu and type *Find a Shipment*.

The 'Find By' dialog box is a search interface for shipments. It features the following fields and options:

- Customer ID:** Text input field.
- Company or Name:** Dropdown menu with 'ABC Company' selected.
- Attention:** Text input field with 'Receiving Department'.
- Address 1:** Text input field with '555 Big Ben Square'.
- Country/Territory:** Dropdown menu with 'United Kingdom'.
- Postal Code:** Text input field with 'EC1Y8SY'.
- City or Town:** Text input field with 'London'.
- State/Province/County:** Text input field.
- Telephone:** Text input field with '12345678987654'.
- Collection Record:** Text input field.
- Reference Number and Value:** Two text input fields.
- Shipper Number:** Dropdown menu.
- Package Type:** Dropdown menu.
- Sort By:** Dropdown menu with 'Date' selected.
- Date:** Dropdown menu.
- Order:** Dropdown menu with 'Ascending' selected.
- Date Range:** Two date range dropdowns, both with '01-Jul-2009' to '27-Jul-2009' selected.
- UPS Service:** Dropdown menu.
- Tracking Number:** Text input field.
- Tracking Number Type:** Dropdown menu.
- Voided Shipments:** Dropdown menu with 'Exclude' selected.
- Billing Information:** Section containing:
  - Bill Transportation To:** Dropdown menu.
  - Bill Duty and Tax To:** Dropdown menu.
  - Split Duty and Tax**

At the bottom of the dialog box, there are four buttons: 'Find...' (with a mouse cursor), 'Clear', 'Cancel', and 'Help'.

# History and Tracking

## Tracking Packages or Shipments

### Tracking from the Shipment History Window

1. To track a single package from the Shipment History window, select a package by highlighting the tracking number. Select **UPS Detail Tracking Page** from the **Activities** menu or press **F8**.
2. To track multiple packages from the Shipment History window:
  - Highlight a date to track all packages shipped on a specific date or highlight a shipment to track all packages in a shipment.
  - From the **Tools** menu, select **Tracking Number Manager**. In the Tracking Number Manager window, in the 1Z tab, click **Add**, then **Track List**.  
*Note: You can track packages for multiple dates and shipments by highlighting the specific date or shipment and continuing to click **Add**.*
3. WorldShip connects you directly to the Tracking Page on the UPS Web site and displays package information.
4. If desired, print the tracking information.
5. Close the Tracking Page window to return to WorldShip.

### Tracking from the UPS Web Site

1. From the **UPS Web Access** menu, select **UPS Tracking Page**. WorldShip connects you directly to the Tracking Page on the UPS Web site.
2. Type your UPS tracking numbers on the Track Packages and Freight tab and click **Track**.
3. Follow the instructions.
4. Close the Tracking Page window to return to WorldShip.

# Billing and Rating Features

## Fuel Surcharge

UPS fuel surcharges are automatically included in the rate displayed for each shipment. The surcharges can change potentially from month to month. A software update will be provided to you automatically.

For more detailed information on the UPS Fuel Surcharge, go to *ups.com*<sup>®</sup> or select **WorldShip Help** from the **Help** menu and type **Fuel Surcharge**.

## Cost Centre Calculator

The Cost Centre Calculator helps you to update the shipping charges displayed by WorldShip for shippers. These updated rates do not affect your UPS billed shipping charges. Instead, the updated rates affect only the shipping rates you charge your customers.

To open the Cost Centre Calculator, select **Cost Centre Calculator** on the **Tools** menu. When the Cost Centre Calculator opens, you will notice the window is divided into left and right panes. Select a shipper in the left pane to display the rate categories (that is, services, accessorials and surcharges) in the right pane. Select a rate category in the left pane or double-click a rate category in the right pane to display all the items you can update for that category in the right pane.

For step-by-step instructions on how to modify your rates, select **Cost Centre Calculator Help** from the **Help** menu in the **Cost Centre Calculator**.

## Selecting Bill-To Information

Use the bill-to fields to indicate who pays for the transportation, duty and tax charges to ship a package, shipment or movement. These fields appear in several windows, including the **Service** tab in the Shipping window. The bill-to fields include:

**Bill Transportation To** includes Shipper, Receiver or Third Party options to indicate who pays the transportation cost to ship the package, shipment or movement.

**Bill Duty and Tax To** includes Shipper, Receiver or Third Party options to indicate who pays the duty and tax costs to ship the package, shipment or movement.

**Split Duty and Tax** check box indicates if you want the transportation payer instead of the tax payer to pay the duty cost to ship the package, shipment or movement. If you select this check box, the Bill Transportation To title changes to Bill Transportation and Duty To, and the Bill Duty and Tax To title changes to Bill Tax To. To reverse this selection, clear the **Split Duty and Tax** check box. A confirmation message appears each time you select or clear this check box.

# Billing and Rating Features

## Third Party Billing

1. Process shipments as outlined on page 1 of this guide. Here are the steps:

- Specify the receiver's address.
- Select a UPS service.
- Select a package type.
- Select **Third Party** in **Bill Transportation To** and the Third Party Address window appears.

The screenshot shows the UPS WorldShip software interface. The 'Ship To' section is populated with 'ABC Company' and the address '123 Main Street, United Kingdom, W14 1EZ'. The 'Service' section is set to 'Express' with a guaranteed time of 10:30am. The 'Package' section is set to 'Package'. The 'Bill Transportation To' dropdown is set to 'Third Party'. The 'Shipment Cost (GBP)' is displayed as 42.53. The 'Process Shipment' button is highlighted.

2. In the Third Party Address window, type the address and account number of the person or company that will pay all of the charges that the shipper would pay for the current shipment. Then click **OK**.

3. In the Shipping window, type the weight of the package and click **Process Shipment**.

The screenshot shows the 'Third Party Address' dialog box. The 'Customer ID' field is empty. The 'Company or Name' field contains 'DEF Company'. The 'Address 1' field contains '456 Main Street'. The 'Country/Territory' is set to 'United Kingdom' and the 'Postal Code' is '1W137UY'. The 'City or Town' is 'Ramsgate'. The 'UPS Account' field is highlighted in yellow.

# Additional Features and Functionality

## Custom Toolbar

The Toolbar Editor allows you to select from a pre-defined list of buttons and configure the selected buttons for use on a custom toolbar. See *Creating a Custom Toolbar*. The Toolbar Button Editor allows you to configure and customise the buttons on a custom toolbar. See *Modifying Buttons on a Custom Toolbar*. You can dock the toolbar vertically to the left or right side of the Shipping, Shipment History and Profile Editor windows or float the toolbar horizontally anywhere on your screen.

## Creating a Custom Toolbar

1. From the **Tools** menu, select **Toolbar Editor**.
2. In the Toolbar Editor window, create a list of buttons for the toolbar:
  - To add a button, select the button in the **Available Buttons** box and click **Add**. The button is added to the **Selected Buttons** box and will be removed from the **Available Buttons** box if it can only be added once.
  - To remove a button, select the button in the **Selected Buttons** box and click **Remove**.
  - To remove all the buttons, click **Remove All**.
3. Edit the selected button as follows:
  - If you added a button that can be added more than once, the Toolbar Button Editor window appears allowing you to configure the selected button. See *Modifying Buttons on a Custom Toolbar*.
  - If you added a button that can be added only once, proceed to step 4.

**Tip:** If you want to change the defaults for the selected button, click **Edit**. See *Modifying Buttons on a Custom Toolbar*.
4. Arrange the buttons on the toolbar in the desired order:
  - To move a button up, select the button and click **Move Up**.
  - To move a button down, select the button and click **Move Down**.

5. To view and use the toolbar:

- Select the **Enable Toolbar** check box to make the toolbar visible. Clear the check box to retain the information but not make the toolbar visible.
- Select the **Dock Toolbar** check box to dock the toolbar on the right side of the Shipping, Shipment History and Profile Editor windows. Clear this check box to float the toolbar anywhere on your screen.

**Note:** If you clear the check box and float the toolbar, you can drag and drop the toolbar and dock it on either side of the Shipping, Shipment History or Profile Editor windows.

6. Click **OK**.

## Modifying Buttons on a Custom Toolbar

1. From the **Tools** menu, select **Toolbar Editor**.
2. In the Toolbar Editor window, add a new button:
  - Select the button in the **Available Buttons** box.
  - Click **Add**.

If you added a button that can be added more than once, the Toolbar Button Editor window appears and shows information for the selected button. The name of the button appears in the title bar. Skip to step 4.

If you added a button that can be added only once, the name of the button appears in the **Selected Buttons** box. If you want to edit the button, proceed to step 3; otherwise, skip to step 7.

3. To edit an existing button on the toolbar:
  - Select the button in the **Selected Buttons** box.
  - Click **Edit**.

The Toolbar Button Editor window appears and shows information for the selected button. The name of the button appears in the title bar.

To edit a button that can be added more than once, proceed to step 4; otherwise, skip to step 5.

# Additional Features and Functionality

## Modifying Buttons on a Custom Toolbar *(continued)*

4. Perform the appropriate action:
  - For **Shipper Number**, click the down arrow in the **Shipper Number** box and select a shipper number.
  - For **Profile**, click the down arrow in the **Profile** box and select a profile.
  - For **Start Keyed Import**, select a map name in the **Start Keyed Import** box.
  - For **Batch Import**, select a map name in the **Batch Import** box.
  - For **Batch Export**, select a map name in the **Batch Export** box.
5. Perform the following actions as needed:
  - To add a tooltip for the button, type up to 80 characters in the **Tooltip Text** box or use the pre-defined tooltip.
  - To add a graphic image on the button, select Use Graphic Image, click the down arrow in the **Image** box and select an image. If you want a custom image, click **Browse** and navigate to and select the desired image.

**Note:** *The image type must be .bmp. The maximum size is 76 x 50 pixels, and the minimum size is 19 x 12 pixels. The default size is 38 x 25 pixels.*
  - To add text on the button, select Use Text as Image and type up to 25 characters in the **Your Text** box.

**Note:** *As you type text, the font will become smaller in order to fit on the button. If you want smaller type, but with minimal characters, add spaces before and after the text.*
  - To pick a background colour for the button, click **Background Colour**. The Colour window appears. Select a colour or define a custom colour and click **OK**.
  - To pick a text colour for the button, click **Text Colour**. The Colour window appears. Select a colour or define a custom colour and click **OK**.
6. Click **OK**.
7. Repeat this procedure as required or click **OK**.

## Using the Custom Toolbar to Download WorldShip Updates

**Note:** *Your Internet connection method must be configured for Direct Access to the UPS Data Centre.*

You can use the custom toolbar to download a WorldShip upgrade.

When a WorldShip upgrade notice is received:

1. WorldShip does one of the following:
  - If the custom toolbar is enabled, WorldShip inserts the Download WorldShip button in the first position on the toolbar.
  - If the custom toolbar is not enabled, WorldShip enables the toolbar and inserts the Download WorldShip button in the first position on the toolbar.
2. At your convenience, click **Download WorldShip**. WorldShip displays the Download WorldShip Web page for your country and language.
3. Follow the instructions as appropriate.
  - When the download and install are completed successfully, WorldShip removes **Download WorldShip** on the toolbar. If **Download WorldShip** is the only button on the toolbar, WorldShip disables the toolbar.
  - If the download and install are not completed successfully (and even if the toolbar is not enabled), the toolbar with **Download WorldShip** appears each time you start WorldShip. Repeat steps 2 and 3.

## Custom Labels

The Custom Label Editor allows you to create, edit and delete templates for custom consignee and doc labels. In order to print these labels, you must set your system preferences on the Printing Setup tab in System Preferences Editor. To specify which custom labels to use, assign the labels to print when using a profile or add a button to the custom toolbar.

**Note:** *You cannot edit or delete the UPS Sample templates.*

# Additional Features and Functionality

## Creating or Editing a Consignee or Doc Label Template

1. From the **Tools** menu, select **Custom Label Editor**. The Custom Label Editor window appears.
2. If you want to edit an existing template:
  - Under **Existing Templates**, select the template that you want to edit.
  - Click **Edit**. The Edit Template window appears.
  - Skip to step 6.
3. If you want to create a template based on an existing template, such as a UPS Sample template:
  - Under **Existing Templates**, select the template on which you want to base the template.
  - Click **Copy**. The Copy Template window appears.
  - Enter a template name consisting of up to 50 characters in the Enter the Name of the **New Template** box and click **OK**. The Edit Template window appears.
  - Skip to step 6.
4. If you want to delete an existing template:
  - Under **Existing Templates**, select the template that you want to delete.
  - Click **Delete**. A message appears asking you to confirm the deletion.
  - Click **Yes**. The Custom Label Editor window appears.
  - Skip to step 10.
5. If you want to create a new template:
  - Under **New Template**, click the down arrow in the **Template Type** box and select a type of label.
  - Enter a name consisting of up to 50 characters for the new template in the **Template Name** box.
  - Click **Create**. The Edit Template window appears.
6. Add each element to the canvas using one of the following add options:
  - Note:** A *Tooltip* appears when you point to most elements you place on the canvas.
  - Add a Field — Click the down arrow in the **WorldShip Fields** box and select a field category. Using the field list under the field category, select a field, click **Add Field** and click the desired location on the canvas to place the field.
  - Add Custom Text — Type the text up to 45 characters in the **Custom Text** box, click **Add Text** and click the desired location on the canvas to place the text.
  - Add a Field and Text — Select a field in the field list, type the text in the **Custom Text** box, click **Add Field & Text** and click the desired location on the canvas to place the field and text.
  - Add an Image — Click **Add Image**. In the Add Image window, supply the path to the image or click **Browse** and browse to and select the image. Then click the desired location on the canvas to place the image.
    - Note:** The image type must be *.bmp* or *.pcx*.
  - Add a Horizontal Line — Click **Add Line**, click and hold the left mouse button to indicate the beginning of the line on the canvas, drag the line to its end and release the left mouse button.
7. Modify the properties of the fields and text placed on the canvas as needed:
  - Select the item on the canvas.
  - Under **Field Properties**, change the font and alignment, make the text bold and define a barcode.
  - Under the **WorldShip Fields** box, change the field length.
  - Click **Modify**.
8. Remove field(s) on the canvas as follows:
  - To remove one field, select the field on the canvas and click **Remove**. A message asks you to confirm the deletion. Click **Yes**, and the field is removed from the canvas.
  - To remove all fields, click **Remove All**. A message asks you to confirm the deletion. Click **Yes**, and all fields are removed from the canvas.
9. To test the custom label, click **Print Test Label**. The label prints using the current label printer selection in system preferences.
10. Click **OK**.

# Additional Features and Functionality

## Selecting Custom Consignee and Doc Labels

Once you have created custom consignee or doc labels using the Custom Label Editor, you can select the custom labels to print.

1. Do one of the following:

- To associate a custom label with a profile, click **Select Custom Label** in the Profile Editor window.
- To select a custom label while creating a shipment, click **Select Custom Label** on the custom toolbar. See *Creating a Custom Toolbar*.

2. In the Select Custom Label window:

- For a small package shipment, click the down arrows in the **Shipment Doc Label**, **Package Doc Label** and **Consignee Label** boxes and select custom labels as needed.
- For an Air Freight shipment, click the down arrows in the **Air Freight Doc Label** and **Consignee Label** boxes and select custom labels as needed.
- For a Ground Freight shipment, click the down arrows in the **Ground Freight Doc Label** and **Consignee Label** boxes and select custom labels as needed.

**Note:** On remote workstations, template names are appended with *(Admin)* or *(Remote)* to distinguish who created the templates.

3. Click **OK**.

# Resources

## Accessing Help

You have several options for accessing help:

### 1. Within the software:

#### WorldShip Help

- To search for specific information, select **WorldShip Help** from the **Help** menu. On the **Index** tab, type the name of the task, term or concept and press **Enter**.
- To find general information about WorldShip, select **WorldShip Help** from the **Help** menu, select the **Contents** tab and select a topic.
- To find help for a specific window, click the **?** in the top right corner (if available) and then a field, click the **Help** button (if available) or hold down the **Shift** key and click **F1**.
- The WorldShip User and Installation Guides are available in a \*.pdf formatted file for viewing and printing. Make sure you install the free Adobe® Reader® software that can be downloaded from *adobe.com*. Follow the steps below to obtain a copy of the Guides:
  1. From the **Help** menu, click **WorldShip User Guides**.
  2. In the Access User Guides page, click the **Download** link for the desired guide.
  3. View and print the document as needed.

### 2. By phone:

If you have technical questions about WorldShip that cannot be answered by this guide or the *Installation Guide* found on *ups.com*, call the technical support number listed on the following page.

Be sure you have the following information when you call:

- Your UPS account number and WorldShip Software Version (found in the lower right-hand corner of the WorldShip screen).
- Name and version of your PC operating system and type of printer.
- Communication method (Direct Access or Dial-up Access).

\*Also available are useful FAQs and e-mail addresses for technical support.

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# Resources

## Technical Support Numbers

If you have questions about WorldShip that cannot be answered by this guide or WorldShip Help, call the following numbers:

Afghanistan.....	9647814318252	Greece.....	210-99 84 334	Poland.....	022 203 0321
Argentina.....	0 800 888 8150	Hong Kong.....	8206 2133	Portugal.....	800 783 458
Armenia.....	10 3741 27 30 90	Hungary.....	06 80016482	Puerto Rico.....	1-888-UPS-TECH (1-888-877-8324)
Australia.....	1800 148 934	India.....	00 0800 852 1113	Romania.....	40 21 233 88 77
Austria.....	0800 312 407	Indonesia.....	001 803 852 3670	Russia.....	7 49 5961 2211
Azerbaijan.....	+10 99 412 493 39 91	Ireland, Republic of.....	1800 202 227	Saudi Arabia.....	966 1 462 6655, ext. 528 and 579
Belarus.....	375-17-227-2233	Israel.....	00-972-(0) 56-890028	Singapore.....	800 852 3362
Belgium.....	0800 21 877	Italy.....	800 122 732	Slovakia.....	+421 (0)2 58250 281
Bosnia.....	033 466 310	Japan.....	00531 85 0020	Slovenia.....	04/ 281 12 42
Brazil.....	55 11 569 46606	Korea, South.....	00798 8521 3669	South Africa.....	+27 11 922 9200
Canada.....	1-888-UPS-TECH (1-888-877-8324)	Kyrgyzstan.....	+996 312 699 988	Spain.....	900 22 58 77
Chile.....	562 685 0755	Latvia.....	7805643	Sweden.....	020 120 2255
China, People's Republic of.....	10 800 852 0698	Lithuania.....	370-37-350505	Switzerland.....	0800 82 25 54
Colombia.....	571 423 8775	Luxembourg.....	FR: 00 33 8050 10365	Taiwan.....	00801 855 662
Cyprus.....	77 77 7200	Malaysia.....	1800 80 4709	Thailand.....	001 800 852 3658
Czech Republic.....	800 143268	Mexico.....	01 800 714 65 35	Turkey.....	90(212) 444 0066
Denmark.....	80 33 22 55	Monaco.....	00 33 8050 10365	United Arab Emirates.....	800-4774 (Local), + 971-4-339-1939
Dominican Republic.....	809 549 2777, 829 420 7947	Netherlands.....	0800 222 5587	United Kingdom.....	0800 331 6010
Estonia.....	372 666 47 00	New Zealand.....	0800 443 785	United States.....	888-553-1118
Finland.....	0800 187 722	Nigeria.....	234 1 2704981-5, 234 1 2704992	Uzbekistan.....	+9987 1 120 3838
France.....	0805 025 550	Norway.....	800 32 255		
Germany.....	0800 100 2630	Philippines.....	1 800 765 8065, 1 800 808 50020		

# Dangerous Goods Shipments

## About Dangerous Goods

**Dangerous Goods is a contract service available in select countries. After upgrading, from the Tools menu, select System Preference Editor, then click the Dangerous Goods tab. You should configure the default settings for the Chemical Record data source and the printing of Dangerous Goods documentation. WorldShip will import Chemical Records from an existing external data source or a WorldShip data source.**

## Editing a Dangerous Goods Chemical Record

The Dangerous Goods Chemical Record Editor allows the shipper to view, delete or modify an existing Dangerous Goods record which can then be stored in the Personal Chemical Table.

### To edit a Dangerous Goods (DG) record:

1. To enter a new chemical record, select **New Record** from the DG Reference drop-down box in the **Options** tab in the Shipping window (the New Record option only appears if you selected WorldShip as a database resource).
2. The Dangerous Goods Chemical Record Editor window appears. **Regulation Set** is selected and disabled. The information for **Quantity**, **Unit of Measure** and **Packaging Type** is required, and the **Transportation Mode** is obtained from the **Regulation Set**.
3. When you click **Save**, WorldShip prompts you for any missing information and informs you that the chemical record is saved to the Chemical Table.
4. When you click **Delete**, WorldShip prompts you to confirm the deletion of the current record from the Chemical Table.
5. When you click **Clear**, WorldShip alerts you with a warning message if the chemical record was modified and prompts you to clear or preserve the editor.

The screenshot shows the 'System Preferences Editor' window with the 'Dangerous Goods' tab selected. The 'Chemical Record Data Source' section has 'External Source' selected. There are checkboxes for 'Print Dangerous Goods documentation using WorldShip' (checked) and 'Export Dangerous Goods after processing a shipment' (unchecked). Below this is a text box for specifying the export location with a 'Browse...' button. The 'Custom Record Identifier Captions' section has three empty text boxes for 'Record Identifier 1', 'Record Identifier 2', and 'Record Identifier 3'. On the right side, there are buttons for 'OK', 'Apply', 'Cancel', and 'Help'.

The screenshot shows the 'Dangerous Goods Chemical Record Editor' window. It contains several fields: 'Reference Number' (2725), 'Regulation Set' (49CFR), 'Reportable Quantity' (empty), and 'Proper Shipping Name' (Dry Ice). There are also fields for 'Technical Name' (empty), 'Class Division Number' (9), 'Subrisk Class' (1.6N), 'Identification Number' (UN184b), and 'Packaging Group' (III). Below these are 'Additional Description' (empty), 'Quantity' (155), 'Unit Of Measure' (kg), and 'Packaging Type' (Fiberboard Box). There are three 'Record Identifier' fields (empty). 'Packaging Instructions' is P123, 'Transportation Mode' is Ground, and 'Label Required' is DG Goods. At the bottom, there are fields for 'Emergency Phone' (8001236678) and 'ER Registrant' (John Goods). At the very bottom, there are buttons for 'Save', 'Delete', 'Clear', 'Close', and 'Help'.

# Dangerous Goods Shipments

## Viewing a Dangerous Goods Chemical Record

You can view chemical records from the **Personal Chemical Table** or the **UPS Chemical Table** by selecting the **Dangerous Goods Chemical Record Viewer** on the **Tools** menu from the **Shipping** window or by clicking **View Chemical Records** on the **Dangerous Goods Chemical Record Editor**.

To view a record from the **Personal Chemical Table**:

1. In the **Dangerous Goods Chemical Record Viewer** window, the **Chemical Table** defaults to **Personal**, the **Regulation Set** defaults to **All** and the **Search Results** window displays all records for all regulation sets that currently exist in the **Personal Chemical Table**. You can enter specific search criteria and filter search results.
2. Select a record and look under **Record Details** for the record's fields and values.
3. To delete the selected record, click **Delete** and then confirm the deletion.

To view a record from the **UPS Chemical Table**:

1. In the **Dangerous Goods Chemical Record Viewer** window, select **UPS** under **Chemical Table**. **Regulation Set** defaults to the first regulation set in the table. The search criteria include the **Regulation Set**, **Identification Number** and **Proper Shipping Name**. **Search Results** displays all records with the same regulation set determined by the value set in the **Regulation Set**.
2. **Record Details** displays the value or content of the currently selected record. You cannot delete the selected record.
3. You can add UPS Chemical data to your **Personal Chemical Table** for use on **Dangerous Goods** shipments.

**Dangerous Goods Chemical Record Viewer**

Search Criteria

Chemical Table: **Personal** | Regulation Set: **All** | Identification Number: | Record Identifier: | Proper Shipping Name: | Search

Search Results

Total Records Displayed: 2

Identific...	Proper S...	Packing ...	Record ID1	Record I...	Record I...	Reg. Set
ID num	Proper S...	I	Rec ID 1	Record I...	Record I...	ADR
ID Num	Proper S...	I	Record ID 1	Record I...	Record I...	IATA

Delete

Record Details:

Field	Value
Reference Number	001
Class Division Number	1.4S
Subrisk Class	1.4S
Technical Name	Technical Name
Transportation Mode	Passenger Aircraft
Additional Description	Additional Description
Regulation Set	IATA

Select | Clear All | Close | Help



# UPS Trade Direct® Shipments

## About UPS Trade Direct

UPS Trade Direct provides freight consolidation, air, ocean and ground transportation, customs clearance and direct delivery to multiple addresses within the destination country, all through a single source.

A consolidated movement can consist of UPS Small Package child shipments and/or LTL/TL child shipments.

UPS Trade Direct is a contractual service. For more information, contact your UPS Account Manager or visit our Web site at [ups-scs.com/support/trade-direct.html](http://ups-scs.com/support/trade-direct.html).

## Processing UPS Trade Direct Shipments

To process a consolidated movement with UPS Trade Direct:

1. Call your UPS Account Representative and obtain a UPS Trade Direct contract.
2. Use the Shipper Editor and the System Preferences Editor to set your preferences for UPS Trade Direct processing.
3. Enter a consolidated movement. See *Entering Consolidated Movements*.
4. Process a child shipment and associate it to an open consolidated movement. See *Processing UPS Small Package Child Shipments*, *Processing LTL/TL Child Shipments* and *Associating Child Shipments with Consolidated Movements*.
5. Edit the consolidated movement and associated child shipments if needed. See *Editing Child Shipments or Consolidated Movements*.
6. Close out the consolidated movement. See *Closing Out Consolidated Movements*.
7. Track the consolidated movement and its associated child shipments, as needed. See *Tracking Child Shipments and Consolidated Movements*.
8. Import or export child shipments, as needed.

**Note:** For more information on UPS Trade Direct, select **WorldShip Help** from the **Help** menu and type About UPS Trade Direct.

# UPS Trade Direct® Shipments

## Entering Consolidated Movements

To enter a new consolidated movement:

1. From the **Activities** menu, select **Trade Direct Manager**. The UPS Trade Direct Manager window appears.
2. Click **Enter New Movement**. The Enter Consolidated Movement — Step 1 of 2 window appears.
3. Under **Contract Information**, select a **Shipper Number**. WorldShip automatically displays the other fields under **Contract Information**.

4. Under Consolidated Movement Details:

- Specify the **Target Ready Date and Time**, **Number of Units**, **Gross Volume** and **Gross Weight**.
- Select the **Unit of Measure**.
- Type a description of the goods in **Description of Goods**.
- Specify the bill-to information.

**Note:** If you select *Third Party*, click the “...” button. In the *Third Party Address* window, specify the address information for the third party and click **OK**.

- Specify the **Shipper Reference** (as needed).
  - Clear the **Collection Address Same as Shipper Address** check box to specify a collection address for the consolidated movement in the Collection Address window. The “...” button appears next to the **Collection Address Same as Shipper Address** check box. Click the “...” button to display and edit the collection address information.
  - Select the **Dangerous Goods** check box (as needed).
5. Click **Next**. The Enter Consolidated Movement — Step 2 of 2 window appears.
  6. Under Estimated Customs Value, type the Customs Value and select a **Currency**.  
**Note:** These fields are shown only if the origin CFS is U.S., Canada or Australia.
  7. Under Consolidated Movement Invoice, specify the **Terms of Sale**, **Reason for Export**, **Declaration Statement** and **Additional Comments**.

8. Clear the **Importer (Sold To) Same as Ship To** check box to specify an importer address. The “...” button appears next to the **Importer (Sold To) Same as Ship To** check box. Click the “...” button to display and edit the importer address information.
9. Click **Quantum View Notify®** to display the Quantum View Notify Recipients (Consolidated Movement) window and enter recipient information.
10. Click **Finish**. The UPS Trade Direct Manager window reappears with the new consolidated movement selected.

# UPS Trade Direct® Shipments

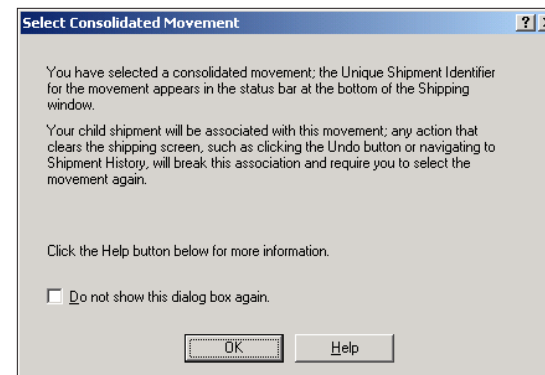
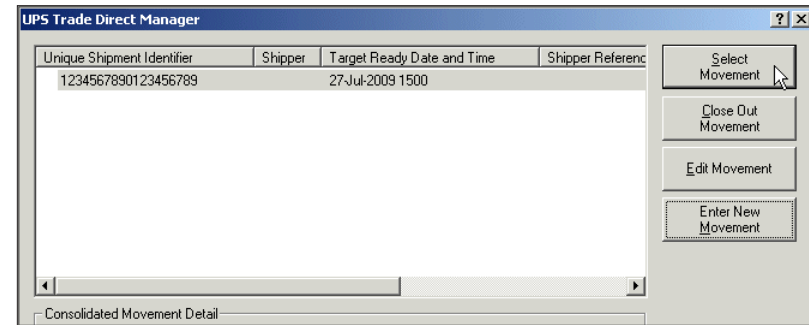
## Associating Child Shipments with Consolidated Movements

Each child shipment must be associated with (or assigned to) a consolidated movement before the child shipment can be processed. This association can occur in one of two ways:

- Process a child shipment and then select the consolidated movement you want to associate with the child shipment. See *Processing UPS Small Package Child Shipments* or *Processing LTL/TL Child Shipments*.
- Select the consolidated movement you want to associate with a child shipment before you process the child shipment. See the instructions below.

To select the consolidated movement before you process a child shipment:

1. On the **Activities** menu, click **Trade Direct Manager**. The UPS Trade Direct Manager window appears.
2. Do one of the following:
  - If the desired open consolidated movement does not appear in the list, enter a new movement.
  - If the desired open consolidated movement appears in the list, select the consolidated movement from the list.
3. Click **Select Movement**. The Select Consolidated Movement window appears. Click **OK** to select the movement and return to the Shipping window.
4. Process a child shipment. See *Processing UPS Small Package Child Shipments* or *Processing LTL/TL Child Shipments*.



# UPS Trade Direct® Shipments

## Processing UPS Small Package Child Shipments

A UPS Trade Direct UPS Small Package child shipment is processed similarly to a non-UPS Trade Direct UPS Small Package. Follow the steps below and refer to *Processing Shipments*.

To process a child shipment before selecting a consolidated movement:

1. In the Shipping window, click the down arrow in the **Shipper** box and select a Trade Direct shipper. WorldShip fills the **Ship From** tab with the destination CFS and the **Country/Territory** box on the **Ship To** tab with the destination CFS Country/Territory.
2. Enter the Ship To information on the **Ship To** tab. Click the down arrow in the **Country/Territory** box and select the Ship To country of the ultimate consignee. You can use the Distribution List feature.
3. Enter information on the **Service, Options, Detail, Reference** and **Customs Documentation** (if applicable) tabs. Ensure that the **LTL/TL Shipment** check box on the **Service** tab is not selected.
4. Click the **Add** button (U.S./Puerto Rico/Canada DCFS only). If your destination CFS is a country other than U.S./PR/CA, indicate the total number of packages on the Shipping window. Click **Process Child Shipment**.

The screenshot displays the UPS WorldShip software interface. The title bar reads "UPS WorldShip - Target Ready Date: Friday, 05-Aug-2011". The interface is divided into several tabs: "Ship To", "Ship From", "Distribution", "Service", "Options", "Detail", "Reference", and "Customs Documentation".

The "Ship To" tab is active, showing the following information:

- Customer ID: [ ]
- Update Address Book
- Residential
- Company or Name: [A Company]
- Attention: [ ]
- Address 1: [123 Main Street]
- Address 2: [ ]
- Address 3: [ ]
- Country/Territory: [United States]
- Postal Code: [27820]
- City or Town: [CONWAY]
- State/Province/County: [NC]
- Telephone: [(123) 456-7890]
- E-mail Address: [ ]
- UPS Account: [ ]
- Tag ID Number: [ ]

The "Service" tab is active, showing the following information:

- LTL/TL Shipment
- UPS Service: [Next Day Air]
- Need it there sooner? [ ]
- Saturday Delivery
- Bill Transportation To: [Shipper]
- With Return Services
- Package: [5]
- Shipment: [5.0]
- Shipment Cost (USD): [106.40]

The "Options" tab is active, showing the following information:

- Package Type: [ ]
- Length: [46] Width: [32] Height: [10] cm
- Declared Value: [ ]
- Reference Number 1: [ ]
- Reference Number 2: [ ]

At the bottom of the interface, there are buttons for "Add", "Delete Pkg", and "Process Child Shipment F10". The "Process Child Shipment F10" button is highlighted with a mouse cursor.

At the bottom of the window, a note reads: "Your invoice may vary from the displayed rates."

# UPS Trade Direct® Shipments

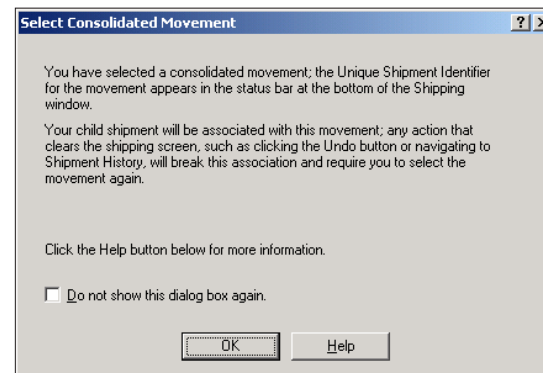
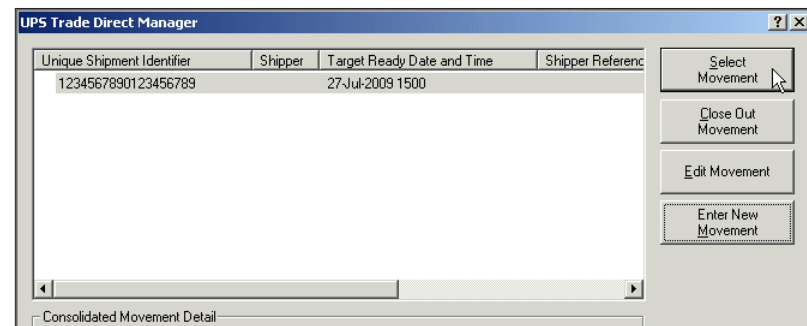
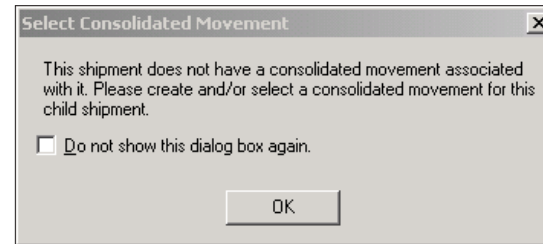
## Processing UPS Small Package Child Shipments *(continued)*

The Select Consolidated Movement window appears. If this child shipment is associated with a consolidated movement, the Select Consolidated Movement window does not appear. Skip to step 7.

5. Click **OK**, then select the consolidated movement in the UPS Trade Direct Manager window and click **Select Movement**. The Select Consolidated Movement window appears.
6. Review the information and click **OK**. The Shipping window appears.
7. If this is a multiple-piece shipment, click **Add** to add the first package. For each additional package, enter the package information and click **Add**.
8. When you are finished, click **Process Child Shipment**. WorldShip generates the labels and documents.

**Note:** The *Shipment History* window shows the consolidated movement and its associated child shipments.

For more information, see *Processing LTL/TL Child Shipments* and *Associating Child Shipments with Consolidated Movements*.



# UPS Trade Direct® Shipments

## Processing LTL/TL Child Shipments

To process an LTL/TL child shipment before selecting a consolidated movement:

1. In the Shipping window, click the down arrow in the **Shipper** box and select a UPS Trade Direct shipper. WorldShip fills the **Ship From** tab with the destination CFS and the **Ship To** tab with the destination CFS Country/Territory.
2. Select the **LTL/TL Shipment** check box on the **Service** tab. The **LTL/TL** tab replaces the **Service** tab to allow entry of LTL/TL information.
3. Enter Ship To information on the **Ship To** tab. You cannot use the Distribution List feature.
4. Enter information on the **LTL/TL, Options, Detail, Reference and Customs Documentation** (if applicable) tabs as needed.
  - On the **LTL/TL** tab under **Shipment**, select a **UPS Service**, specify the bill-to information and type a **General Description of Goods**.
  - On the **LTL/TL** tab under **Freight Line** and **Handling Unit**, select the **Freight Class** and a **Package Type** for a single handling unit and type the dimension of one piece of the handling unit in Length, Width and Height. In addition, type the number of pieces in a single handling unit in Pieces on Pallet (Package Type must be Pallet/Skid) and a general description of a single handling unit in Description.
  - On the **LTL/TL** tab under **Weight**, type the weight of a single handling unit in Handling Unit.
  - On the **Options** tab, select options as appropriate.
  - On the **Detail** tab, type special instructions pertaining to the current shipment in Special Handling for Shipment.
  - On the **Reference** tab, type **Reference Number 1** and **Reference Number 2**.
  - On the **Customs Documentation** tab (if displayed), prepare the necessary documents for this shipment.

Your invoice may vary from the displayed rates.

Your invoice may vary from the displayed rates.

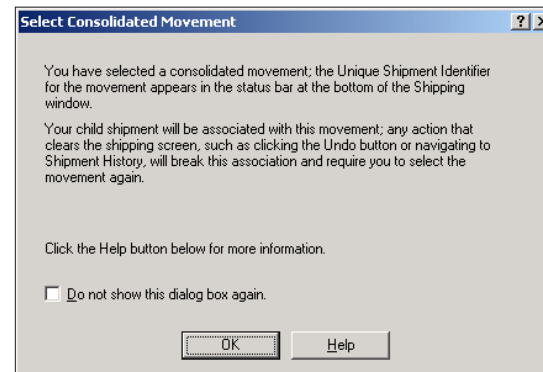
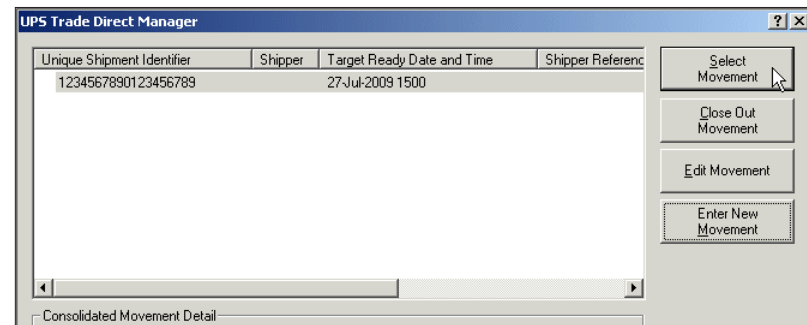
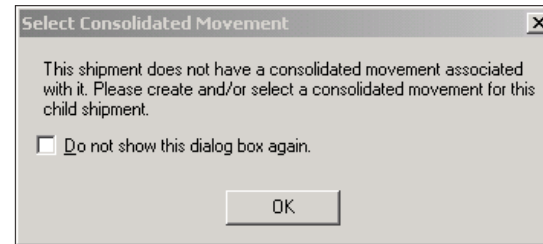
# UPS Trade Direct® Shipments

## Processing LTL/TL Child Shipments *(continued)*

5. Click **Add Line**. The Select Consolidated Movement window appears. If this child shipment is associated with a consolidated movement, the Select Consolidated Movement window does not appear. Skip to step 9.
6. Click **OK**. The UPS Trade Direct Manager window appears.
7. Select the consolidated movement you want to associate with the child shipment and click **Select Movement**. The Select Consolidated Movement window appears.
8. Click **OK**. The Shipping window appears.
9. If this is a multiple-piece shipment, click **Add Line** to add the first freight line. For each additional freight line, enter the necessary information and click **Add Line**.
10. When you are finished, click **Process Child Shipment**. WorldShip generates the labels and documents.

**Notes:** If the LTL/TL Pallet Label Processing window appears, enter the required data.

The Shipment History window shows the consolidated movement and its associated child shipments.



# UPS Trade Direct® Shipments

## Editing Child Shipments or Consolidated Movements

### Editing an Open Consolidated Movement:

1. From the **Activities** menu, select **Trade Direct Manager**. The UPS Trade Direct Manager window appears.
2. Select the consolidated movement that you want to edit.
3. Click **Edit Movement**. The Edit Consolidated Movement — Step 1 of 2 window appears.
4. Edit the available fields as necessary and click **Next**. The Edit Consolidated Movement — Step 2 of 2 window appears.
5. Edit the available fields as necessary and click **Finish**.

### Editing a Child Shipment Associated with an Open Consolidated Movement:

1. Under UPS Consolidated Movements in the Shipment History window, click the + symbol next to Open Movements.
2. Select the child shipment that you want to edit.
3. From the **Activities** menu, select **Edit/Reconcile Shipment**. A confirmation message appears.
4. Click **Yes**. The Shipping window appears and shows the child shipment.
5. Edit the child shipment and click **Process Child Shipment**.

The screenshot displays the 'UPS Trade Direct Manager' application window. At the top, there is a table with columns: 'Unique Shipment Identifier', 'Shipper', 'Target Ready Date and Time', and 'Shipper Reference'. A single row is visible with the identifier '1234567890123456789', a green status icon, and the date '27-Jul-2009 1500'. To the right of the table are four buttons: 'Select Movement', 'Close Out Movement', 'Edit Movement' (with a mouse cursor over it), and 'Enter New Movement'. Below the table is a section titled 'Consolidated Movement Detail' with tabs for 'Details', 'Origin CFS', and 'Destination CFS'. The 'Details' tab is active, showing a grid of information: 'Small Package Shipments: 2', 'Total Weight: 18.0 kg', 'Product Type: Cross Border North', 'Packages: 2', 'Customs Value: 30.00', 'Package Pallet Label', 'LTL/TL Shipments: 1', 'Currency: British pound', 'Quantum View Notify', and 'Countries/Territories of Origin'. At the bottom of this section, there is a 'Preview Documents' area with a dropdown menu set to 'Bill of Lading' and a 'Print Preview' button. On the far right of the window, there are 'Exit' and 'Help' buttons.

# UPS Trade Direct® Shipments

## Closing Out Consolidated Movements

### Closing Out One Consolidated Movement:

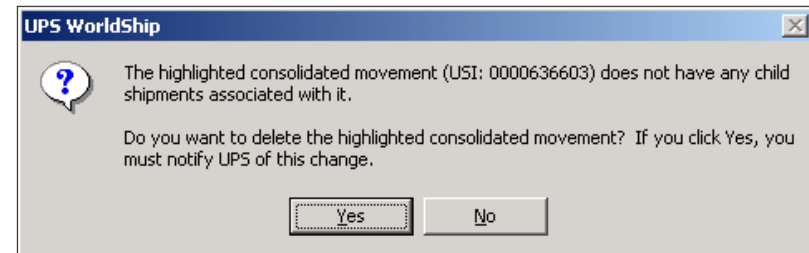
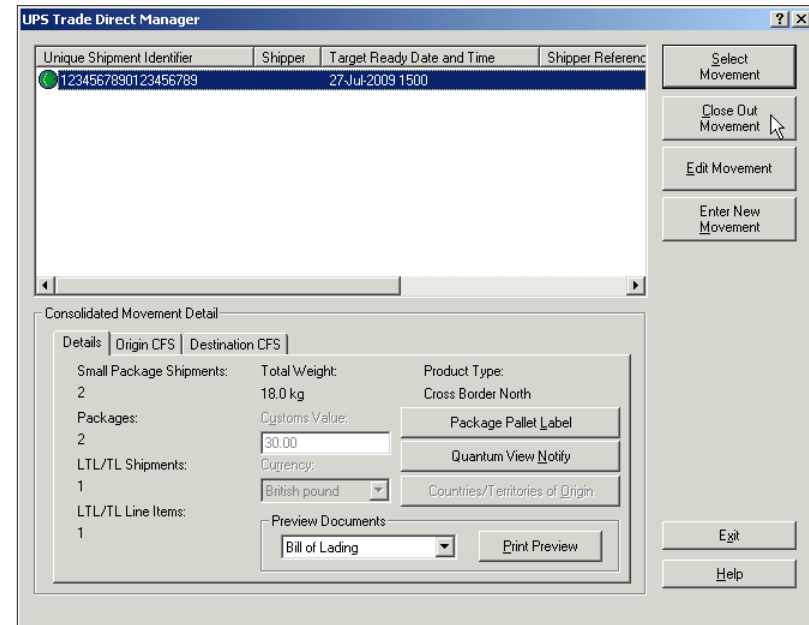
1. From the **Activities** menu, select **Trade Direct Manager**. The UPS Trade Direct Manager window appears.
2. Select the consolidated movement you want to close out.
3. Click **Close Out Movement**. A confirmation message appears.
4. Click **Yes**. WorldShip prints the labels and documents. WorldShip will upload Package Level Detail (PLD) during closeout; no other End of Day processing is required.

### Closing Out Multiple Consolidated Movements:

1. Select multiple movements in the UPS Trade Direct Manager window.
2. Click **Close Out Movement**. WorldShip closes out the selected movements in the order in which they appear.

**Note:** If you attempt to close out a consolidated movement without an associated child shipment, WorldShip asks if you want to permanently delete the movement. Click **Yes** to delete the consolidated movement, or click **No** to cancel the close out and keep the consolidated movement on your system.

If you attempt to close out a consolidated movement with a shipment that contains goods with different currencies, the Enter Invoice Totals window appears. Using this window, enter the invoice currency and amounts for the consolidated movement.



# UPS Trade Direct® Shipments

## Tracking Child Shipments and Consolidated Movements

Tracking UPS Trade Direct child shipments is similar to tracking other types of shipments.

The following differences in tracking functionality pertain to UPS Trade Direct shipments only:

- The Shipment History window shows a UPS Consolidated Movements category. Under this category, Deferred Shipments, Imported Shipments, Open Movements and Date-Time (Closed) can appear.
- You can track consolidated movements and associated child shipments under the Date-Time (Closed) category by using the following numbers:
  - Unique Shipment Identifier (USI)
  - Sub Pro Number
  - 1Z Tracking Number
- When you select a child shipment or consolidated movement in the Shipment History window, information about the shipment or movement appears on the right side of the window.
- From the Tracking Number Manager window, select the **Sub Pro/USI** tab and click **Track List** to track only one tracking number type at a time — either Sub Pro or USI. If your list contains both types, the Tracking Number Manager tracks one number type and then reappears to allow you to continue tracking.

