

Acumatica Smart Shipment Integration

Summary

Acumatica Smart Shipment Integration is a Windows desktop application that integrates Acumatica ERP system with the following shipping systems:

- UPS WorldShip
- FedEx Ship Manager

Application enables users to process Acumatica shipments in one of the supported shipping applications with the subsequent update of the tracking and freight cost information in Acumatica.

Requirements

- UPS WorldShip and FedEx Ship Manager shipping systems. Applications can be downloaded from the official www.ups.com and www.fedex.com websites. Installation and registration processes must be completed before using these applications in the conjunction with Acumatica Shipping Tool.
- Web Browser: Chrome, Firefox or Edge
- Acumatica 6.0 and higher
- (optional) Advanced Fulfillment Software (Acumatica Customization) with the support of the Acumatica Shipping Tool Integration.

Shipping Tool Integration Setup

After the Acumatica Shipping Tool installation, the following required parameters must be set up in the administrative settings window (Fig. 1):

- **Login** – user must have access to the Shipment SO.30.20.00 screen.
- **Password**
- **Company** – parameter is required only in case you are using multiple companies in Acumatica.
- **Box ID** – Box ID of the respective Box defined via the Boxes CS.20.76.00 screen. This Box ID is used to process Acumatica Shipments without packages. Make sure this BOX ID presents in the list of allowed boxes in the Ship Via Code used in Acumatica shipments.

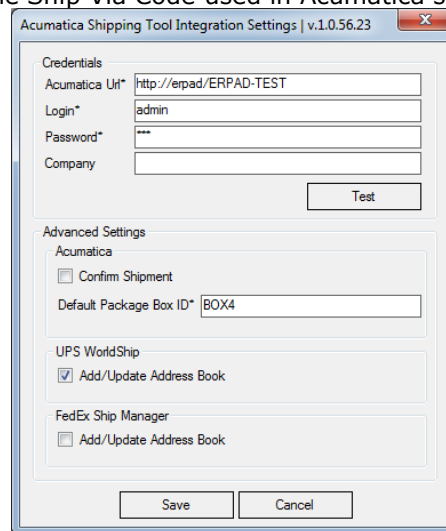


Figure 1 – Administrative settings

Additionally, the following parameters are available:

- **Confirm Shipment** – auto-confirms shipment in Acumatica after the processing.
- **Add/Update Address Book** – parameters in UPS and FedEx Settings allows users to control the default value of the respective check-boxes in the shipping applications during the shipment processing. Please note that in FedEx this check-box is active only for the existing recipients and is always disabled and set to true for the new recipients. So, in case user processes the shipment for a new recipient in FedEx, this check-box will be set to true even if it is set to false in the application settings.

Application toolbar (Fig. 2) contains the following buttons:

- **UPS** – initiates the shipment processing via the UPS WorldShip
- **FedEx** - initiates the shipment processing via the FedEx Ship Manager
- **Settings** – opens the Administrative settings screen (see Fig. 1).
- **Exit** – closes the application.



Figure 2 – Application toolbar

The application toolbar saves the last position used by the user.

Processing scenarios

Shipment processing can be invoked from the Acumatica Shipping screen SO.30.20.00. User is able to begin the processing only if the screen is active in one of the supported Web Browsers and the selected shipping system is up and running. Application takes the topmost window in the browser hierarchy to process the shipment.

Alternatively, it can be initiated from the Pick, Pack and Ship screen SO.30.20.10. When the user finishes picking/packing, the system will automatically trigger the FedEx or UPS application. Once shipment is completed in the external application the Acumatica data is updated and shipment is fully confirmed. It is recommended to set "Confirm Shipment" parameter to true in this use case.

Acumatica Setup

Make sure that the Ship-Via Code CS.20.75.00 with the manual freight calculation is used in Acumatica shipments (Fig. 3). In other case, freight cost will not be updated.

The screenshot shows the Acumatica interface for configuring Ship Via Codes. The top navigation bar includes tabs for ORGANIZATION, FINANCE, DISTRIBUTION, CONFIGURATION, SYSTEM, and HELP. The left sidebar shows a tree view with 'Sales Orders' selected. The main area displays the 'Ship Via Codes' configuration for 'New York'. The 'Details' tab is active, showing fields for 'Ship Via' (LOCAL), 'Description' (Local Delivery Service), 'Calendar' (EST - Eastern Time (NY)), 'Calculation Method' (Manual), 'Base Rate' (0.0000), 'Common Carrier' (checked), 'Tax Category', and various account codes for Freight Sales and Freight Expense.

Figure 3 – Ship Via Codes with manual calculation method

To be able to initiate the shipment processing from the SO.30.20.10 screen, Ship Via Codes should be pre-configured to be used in conjunction with one of the supported shipment application.

The screenshot shows the 'Advanced Fulfillment' tab of the 'Ship Via Codes' configuration. It displays the 'Ship Via' (FEDEXSHIPMANAGR) and 'Description' (FedEx Ship Manager). The 'Use External Shipping Application' checkbox is checked. The 'Shipping Application' dropdown menu is open, showing options: 'FedEx Ship Manager', 'UPS WorldShip', and 'FedEx Ship Manager'.

Figure 4 – Ship Via Codes configuration CS.20.75.00

The Pick, Pack and Ship screen triggers processing of a shipment in the related desktop shipping systems with the subsequent update of the tracking and freight cost information in Acumatica only in case Ship-Via Codes are configured to use external shipping application (Fig. 4).

Field mapping

Regardless of the scenario, after the processing is invoked application retrieves the Shipment details from Acumatica and submits them to the selected shipping application using predefined mapping (Fig. 5). This mapping is not configurable.

#	Acumatica Shipment	UPS WorldShip	FedEx Ship Manager
1	CustomerID	CustomerID	ReceipientID
2	Contact.DisplayName	Company or Name	Company name
3	Contact.Position	Attention	Contact Name
4	Contact.Address.AddressLine1	Address 1	Address 1
5	Contact.Address.AddressLine1	Address 2	Address 2
6	Contact.Address.AddressLine3	Address 3	
7	Contact.Address.Country	Country/Territory	Country
8	Contact.Address.PostalCode	Postal Code	Postal code
9	Contact.Address.City	City or Town	City
10	Contact.Address.State	State/Province/Country	State/Province
11	Contact.Phone1	Telephone	Telephone
12	Contact.Email	E-mail Address	ShipAlert tab -> Recipient Email Address
13	ShipmentNbr	Reference Number 1	Shipment ID
14	Packages.Weight	Weight	Weight
15	Number of Packages (calculated)		Number of packages
16			Bill transportation to: 1 - Sender
17			Print labels after I have completed this shipment field is defaulted to: true
18		Default UPS Service	Service Type is defaulted to: R – FedEx Ground Service

Figure 5 – Field mapping

All other fields except those mentioned in the table should be populated by the user. Once the user finalizes and processes the shipment in the shipping application (see Fig. 6 and 7) the application updates the Acumatica shipment with tracking numbers, freight cost and package weight (Fig. 8 and 9) and refreshes the screen.

Acumatica Shipping Tool does not convert unit of measures for weight during shipment processing. Therefore, please make sure that Acumatica and the shipping systems use the same unit of measure. Please note that in some cases, for instance when user ships internationally, UPS or FedEx can require additional fields to be filled for the shipment processing. In these cases, the shipping tool stops the process and populates only the fields which are enabled in the shipping system.

Figure 6 – Process Shipment in UPS WorldShip

Figure 7 – Process Shipment in FedEx Ship Manager

Document Details	Orders	Shipping Settings	Packages
Confirmed	Box ID	Type	Description
	BOX4	Manual	

Figure 8 – Updated Tracking Number in Acumatica Shipment after processing

SHIP-TO INFO	SHIPPING INFORMATION
Business Name: SO customer #151-4	Ship Via: UPSWORLI
Attention: Finance Group	FOB Point:
Phone 1: 215-532-3333	Shipping Terms:
Email: info@abventures.com	Shipping Zone ID:
Address Line 1: 601 W Girard Ave	Freight Currency: USD
Address Line 2:	Freight Cost: 7.58
City: Philadelphia	Freight Amt.: 7.58
Country: US - United States of America	
State: PA - PENNSYLVANIA	
Postal Code: 19123	

Figure 9 – Updated Freight Cost in Acumatica Shipment after processing

Acumatica Shipment Statuses and processing

Acumatica Shipping Tool processes only the shipments with "Open" status. Shipments with other statuses will not be processed.

"Confirmed" shipments need to be manually corrected before processing: SO.30.20.00 – Actions – "Correct Shipment" action.

Please note that Acumatica Shipment package info, tracking numbers and freight cost will be overridden each time the shipment is processed.

Voided Shipments and Packages

User can Void (Delete) processed shipments before running End of Day process in the supported shipping systems.

In UPS WorldShip this can be done by clicking "Void" in the Shipping History (Fig. 10).

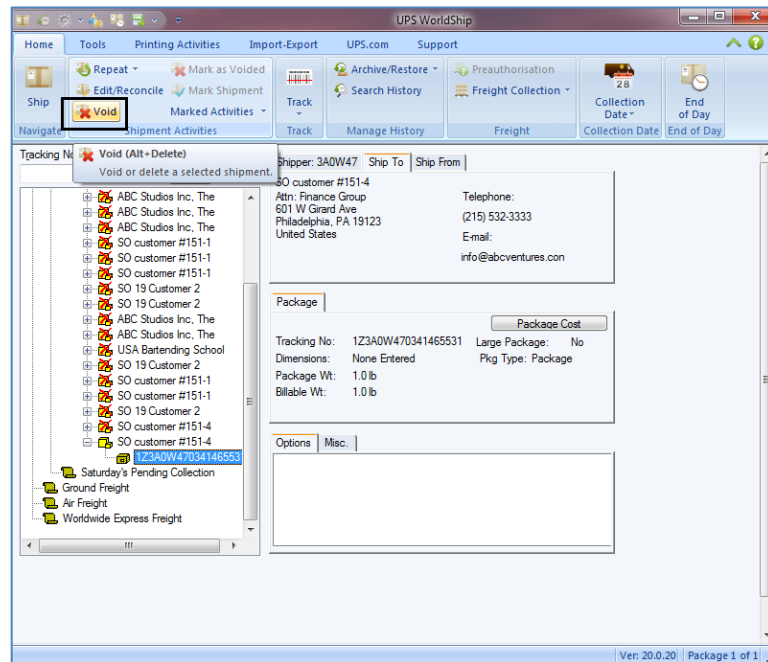


Figure 10 – Void Shipment in UPS WorldShip

In FedEx Ship Manager, users can delete a shipment by clicking "Delete" in the respective Shipping List (Fig. 11).

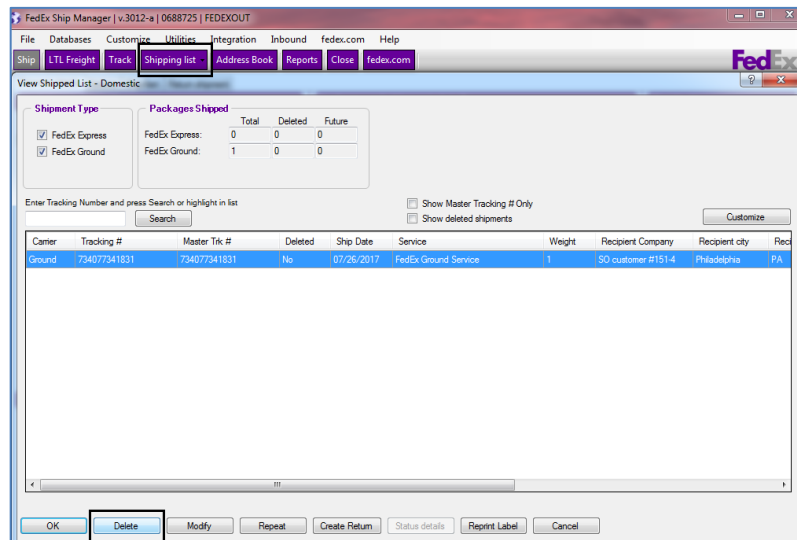


Figure 11 – Delete Shipment in FedEx Ship Manager

Voided (Deleted) shipments are marked as deleted and updated in Acumatica according to the following logic:

Shipment level:

1. If Shipment has "Open" status, it gets "On Hold" Status (Hold =true).
2. If Shipment has "On Hold" status, nothing happens.
3. If Shipment has "Confirmed", "Completed" or "Invoiced" status other status, no updates are performed on the Shipment and Package levels.
4. Freight cost for package is deducted from the Shipments Freight cost and Shipments Freight cost is updated (cases 1-3).
5. Shipment Date is updated.

Package level (applicable only to cases 1-2):

6. Package Tracking Number is cleared.
7. Package Confirmed filed value is set to false.

Shipments with no packages

In case user processes a shipment with no packages, new package(s) will be added to the Shipment. Application will use the Default Box ID specified in the application settings as the Box ID value in the Packages grid.