

Managing a UPS Shipping Label within the Impact Widget SoftPro 360

In order to maintain a streamlined closing process, save time, and be more efficient, SoftPro 360 users now have the ability to prepare UPS shipments directly from the Impact widget SoftPro 360. **UPS - Shipping** seamlessly populates the name, address and work phone number of the contacts in your Impact order, allowing you to quickly select a contact and create a UPS Shipping Label without ever leaving Impact.

UPS - Shipping can be found in the SoftPro 360 **New Product** menu in the SoftPro 360 widget. Double click on the **UPS - Shipping** entry to start creating your UPS shipping labels (or highlight **UPS - Shipping** and click **OK**).

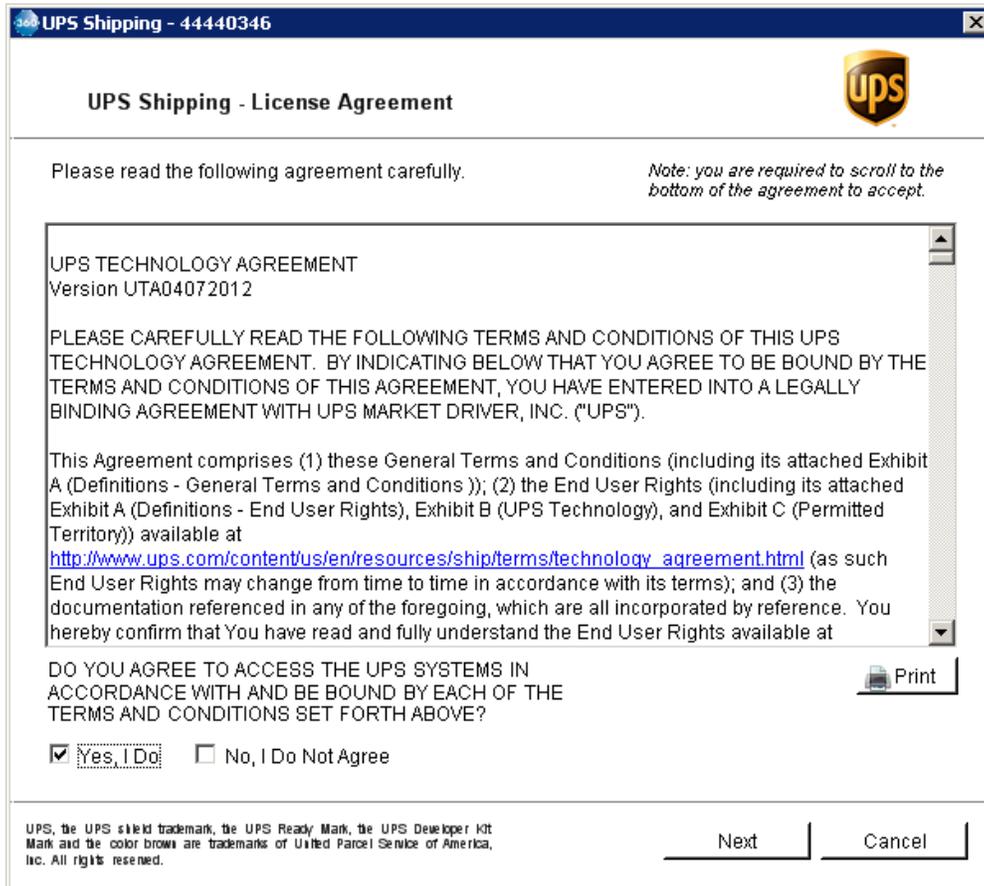


If you already have an Impact order open on your desktop, the order number will be listed in the **Order Linking** dialog in the **Open Order Numbers** and **Selected Order Number** fields. You may choose to overwrite the **Selected Order Number** with an order that is not currently open; simply enter the full Impact order number, including any leading zeroes, in the **Selected Order Number** field. Once you have confirmed the order to link, click **OK** to continue.

The image shows a software dialog box titled "Order Linking". It has a light gray background and a dark blue title bar. The dialog is divided into two main sections. The first section, labeled "Open Order Numbers:", contains a list box with a blue header bar and the text "44440346" listed below it. The second section, labeled "Selected Order Number:", contains a text input field with the text "44440346" entered and highlighted. At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

The first time you access **UPS - Shipping** you will be taken to the **UPS Shipping – License Agreement** screen. To advance beyond this screen you must agree to the terms of the UPS Technology Agreement. The checkboxes will become enabled after you have read the agreement and move the right scroll bar to the bottom of the agreement.

Note: you can get back to this screen by accessing the **Manage UPS Accounts** button on the **UPS Shipping** screen and selecting the **UPS Registration** tab.



UPS Shipping - 44440346

UPS Shipping - License Agreement

Please read the following agreement carefully. *Note: you are required to scroll to the bottom of the agreement to accept.*

UPS TECHNOLOGY AGREEMENT
Version UTA04072012

PLEASE CAREFULLY READ THE FOLLOWING TERMS AND CONDITIONS OF THIS UPS TECHNOLOGY AGREEMENT. BY INDICATING BELOW THAT YOU AGREE TO BE BOUND BY THE TERMS AND CONDITIONS OF THIS AGREEMENT, YOU HAVE ENTERED INTO A LEGALLY BINDING AGREEMENT WITH UPS MARKET DRIVER, INC. ("UPS").

This Agreement comprises (1) these General Terms and Conditions (including its attached Exhibit A (Definitions - General Terms and Conditions)); (2) the End User Rights (including its attached Exhibit A (Definitions - End User Rights), Exhibit B (UPS Technology), and Exhibit C (Permitted Territory)) available at http://www.ups.com/content/us/en/resources/ship/terms/technology_agreement.html (as such End User Rights may change from time to time in accordance with its terms); and (3) the documentation referenced in any of the foregoing, which are all incorporated by reference. You hereby confirm that You have read and fully understand the End User Rights available at

DO YOU AGREE TO ACCESS THE UPS SYSTEMS IN ACCORDANCE WITH AND BE BOUND BY EACH OF THE TERMS AND CONDITIONS SET FORTH ABOVE?

Yes, I Do No, I Do Not Agree

Print

Next Cancel

UPS, the UPS shield trademark, the UPS Ready Mark, the UPS Developer Kit Mark and the color brown are trademarks of United Parcel Service of America, Inc. All rights reserved.

After agreeing to the terms of the UPS License Agreement you will advance to the **UPS Shipping – Shipper Information** screen. Your contact information will be pre-populated based upon your SoftPro 360 registration.

On this screen you have the option to set defaults for **Delivery Confirmation, Address Validation, Ship Notification, Exception Notification** and **Delivery Notification**. Enabling these settings here will set them as the default for all users and for all labels created, however, you can modify the setting on a per label basis as needed.

- **Delivery Confirmation** options are None, Signature Required, Adult Signature Required and Shipper Release
- **Address Validation:** Address Validation is an automatic function that verifies the city, state, and postal code combination of any U.S. Ship To address. If UPS is unable to validate the combination, you will have the option to use a suggested address from an address database, revise the original address, or use the original address.
- **Ship Notification:** A Ship notification tells you when shipment information has been received by UPS
- **Exception Notification:** An Exception notification informs you about the unforeseen events resulting in a change to the expected delivery day and includes the rescheduled delivery date.
- **Delivery Notification:** A Delivery notification tells you when the shipment has been delivered

Note: You can get back to this screen by clicking the **Settings** button on the **UPS Shipping** screen.

Click **Next** to receive a confirmation that you have completed the UPS registration.

The image shows a screenshot of the 'UPS Shipping - Shipper Information' window. The window title is 'UPS Shipping - 44440346'. The main title is 'UPS Shipping - Shipper Information'. The UPS logo is in the top right corner. The form contains the following fields:

- Name: Joseph Westrick
- Company Name: USA Digital Solutions, Inc.
- Address 1: 10835 N. 25th. Ave.
- Address 2: Suite 350
- City/State/Zip: Phoenix AZ 85029
- Email: JWestrick@digisolaz.com
- Phone: (602) 866-8199

Below the form is the 'Default Shipment Settings' section:

- Delivery Confirmation: None (dropdown menu)
- Address Validation: Validate Addresses
- Quantum View Notify@: Ship Notification, Exception Notification, Delivery Notification

At the bottom of the window are 'Next' and 'Cancel' buttons. A 'Registration Complete' dialog box is overlaid on the bottom left of the window. The dialog box has a blue header 'Registration Complete' and the UPS logo. The text inside says: 'Registration successful! Press continue to get started shipping with UPS. To learn more about UPS services, please visit UPS.com.' There is a 'Continue' button at the bottom of the dialog box.

Click **Continue** to move on.

On the **UPS Shipping – Account Information** screen you will need to enter your UPS Account Number, choose an Account Name, and enter the zip code associated with the account. If you do not currently have a UPS account click the “Visit UPS.com” link to open a new account.

If you have negotiated rates with UPS you will need to complete the Invoice Details section.

Click **Submit** to validate your UPS account number.

Note: You can add additional **UPS Accounts** by accessing the **Manage UPS Accounts** button found on the **UPS Shipping** screen.

Manage UPS Accounts

Add UPS Account | Current UPS Accounts | UPS Registration

UPS Account Number: *

Name For This Account: *

Postal Code (Pickup Location): *

Account Usage: My organization (same SoftPro license)
 Just for me

Negotiated Rates

Authenticate your individual account using information from your most recent invoice. This information is necessary in order to use UPS negotiated rates. If you do not receive regular invoices these fields can be left empty.

Invoice Number:

Charges This Period:

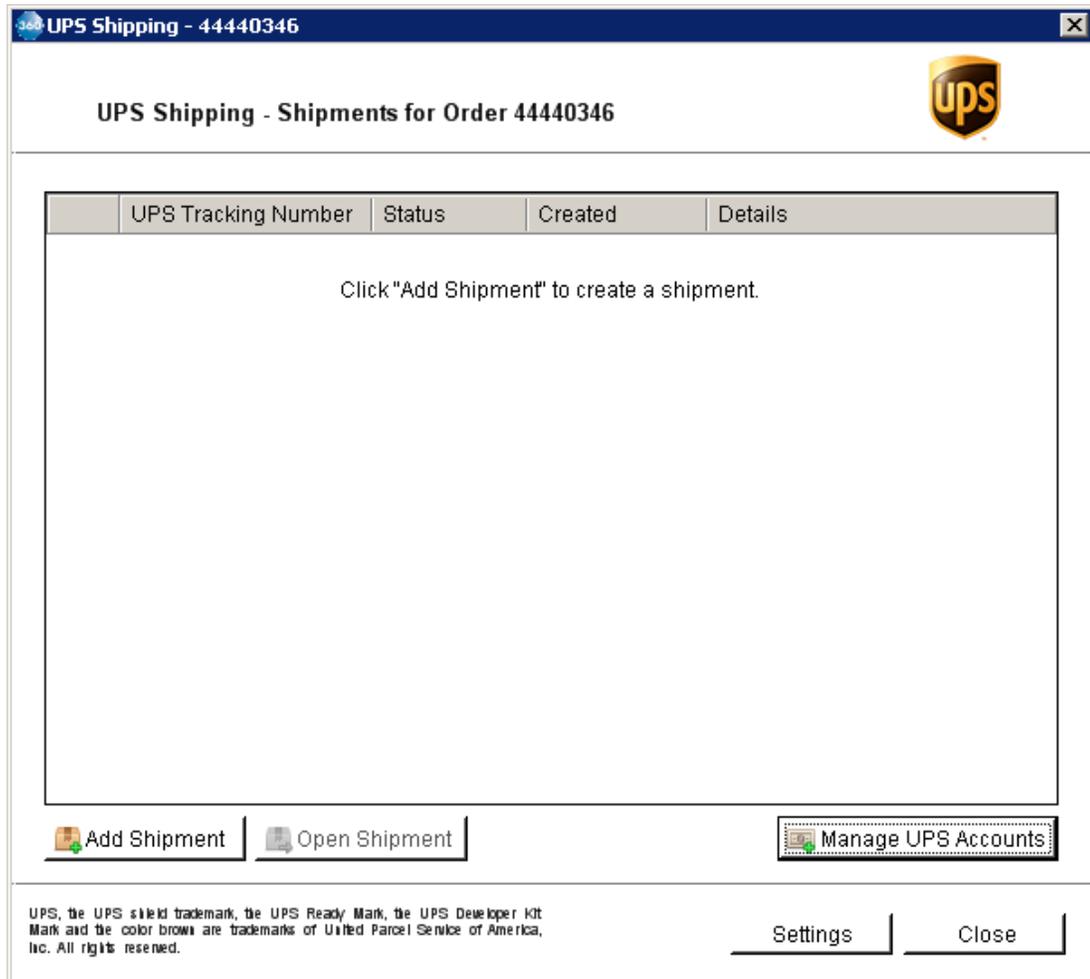
Invoice Date:

Control ID: (Required only if present on invoice)

For subsequent uses of UPS Shipping, the **UPS Shipping** screen will be the first screen displayed. The **UPS Shipping** screen will display all shipments created for the linked Impact order. To create a shipping label, click the **Add Shipment** button.

Note: Click the **Managing UPS Accounts** button on the **UPS Shipping** screen to add additional **UPS Accounts**, view **Current UPS Accounts** and renew the **UPS Registration**.

Note: Click the **Settings** button on the **UPS Shipping** screen to modify **Shipper Information** or change default settings.



The **Create Shipment** screen lists the contacts entered into the linked Impact order. Highlight the contact you would like to ship to and (when entered into the Impact order) the contact's name, address and work phone number will populate into the appropriate fields.

If additional UPS Accounts have been added, they will be available under the **UPS Account** drop down list. You have the option to select the **Package Type**, enter the package **Weight** and select the **Service Type**. You can also select the options of **Residential Delivery**, **Validate Address** or create a **Return Label**. The **Compare Rates** link will provide estimated rates for the package type selected.

UPS Shipping - 44440346

Create Shipment - 44440346

Select a Contact:

- B1** Buyer1, Test
- S1** Seller, First
- L** Bank of America
- O** Source Name

UPS Account: test (T1426T)

Person: Buyer1, Test

Ship To: Buyer1, Test

Company:

Address: Company's Person's

Address 1: 123 Buyer Lane

Address 2:

City/State/Zip: Phoenix AZ 85029-

Phone: (602) 999-9999

Pkg. Type/Wt: UPS Letter 0.1 lbs.

Service Type: Next Day Air® [Compare Rates](#)

Options: Residential Delivery Return Label
 Validate Address [More Options](#)

Submit Cancel

The **More Options** link provides additional options that can be selected on a per shipment basis.

- **Additional Service Options** – Saturday Delivery
- **Delivery Confirmation** options are None, Signature Required, Adult Signature Required and Shipper Release
- **Verbal Confirmation:** To confirm delivery of your shipment, a UPS representative will call on the day of delivery, using the preferred contact telephone number listed on your UPS Next Day Air® Early A.M.® package.
- **Package Dimensions:** Length, Width, Height
- **Large/Unusual Shape Package** – Large Package and Additional Handling
- **Ship Notification:** A Ship notification tells you when shipment information has been received by UPS (if entered into the Impact order for the contact, the contact’s email address will flow to the Email field)
- **Exception Notification:** An Exception notification informs you about the unforeseen events resulting in a change to the expected delivery day and includes the rescheduled delivery date. (if entered into the Impact order for the contact, the contact’s email address will flow to the Email field)
- **Delivery Notification:** A Delivery notification tells you when the shipment has been delivered. (if entered into the Impact order for the contact, the contact’s email address will flow to the Email field)
- **Declared Value**
- **Account Type** options are: Daily Pickup (set by default), Customer Counter, One Time Pickup, On Call Air, Letter Center and Air Service Center

****Note: value-added service charges may apply****

Additional Options

Additional Service Options
 Saturday Delivery

Delivery Confirmation
None Verbal Confirmation

Package Dimensions
Length Width Height
Inches - Valid for "My Packaging" Only

Large/Unusual Shape Package
 Large Package Additional Handling

Quantum View Notify®
 Ship Notification Delivery Notification
 Exception Notification
Email: testbuyer1@digisolaz.com

Declared Value:

Account Type: Daily Pickup

Close

When the options are completed, click on **Close** to return to the **Create Shipment** screen.

When the order is completed, click on the **Submit** button.

To create a Return Label, highlight the **Contact** the package will be shipped from and check the **Return Label** checkbox. This feature changes the **Ship To** field to **Ship From**. Click **Submit**.

UPS Shipping - 44440346

Create Shipment - 44440346

Select a Contact:

- B1** Buyer1, Test
- S1** Seller, First
- L** Bank of America
- O** Source Name

UPS Account: test (T1426T)

Person: Buyer1, Test

Ship From: Buyer1, Test

Company:

Address: Company's Person's

Address 1: 123 Buyer Lane

Address 2:

City/State/Zip: Phoenix AZ 85029-___

Phone: (602) 999-9999

Pkg. Type/Wt: UPS Letter 0.1 lbs.

Service Type: Next Day Air® [Compare Rates](#)

Options: Residential Delivery **Return Label** [More Options](#)
 Validate Address

Submit Cancel

On the **Shipment Details** screen you can **Print Preview**, **Print** or **Cancel** your UPS shipping label.

To track the shipment click the **Track** hyperlink, which will take you to the UPS tracking website.

Click **Close** to close this window and return to the **UPS Shipping** screen.

The screenshot shows a window titled "UPS Shipping - 44440346" with a close button in the top right corner. The main content area is titled "Shipment Details - 44440346" and features the UPS logo in the top right. The details are organized into two columns: "Shipping From:" and "Shipping To:". Below these are input fields for "UPS Tracking Number:", "Shipping Cost:", and "Estimated Delivery Date:". At the bottom of the main area are three buttons: "Print Preview", "Print Label", and "Cancel Shipment". A "Close" button is located at the bottom right of the window.

Shipping From:	Shipping To:
Buyer1, Test 123 Buyer Lane Phoenix, AZ 85029- (602) 999-9999	Joseph Westrick USA Digital Solutions, Inc. 10835 N. 25th. Ave. Suite 350 Phoenix, AZ 85029 (602) 866-8199

UPS Tracking Number: [Track](#)

Shipping Cost:

Estimated Delivery Date:

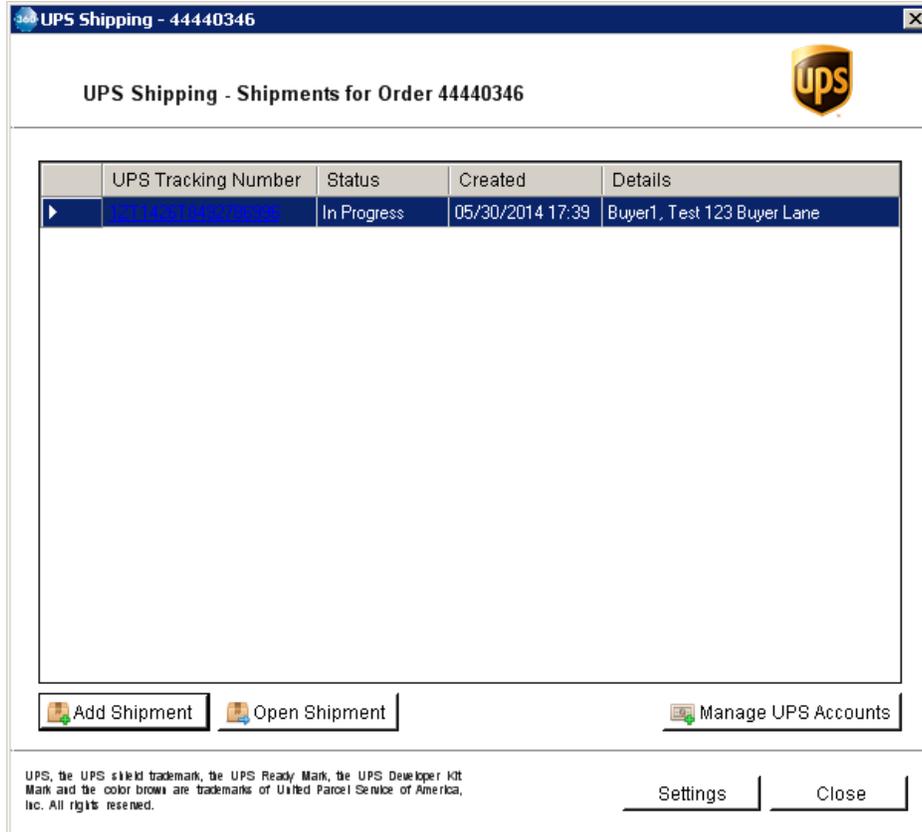
Shipping Label:

After you have created the shipment, you will return to the **UPS Shipping** screen.

The screen will now display a tracking number hyperlink for the shipment. Click the **Tracking Number** to link to the UPS tracking website.

The **Status** will update to **Completed** once the package has been delivered.

The **Open Shipment** button will take you back to the **Shipment Details** screen. The **Open Shipment** button is only enabled when the status of the transaction is **In Progress**.



Your SoftPro 360 widget will update with a Transaction for the shipment and the UPS tracking number will be available as a hyperlink under the **Description** column. The link will take you to the UPS tracking website. The **Status** will update to **Completed** once the package has been delivered.



Adding UPS Accounts

Select the **Managing UPS Accounts** button on the **UPS Shipping** screen to add additional **UPS Accounts**, view **Current UPS Accounts** and renew the **UPS Registration**. The UPS Registration will be required if the UPS product has not been used for a period longer than 7 months or if an error is received stating "Invalid Access License for the tool please re-license". To add an Additional UPS Account, enter the UPS Account Number, Account Name and Postal Code. Select **My Organization** if the account should be available to all users. Select **Just for me** if the UPS account should only be available to you. Then click **Add UPS Account**.

Manage UPS Accounts

Add UPS Account | Current UPS Accounts | UPS Registration

UPS Account Number: *

Name For This Account: *

Postal Code (Pickup Location): *

Account Usage: My organization (same SoftPro license) Just for me

Negotiated Rates

Authenticate your individual account using information from your most recent invoice. This information is necessary in order to use UPS negotiated rates. If you do not receive regular invoices these fields can be left empty.

Invoice Number:

Charges This Period:

Invoice Date:

Control ID: (Required only if present on invoice)

After adding an additional UPS Account you will be taken to the **Current UPS Accounts** screen. This screen displays all UPS Accounts created under the company's serial number. To remove an account so that it is no longer available to any user, click the **Remove** link.

