

uickSHIP™

INTRODUCTION

The QuickSHIP is a single user application designed specifically for those who use the United Parcel Service (UPS) and has been approved by UPS nationally. It was designed for shippers in the lower 48 states and does not contain charts for shipments originating in Alaska or Hawaii.

As businesses large and small know, the preparation and paperwork involved in shipping parcels often consumes valuable time and energy. QuickSHIP has been developed to help you:

- * Keep better track of your shipping records
- * Maintain an easily-updateable customer list
- * Quickly calculate shipping totals based on package weight and method of shipping

This document will go over the features found in QuickSHIP.

Multiuser and cross platform versions of this program and related modules (invoicing, accounts receivable, etc.) are available from ShopKeeper Publishing International, Inc. (904-222-8808).

REQUIREMENTS

QuickSHIP will work on any Macintosh with at least 1 meg of RAM. The printing of C.O.D. tags requires an ImageWriter or other compatible dot-matrix printer. Printing of shipping labels and all reports can be done on either a Dot matrix or a laser printer.

Scales - This version of QuickSHIP is set up to work with a Model DPB-100 digital platform scale from Chatillon Scale Division, 83-30 Kew Gardens Road, Kew Gardens,

NY 11415-1999 (phone 718-847-5000). The scale should be connected to the Macintosh modem port. (Set the scale for 9600 baud 8 data bits, one stop bit, no parity [8-1n].)

Pre-printed forms are available from NEBS. You may contact them at (800) 225-9550. When ordering the forms, please specify the following numbers:

Pin fed (dot matrix printer) Shipping Labels: NEBS 009375A-1 TSY
Laser Shipping Labels: NEBS 9395-1 TSY

INSTALLATION

Drag the QuickSHIP icon and the "Files" folder to your hard disk drive folder. When copying is complete, open the application by double clicking on the icon.

The first things you must do after starting the program is go to Housekeeper and enter the zone chart for your area and your company information.

If you are in the Western USA then you should also take the two files in the "Western USA Intl" folder and drag them into the "Blank" folder that is inside the "Files" folder. Let them replace the files that are there.

System 7 NOTE: Create an alias for the QuickSHIP and put the alias in the Apple Menu Items folder in your system folder. This will let you have the QuickSHIP work like a desk accessory.

UPS REQUIREMENTS

While QuickSHIP has been approved by UPS National, it is still the policy of UPS to approve each site's use of any computer manifest system on an individual basis at the local level. To get your system approved you will need to contact your local UPS office.

Before contacting your local UPS office there are some things you should do:

1. Enter your local UPS zip code / zone chart into QuickSHIP. Triple check this. Incorrect entries on this chart is the most common reason for a computer manifest site to be rejected.
2. Print out the following and have ready for the UPS representative:
 - a. the zip code/zone chart
 - b. the UPS Rate chart
 - c. a sample typical manifest for your business with at least 110 entries.

THE HOME WINDOW

You will see on your screen the ShopKeeper Home Window. From here, you can access the many features of QuickSHIP.

IMPORT

Used to load a manifest file; in this case, manifest files that have been prepared outside of QuickSHIP. Some programs like ShopKeeper™ POS and Bill-IT™ (ShopKeeper Publishing International, Inc. 904-222-8808) can prepare manifest files as they do the invoicing. In this case you simply import the file. QuickSHIP will review the entries after they have been imported. If there are any international shipments or entries that it does not understand it will open a "Fix Import" window. In this Fix Import window you can make any adjustments that are needed in USA entries and/or lookup and assign UPS International Air zones for the international customers.

Note: Old manifests that you saved out of QuickSHIP may also be reimported using this button.

For more information on how to prepare a manifest file for importing, please see Importing Manifest Files below.

CLIENT FILE

Click on the Client File button. This displays a listing of names in the client file. Client files are the records where client information is stored, and this information is used in the printing of shipping labels and C.O.D. forms.

* Print Client List -- This button produces a printout of the entire client list.

* New Client -- Click here to open a blank client file. Here you can enter information to establish a file on a new client. Use your Tab key to move from one field to the next. Client ID can be a special name or number designated to a particular client. Note there is more than one address field, allowing alternate addresses to be listed. The Miscellaneous field can be used to keep any other information listed in the file. When entering a new client, fill out as much information as possible. Though not all blanks need to be filled, it is important to at least provide the zip code of the client, or the file cannot be saved. When you have entered new client information, click Save.

* Edit Client -- This button allows you to change information under any client name you've highlighted. Click once on a name to highlight it, then click the Edit Client button -- or just click the client's name twice to open the file. Any changes must be saved to remain in the file.

On the Edit Client window there will be a History button. This history shows when and how you shipped something to this client. It is prepared when you delete all of the entries in the manifest file. You can also mark when you receive payment on C.O.D.'s using the History window.

Click the Home Window button when finished.

UPS (USA)

- * UPS (USA) -- This calls up a template form for sending parcels within the United States. On the left you will see a row of checkboxes for the delivery services, as well some special command features.
- * GroundTrac -- Check if the parcel is to have the premium rate for UPS GroundTrac service.
- * C.O.D. -- Check here if the parcel is to be sent Cash on Delivery. You can enter the amount in the space provided once QuickSHIP calculates the total shipping costs.
- * Oversize -- Check here if your parcel is larger than the standard UPS measurements.
- * Call Tag -- Requests that UPS follow instructions for Call Tag delivery.
- * Enter in Log -- Provides a log entry you can access and print later.
- * Print Label -- Check here to mark this form for printing later.
- * Saturday Delivery -- for special Saturday delivery.
- * Find Client -- Calls up client file names in the window provided=. When you have located the client file, click it twice. The information should appear under the Client Info heading. You should also assign an invoice number in the upper right-hand space.
- * List -- calls up a manifest window from which a record may be chosen. The Previous and Next buttons allow you to automatically move to the corresponding manifests entries without leaving the template.

Move the cursor to the enclosed area on the lower half of the screen. Here you will enter information concerning the method of delivery. Simply click on the box or boxes that correspond to the delivery method you desire. When finished, enter the weight of the parcel in the space provided -- and remember to always round up to next highest pound. Declare any value in the space provided.

The three buttons in the upper right corner of this box also allow you to display other manifests.

- * Recalc. -- when all information is entered, this will calculate the total charges for the package. You can make any changes in any part of the form, as long as you remember to click the Recalc. button afterwards. Be sure to save your work.
- * Label -- if you do not have Laser labels selected then hitting the label button will produce a shipping label for what is on the screen.

Click Cancel to return to the Home Window.

UPS (Intl)

Click the UPS (Intl) button. This calls up a template for the form required to send parcels around the world. Use your Tab key to move from field to field. You can enter an Invoice Number of your own choosing.

* Find Client -- Calls up your client list. Click your chosen client twice and it will appear on this form.

Enter the weight and value of the parcel in their proper fields, and select which checkboxes you need.

* The Letter -- Denotes that a letter is being sent.

* Oversize -- Marks an oversize parcel.

* Enter in Log -- Automatically records this in your QuickSHIP manifest log.

* Print Label -- Marks this file for printing of shipping label.

In the upper right corner of this form is a Zone entry field. This is information you can easily obtain from QuickSHIP. Simply click the Find Zone button at the bottom left. This will call up a zone chart for the part of the world to which you are sending the parcel. Simply click twice on the proper city, country or region that corresponds to the one entered on your form -- it's directly below the zone window. (Note: if you leave the Country field empty QuickSHIP will bring up the entire list.)

* Recalc. -- When all information has been entered, click this button. Your total charges will be calculated and displayed.

Click Cancel to return to the Home Window.

UPS REPORTS

There are several report files that QuickSHIP uses. These can easily be printed out to an ImageWriter. To get to the Reports window, click the UPS Reports button at the Home Window.

*Print COD's Not Paid -- give you a list of COD's that have not been marked paid in the client files.

* Print AK Cities -- This prints the Alaskan Cities file, showing which cities are in the 2nd day air zone.

* Print UPS Zone Chart -- The rate chart is divided by zones, with each column giving the weight in pounds and the corresponding dollar amount.

* Print UPS Zone Chart -- The zone chart shows which zip code numbers correspond with each zone.

* Print UPS Countries -- This prints the entire listing of countries, along with any city and postal codes, and the shipping zone number. Please note that this report runs several pages, and may tie up your printer for a while.

* Print UPS Manifest -- This prints the manifest of shipping records. Before printing, please be sure to see that Wide Orientation is checked under the Page Setup option under the File command.

* Print C.O.D. Tags -- You will see a print window with several buttons along the right. The window along the left displays any client files which have been marked as C.O.D. When C.O.D. information has been filled out for a client, a tag may be printed. Simply insert the NEBS 9259 C.O.D. tags into your ImageWriter or other compatible dot-matrix printer and click this button.

Check your Page Setup under the File menu before printing. Be sure to mark the COD tag option and also mark the No Gaps Between Pages checkbox.

Erase Label List -- To clear the list, click here.

Delete Label -- To delete a particular label, highlight the client name and click this button.

Print Letterhead (All) -- Prints all listed C.O.D. labels with your letterhead, which is taken from the Company Information you enter under Housekeeper (see below).

Preprinted (All) -- Print all listed C.O.D. labels without including your letterhead. This is for those users whose UPS labels have their addresses preprinted on their labels.

Print Letterhead (One) -- Prints one C.O.D. label, with your letterhead, for any client file that has been highlighted in the left window.

Preprinted (One) -- Prints a label for any one highlighted C.O.D. client file, minus the letterhead. For preprinted label users.

Test Label -- Prints a sample label so you can check the alignment of the label in your printer.

Click Cancel when finished.

* Print Shipping Labels -- When shipping information has been filled out for a client, a shipping label may be printed. Simply insert the NEBS 9375 shipping labels into your ImageWriter or other compatible dot-matrix printer and click this button. Be sure you've checked the Shipping Label option under Page Setup in the File menu before printing.

Erase Label List -- To clear the list, click here.

Delete Label -- To delete a particular label, highlight the client name and click this button.

Print Letterhead (All) -- Clicking this button tells the printer to print all listed shipping labels with your letterhead, which is taken from the Company Information you enter under Housekeeper (see below).

Preprinted (All) -- This button tells the printer to print all listed shipping labels without including your letterhead. This is for those users whose UPS labels have their addresses preprinted on their labels.

Print Letterhead (One) -- This command prints one shipping label, with your letterhead, for any client file that has been highlighted in the left window.

Preprinted (One) -- Prints a label for any one highlighted shipping client file, minus the letterhead. For preprinted label users.

Test Label -- This prints a sample label so you can check the alignment of the label in your printer.

Click Cancel when finished.

When finished, click the Home Window button.

HOUSEKEEPER

Click on Housekeeper. Housekeeper lets you edit certain charts within QuickSHIP, as well as enter your company information that will be printed out on invoices. There is also a compact files command that can reduce the size of your files.

* Company Info -- This is information about your company that QuickSHIP will print onto invoices and records. Please fill this out and save. When finished, click Cancel.

* Edit Zip Code Chart -- This gives you access to the zip code chart and allows you to make and save changes. The zip codes are separated into groups whose parameters are set by the beginning and ending numbers of the codes, as well as the zone number each set of zip codes falls into. Clicking New will allow you to add a new zip code to the file. Clicking edit will allow you to edit any zip code group you have highlighted. Be sure to save any changes to this file. When finished, click Cancel.

* Edit Intl Chart -- This button opens the International Chart file, where you can edit international countries, their city and postal codes, and their zones. You can either edit an existing country or add a new one. Save your changes and click Done when finished.

* Edit Alaska Cities -- You can edit or add new cities to the Alaskan cities file after clicking this button. Please note that Alaskan cities are currently either Zone 14 or Zone 16. QuickSHIP only lists Zone 14 cities, and only those should be added to this file. Those Zone 16 cities should never be added to this chart; QuickSHIP will automatically default any non-Zone 14 Alaskan cities to Zone 16.

* File Operations -- Click this button to display a window where you can import and export files, and compact the size of your files.

Import -- To import a tab-delimited text file, click this button. When the import window pops up, select the file to be imported and click it twice. The file will be imported to the ShopKeeper Folder.

Export -- This button exports a chosen client file from its present format to a tab delimited text file.

delete Histories -- Allows you to purge old histories from your files. You set the date and it removes all paid history information prior to that date.

Compact All Files -- This button automatically compacts and reindexes every file in your "Files" folder. A dialog box will appear to warn you that this procedure can take a long time (it's true). You'll be given one last chance to decide if this is what you want to do. Try it once and see if you can live with the lag. It will definitely save you space on your drive.

QUIT

This button on the Home Window quits QuickSHIP and returns you to your desktop.

Importing Manifest Files -- QuickSHIP exports its files as tab delimited text files, and these are the only kinds of files it will accept as imports. Tab delimited text files can be prepared using any word processing program, spreadsheet, or data base program, as long as the file is saved as "text only." Here are some guidelines for preparing tab delimited text files:

- * Each Manifest file has 36 lines, or fields. They correspond to certain information that QuickSHIP needs in order to establish a file. Do not enter the line numbers or the following periods when writing a tab delimited text file. They are provided for your information only.

- * Note the categories which are followed by parentheses. Only the information specified in the parentheses should be entered. Dollar and number values will stand alone in those fields. The categories whose parentheses contain 0/X are fields that, in QuickSHIP, will be marked with a checkbox. X and 0 (blank) and true and false characters, respectively. If you wish a specific box to be checked when your file is imported, leave an X in that line. If not, leave it blank.

- * The export program must always account for all fields. So if a field is going to be left blank, make sure you at least leave a tab character behind on that line. The only exceptions to blank fields are the Client ID, Client Name (field 4) and the COD Amount (field 23 [this may be zero but must have a number]), and for USA clients, the Zip Code (field 10).

- * Each record should be terminated with a return character.

- * For UPS ground residential service, add 100 to the zone number in field 35.

- * The 36 fields are:

1. Via (ex. UPS)
2. Invoice #
3. Client ID (required and must be unique)
4. Client name
5. Address 1

6. Address 2
7. Address 3
8. City
9. State
10. Zip/Postal Code
11. Country
12. Attention
13. Phone #
14. Fax #
15. Miscellaneous
16. Purchase Order #
17. Invoice amount
18. Cash only (0/X)
19. A.O.D. (0/X) [no longer used by UPS]
20. Call Tag (0/X)
21. Cash Only (0/X)
22. USA Client (0/X)
23. COD amount (dollars, required)
24. Is a COD (0/X)
25. Date (MM-DD-YY)
26. Oversize (0/X)
27. Saturday delivery (0/X)
28. UPS ground commercial (0/X)
29. UPS ground residential (0/X)
30. 2nd day air (0/X)
31. UPS red package (0/X)
32. UPS red letter (0/X)
33. UPS value (dollars)
34. Weight (# in pounds)
35. UPS zone (#)
36. Manifest memo (text)

Using QuickSHIP with ShopKeeper™ or Bill-IT™ -- Both programs have the ability to create an entry in a UPS manifest export file for each invoice that is printed (click on "Make UPS file" under the options menu in Bill-IT or check the "Make UPS file" button in the "Shipping Labels" area of ShopKeeper). The "UPS.date" file created by either of these programs may be directly imported into QuickSHIP.

After using the import procedure (above), to review and put zones on the international packages, you should go to the UPS USA window to review and set the shipping options for the rest of the manifest entries.

You will need ShopKeeper version 5.4.30 or higher or Bill-IT version 4.02 or higher.

3711 Shamrock West

Suite 176-P

Tallahassee, FL 32308 USA

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