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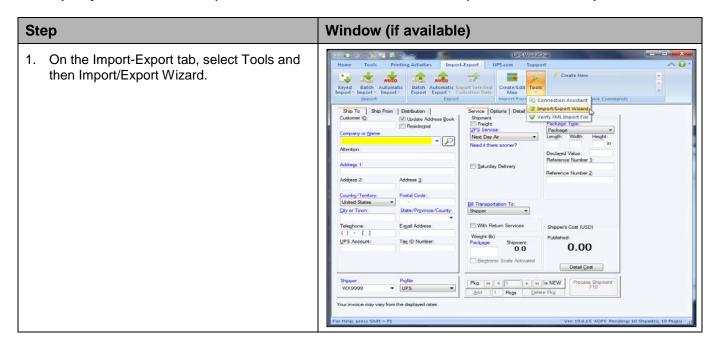
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Import Customer Addresses using the Import/Export Wizard

Note: Customer addresses stored in a previous version of WorldShip are automatically added to your address book. If you do not see your addresses, call UPS Technical Support on 0800 3316010.

To import your address book (stored in a Microsoft® Access database) into UPS WorldShip:





Window (if available) **Step** Import/Export Wizard - Main Menu - Step 1 of 5 ? × 2. The Import/Export Wizard - Main Menu -Step 1 of 5 window appears. Welcome to the WorldShip Import/Export Wizard Select I need help with importing The Import/Export Wizard will help you integrate your data with WorldShip by providing step-by-step guidance throughout the import and export processes. information into WorldShip. Click Next. How can the wizard assist you? • I need help with importing information into WorldShip C I need help with exporting information out of WorldShip G o to advanced wizard features (edit maps, perform import/export, and more) <u>H</u>elp ? | X | Import/Export Wizard - Select Data Type - Step 2 of 5 3. The Import/Export Wizard - Select Data Type – Step 2 of 5 window appears. Select Addresses. Click Next. Select the type of Data you would like to Import: Addresses C Small Package Shipments C Freight Shipments C Small Package Commodities for International Shipments C Freight Commodities C Custom Package Types C Charge Back Codes k <u>B</u>ack Next> <u>C</u>ancel <u>H</u>elp



Window (if available) **Step** Import/Export Wizard - Connect Data To WorldShip - Step 3 of 5 4. The Import/Export Wizard – Connect Data to WorldShip - Step 3 of 5 window Before you can import/export your data you must connect your appears. before you can importexport your data you must connect your data file to WorldShip. To make a connection, provide a name for the connection then browse to your data file. The connection name will enable you to identify the connection in the future if you wish to modify it. Type a name for the data connection in the Data Connection Name box. *Data Connection Name: NEW ADDRESSES Click Browse. Where is the location of your DATA file? Browse... C SQL Server C Oracle Or Select an Existing Data Connection k <u>B</u>ack Next> <u>C</u>ancel <u>H</u>elp Select a file: ? × 5. The **Select a File** window appears. Look in: Caracteristics Addresses Browse to and select your data file. Schema.ini worldship.csv Click Open. worldship.csv <u>O</u>pen All files (*.*)

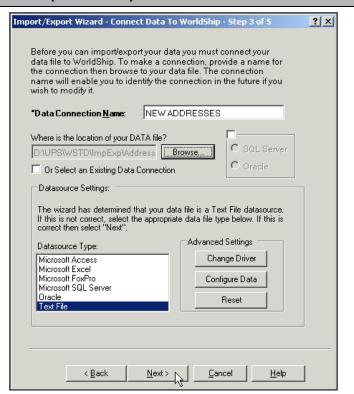


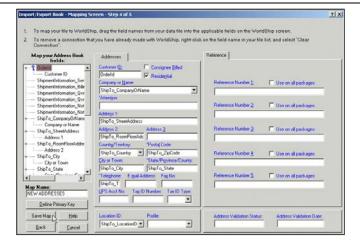
Step

- The Import/Export Wizard Connect Data to WorldShip – Step 3 of 5 window appears again and shows the Data Source Type as determined by the Import/Export Wizard under Data Source Settings.
 - If the **Data Source Type** is not correct, select the type.
 - Click Next.

- 7. The Import/Export Book Mapping Screen Step 4 of 5 window appears.
 - Map your file to WorldShip by dragging and dropping each field name in the Map your Address Book fields box to the applicable field box on the WorldShip side on the right.
 - In the Map your Address Book fields box, select the field that uniquely identifies each customer and click Define Primary Key. A key appears next to the field name.
 - Enter a name for the map in the Map Name box.
 - Click Save Map.

Window (if available)







Window (if available) Step 8. The Import/Export Wizard - Data Import/Export Wizard - Data Connected to WorldShip - Step 5 of 5 ? × Connected to WorldShip - Step 5 of 5 window appears. Select Import/Export your data now. Click Next. You have successfully set up your import/export! What would you like to do next? • Import/Export your data now C Return to wizard Main Menu C Exit to WorldShip < <u>B</u>ack Next> ⊳ <u>C</u>ancel $\underline{H}\text{elp}$ The Import/Export Wizard – Batch Import/Export Wizard - Batch Import / Batch Export ? X Import/Batch Export window appears. Select your data map file name. You have chosen to configure: Click Finish. Batch Import/Batch Export Select Data Map File from list below: Map File DataType Data Cont A IMPORT ADDRESSES Address IMPORT / I_Access_addresses Address Access Address Access I_Access_Gold_Address Address Access I_txtcsv_Addresses Address txt_csv I_txt_address NEW ADDRESSES txt_csv NEW ADI Address Address Charge Back Code Charge Ba { Default Import } E_Access_commodity Commodity Access E_txt_commodity Commodity txt_csv I_Access_commodity Commodity Access Create Map < Back Einish N <u>C</u>ancel <u>H</u>elp



Step Window (if available) Batch import data ? × 10. The Batch Import Data window appears. This window shows all the available maps, Select a map to import data from: including the map that you created. Map ODBC DSN Map Name △ Map Type 🗱 l_txt_address Address Book txt csv Under Select a map to import data I_txt_commodity Commodity txt_csv 🔃 l_txt_shipment Shipment txt esv from, select the map name that you I_txt_worldease Shipment txt csv created. Address Book 🔃 I_txtcsv_Addresses txt_csv NEW ADDRESSES Address Book NEW ADDRESSES Original 10 I Access. Shipment Under What type of import would you like to do, select Discard Duplicate What type of import would you like to do? Address Books | Distribution Lists | Records. Manually process duplicate records | Importer | Intermediate Consignee Discard duplicate records ☐ Intermediate Consignee ☐ Producer ☐ Ship From / Return To ☑ Ship To / Collect From ☐ Third Party ☐ Ultimate Receiver Click Next. C Overwrite existing records Do not use postal code validation Delete existing records 11. The Import/Export Preview window appears. ? x Importing from D:\UPS\WSTD\ImpExp\AddrBook\NEW ADDRESSES.dat There are 4 record(s) to be imported. Click Next. 12. The **Progress** window appears. ? × Progress Importing from D:\UPS\WSTD\ImpExp\AddrBook\ADDRESS IMPOF Continue to Step 13. Importing record 1 translating record 1 for Record Container . 18% Cancel



Step

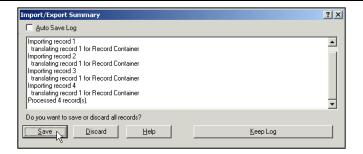
13. The Import/Export Summary window displays.

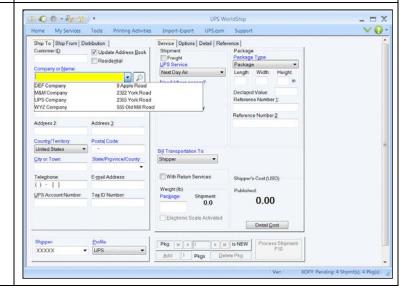
Tip: To view the Import/Export Summary listing, click the up and down arrows or move the scroll bar.

Options in this window include:

- Click Save to save the imported addresses.
- Click **Discard** to discard the imported addresses.
- Click Auto Save Log to save the log to a specified directory.
- 14. The **Shipping** window appears.
 - Click the down arrow in the Company or Name box to see the imported addresses.

Window (if available)



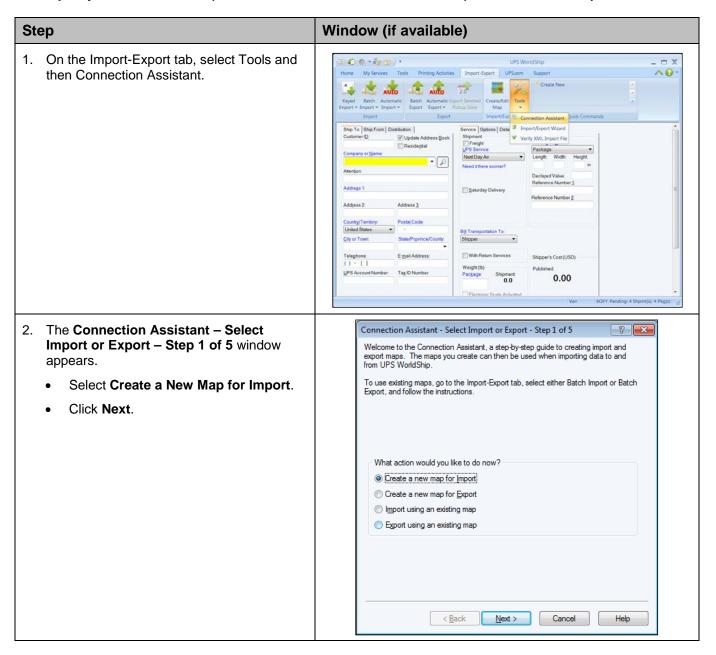




Import Customer Addresses using the Connection Assistant

Note: Customer addresses stored in a previous version of WorldShip are automatically added to your address book. If you do not see your addresses, call UPS Technical Support on 0800 3316010.

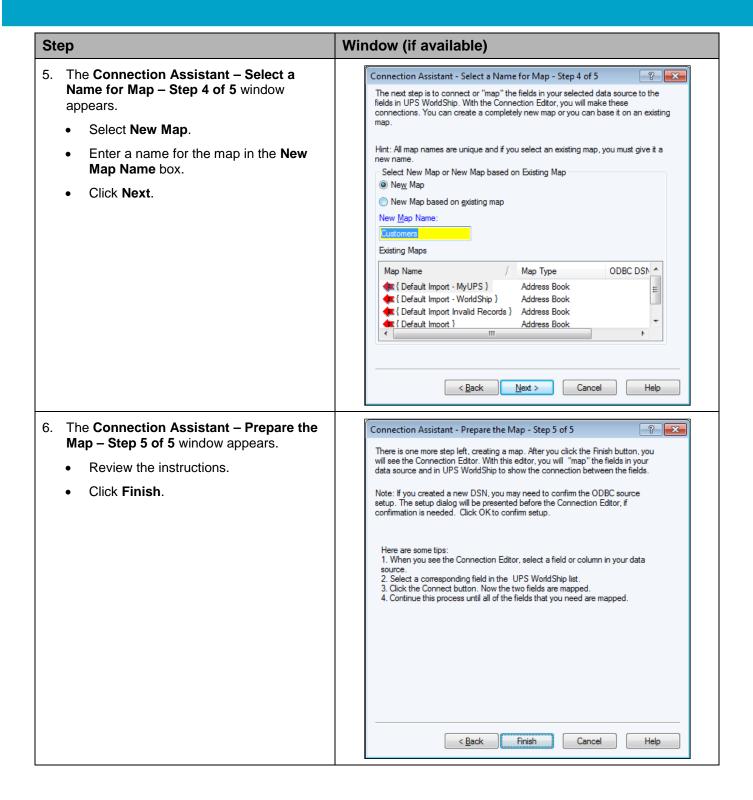
To import your address book (stored in a Microsoft® Access database) into UPS WorldShip:





Window (if available) Step 3. The Connection Assistant - Select the Connection Assistant - Select the Data Type - Step 2 of 5 Data Type - Step 2 of 5 window appears. Select the type of information you are working with, such as addresses or shipments Check for the following defaults: Address Book in the Import Data Choose the type of Import data. Types box and Ship To/Collect From Select Address Book(s) and/or Import Data Types Distribution Lists on the Address Books tab. Address Book Address Books | Distribution Lists | Click Next. Access Point Importer Intermediate Consignee Producer Ship From / Return To Ship To / Collect From Third Party Ultimate Receiver < Back Next > Cancel Help 4. The Connection Assistant - Data Source -? **x** Connection Assistant - Data Source - Step 3 of 5 Step 3 of 5 window appears. Select By File. Enter the location of the file in the Select the Data Source Currently Selected File box, or click Data Source Name (DSN): By Known ODBC Source **Browse** and locate and select your file. Customers System DSN By File ĮD: Select Microsoft Access Driver (*.mdb) Currently Selected File: in the ODBC Drivers box. C:\Users\rqp5kbq\Docu Password: Enter the name for the new file in the ODBC Drivers: Data Source Name (DSN) box. Driver para o Microsoft Visual FoxPro SQL Native Client Click Next. Microsoft Excel Driver (*xls, *xlsx, *xlsm, *xlsb) Microsoft Access Text Driver (*.txt, *.csv) SQL Server Native Client 10.0 Refresh List Launch the ODBC Administrator < <u>B</u>ack Next > Cancel







Window (if available) Step 7. The ODBC Microsoft Access Set Up ? X ODBC Microsoft Access Setup window appears. Data Source Name: Customers OK Check for the following: the DSN name Description: My Current Customers Cancel that you entered appears in the Data Database Source Name box, and the file name Database: C:\...\Customers\Customers.accdb <u>H</u>elp that you entered appears for **Database**. Create... Repair.. Compact... Advanced... Select None under System Database. System Database Click OK None Database: System Database... Options>> 8. If the **Data Source Name** (DSN) already × Error exists, a message asks you to confirm your choice. The datasource named 'Customers' already exists. Replace it with this definition? Click Yes to replace the existing DSN with your new DSN. <u>Y</u>es <u>N</u>ο Cancel Click No to rename your DSN. Edit 'Customers' import map 9. The **Edit import map** window appears. ODBC Tables WorldShip Fields Under ODBC Tables, click the down AddressBook Address Book arrow and select the table that contains Column Name Width Type the Primary Key for Import, a field that **Email Address** VChar Company or Name IsResidential uniquely identifies each customer. lsConsigneeBilled VChar USPS PO Box Indicator USPSPOBoxInd... VChar 50 Address 1 Select the field in the table that uniquely TaxIDNumber Address 2 identifies each customer. TaxIDType VChar Address 3 City or Town Click Define Primary Key for Import. Define Primary Key for Import Define Foreign Key Relationships Prompt for the table name each time the map is What You Have Mapped So Far ODBC Login ODBC Tables WorldShip Fields Cancel



Window (if available) Step Edit 'Customers' import map 10. A key appears next to the ODBC Table's ODBC Tables WorldShip Fields name and next to the selected field to AddressBook Address Book indicate the Primary Key for Import. Column Name Width Type Select the field under WorldShip Fields **Email Address** VChar Company or Name that best matches your selection under IsConsignee Billed VChar USPS PO Box Indicator **ODBC Tables**. USPSPOBoxInd... VChar Address 1 TaxIDNumber TaxIDType VChar Address 3 Click Connect. AddressValidati. VChar City or Town Define Primary Key for Import Connect Define Foreign Key Relationships Prompt for the table name each time the map is What You Have Mapped So Far: ODBC Tables WorldShip Fields ODBC Login Cancel <u>H</u>elp 11. The mapped fields appear under What You Edit 'Customers' import map ? X Have Mapped So Far. WorldShip Fields AddressBook Address Book Continue to map the rest of the ODBC C... / Column Name Width Fi... / Field Tables names to the WorldShip Customer ID Attention VChar Fields. VChar **90** 3 Attention USPS PO Box Indicator RoomFloor VChar Department VChar **90** 5 Address 1 Click OK. VChar Address 2 StateProv VChar Address 3 PostalZipCode City or Town VChar Define Primary Key for Import Disconnect Define Foreign Key Relationships Prompt for the table name each time the map is Edit What You Have Mapped So Far: ODBC Tables WorldShip Fields △ ODBC <u>L</u>ogin <u>0</u>K AddressBook::Country Address Book::Country/Territory Cancel AddressBook::PostalZipCode Address Book::Postal Code <u>H</u>elp 12. A message asks you to confirm your batch **UPS WorldShip** 23 import. Do you want to Batch Import now with Customers1? Click Yes. <u>Y</u>es



Window (if available) Step Batch import data ? X 13. The Batch Import Data window appears. This window shows all the available maps, Select a map to import data from: including the map that you created. Map Name / Map Type ODBC DSN/Location Ε Under Select a Map to Import Data Sample Order Import 1 Shipment (x) { Default Import - My... Address Book UPS WorldShip Sample.. from, select the map name that you created. ♠ { Default Import - Wor... Address Book ♠ { Default Import Invali... Address Book Under What type of import would you What type of import would you like to do? Address Books | Distribution Lists | like to do, select an option Manually process duplicate records Access Point Importer Intermediate Consignee Producer Ship From / Return To V Ship To / Collect From Third Party Ultimate Receiver Click Next. Discard duplicate records Overwrite existing records Do not use postal code validation Delete existing records <u>N</u>ext <u>C</u>ancel 14. The Import/Export Preview window appears. Importing from C:\MYUPSDATA\UPS\WSTD\ImpExp\AddrBook\Customers.dat There are 44 record(s) to be imported. Click Next. <u>N</u>ext <u>C</u>ancel <u>H</u>elp 15. The **Progress window** appears followed by Import/Export Summary Auto Save Log the Import/Export Summary window. Importing record 4 1 translating record 1 for Record Container Importing record 4 2 translating record 1 for Record Container Importing record 4 3 translating record 1 for Record Container Importing record 4 3 translating record 1 for Record Container Importing record 4 4 translating record 1 for Record Container Importing record 4 4 translating record 1 for Record Container Processed 4 4 record(s). There were 1 duplicate record(s). There were 2 record(s) already in the database. **Tip:** To view the Import/Export Summary listing, click the up and down arrows or move the scroll bar. Do you want to save or discard all records? Options in this window include: Save Discard Help Keep Log Click **Save** to save the imported addresses. Click **Discard** to discard the imported addresses. Click Keep Log to save the log to a specified directory.



Window (if available) Step 16. The **Shipping** window appears. 100.84)· UPS WorldShip Home My Services Tools Printing Activities Import-Export UPS.com Support V 0 -Click the down arrow in the Company Service Options Detail Reference | Shipment Package Package Package Iype: UPS Service: | Next Day Air | Next Da Ship To | Ship From | Distribution | Customer ID: | Update Address Book | Residenal or Name box to see the imported addresses. 9 Apple Road 2322 York Road 2355 York Road 555 Old Mill Road DEF Company M&M Company UPS Company WYZ Company United States United States City or Town: E-mail Address: Shipper's Cost (USD) UPS Account Number Tag ID Number 0.00 Electronic Scale Activated Detail Cost Pkg H 4 1 F10 Process Ships Add 1 Pkgs Delete Pkg