



UPS ShipExec User Guide

ShipExec Thin Client – User Guide

This document describes the use of ShipExec specifically related to the use by OSU. More general guides for ShipExec can be found in the links below.

Links for reference:

[ShipExec](#)

[UPS ShipExec Help Pages](#)

[Address Book User Guide](#)

[UPS Dry Ice and Hazardous Materials Support](#)

Sections:

ShipExec Account Setup
Standard Shipment
Domestic Dry Ice Shipment
Standard International Shipment
Creating a Return Shipment
Troubleshooting & FAQ

New ShipExec Account Setup

Before gaining access to the ShipExec system you must:

1. Review this document and any training links included.
2. Successfully complete the [Purch9 Shipping quiz](#) in BuckeyeLearn with a score of 84% or higher.
3. Complete the [UPS ShipExec Shipping Access Request Form](#).
4. Email the form to osums@osu.edu.

Once these steps were completed, someone at OSUMS will setup your account username using your University or OSUMC email.

*Users that previously had access to the UPS CVS system were imported into ShipExec using the email address on file.

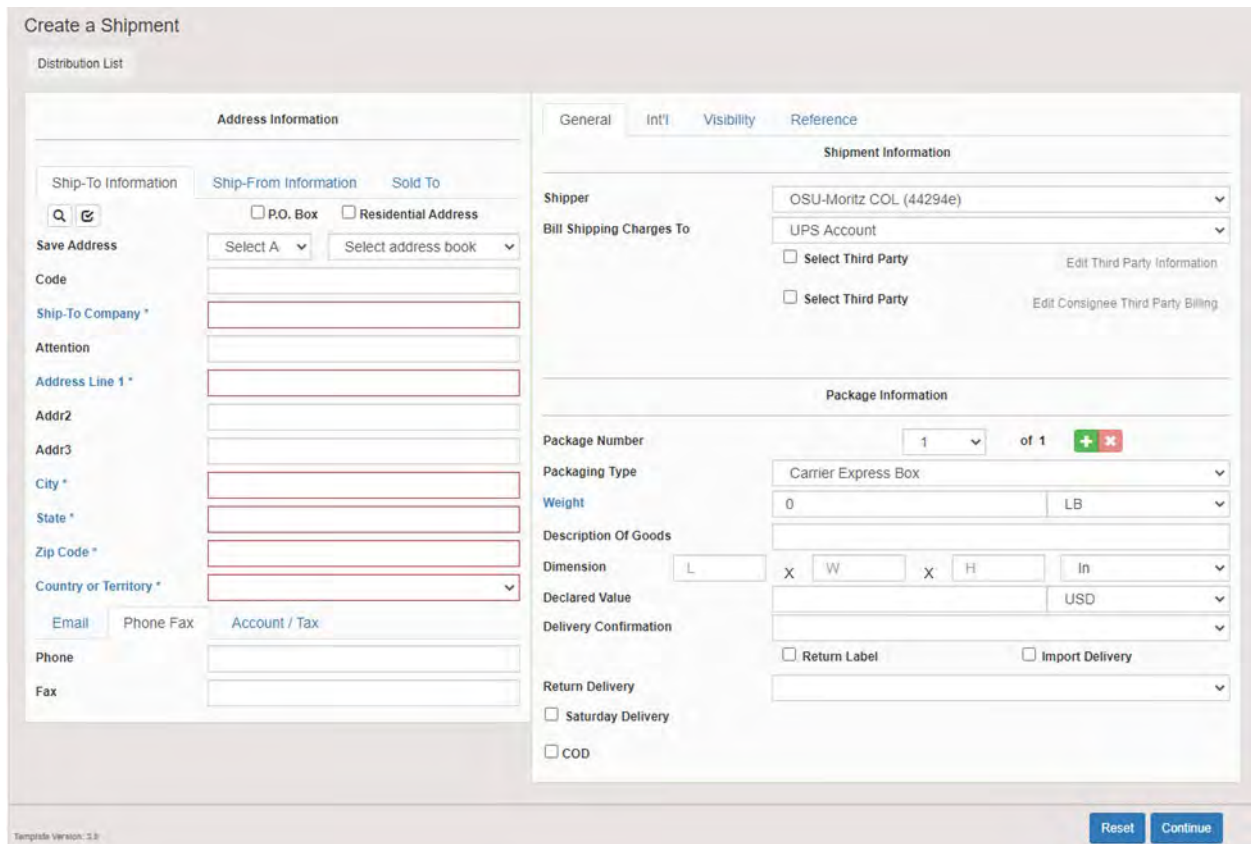
UPS ShipExec User Guide

Shipping with ShipExec Thin Client

Standard Shipping

Upon login, you will be presented with the ShipExec Dashboard. To ship a standard domestic package, follow these steps:

1. Locate the “Shipping” drop down menu in the ShipExec ribbon at the top of the page. Select “Shipping and Rating” from the available choices.
2. You are now presented with the Create a Shipment workspace. Note that several form fields are highlighted red and with a blue asterisk next to the labels. These forms must be filled out to complete the shipment.



The screenshot shows the 'Create a Shipment' interface. On the left, the 'Address Information' section has tabs for 'Ship-To Information', 'Ship-From Information', and 'Sold To'. The 'Ship-To Information' tab is active, showing fields for 'Save Address', 'Code', 'Ship-To Company *', 'Attention', 'Address Line 1 *', 'Addr2', 'Addr3', 'City *', 'State *', 'Zip Code *', and 'Country or Territory *'. Several of these fields are highlighted in red and have a blue asterisk next to their labels. Below these are fields for 'Email', 'Phone Fax', 'Account / Tax', 'Phone', and 'Fax'. On the right, the 'Shipment Information' section has tabs for 'General', 'Int'l', 'Visibility', and 'Reference'. The 'General' tab is active, showing fields for 'Shipper' (OSU-Moritz COL (44294e)), 'Bill Shipping Charges To' (UPS Account), and 'Package Information'. The 'Package Information' section includes 'Package Number' (1 of 1), 'Packaging Type' (Carrier Express Box), 'Weight' (0 LB), 'Description Of Goods', 'Dimension' (L x W x H in), 'Declared Value' (USD), 'Delivery Confirmation' (Return Label, Import Delivery), and 'Return Delivery' (Saturday Delivery, COD). At the bottom right, there are 'Reset' and 'Continue' buttons.

UPS ShipExec User Guide

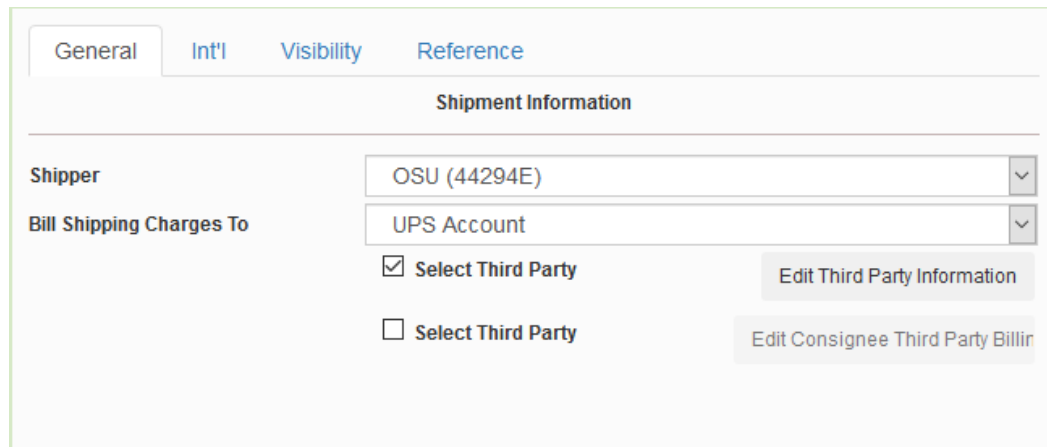
Address Information

1. In the **Ship-To Information** tab, enter the recipient's name and address. Enter the email address and phone number if applicable.
 - a. **Note – The State field must be in all CAPS in abbreviated form**
2. Click on the **Ship-From Information** tab. This should be prepopulated with your personal information.
3. Once the address information is complete, click on the **General** tab to begin inputting package specifications.

Shipment Information

1. On the **General** tab, select the Shipper. The default is the University UPS account.
2. Select who to Bill Shipping Charges to. The default is the University UPS account.

Note that there are options to Bill Receiver or Third Party. If applicable, select an option and complete the additional form.



General	Int'l	Visibility	Reference
Shipment Information			
Shipper	OSU (44294E) ▼		
Bill Shipping Charges To	UPS Account ▼		
<input checked="" type="checkbox"/>	Select Third Party	Edit Third Party Information	
<input type="checkbox"/>	Select Third Party	Edit Consignee Third Party Billin	

Package Information

1. Now select your package specifications.
 - a. Select number of packages
 - b. Select package type – If the packaging is not UPS supplied, select “customer supplied” from the drop down.
 - c. Enter weight
 - d. Enter description of goods – **Required for Return shipments**
 - e. Enter dimensions – failure to include dimensions will result in a UPS correction charge.



UPS ShipExec User Guide

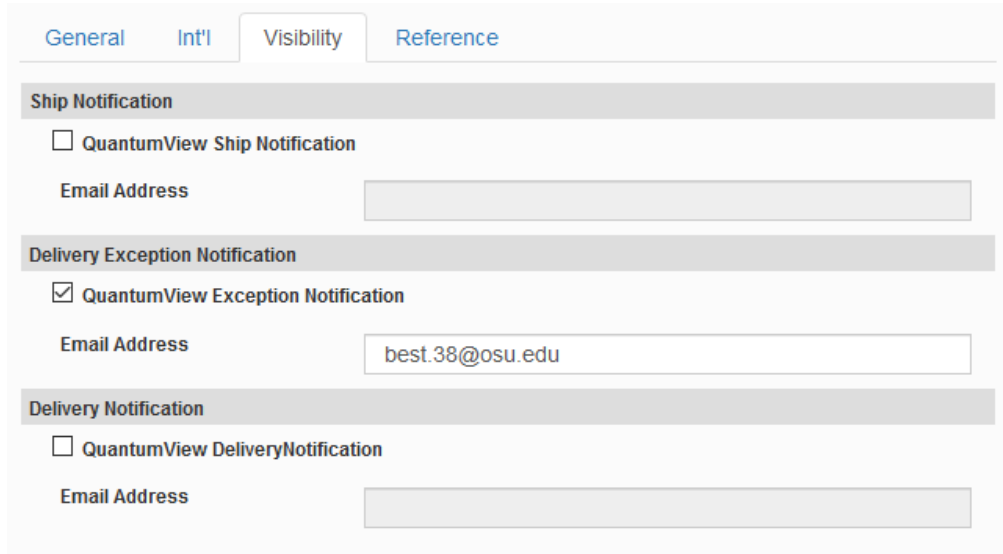
- f. Enter declared value – all shipments are covered with \$100 insurance coverage. Inputting a value in this field will increase this insurance and will result in additional fees.
- g. Select Delivery Confirmation options if applicable. Note that selections will result in additional fees

The screenshot shows the 'Package Information' form with the following fields and options:

- Package Number:** 1 of 1 (with + and x icons)
- Packaging Type:** Carrier Express Box
- Weight:** 0 LB
- Description Of Goods:** (empty text field)
- Dimension:** L x W x H in
- Declared Value:** (empty text field) USD
- Delivery Confirmation:**
 - Delivery Confirmation
 - Require Proof of Delivery Signature
 - Require Adult Signature
 - Return Label
 - Import Delivery
- Return Delivery:** (empty dropdown menu)
- Saturday Delivery
- COD

- h. Select Return Label if applicable – note that creating a Return shipment is covered in an additional section below.
2. After the Address Information, Shipment Information and Package Information forms have been filled out, click on the **Visibility** Tab.

UPS ShipExec User Guide



General Int'l **Visibility** Reference

Ship Notification

QuantumView Ship Notification

Email Address

Delivery Exception Notification

QuantumView Exception Notification

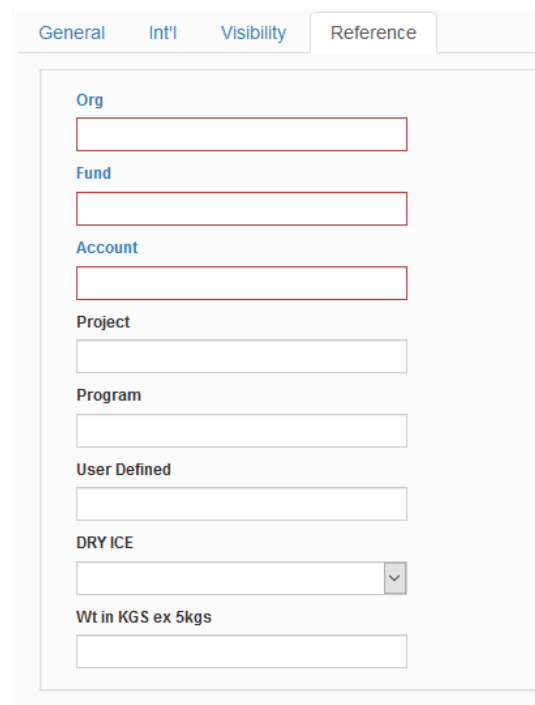
Email Address

Delivery Notification

QuantumView DeliveryNotification

Email Address

3. Select any of the notifications that you wish to receive for the shipment. The email address field should default to your login account.
4. Next, click on the **Reference** tab.



General Int'l Visibility **Reference**

Org

Fund

Account

Project

Program

User Defined

DRY ICE

Wt in KGS ex 5kgs



UPS ShipExec User Guide

5. Enter the department account information that the shipping charges should be applied to. Complete all three fields: Org, Fund and Account.
6. Click the blue **Continue** button to proceed to the **Rates** screen.
7. The Rates screen provides shipping options for your package sorted from lowest to highest ranked service. Pick the service level that is applicable to your shipment and click the blue **Ship** button to continue.
 - a. Note that these rates are estimates only.
8. If a rate other than ground is selected, the system will ask why you are choosing to upgrade. This is a required field. – See FAQ for more.
9. Once the shipment has been generated, a window should display your UPS shipping label that is now ready to print.
10. Your standard, domestic shipment is now complete.

UPS ShipExec User Guide

Shipping with ShipExec Thin Client

Domestic Dry Ice Shipping

Before shipping dry ice, review the [UPS Support webpage](#) regarding dry ice and hazardous materials

Upon login, you will be presented with the ShipExec Dashboard. To ship a domestic **Dry Ice** package, follow these steps:

1. Follow the process steps described in the section called "Standard Shipping."
2. At the **Reference** tab, complete these additional steps:
 - a. Under the **DRY ICE** drop down field, select the proper shipping name **UN1845, DRY ICE, 1 x**
 - b. In the **Weight in KGS** field, enter the weight of the dry ice. For example, manually type out 5 KGS.
3. Continue with the process steps described in the section called "Standard Shipping" until complete.
4. After printing the UPS shipping label, verify that the label contains the following information in the Reference No. 2 field: **UN 1845, DRY ICE, 1 x 5kgs.**



Note: Failure to include the proper shipping name in the Reference 2 field of any shipment that contains Dry Ice will result in a UPS Shipping violation.

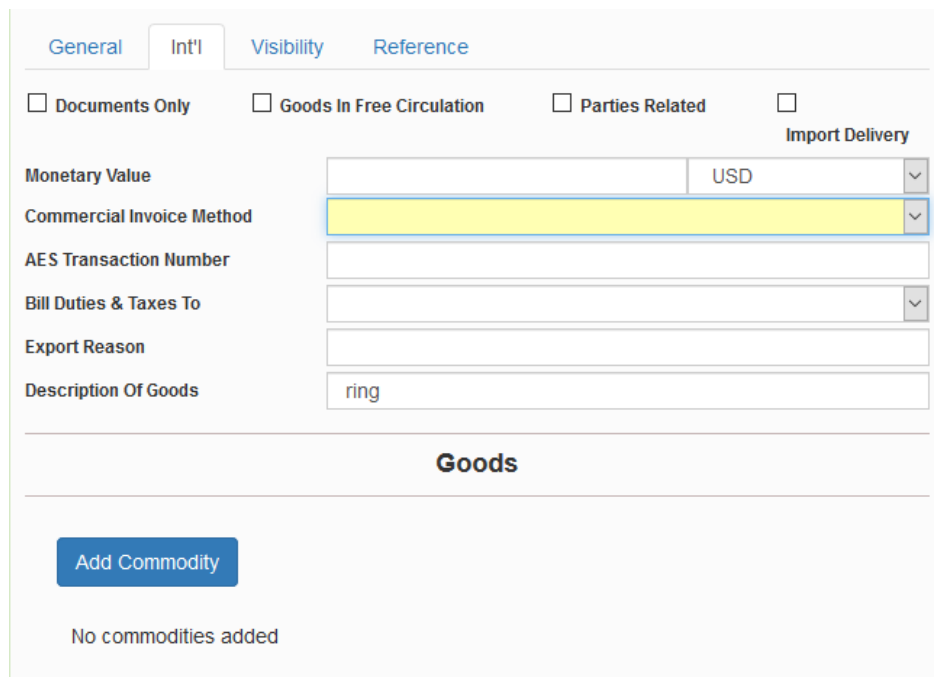
UPS ShipExec User Guide

Shipping with ShipExec Thin Client

Standard International Shipping

Upon login, you will be presented with the ShipExec Dashboard. To ship a package internationally, follow these steps:

1. Follow the process steps described in the section called “Standard Shipping.”
2. Complete the additional steps on the **Int’l** tab. This is the international tab.



The screenshot shows the 'Int'l' tab in the ShipExec Thin Client interface. It features four tabs: 'General', 'Int'l', 'Visibility', and 'Reference'. Under the 'Int'l' tab, there are four checkboxes: 'Documents Only', 'Goods In Free Circulation', 'Parties Related', and 'Import Delivery'. Below these are several input fields: 'Monetary Value' (with a dropdown set to 'USD'), 'Commercial Invoice Method' (highlighted in yellow), 'AES Transaction Number', 'Bill Duties & Taxes To' (with a dropdown), 'Export Reason', and 'Description Of Goods' (containing the text 'ring'). At the bottom, there is a section titled 'Goods' with an 'Add Commodity' button and the text 'No commodities added'.

- a. Check mark the options that apply to the shipment
 - b. Enter a Monetary Value
 - c. Select a Commercial Invoice Method that is applicable to your shipment
 - d. Enter your Automated Export Number in the AES Transaction Number field if applicable
 - e. Select “UPS Account” from the Bill Duties and Taxes To form field
 - f. Enter an export reason for your shipment
 - g. Provide a Description of Goods for your shipment
3. Continue with the process steps described in the section called “Standard Shipping” until complete.

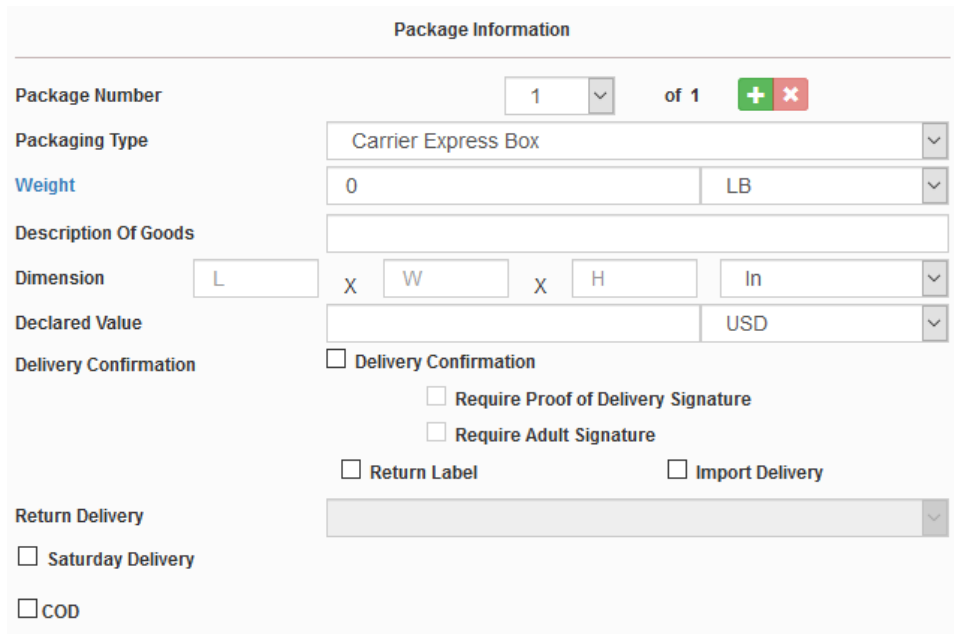
UPS ShipExec User Guide

Shipping with ShipExec Thin Client

Standard Return Shipping

Upon login, you will be presented with the ShipExec Dashboard. To create a Return shipment, follow these steps:

1. Follow the process steps described in the section called “Standard Shipping.”
2. On the **General** tab, complete these additional steps to create the Return label:



Package Information

Package Number: 1 of 1

Packaging Type: Carrier Express Box

Weight: 0 LB

Description Of Goods:

Dimension: L x W x H in

Declared Value: USD

Delivery Confirmation:

- Delivery Confirmation
 - Require Proof of Delivery Signature
 - Require Adult Signature
- Return Label
- Import Delivery

Return Delivery:

- Saturday Delivery
- COD

- a. Locate the **Package Information** section.
- b. Check mark the **Return Label** button. Note that this will change the Ship-To Information tab with the Ship-From Information tab in the **Address Information** section.
- c. The **Return Delivery** drop down form field is now unlocked. Select “Print Return Label” from the available drop-down options.
- d. Description of Goods is required for return shipments.
- e. Continue with the process steps described in the section called “Standard Shipping” until complete.



UPS ShipExec User Guide

Troubleshooting & FAQ

Error Codes:

If you are receiving – “Error Code : 995 Error in one or more packages: Oh is not a valid state for the specified shipment.”

- The state needs to be capitalized in abbreviated form. i.e.-“OH” Not Ohio or Oh

Why is it asking for a reason to upgrade the shipping method?

- This is a feature included with the software to help companies understand why they are spending more for shipping. We have no current intentions on using this feature but the field must still be filled out.

CVS Address Book

- If you previously had a personal address book in CVS but cannot access it anymore, please contact osums@osu.edu to retrieve your address book.

Pricing seems much higher than CVS.

- Prices that are displayed in ShipExec are currently the UPS Published Rates rather than our contracted rates. This should be addressed soon.