

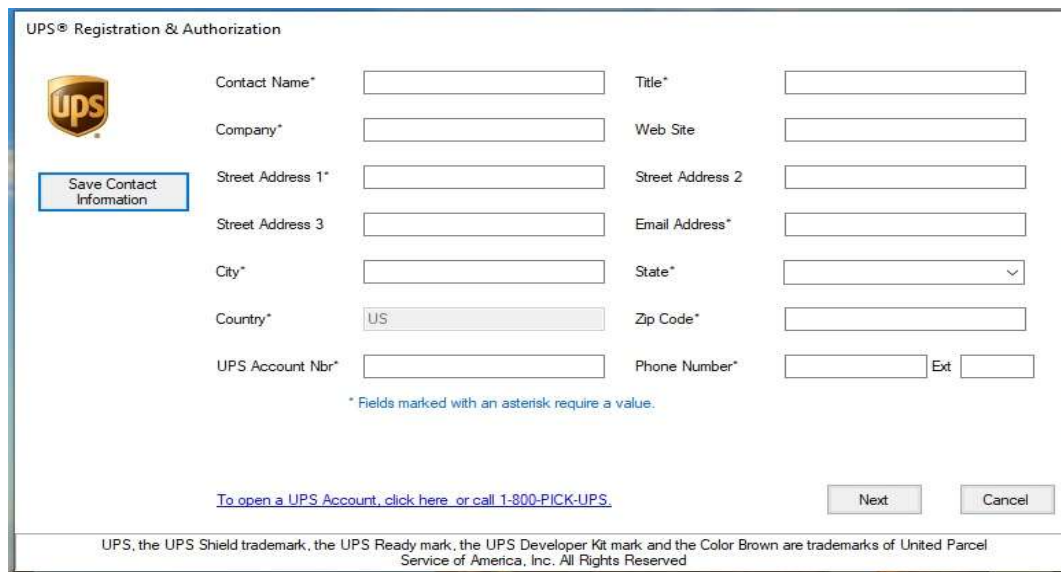
Register Using UPS Online® Tools

The UPS Registration option is accessed via the VinNOW Setup menu, then System Options, System Options Settings, under the UPS Online® Shipping Tools tab. Click on UPS Registration. The initial screen displayed in the UPS Online® Tools Licensing and Registration.


Click the Next button to continue the process, or click Cancel to cancel. The next screen displays the UPS Online® Tools license agreement as it is retrieved from UPS via your internet connection.

Use the scroll bar on the right side of the screen to read through the entire agreement. You may click the Print button to produce a printed copy of the agreement. If you agree with the agreement, click the 'Yes I agree' option button. Click the Next button to continue. The next screen displayed is for entry of your UPS Account information.

The information on this screen identifies your UPS account information.



UPS® Registration & Authorization



Save Contact Information

Contact Name* Title*

Company* Web Site

Street Address 1* Street Address 2

Street Address 3 Email Address*

City* State*

Country* Zip Code*

UPS Account Nbr* Phone Number* Ext

* Fields marked with an asterisk require a value.

[To open a UPS Account, click here or call 1-800-PICK-UPS.](#)

Next Cancel

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The Contact Name and Title fields displayed are defaults from the user's User record. You may change these. The name entered here will show up on the shipping label, so you may want to use something generic, such as Shipping Department. The UPS contact name field can only be 20 characters long. The Company, Address, and Phone fields are defaults from the System Options Winery Info record in VinNOW.

The UPS Account Number that is entered on this form should be the same Account Number that is associated with your online UPS Account which the User grants VinNOW access to in the next steps of the Authorization process.

If there is something that is not correct or missing from your UPS registration you will get an advisory message about it.

There are 3 command buttons on this form. The purpose of each is as follows.

The **"Save Contact Information"** button will save the values entered on this form to the VinNOW database. This is provided so that UPS Account details can be changed without having to go through the UPS Account Authorization process again. We recommend you select this option. After the data is saved to the VinNOW database, click the "Cancel" button to exit this form.

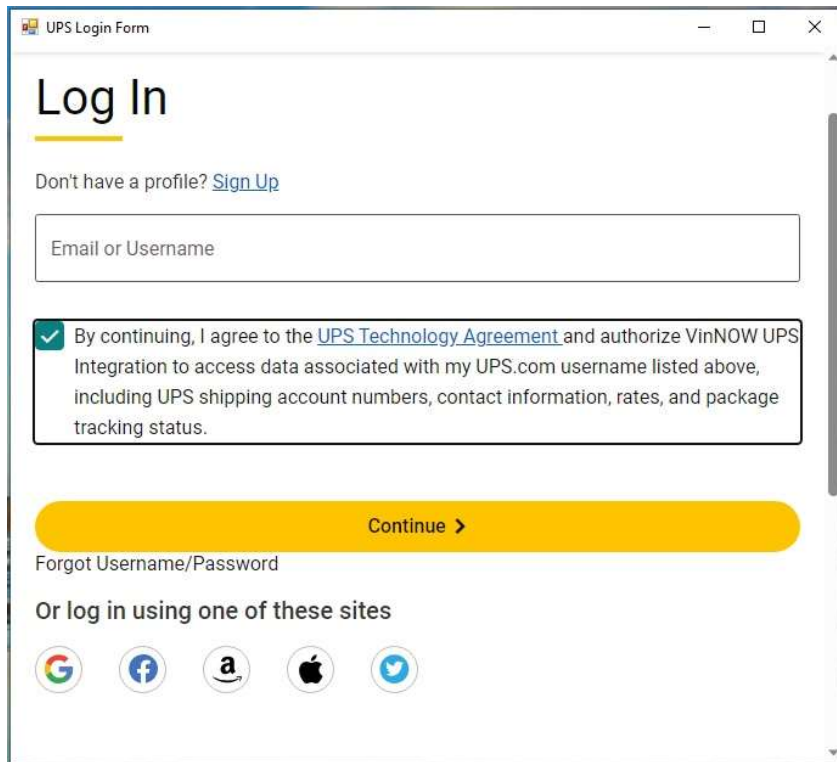
The "Next" button is used to navigate to the next step in the UPS Account Authorization process. This only needs to be used if you have not previously granted Authorization to VinNOW to access your UPS Account. Clicking the "Next" button will save the values entered on this form to the VinNOW database prior to moving on to the next screen.

The "Cancel" button is used to exit this form.

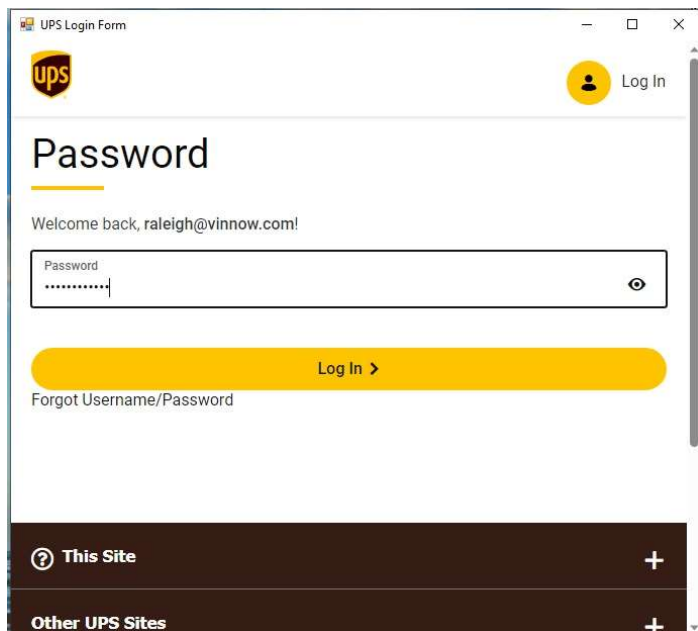
Granting UPS Account Authorization to VinNOW

To use the UPS features offered within VinNOW, you must go through the process of Authorizing access to your UPS account to VinNOW. This is done from within VinNOW. The Authorization process is accessed by clicking the "Next" button on the "UPS Registration and Authorization" form.

The UPS Login credentials used for the Authorization process are the same as those used when directly accessing the online UPS Account which is to be linked to VinNOW. Do not use any of the alternate site login methods that may be displayed on the "Log In" form.



The Authorization process is completed by entering your UPS Account password and clicking their “Log In” button.



If the Authorization process fails, a message will display informing you that the process has failed and the UPS features within VinNOW will not be available until there is successful Authorization.

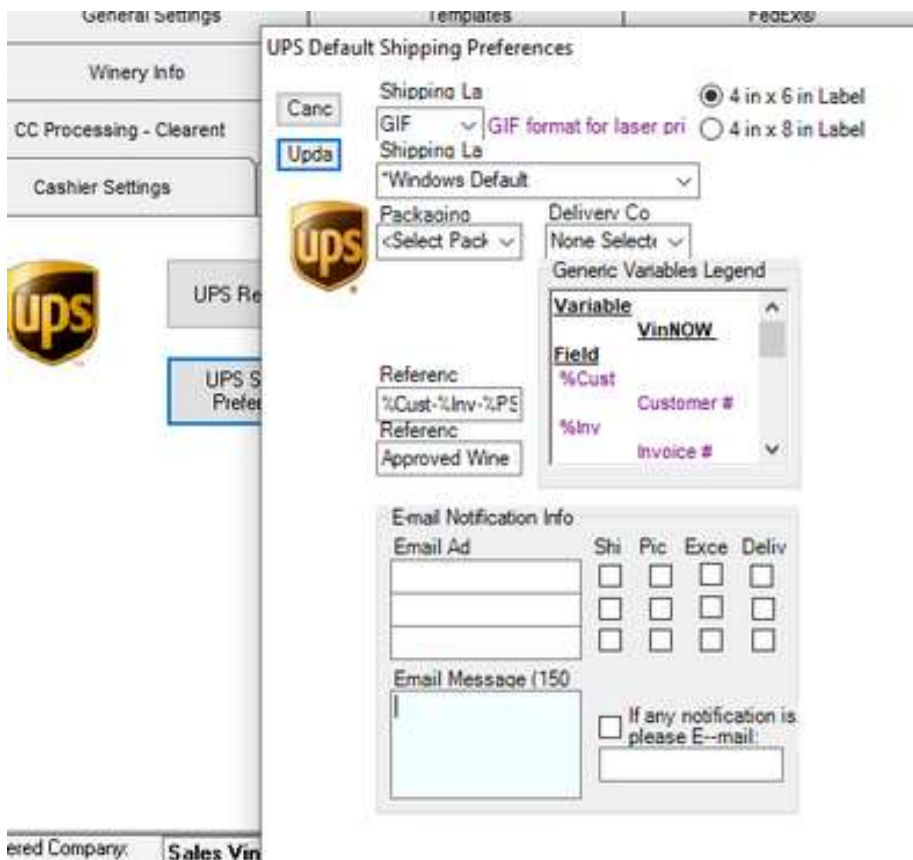
If the Authorization process completes successfully, you will see the following:



Clicking the Finish button will return you the VinNOW main Customer Search screen and can continue to setting up the shipping preferences.

Setting Up UPS Shipping Preferences

The purpose of UPS Shipping Preferences is to set default values to be used when creating UPS shipments. To access this function, go to Setup, System Options, System Options Settings, then click on the UPS Online® Shipping Tools Tab.



Shipping Label Format – This is the format used when generating the UPS shipping labels. The default value is GIF format. UPS shipping labels may be printed in either GIF format or EPL format by using the drop-down arrow and selecting the appropriate format.

The **GIF** format prints a GIF image on standard 8.5" x 11" paper which can be attached to your packages by placing the label in a UPS Shipping Pouch. If you do not have a pouch, affix the folded label using clear plastic shipping tape over the entire label.

The **EPL** format is used to print the shipping labels in EPL2 format on an Eltron label printer. When using EPL format you may specify a label size of either 4x6 or 4x8.

Note: When a shipment is created, the label will be generated using the format specified here. Once a shipment has been created using one of the formats, it is not possible to regenerate it and re-print it in any other format.

Shipping Label Printer – This is the printer where the shipping labels will be printed. If using the EPL format, be sure this printer is a label printer capable of accepting EPL2 formatted data. Please contact UPS for specifics on what ZPL printer is needed to print UPS Labels. If the setting is GIF it can be any standard 8 1/2 x 11 printer.

Packaging – is the default value for Packaging that will be displayed initially on the Shipment Request screen when creating UPS shipments. Please note: When shipping UPS Ground, the only valid value for Packaging is "Your Packaging".

Delivery Confirmation – is the default value for Delivery Confirmation that will be displayed initially on the Shipment Request screen when creating UPS shipments. Normally wineries must set this value to "Adult Signature Required" because wine is being shipped.

Reference 1 – is the default Reference 1 value that will be displayed initially on the Shipment Request screen when creating UPS shipments. The Reference 1 information is displayed on the UPS shipping label.

The suggested default for Reference 1 is the concatenation of following three VinNOW shipment related fields separated by dashes: customer number, invoice number, and the packing slip number. To represent this, generic variables are used as follows: %Cust-%Inv-%PS, where:

%Cust - represents the VinNOW customer ID number

%Inv - represents the VinNOW invoice number

%PS - represents the VinNOW packing slip number

Reference 2 – is the default Reference 2 value that will be displayed initially on the Shipment Request screen when creating UPS shipments. The Reference 2 information is displayed on the UPS shipping label. The suggested VinNOW default for Reference 2 is 'Approved Wine Shipper' which is required for wineries shipping wine.

Email Notification Information – allows you to supply the default UPS Quantum View E-mail notification service information that will be set in the Shipment Request screen when it is initially displayed while creating UPS shipments.

VinNOW allows you to specify general notification e-mail addresses (up to 3 addresses). On this screen the following generic variables may be used in the email address field:

%ShipEmail – represents the VinNOW Shipping Info e-mail address

%CustEmail – represents the VinNOW Customer e-mail address

%AltEmail - represents the VinNOW Customer alternate e-mail address

%BillEmail - represents the VinNOW Billing Info e-mail address.

Next select the appropriate check boxes to send an email to the recipient or others based on the status of the shipment. The package tracking number will automatically be used as the e-mail subject. At least one box needs to be checked to save the information and email address or generic variable.

Ship Notification: UPS considers a package "shipped" when the billing account/label is created during the "Shipment Created" process in VinNOW.

Pickup Notification: Sent when the package has been marked by UPS as picked up from the winery for shipment.

Exception Notification: Notifies you when and why a shipment will not meet its original scheduled delivery date, and provides a rescheduled date of delivery

Delivery Notification: Confirms the delivery of a shipment

Note: We recommend that you have an email account that is not your primary winery or personal email that you can list in the email notification section and have the exception and delivery options checked. This way you can easily see and reference any exceptions that were sent to a customer, and any notification of delivery should the customer have questions.

Ups follows a specific/generic format for their shipping notification emails. They also allow you to enter an optional message (maximum 150 characters) that will be included in the notification e-mails.

If a label is generated and then the UPS order voided, keep in mind the customer will receive an e-mail notification of shipment based on the original label. If you void the shipment (within the 24 hr window), a second email will then be sent indicating that the shipment has been canceled.

You are now ready to begin using the UPS Online Tools for Shipping and Tracking.

UPS Online® Tools Shipping

The UPS Shipping option is accessed via the VinNOW Maintenance menu as part of the UPS Online® Shipping Tools options. An internet connection is required to access this option.

The UPS Shipping screen allows the user to search for and view the status of a list of orders created in VinNOW. This screen is used primarily to perform the following two functions:

 Create UPS shipments and print the shipping labels for orders with a status of ready 'To Be Shipped'.

 Accept Shipment of UPS shipments for orders with a status of 'Shipment Created' which updates the order's status to 'Shipped.'

Note: if you are a ShipCompliant customer if you check compliance of the order when updating the order to Accept Shipment, the shipment will be sent to ShipCompliant.

Other functions that can be performed from this screen are:

Void a Shipment- Shipments can be Voided up to 28 days after creation. Return shipments must be voided within 24 hours.

Re-print a UPS shipping label: find order and click on the box to left of invoice#, click on Process menu then Reprint UPS Shipping Label.

View/Edit the VinNOW packing slip.

View order invoice-You can only View the VinNOW Order Invoice at this time but cannot make any changes from this screen.

UPS Pickup Scheduling feature is accessed through the UPS Shipment form. This feature is documented in the "Pickup Scheduling" topic below

UPS Pickup Summary feature is accessed through the UPS Shipment form. This feature is documented in the "Pickup Summary" topic below

Creating UPS Shipments

UPS shipments may be selected and created one at a time, or for VinNOW group orders where all the orders contain the same products, an entire group of orders can be selected and the shipments created in a single batch operation. Split shipment packing slips however, cannot be selected for shipping at the same time. If you do, you will receive a message that the shipment must contain the same items.

Processing A Single Shipment

Creating and processing a single UPS shipment in VinNOW requires five steps:

- Find the order to be shipped in the UPS module.
- Select the order.
- Click "Create Shipment" Button
- Enter the shipment details.
- Create the shipment and a label will print.

Find the Order

Find the order to be shipped by specifying the desired search criteria to find the desired order with an Order Status of "To Be Shipped". By default, the search criteria is set to search for orders with an Order Status of ready "To Be Shipped" and the Shipper set to 'UPS' for all orders with a UPS shipper/service.

Select the Order

Select the order by clicking in the second column, to display the check mark in the column.

Create the Shipment

When the check mark is displayed, the 'Create Shipment' button will be enabled. Note: Shipments can be created for the following statuses: "To Be Shipped", "Invoiced", "Hold for Payment", "Futures Hold"

If the is not displayed, but is only highlighted with an asterisk (*) in column 1, it may be that the status of the selected order is some other status than "To Be Shipped". Shipments can only be created for orders with a status of 'To Be Shipped'

Enter the Details and Create Shipment

Click the 'Create Shipment' button to display the Shipment Request screen.

On the Shipment Request screen enter the shipment details for the service information, package information, and the payment information.

Send the request to UPS to create the shipment after the shipment details have been entered, by clicking the 'OK' button. You will then be prompted to confirm the request, when confirmed the request will be sent to UPS and your label will print.

Note: If you have checked the ShipCompliant box on the UPS screen, when the label is created, the order is saved to ShipCompliant.

Service Information

Service - Select a packaging type from the drop-down menu. Required for all shipments. If a UPS service was selected when the VinNOW order was created, it will be the default on this screen.

Saturday Delivery – Select this checkbox if you need the shipment to arrive on Saturday. Availability is limited to specific services and selected destinations.

E-mail Notification – This checkbox allows you to use UPS Quantum View E-mail notification service. Select the appropriate check boxes to alert the recipient or others that a shipment has been sent, that an exception has occurred, and/or that the shipment has been delivered. See Email Notification Information (above) for more information.

Note: The checkbox must be checked, in order for any e-mail notification information entered to be included with the shipment creation request.

Number of Packages - Select the number of packages (up to 99) in your shipment from the drop-down menu. The default setting is one package. A separate Tab Page will be created/displayed for package information.

Carbon Neutral Shipment - If selected, this indicates that the shipper is enrolled in the UPS Carbon Neutral Program AND is granting approval to UPS to charge the shipper's account the cost of purchasing the carbon offset applicable to this shipment. Please check with UPS to determine if checking this box will incur additional charges to your shipment.

From the UPS website description: We take care of everything, from calculating the carbon dioxide (CO2) emissions to purchasing and retiring the carbon offsets.

When the driver picks up the package(s), update the packing slip status by selecting the order in UPS module and click "Accept Shipment".

Note: clicking the "Accept Shipment" button triggers an action to mark the shipment as having been shipped by updating the Shipment's Status only in the VinNOW database. Nothing is communicated to UPS when this action is taken. Charges for the Shipment are accrued when the Shipment is created within VinNOW.

Print Return Labels - by selecting the Print Return Labels checkbox, a Return shipment label will be printed for each Forward shipment created in



the shipment request. At this point in time, return labels cannot be created for shipments that have more than 1 package.

In order to email to the customer, select "electronic return label" and a label will be sent to the customer by UPS.

Package Information

Packaging – Select a packaging type from the drop-down menu. The default value for this field is as specified in your system's UPS Shipping Preferences.

Weight – Enter the weight of the package. Required for all packages except UPS Letter or UPS Express Envelope.

Determination of the Actual Weight: Actual weight is the package weight rounded up to the next whole pound. Use a scale to determine the weight of the package. Round any fraction of a pound to the next whole pound for UPS Express® Envelopes (letters) over eight ounces and all other packages.

Determination of the Dimensional Weight: Dimensional weight reflects package density, which is the amount of the space a package occupies in relation to its actual weight. Dimensional weight may apply to all UPS domestic and international package services.

Determine the package dimensions in inches. For each dimension, measure at the longest point, rounding each measurement to the nearest whole number (for example, 1.00 to 1.49 will be considered 1, and 1.50 to 1.99 will be considered 2).

Multiply the package length by the width by the height. The result is the cubic size in inches.

For Domestic Shipments: Divide the cubic size in inches by 166 to determine dimensional weight in pounds. Increase any fraction to the next whole pound.

Determination of Billable Weight: Compare the package's actual weight to its dimensional weight. The greater of the two is the billable weight and should be used to calculate the rate. For multiple-package shipments, total the billable weight of all packages in the shipment.

UPS has established specific weight and size limits for the packages that you send with all UPS services. The restrictions below only pertain to individual packages. There are no limits to the total weight of your shipment or the total number of packages in your shipment. Shipments larger than the limits listed below will require the use of our UPS Freight services.

Packages can be up to 150 lbs (70 kg).

Packages can be up to 165 inches (419 cm) in length and girth combined.

Packages can be up to 108 inches (270 cm) in length.

Packages with a large size-to-weight ratio require special pricing and dimensional weight calculations.

Note: Packages that exceed UPS weight and size limits are subject to an Over Maximum Limits charge. If you are unsure or want to verify package weight or size restrictions, check with UPS support as these limits are determined by UPS not VinNOW.

A Large Package Surcharge may apply to domestic and international shipments. A package is considered a "Large Package" when its length plus girth $[(2 \times \text{width}) + (2 \times \text{height})]$ combined exceeds 130 inches.

Large Packages are subject to a minimum billable weight of 90 pounds. An Additional Handling charge will not be assessed when a Large Package Surcharge is applied.

Note: The determination of whether a package's weight/size value will trigger a surcharge for "Additional Handling" or "Large Package" is made by our program using the Weight/Size values entered by the User. If either of these conditions are met, the applicable check box ("Additional Handling", "Large Package") on the Shipment Detail form will be marked/checked. The User does not have to take any action. UPS will determine if the package should have "Additional Handling" or "Large Package". Check with UPS support if you have questions on this surcharge as these limits are determined by UPS not VinNOW.

Dimensions – Enter the package dimensions (length, width, and height) if you are supplying your own packaging. If your package is oversized, select the Oversize type. Length must be greater than Height and Width. Maximum size is 108 inches for any dimension.

Declared Value – Enter the value of your package. The maximum declared value for a package is USD\$50,000 or equivalent in local currency for UPS account transactions. UPS protects each package against loss or damage up to USD\$100 (U.S. destinations) or any shipment for USD\$100 (international destinations) at no additional charge. For other additional limits and restrictions on declared value, please refer to the respective UPS tariff guide.

Delivery Confirmation – Select from the drop-down menu to have UPS send automatic delivery confirmation, to require a signature for delivery, or to require an adult signature. The default value for this field is as specified in your system's UPS Shipping Preferences.

Additional Handling – Select the checkbox if your package is over 60 inches in length, or is an unusual size or shape. An additional handling charge applies.

C.O.D. Amount – Enter the monetary amount in US dollars that UPS is to collect from your recipient upon delivery of a Collect on Delivery (C.O.D.) shipment.

Cashier's Check or Money Order Only - Select the checkbox if your recipient will give this type of secured funds payment to the UPS driver for a C.O.D. delivery.

Reference 1 - User defined information that may be displayed on the UPS shipping label. The default value for this field is as specified in your system's UPS Shipping Preferences. The VinNOW suggested default for Reference 1 is the concatenation of following three VinNOW shipment related fields separated by dashes: customer number, invoice number, and the packing slip number.

Reference 2 – User defined information that may be displayed on the UPS shipping label. The default value for this field is as specified in your system's UPS Shipping Preferences. The suggested VinNOW default for Reference 2 is 'Approved Wine Shipper' which is required for wineries shipping wine.

Payment Information

For each new shipment the default payment method for the shipping charges is 'Bill To Account' which will bill to your UPS account number.

Additional payment method options are:

Bill Receiver - Allows you to bill the shipment receiver. Enter the receiver's UPS Account #, and the receiver's zip code. When you have completed entering the information, close the window by clicking the 'X' in the upper right corner.

Bill Third Party - Allows you to bill a third party. Enter the third-party UPS Account #, and the third party's zip code. When you have completed entering the information, close the window by clicking the 'X' in the upper right corner.

Click the 'OK' button to send an internet request to UPS to create the shipment, after supplying the desired shipment details on Shipment Request screen described above. This may take a few seconds for each shipment creation. If the request is received and approved, the UPS shipping label will be printed and the initial Shipping screen will be displayed. There will be a bowtie graphic on the UPS label which indicates to the driver that the order is logged online with UPS. This replaces the need for an End of Day report which is used by WorldShip.

The original order selected for shipment creation will show the status as 'Shipment Created' and corresponding Shipment ID will be displayed. When the driver picks up the package(s), update the packing slip status to shipped via standard shipping module.

End of Day Report

When the UPS driver picks up an order, by changing the status on the order to Accept Shipment this replaces the need for the End of Day Report that is used by WorldShip. VN uses an XML ship tool port with UPS Online. The label will print out with a bowtie graphic indicating to the UPS driver that the order is logged online with UPS and VinNOW. This replaces the need to scan boxes.

Processing Group Order Shipments

Make sure your VinNOW user profile has the back office report printer print action set to "No Prompt" so you do not have to "ok" each label to print.

Processing group order shipments requires the same steps as processing a single shipment.

- Find the group of orders to be shipped, by setting the search criteria similar to the following:
 - Status: 'To Be Shipped'
 - Shipper/Service: 'UPS'
 - Group Order #: number of the group order desired
- Select the entire group by clicking the check mark in the heading column at the top of the list. All the eligible orders will be selected.
- Click the 'Create Shipment' button to display the Shipment Request screen. Under Ship To, instead of a single recipient, you will see an entry for each of the orders selected.
- Since each shipment will contain the same items, you will need to enter the shipment details only once, and they will be applied to each shipment created. (See Processing A Single Shipment, Entering Shipment Details above.)
- Send requests to UPS to create the shipment after the shipment details have been entered, by clicking the 'OK' button. You will then be prompted to confirm the requests.

Click 'OK' to confirm will commence processing of the batch of shipments, one shipment at a time. A shipping label for each shipment will be printed. If a shipment is unable to be processed for any reason during the process, the process will continue with the next shipment. At the end of the batch processing, a message will be displayed to alert the user if there were any errors. Shipments which could not be processed will still have a status of 'To Be Shipped' and the Shipment ID will show "Shipment Error'.

Shipping Rates

It is possible to retrieve and view the various shipping rates for different UPS delivery services that would be applicable to the UPS Shipments being created. On the Shipment Request detail form, there is now a "Check Rates" button that can be clicked to go to the VinNOW UPS Service Rates form. (The detailed workings of that form is documented below.) One thing to note when Checking Rates while processing Group Order shipments is if the UPS service of any included shipment is changed from what the default service is, when you return to the Shipment Request detail form, there will be a message on that form informing you that multiple services have been applied,



and the drop-down selection list for UPS Services will not be enabled on the form.

Shipment Rating feature can be accessed from the UPS Shipment Request detail form by clicking the "Check Rates" button. Before you can check rates, all of the information required to create a Shipment must be supplied. Once the shipment information is supplied, clicking "Check Rates" will bring up the Shipment Rating form.

The Rating form will display many of the item values on which the ratings are based. These values are read-only and cannot be changed on this form. The main grid on the Rating form will have a row for each Shipment that is to be created. Upon form entry, only the first Shipment will have its Service Rates retrieved and displayed.

You can get the ratings for other shipments by clicking on the section column for that shipment and then clicking "Get Rates". All the shipments can be selected by clicking in topmost column.

Once rates have been retrieved, they will display in the shipment's grid row under the column for any of the available UPS services. If no rate is displayed for a shipment, then that UPS service is not available/valid for that particular shipment. The User can still set that service as the delivery method. But it will likely return an error form UPS when attempting to create the shipment.

User has the option of viewing either "Standard Rates" or "Negotiated Rates" in the grid. Click on the applicable option control for the rates you want to view.

To change the UPS Service for any of the shipments in the grid:

1. Select those shipments whose UPS Service you want changed by clicking in their selection column in the grid.
2. Select the desired UPS Service from the drop-down list that is above the grid.
3. Click on the "Go" button adjacent the drop-down list. A confirmation message will display prior to any changes being made to the selected shipments.

4. If User confirms they want the service change, the shipment's service will be updated and the new service will then display in that shipment's grid row in the Shipper / Service column.

The area at the bottom of this form will display warnings or alerts that have been returned by the UPS system for any selected shipment whose Ratings were retrieved.

Typically, every shipment will carry the following message:

110971: Your invoice may vary from the displayed reference rates.

Printing UPS Shipping Labels

Initially the UPS shipping label is printed when the UPS shipment is created. (See Processing A Single Shipment and Processing Group Order Shipments above.)

To re-print a UPS shipping label:

- Find the desired order
- Select it, by clicking in the Invoice number column to highlight it
- On the Process menu, click the 'Re-Print UPS Shipping Labels'.

Note: The label will print in the GIF or EPL format it was generated with and cannot be changed and reprinted in the other format without voiding and regenerating the label again.

To Create a UPS Return Shipment:

1. Find the desired order in the grid.
2. Select it, by clicking in the Invoice number column to highlight it
3. On the Process menu, click the 'Create Return Shipment...' selection.

This will bring up the Request Shipment detail form. Creating a Return shipment is very similar to creating a Forward shipment. A Return shipment can be created only for Orders having a status of "Shipped" or "Picked Up". For Returns, it is required that you indicate the type of Return you wish to create.

The options for Return Type are as follows:

UPS Print Return Label – The shipper prints the return label and the Return Service Customer Receipt using WorldShip and includes the label and receipt with the outbound shipment. The customer applies the return label to the package and gives the package to a UPS driver or drops it off at a UPS

Customer Center or an Authorized Shipping Outlet. The customer keeps the Return Service Customer Receipt for tracking purposes and as proof of pick up by UPS

UPS Electronic Return Label – UPS electronically notifies the customer via e-mail that a return label and receipt are available. To print the label and receipt, the customer clicks the Web link in the e-mail, prints the return label and receipt using a Web browser, applies the label to the package, and gives the package to a UPS driver or drops it off at a UPS Customer Center or an Authorized Shipping Outlet. The customer keeps the receipt for tracking purposes and as proof of pick up by UPS.

UPS Print & Mail Return Label – UPS prints the return label and mails the label to the customer. The customer applies the return label to the package and gives the package to a UPS driver or drops it off at a UPS Customer Center or an Authorized Shipping Outlet.

UPS Pickup Attempt (Call Tag) – The UPS driver makes one attempt to bring the package label to the pickup location and pick up the package. If the package cannot be picked up, the driver leaves the label at the pickup location, and the customer gives the package to a UPS driver or drops it off at a UPS Customer Center or an Authorized Shipping Outlet.

UPS Pickup Attempts (Call Tag) – The UPS driver brings the package label to the pickup location and picks up the package. If the package cannot be picked up on the first attempt, the driver attempts to pick up the package on each of the next two business days. If the package is not picked up after three attempts, the driver returns the label to UPS

Voiding UPS Shipments

Shipments can be Voided up to 28 days after creation. Return shipments must be voided within 24 hours.

Void is only valid before a shipment is picked up by the UPS service provider.

To void a shipment:

- Go to UPS Online Tools Shipping in Back Office
- Find the desired order in the UPS Shipping module.
- Select it, by clicking on the invoice in the check mark column.
- On the Process menu, click the Void Shipment option.

Note: if you have your email preferences set to email the customer when the UPS label is created, the customer will receive an e-mail notification of shipment based on the original label. If you void the shipment (within the 24hr window), a second email will then be sent indicating that the shipment has been canceled

Note: Voiding a shipment is not the same as voiding an invoice. If you need to do both, void the shipment first, then void the invoice.