



# *Third Party Carrier (3PC<sup>TM</sup>) Manifests*



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*This document assumes that you are familiar with the shipping manifest module, and that you plan to implement the Third Party Carrier feature. For shipping manifest information not covered in this document, see Ensite Pro online help.*

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## Understanding Third Party Carrier Manifests

One of the key factors in keeping your company's expenses low is to minimize your shipping costs. Since shipping packages can be a time-consuming task, your shipping processes should be as efficient as possible. DDMS' Third Party Carrier (3PC™) feature was designed to help you streamline your shipping processes. This new program acts as an interface between the shipping manifest program and a third party shipping service. It allows you to streamline your 3PC™ billings and enables you to better track your customers' packages.

Begin by creating orders in the Order Entry window. Then build your shipping manifest in the usual manner in the (TS) Shipping Manifest screen. You can also use the (TR) Order Entry Reports screen to manually add or scan each 3PC™ pick ticket onto the manifest. Once the pick tickets are listed on the manifest, export the pick ticket information to the shipping service using the third party carrier's software. (Usually this software resides on a Windows PC. You can obtain this software from your Third Party Carrier service.)

After the information has been exported, the Third Party Carrier processes the information and determines the package's weight, the method by which to ship the package, insurance information, and freight charges. While you may have several pick tickets listed on each manifest, the freight shown by the Third Party Carrier represents the total amount for the package being shipped. After the information is processed, the Third Party Carrier also creates and prints your shipping labels, using your on-site label printer. This saves you the necessity of printing the labels yourself.

After the labels print, import the third party information from your Windows PC back to your DDMS system. At this time, all the delivery information is attached to the invoice and can be viewed in the Order Entry window. (The system lists the Third Party Carrier information, including the tracking number as a special MMMM line on the ticket in text-based order entry.) This line includes the freight charges for the ticket, which prints on the invoice. Since you have the tracking number readily available and attached to the invoice, tracking your packages is easier than ever.

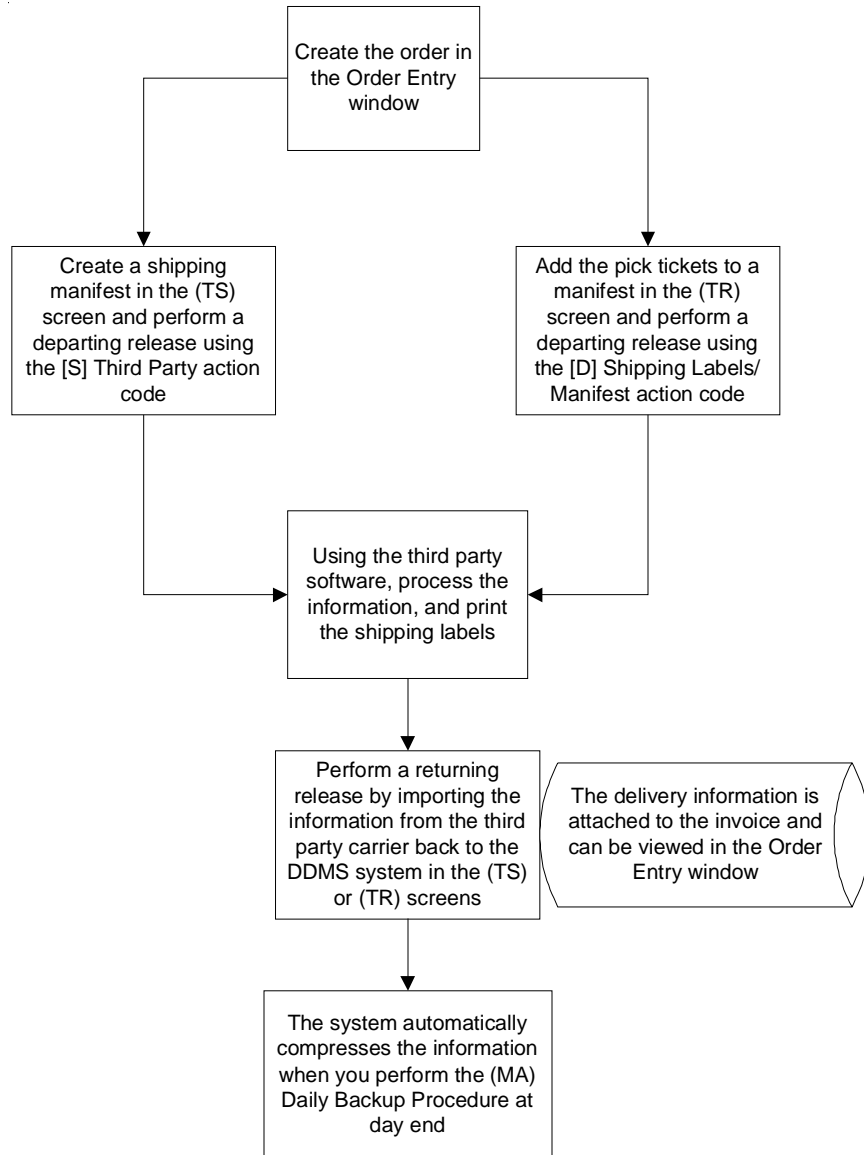
The 3PC™ feature allows you the flexibility to decide whether to charge the customer for the 3PC™ freight charges and the method by which to ship the order, overnight, ground, and so forth. You can set separate default shipping methods and freight settings for each customer in the Customer window. Since these settings are only defaults, you can easily change them when you actually place the customer's order. You do this using the new 3PC™ special.

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*The flow of a TPC shipping manifest is shown on the following page.*

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# Chart 1: The Flow of a Third Party Shipping Manifest



### Third Party Carrier Files

**PSHIPI:** This file acts as the source file. It contains the information from the Third Party Carrier and updates your DDMS system when you import the information back to your DDMS system.

**PSHIPO:** This file acts as the export file. It contains all the pick ticket and manifest information that you export to your Third Party Carrier. This file must be placed in a shared directory on your system so that the Third Party Carrier can read and update the file.

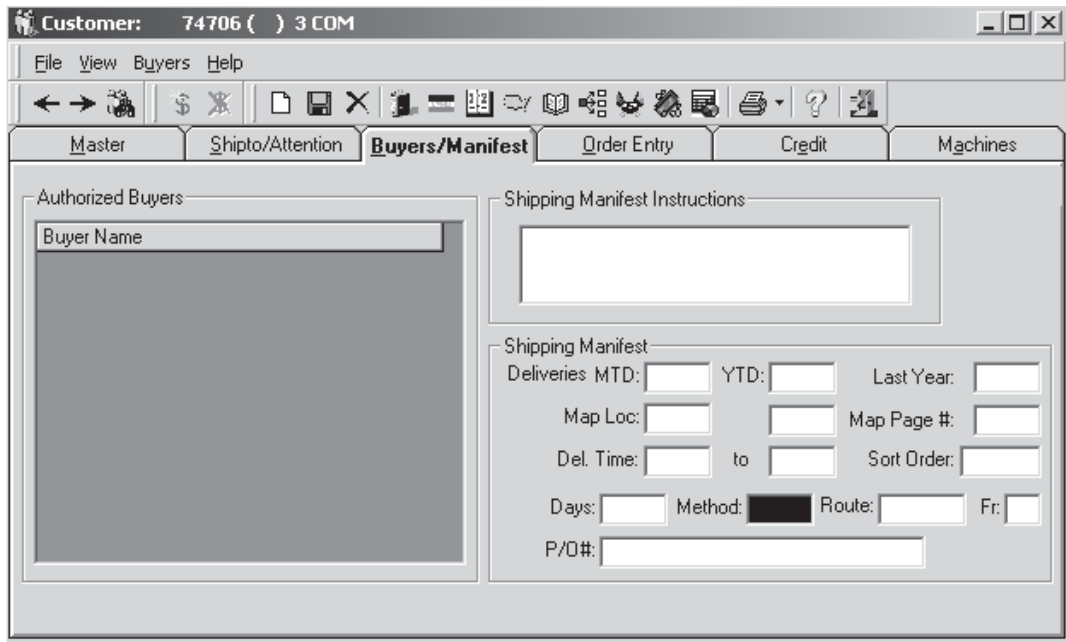
**M-TPC:** If exceptions occur when you export the file, the system moves the information to this file.

### What You Need To Set Up

Any feature that requires setup is shown in the following steps. If you are going to use these features, you must first set them up. Next to each feature listed below is the heading that you should refer to for instructions on enabling the feature.

1. Set up the Third Party Carrier boxes in the Customer Buyers/Manifest tab. See **Setting Up the Customer Buyers/Manifest Tab**.
2. Set up the parameters in the (L8) screen. See **Setting Up the (L8) Screen**.
3. Set up one parameter in the (L8R) screen. See **Setting Up the (L8R) Screen**.

**Figure 1:**  
Customer  
Buyers/Manifest  
Tab



## Setting Up the Customer Buyers/Manifest Tab



- 1 From the Ensite Pro Master Menu, double-click
- 2 In the Customer Master tab, retrieve the customer then click the Buyers/Manifest tab.
- 3 Click the Method box to specify the default method to ship orders to this customer. See Figure 1. For example, you could enter Ø1 for over-night shipment, Ø2 for second day delivery, or Ø6 for ground shipment, and so forth. (This box represents the default method of shipment. You can change the method of shipment when you place the customer's order.)
- 4 Click the Fr box to specify whether to bill the customer for third party carrier freight charges. When you print the information you receive from the third party carrier, the total freight amount appears on one line.

Type **Y** to create the TPC freight charges, but not add them to the customer's invoice. The customer is not charged for the TPC freight, and the charge does not appear as a separate line item on the invoice. However, you can use the freight information to track freight costs.

Type **B** to add the TPC freight charges to the order and charge the customer for the freight. The freight appears as a separate, billable item on the invoice. You can also use the freight information for reporting purposes.

Type **N** to not create, bill or track the TPC freight charges.

## Setting Up the (L8) Screen

- 1 Go to the (L8) screen and select the [C] Change action code.
- 2 In the G/L Location field, enter the location or press Tab to accept the default location.
- 3 Tab to the Third Party Carrier Vol field and enter the volume serial on which to store the PSHIPI and PSHIPO files, W3, for example. See Figure 2. These files store the 3PC™ information on your DDMS system. You must store these files in a shared directory on your system. This allows the third party system to read and update the files as needed.

- 4 In the Set Ctn From Third Party Carrier field, specify whether the CTN (carton) field should be automatically updated with the cartons you're actually shipping. After you export the manifest to the Third Party Carrier, update the DDMS system with the 3PC™ information. When you import the information from the Third Party Carrier, you can specify that the CTN (carton) field be automatically updated with the cartons you're actually shipping.

Type **Y** to automatically updates the carton amount.

Type **N (default)** and the system does not update the carton amount with 3PC™ information.

- 5 When finished, press Enter. If you press Esc before doing so, the system does not save your changes.

### Setting Up the (L8R) Screen

- 1 Go to the (L8) screen and select the [R] Routes action code.
- 2 When the (L8R) screen appears, select the [C] Change action code.
- 3 In the G/L Location field, press Tab to accept the default location or enter the location for which you are setting parameters.
- 4 In the Route field, enter the route to use with a Third Party Carrier. For example, if you use UPS as a Third Party Carrier, enter UPS in this field.

**Figure 2: New Fields in the (L8) Screen**

```

16:45:04                (L8) Manifest & Route Parameters                11/16/99
=====
Action [I] (C=Change, I=Inquiry, P=Picking, R=Routes) G/L Location [ 1 ]
=====
Additional Journal Name [1297-S   ] Vol. [BD??]
PASSWORDS : Release ?DDMS Delete ?DDMS Reindex ?DDMS Purge ?DDMS
Next Manifest #          9          Do Returning Release Y/N/B/V ?
Maximum Number of Stops [   ]      Default to Carton or Envelope C/E ?
Batch Add Bill Complete Orders Y/N ? Third Party Carrier Vol. [ W3 ]
Format Printer          Set Ctn From Third Party Carrier Y/N ?
Label [SM-LB1] [1]
Loading [MANIFL] [1]
Delivery [MANIFD] [1]
      DEFAULT LIMITS
Loc #          to #
Status :       to :
Sic  :         to :
Route :        to :
Sort :         to :
PO #:
to #:
Default Order Date to Yesterday Y/N ?
=====

```

## Third Party Carrier Manifests

- 5 Tab to the When Releasing Manifest, Build Third Party External Source Table field and type **Y**. You use this field to specify that this route be used with a Third Party Carrier service. See Figure 3.
- 6 Press Enter to move the cursor through the screen. If you press Esc before doing so, the system does not save your changes.

## Building the Manifest

You begin by building your shipping manifest in the (TS) or (TR) screens. Both of these methods are described below. When you build the manifest, the system creates the PSHIPO file. This file contains all the pick ticket manifest information. The system uses this file to export the information to the Third Party Carrier.

### Building the Manifest in the (TS) screen

The following instructions detail how to build a manifest and save the information to a file in the (TS) screen. After the information is saved to a file, you can export it to the Third Party Carrier. To build the manifest, see the heading **Building the Manifest in the (TR) Screen**.

- 1 Go to the (TS) screen and select the [A] Add action code.
- 2 At the Append to Existing Manifest prompt, type **N**.
- 3 At the Manifest Creation Method prompt, type **A** to build the manifest according to Entry Order.

**Figure 3: New Fields in the (L8R) Screen**

```
14:06:35 (L8R) Route Parameters 07/10/07
=====
Action [I] (C=Change, I=Inquiry) G/L Location [ 1] Route [11 ]
=====
Route Desc [SAME DAY DELIVERY ]
Driver [ ]

Delivery Days [ ]
Maximum Number of Stops [ ]

Last Manifest # 87
When Releasing Manifest, Build Third Party External Source Table Y/N ?Y

Format Printer
Label [ ] [ ]
Loading [ ] [ ]
Delivery [ ] [ ]

Substitute List ID [111 ]
=====
```

## Third Party Carrier Manifests

- 4 When the cursor moves to the Route field, enter the route for this third party manifest, UPS, for example.
- 5 The system displays the information set up for this route in the (L&R) screen, including the driver's name, delivery days, maximum number of stops, and last manifest number. At the Correct Route prompt, type **Y** to specify this is the correct route.
- 6 When the Print Shipping Labels When Adding prompt appears, type **N** or press Enter. (There is no need to print shipping labels at this time. You print shipping labels after you export the information to the Third Party Carrier.)
- 7 In the Invoice # field, enter the first pick ticket to place on this manifest. You can do this by manually entering the number or by scanning the invoice bar code.
- 8 At the Correct Ticket prompt, type **Y** to specify that the ticket is correct.
- 9 In the Ctn field, press Tab to accept the default of one carton or enter the number of cartons on the invoice.
- 10 In the Env field, enter the number of envelopes on the invoice, or press Tab to indicate that no envelopes are listed on the invoice.
- 11 In the Sort field, you can change the order in which the invoice is sorted on the manifest. The sort determines the order in which delivery is made. Press Tab to accept the default sort code of 10, or enter a different sort for this invoice.
- 12 At the Change Customer Shipto Address prompt, specify whether to change the customer's shipping address.  
  
Type **Y** to change the address. When the cursor moves to the Name field, press Tab to each field to change and enter the new information over the existing information. When you finish making changes, press Enter. Go to **Step 13**.  
  
Type **N (default)** to accept the customer's default shipping address. Go to **Step 14**.
- 13 If you change the customer's shipping address, the system displays the Update Customer With New Shipto prompt. At this prompt, you can update the customer's shipping address in the customer's shipping address from the Customer Shipto/Attention tab. Type **Y** to update the customer's shipping address in the customer's shipping address from the Customer Shipto/Attention tab. Type **N** to not update the customer's shipping address in the customer's shipping address from the Customer Shipto/Attention tab. The shipping address changes apply only to this manifest.

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- 14 When the cursor returns to the Invoice # field, enter the next invoice number to add to this manifest. When you finish adding invoices to the manifest, press Esc.
- 15 The system displays the route information, along with the total number of stops, cartons, envelopes, invoices, and credits for this manifest. Press Enter.
- 16 When the cursor returns to the action code field, export the manifest to the Third Party Carrier by selecting the [S] Third Party action code.
- 17 At the (E)xport/(I)mport And Release prompt, press Enter or type E. See Figure 4.
- 18 If the Enter Password prompt appears, enter the releasing password. (This prompt appears if a password is set in the Release field in the (L8) screen.)
- 19 In the Manifest # field, enter the number of the manifest to release and press Enter.
- 20 The Manifest Summary Window appears and the cursor moves to the Release field. This window displays the route information from the (L8R) screen, including the total number of stops, cartons, envelopes, invoices, and credits.  
In the Release field, type Y.
- 21 When the cursor moves to the Delivery field, you can change the delivery date and time and the driver.
  - To accept the displayed delivery date, time, and driver for this order, press Enter. Go to **Step 22**.
  - To change the default delivery date, time, and driver, press Tab to move the cursor to the fields to change and enter the new information over the existing information.
- 22 In the Print field, indicate whether to print the manifest at this time.  
Type **Y (default)** to print the manifest information. Go to **Step 23**.  
Type **N** to not print the manifest information. Go to **Step 28**.
- 23 If you specify the print the manifest, the cursor moves to the Loading, Delivery, Both field. Specify the type of manifest to print.  
Type **L** to print a loading manifest. This manifest prints in descending order. The last order to be delivered prints at the top of the manifest. Go to **Step 24**.

Type **D (default)** to print a delivery manifest. Invoices are listed in the order to deliver, beginning with the first order and ending with the last order. Go to **Step 26**.

Type **B** to print both a loading and a delivery manifest. Go to **Step 24**.

**24** In the Loading Format field, press Tab to accept the default format MANIFL, or enter the format type to print.

**25** In the corresponding Printer field, press Tab to accept the default printer, or enter the logical name of a different printer.

If you specified to print only a loading manifest, go to **Step 28**.

If you specified to print both a loading and delivery manifest, go to **Step 26**.

**26** In the Delivery Format field, press Tab to accept the default format MANIFD, or enter the format type to print.

**27** In the corresponding Printer field, press Tab to accept the default printer, or enter the logical name of a different printer.

**28** At the Are You Sure prompt, type **Y**. The system releases the manifest and prints the formats, if specified.

**29** At the Any Key For Next Manifest message, press Enter. The system exports the information and creates the PSHIPO file.

**Figure 4: The (E)lexport/(I)mport And Release Prompt**

```

(TS) Shipping Manifest (MM/DD/YY) 11/16/99
-----
Action ? [S] File :P-MASTER
-----
Manifest # _____ Date :MM/DD/YY Invoice # _____ -_ Date :MM/DD/YY
Name : _____ Account # _____ Dept : _____
Route : _____ Map Loc : _____ Page # _____
Delivery Time #_:_ to #_:_ Days : _____
Sort : _____
Instructions : _____
-----
Route Sort Invoice # Ctn. Env. Route Sort Invoice # Ctn. Env.
-----
(E)lexport/(I)mport And Release E/I ?E
    
```

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- 30 The system displays the next manifest, searching numerically by manifest number. When you finish releasing manifests, press Esc. The cursor returns to the Manifest # field.

### Building the Manifest in the (TR) Screen

The following instructions detail how to build a manifest and save the information to a file in the (TR) screen. After the information is saved to a file, you can export it to the Third Party Carrier.

- 1 Go to the (TR) screen and select the [D] Shipping Labels/Manifest option.
- 2 When the cursor moves to the Type field, type T.
- 3 The system displays the Third Party Carrier screen, and the cursor moves to the Update (E)xport File, Process (I)mport File prompt. Press Enter or type E.
- 4 When the cursor moves to the Pick Nbr field, enter the first pick ticket to place on this manifest. You can do this by manually entering the number or by scanning the invoice bar code.
- 5 At the Is This The Ticket prompt, type Y if the correct ticket is displayed. (If the correct ticket is not displayed, type N to enter a different ticket number.) See Figure 5.

**Figure 5: The Is This the Ticket Prompt**

```
08:44:42                Third Party Carrier REV. (09/16/99)                11/16/99
-----
Order Writer :____      G/L Loc #__  Inv Loc #__      Transaction #_____-
                               File :_____ Vol :_____
Name :ABC COMPANY      Account #    10001
                               Slsm :____ Status :_  P/O #_____
      901 SAVANNAH DR
      KELLER              TX 76248      817 555 1234  Sub-Total $_____
-----
#  Item      Mfg      Description      UM C Order  Ship  Price
_PICK_NBR_  _PICK_NBR_  _PICK_NBR_      _PICK_NBR_      _PICK_NBR_
10920-0
10921-0
      -0

IS THIS THE TICKET Y/N ?Y
```

- 6 When the cursor returns to the Pick Nbr field, enter the next pick ticket number to place on this manifest. You can continue to enter as many tickets as necessary.
- 7 When you finish entering pick tickets, with the cursor in the Pick Nbr field, press Esc. The cursor returns to the Master Menu.
- 8 The system exports the information and creates the PSHIPO file.

## Exporting the File to the 3PC™ Service

After you've built the PSHIPO file, you're ready to export the information to your 3PC™ service. You do this using the third party carrier's software. (Usually this software resides on a Windows PC. You can obtain this software from your Third Party Carrier service.)

Since Third Party Carrier service export instructions vary, they are not included in this document. For instructions on performing this function, refer to your Third Party Carrier software documentation.

Once you export the information, the Third Party Carrier processes the information and determines the package's weight, the method by which to ship the package, insurance information, and freight charges. While you may have several pick tickets listed on each manifest, the freight shown by the Third Party Carrier represents the total amount for the package being shipped.

After the information is processed, the Third Party Carrier also creates and prints your shipping labels, using your on-site label printer. This saves you the necessity of printing the labels yourself.

## Importing and Releasing the Information to the DDMS System

Once the labels are printed, you can import the Third Party Carrier information back to the DDMS system. When you do, DDMS places the information, including the tracking number on the ticket as an MMMM line (text-based). You can view this information in the Order Entry window.

You can import the 3PC™ information using either the (TS) or (TR) screens. Both of these methods are described below.

### Importing Information Using the (TS) Screen

Use the following instructions to import the 3PC™ information back to the DDMS system using the (TS) screen:

- 1 Go to the (TS) screen and select the [S] Third Party function.
- 2 At the (E)xport/(I)mport And Release prompt, type I.

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- 3 If the Enter Password prompt appears, enter the releasing password. (This prompt appears if a password is set in the Release field in the (L8) screen.)
- 4 In the Manifest # field, enter the manifest number to import and press Enter.
- 5 The Manifest Summary Window appears and the cursor moves to the Import Target File prompt. At this prompt, type **Y** to import the information to your DDMS system from the Third Party Carrier.
- 6 The system imports the information from the Third Party Carrier. The system lists any exceptions at the bottom of the screen, along with the Release Manifest, Print Exceptions prompt. See Figure 6. (The system stores any exceptions in the M-TPC file.)

Type **Y** to release the manifest information to the DDMS system.

Type **N (default)** to not release the manifest information to the DDMS system.

---

**Note:** If any exceptions occur, you can correct them using the Third Party Carrier software or the DDMS system. The exceptions in the M-TPC file are purged at day's end when you perform the (MA) Daily Backup Procedure.

---

**Figure 6: The List of Exceptions in the (TS) Screen**

```
15:48:00 (TS) Shipping Manifest (10/29/XX) 11/16/99
-----
Action ? [S] Import File :P-MASTER
-----
Manifest # 218 Date :10/29/99 Invoice #.....- Date :././..
Name :..... Account #..... Dept :....
..... Route :.... Map Loc :.... Page #....
..... Delivery Time #... to #... Days :....
..... Sort :.....
Instructions :.....
-----

Nbr Of Tickets That Have Invalid Status For Freight [ 1]
Nbr Of Invalid Carton Counts [ ]
Nbr of Tickets Found on Manifest But Not In Target [ ]
Nbr Of Tickets in Target But Not Manifest [ ]

Release Manifest, Print Exceptions Y/N ?N (N=Print Exceptions)
```

## Importing the Information Using the (TR) Screen

Use the following instructions to import the 3PC™ information back to the DDMS system using the (TR) screen:

- 1 Go to the (TR) screen and select the [S] Third Party function.
- 2 At the (E)xport/(I)mport And Release prompt, type I.
- 3 At the Are You Sure prompt, type Y.
- 4 The system displays the Processing File message. When the procedure is complete, the system imports the information from the Third Party Carrier. The number of records processed appears, along with the current pick ticket number. See Figure 7. At the Finished Processing Target File message, Press Enter.

## Viewing 3PC™ Information in Order Entry

After you import the 3PC™ information back to your DDMS system, you can view it in the Order Entry window.

- 1 From the Ensite Pro Master Menu, double-click



**Figure 7:  
Importing the  
Information in  
the (TR) Screen**

```

10:23:51          Third Party Carrier REV. (09/16/99)          11/16/99
-----
Order Writer :____ G/L Loc #__ Inv Loc #__ Transaction #_____-
                                     File :_____ Vol :____
Name : _____ Account #_____
                                     Slsn :___ Status :_ P/O #_____
                                     Lines #__ __._%
                                     Sub-Total $_____.__
-----
#  Item          Mfg          Description          UM C Order  Ship  Price
_PICK_NBR_     _PICK_NBR_     _PICK_NBR_          _PICK_NBR_     _PICK_NBR_

Processing File...
Records Processed [    2]
Current Pick Number [ 10921-0]

Finished Processing Target File. Press Any Key
    
```

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- 2 In the Order # box, enter the number of the invoice for which to view 3PC™ information. This information includes the manifest number, the manifest date, the time when the manifest information was imported, the containers and envelopes, the sort code, and the delivery driver.
- 3 When you finish viewing 3PC™ information, press Esc.