



Installing Clippership

This chapter provides installation and configuration instructions for three types of Clippership stations: attended, single-user and polling.

An attended station is a PC workstation that runs Clippership. It's called the attended station because a user processes shipping information with the Clippership software and uses it to print manifests or output manifests to disk — in other words, someone is attending to the station.

Attended stations are the most common basic type of Clippership installation and are often used in a warehouse where the person in charge of shipping is someone other than the person entering orders. Attended stations by themselves cannot pass information back and forth with FACTS.

To get this capability, a polling station must be used. This is an optional type of setup where a computer running Clippership acts more like a server and works primarily to deliver information quickly and efficiently between Clippership and terminals and PCs running FACTS. The polling station allows FACTS users to get real-time freight calculations during Quote Entry (in Sales Orders) provides real-time freight calculations, electronic change requests and rate shopping within FACTS Quote Entry.

A single-user station is an alternative to the attended/polling configuration. This type of setup runs Clippership *and* FACTS on the same PC workstation and is better suited for warehouse distributors where the same people who enter orders also handle confirmation and shipping.

This chapter also provides configuration instructions for FACTS programs, and an FAQ section is included at the end.

If you need more information about using the Clippership software, such as entering, deleting or changing shipping information, procedures for closing out carriers, etc., refer to the Clippership On-line Guide. You can access the guide by choosing *Help→User's Guide* from the menu bar on main Clippership window.

The instructions provided in this chapter work with Clippership v 3.0.

Other Clippership versions may differ in procedure.

Before you begin

What is Clippership?

Clippership is a UPS-approved third-party software package developed by Kewill System's E-Commerce division (formerly Tracer Research). The FACTS Development Team partnered with Tracer Research to provide FACTS users with a UPS-compliant shipping solution that is fully integrated with FACTS.

The version of Clippership you're about to install only handles UPS. Users can upgrade to a multi-carrier version — also supported by FACTS — by contacting a TracerX reseller, such as Evcor-Atlanta.

How does the FACTS/clippership integration work?

In a typical day using the Clippership/FACTS integration, a sales order clerk enters a document as usual. All Sales Order entry programs create flat files, called working files, in the common directory FACTS shares with Clippership. This working file contains the ship-to and ship-via information, as well as other pertinent shipping information, entered on the documents.

As the shipping department packages goods, it enters a package ID into Clippership. This ID is a combination of the FACTS document number, company ID and warehouse ID. When the ID is created, Clippership pulls the shipping information from the working file created by that order. After the shipping department completes its shipping activity — which may include preparing multi-package items, adjusting weights and selecting a different carrier — Clippership replaces the working file with the shipping file in the working directory.

When a carrier picks up goods prepared by the shipping department, Clippership users perform the carrier closing procedure. When this procedure is complete, Clippership creates a final flat file (called the closed file), which is the last stage of the shipping process.

These three types of flat files come into play when FACTS users print invoices and run the Daily Sales Register. As invoices are printed, FACTS looks for a corresponding ship or closed file. If it finds one, FACTS automatically updates the invoice with the shipping information provided by Clippership, specifically the freight amounts, carrier and shipping address. If a user is batch printing and FACTS doesn't find a ship or closed file, the system will not print the invoice. If a user is printing invoices individually, the freight field on the invoice will read "TBD" until a ship or closed file is found.

Similarly, when the Daily Sales Register (DSR) is run, it looks for closed files from Clippership that corresponds to the invoices being processed. If it can't find a closed file the invoice does not post and it's placed in the reprint file. On the other hand, if the DSR detects a corresponding closed file, it compares the information in the closed file with the information on the invoice. If the

information matches, the DSR processes the invoice as usual. If there is a discrepancy, the DSR skips the invoice and places it in the invoice reprint file.

After the invoice is reprinted, the document information is updated from the Clippership closed file. When a user runs the DSR again, the invoice will process as usual.

The net result is that this process allows users to confirm orders without having to wait for Clippership information.

System Requirements

- Operating system: Windows 95, 98 or NT
- Polling with FACTS running on UNIX server: FacetWin™ or some other program that will allow the UNIX server to map to the polling directory

Refer to the Clippership documentation for hardware specifications (i.e., memory, drive space, etc.)

Materials you will need

- Clippership Installation CD provided in the FACTS software packet
- TracerX license key (dongle)
- TracerX license diskette (without this you can only install a demo copy of Clippership)
- *UNIX users:* FacetWin or a similar package that enables you to map the polling station to a drive on the UNIX host

Attaching the TracerX license key

The license key, or dongle, is a security device supplied by TracerX that must be attached to the serial port of any computer on which you intend to install Clippership — this includes polling, attended and single-user workstations.

The license key is what allows the modem on your computer to interface with UPS.

If a computer has more than one serial port, attach it to the port associated with COM1 and the modem connection.

Installation process overview

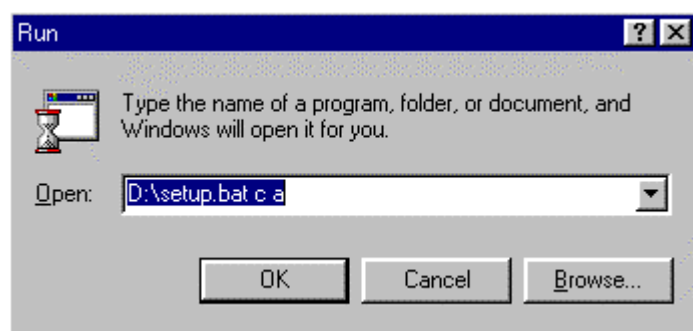
1. Begin with the installation and configuration of the attended station or single-user station. *Instructions for attended and single-user stations begin on page 10-4.*
2. Install and configure the Clippership polling station, if one is used. *Instructions begin on page 10-17.*
3. Finish with FACTS configuration in Warehouse F/M, Ship Via F/M, and for Clippership configurations that use single stations, Terminal F/M. *Instructions begin on page 10-25.*

Installing Clippership on attended and single-user stations

1. Close all programs before you begin.
2. Place the Clippership CD that is included in the FACTS Software Packet in the CD drive.
3. Select *Start→Run*.
4. Choose **Browse** and navigate to the **setup.bat** file on the CD. Choose **OK**.
5. After the setup.bat path in the Run command line, enter a space and the letter of the drive on which you want to install Clippership.

Type another space and enter the letter “a” to indicate that you want to install the attended station setup. Type “s” to indicate that you want to setup a single-user station.

If you do not enter the drive and setup parameters, the batch file will not let you continue with the Clippership installation.




6. When the batch file finishes, it automatically starts the Clippership Install Shield.
7. Accept the defaults in the Clippership Install Shield. Close the DOS window.
8. You are now ready to begin installing the TracerX software.

Installing TracerX on attended or single-user stations

TracerX is the development system used to create and modify Clippership.

To install the TracerX Development System:

1. Select the CD drive in Windows Explorer. Open the **txwin** folder and double-click on the  Setup file.
2. Follow the on-screen prompts. The defaults should work for the majority of users.
3. Once the installation is complete, navigate to the location where you installed TracerX and open the **txwin** folder.
4. Create a new shortcut for the *txdev.exe* file (icon with the yellow X) and drag it to the desktop.
5. Do the same for the *txrun.exe* file (icon with the green X). When you are done, you should have two TracerX shortcuts on the desktop — one for Development and one for Runtime.
6. Once the shortcuts are on the desktop, you are ready to begin configuring the attended station.

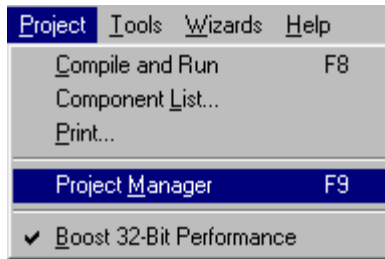
Configuring attended and single-user workstations

Loading the TracerX attended or single-user project

A TracerX project is loaded for each *type* of workstation you install. Therefore, if your configuration only uses an attended station, you only need to load the Attended project.

If your configuration uses both the attended and the polling stations, you will load a project for each. Instructions for loading the polling station project start on page 10-18.

1. If you received a license diskette, insert it into the floppy drive.
2. On the desktop, double click on the yellow TracerX icon to launch the TracerX Development System.
3. In the TracerX Development System window, select *Project→Project Manager*.



4. If you indicated an attended station setup by entering “a” during installation, FACTA should appear highlighted in the Project Manager window.

If you indicated a single-user station setup by enter “s,” FACTS should appear highlighted in the Project Manager window.

When you have the right project selected, click **Load**. When the project is loaded an asterisk appears under the status header and an **Unload** button replaces the load button.

➡ If UNTITLED appears in the Project Manager window, highlight it and delete it.

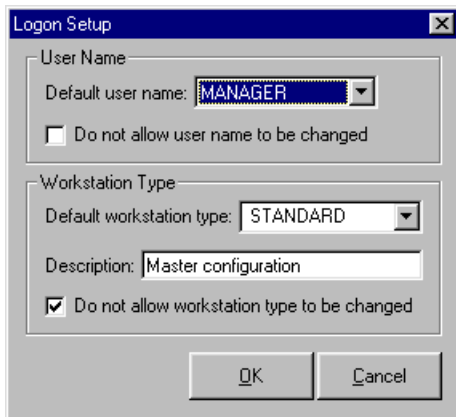
5. Once the FACTA or FACTS project is loaded, click **Exit** in the Project Manager window.
6. In the menu bar, select *Project→Compile and Run* or press F8.
7. When the TracerX startup screen appears, click **OK**. You can now begin setting up your Clippership workstations.
8. If you did not place the Clippership license diskette in the floppy drive, a License File Error appears after you start Clippership for the first time.

If you have the diskette, insert it in the drive now and choose **OK**.

If you do not have the diskette, choose **OK** and then Yes to run Clippership in demo mode. Choose **No** to quit the configuration.

Logon setup

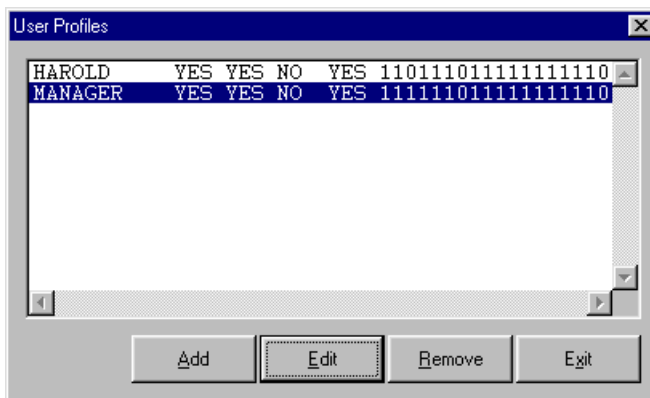
1. In Clippership, select *Utilities→Workstation Setup→Logon*.
2. Select **MANAGER** as the default user name. Deselect the **Do not allow user name to be changed** box.



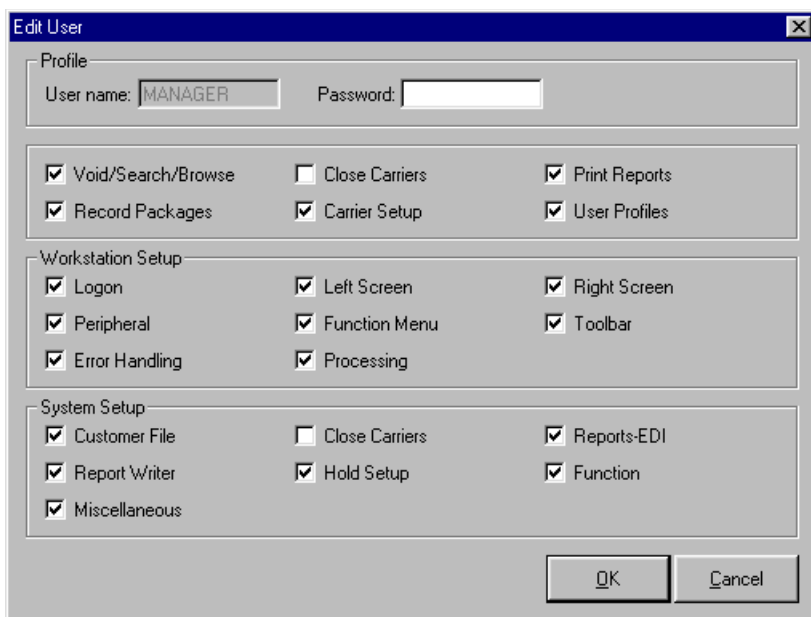
3. Enter **STANDARD** as the default workstation type. You can enter a description for the workstation type; however, it's optional.
4. Make sure the **Do not allow workstation type to be changed** box is *selected*.
5. Click **OK** to begin setting up user profiles.

User Profile Setup

1. In Clippership, select *Utilities* → *User Profiles*.
2. Select **Manager** in the User Profile window and click **Edit**.



3. In the Edit User window, deselect the **Close Carriers** options in the Profile and System Setup sections and click **OK**.



The **Edit User** dialog box contains the following sections and options:

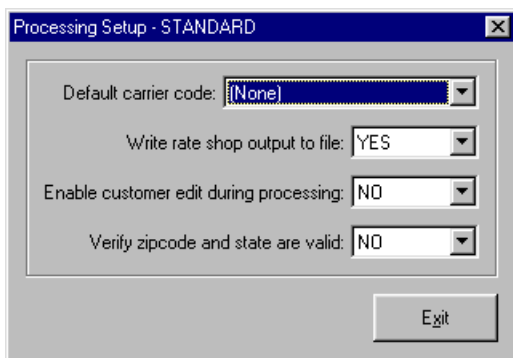
- Profile:**
 - User name:
 - Password:
- Options:**
 - ☒ Void/Search/Browse
 - ☐ Close Carriers
 - ☒ Print Reports
 - ☒ Record Packages
 - ☒ Carrier Setup
 - ☒ User Profiles
- Workstation Setup:**
 - ☒ Logon
 - ☒ Left Screen
 - ☒ Right Screen
 - ☒ Peripheral
 - ☒ Function Menu
 - ☒ Toolbar
 - ☒ Error Handling
 - ☒ Processing
- System Setup:**
 - ☒ Customer File
 - ☐ Close Carriers
 - ☒ Reports-EDI
 - ☒ Report Writer
 - ☒ Hold Setup
 - ☒ Function
 - ☒ Miscellaneous

Buttons: **OK**, **Cancel**

4. Choose **Add** in the Add User window, type in a user name and password (password optional). Deselect the **Close Carriers** options (both in the Profile and System Setup sections). Click **OK**.
5. Repeat Step 4 to create a profile for each user who needs to log on to Clippership. Make sure the **Close Carriers** options are deselected for each user.
6. Click **Exit** in the User Profiles window.

System Setup

1. From Clippership menu bar, select *Utilities→Workstation Setup→Processing*.



The **Processing Setup - STANDARD** dialog box contains the following options:

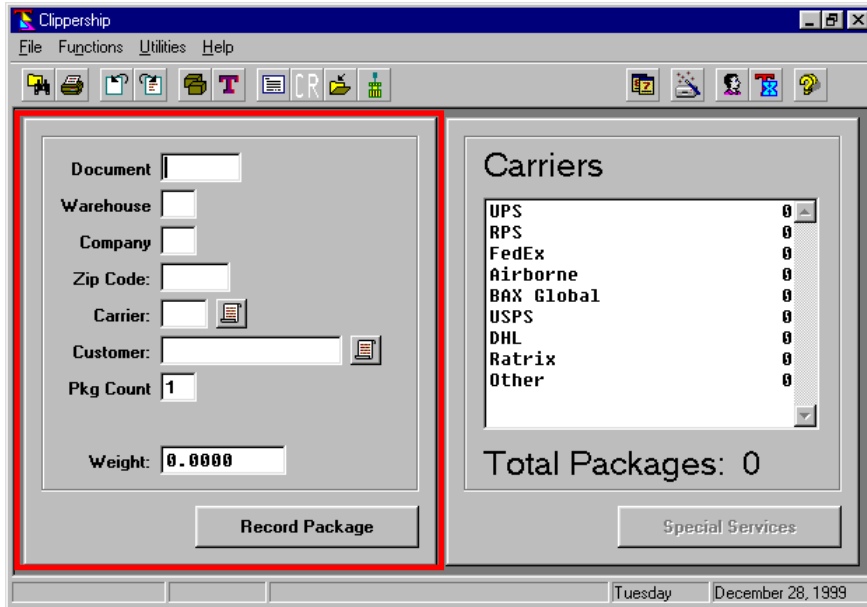
- Default carrier code:
- Write rate shop output to file:
- Enable customer edit during processing:
- Verify zipcode and state are valid:

Button: **Exit**

2. Make sure the **Write rate shop output to file** option is set to YES and click **Exit**.

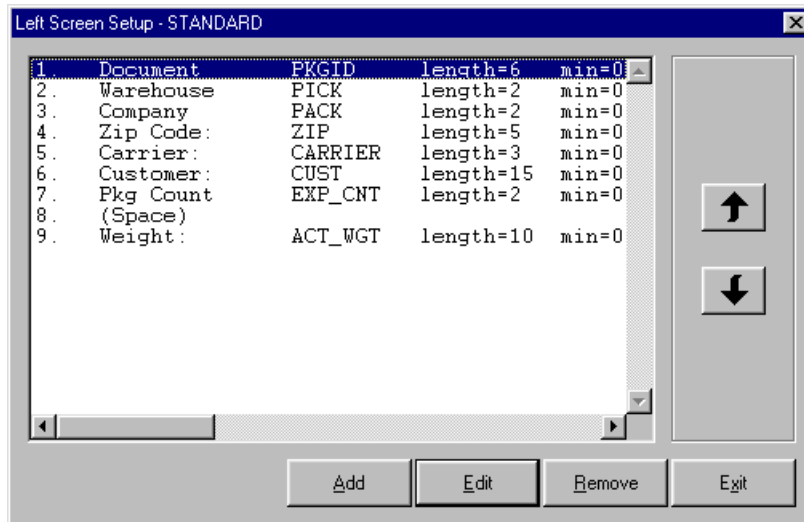
Left Screen Setup

The Left Screen Setup procedure enables you to create the fields that need to appear on the left side of the main Clippership screen so that users can properly process shipping information between FACTS and Clippership.



To configure the left screen:

1. Select *Utilities*→*Workstation Setup*→*Left Screen* to open the Left Screen Setup - STANDARD dialog box.



2. Use the **Add**, **Edit**, **Remove** and both arrow buttons to create the following entries in the order listed in this table.

Field Name	Description	Max. Field Length	Min.	Lookup
PKGID	Document	Length=6	Min=0	
PICK	Warehouse	Length=2	Min=0	
PACK	Company	Length=2	Min=0	
ZIP	Zip Code	Length=5	Min=0	
CARRIER	Carrier	Length=3	Min=0	CS_CARR.FIL
CUST	Customer	Length=15	Min=0	CS_CUST.FIL
EXP_CNT	Pkg Count (Space)	Length=2	Min=0	
ACT_WGT	Weight	Length=10	Min=0	
PO_NO (optional)	Customer P.O.	Length=10	Min=0	

The image shows two side-by-side dialog boxes. The left box is titled 'Add Field 10' and the right box is titled 'Edit Field 1'. Both boxes contain the same configuration for a field named 'PKGID'. The 'Description' is 'Document', 'Length' is 6, 'Min' is 0, 'Recall' is 0, 'Overwrite' is checked, 'Default' is empty, and 'Lookup' is empty. Both boxes have 'OK' and 'Cancel' buttons at the bottom.

For instance, the Document field doesn't initially appear on the Left Screen Setup window.

To create it, either choose **Add** in the Left Screen Setup window to get the Add Field window or choose a field that doesn't appear in the table above and click **Edit**.

Make sure you remove any fields that do not appear in the table.

Use the arrow keys to put them in the listed order.

- When you have created all the fields listed in Step 2 with the appropriate parameters, click **Exit** in the Left Screen Setup – Standard window.

Peripheral Setup

Clippership provides drivers for many specialized printers, scales and barcode scanners. If you want to add peripheral devices, refer to the Clippership documentation for instructions.

If your system **does not use peripherals**:

1. Select *Utilities→Workstation Setup→Peripheral→Device Setup* from the menu.
2. Highlight the default peripheral — scale — and click **Remove**. Choose **Yes** to confirm.
3. Choose **OK** at the Info Window and exit Clippership.
4. Alt+Tab to access the TracerX Development System and press F8 to compile and run.
5. Choose **OK** at the TracerX Startup window.
6. Choose **OK** to logon as MANAGER.

Creating Custom Functions

The FACTS/Clippership interface uses three custom functions. One establishes the Change Requests feature, which provides FACTS Quote Entry users a method of sending their shipping departments changes to shipping information (requires polling station).

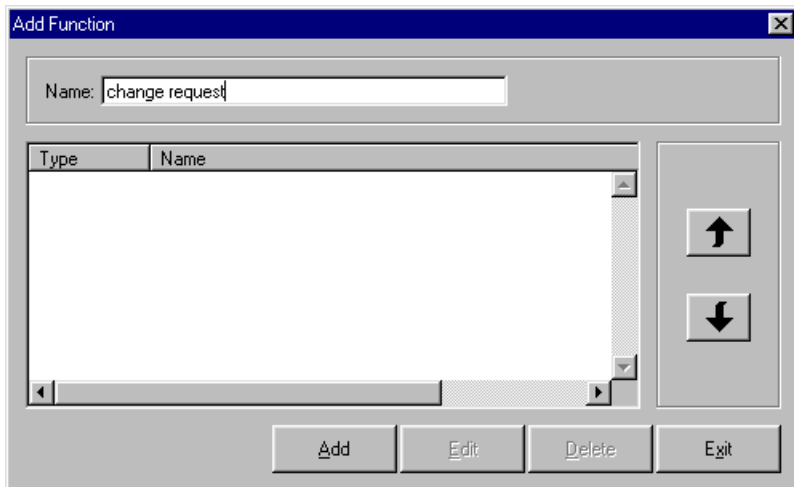
The second creates the Custom Close Carrier tool, which the shipping department uses to indicate that carriers have picked up shipments for the day.

The third establishes the FACTS/Clippership working directory, which enables real-time freight calculations and other communications between FACTS and Clippership.

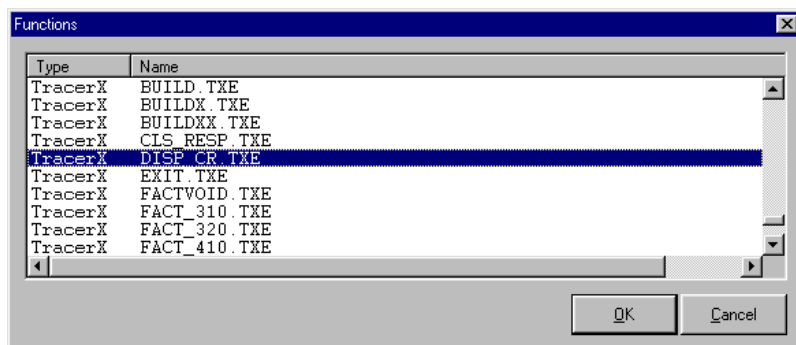
To create the custom functions:

1. Select *Utilities→System Setup→Custom Function* from the menu bar.
2. Click **Add** in the Custom Function Setup window.

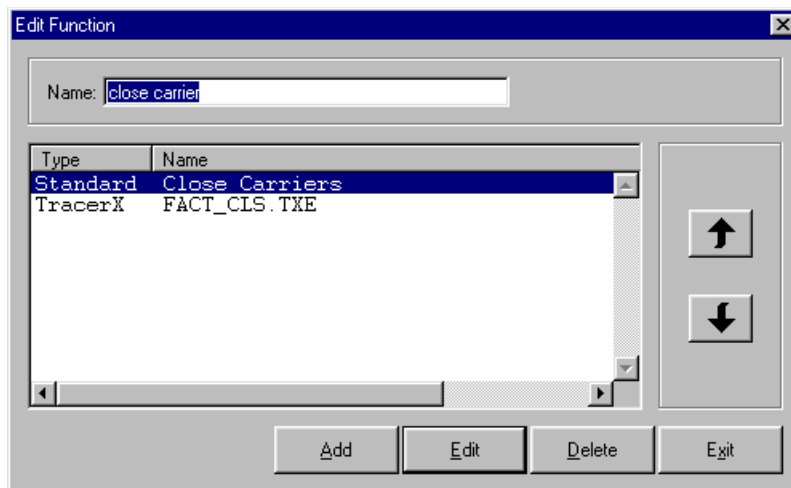
3. In the Add Function window, type “change request” in the Name field and then click **Add**.



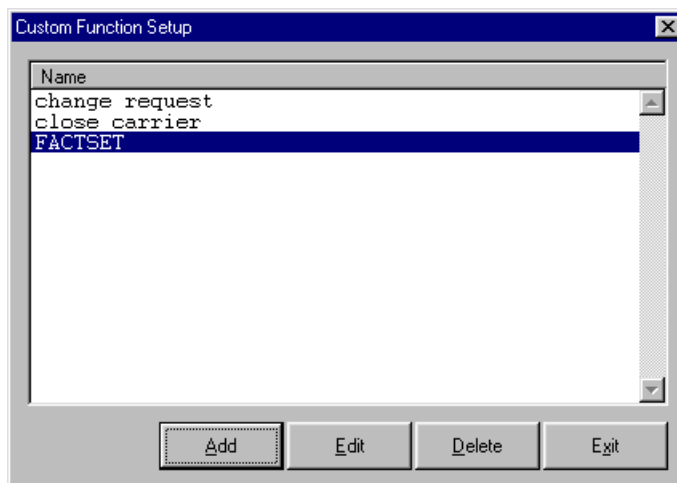
4. In the Functions window, scroll down to **TracerX DISP_CR.TXE**. Highlight this custom function and click **OK**.



5. Click **Exit** in the Add Function window to return to the Custom Function Setup window.
6. Click **Add** to set up the Close Carrier custom function. In the Add Function window, type “close carrier” in the name field and click **Add**.
7. In the Functions window, select **Standard Close Carriers** first and click **OK**. Click **Add** again and select **TracerX FACT_CLS.TXE**. Click **OK**. You should have two functions listed for Close Carrier.



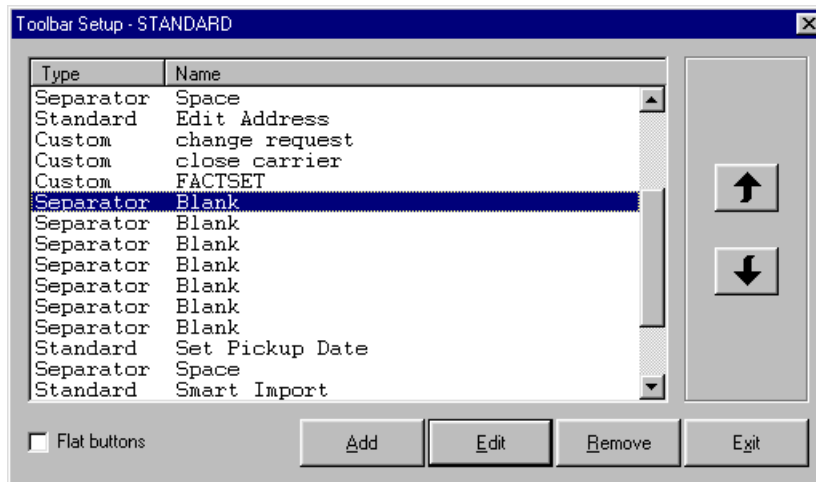
8. Click **Exit** to return to the Add/Edit Function window.
9. Click **Add**. Type "FACTSET" in the Name field and click **Add** in the Add/Edit Function window.
10. Select TracerX FACT_SET.TXE from the Functions list and click **OK**.
11. Click **Exit** in the Add/Edit Function window.
12. Make sure the three customer functions appear in the Custom Function Setup window. Click **Exit**.



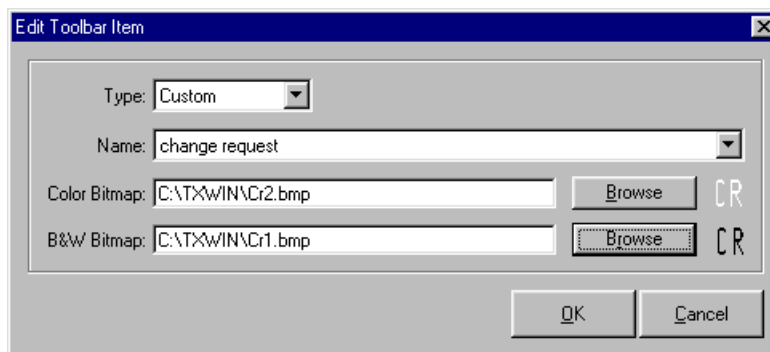
➡ You do not have to exit and restart Clippership after you finish creating custom functions.

Creating toolbar buttons for custom features

1. Select *Utilities*→*Workstation Setup*→*Toolbar* from the menu.
2. In the Toolbar Setup - Standard window, scroll to the top of the list and highlight the **Standard Close Carrier** option. Click **Remove** and click **Yes** to confirm.
3. Next highlight one of the options labeled “Separator Blank,” then click **Edit**.



4. In the **Type** field, select *Custom* from the drop down list. In the **Name** field select “change request” from the drop down list.



5. Click **Browse** next to the color bitmap field and navigate to C:\TXWIN\CR2. Click **Open**.
Click the BROWSE Button next to the B&W bitmap field and navigate to C:\TXWIN\CR1. Click **Open**.
Click **OK** in the Edit Toolbar Edit Item window.
6. Select another *Separator Blank* option in the Toolbar Setup window and click **Edit**.
7. In the **Type** field, select *Custom* and in the **Name** field select “close carrier.”

8. Choose **Browse** next to the color bitmap field and navigate to C:\TXWIN\CLOSE2. Click **Open**.

Click the BROWSE Button next to the B&W bitmap field and navigate to C:\TXWIN\CLOSE1. Click **Open**.

Click **OK**.
9. Select a *Separator Blank* option in the Toolbar Setup window and click **Edit**.
10. Select *Custom* in the **Type** field and select FACTSET in **Name** field.
11. Choose **Browse** next to the color bitmap field and navigate to C:\TXWIN\SETUP2. Click **Open**.

Choose **Browse** next to the B&W bitmap field and navigate to C:\TXWIN\SETUP1. Click **Open**.
12. Click **OK** in the Toolbar Edit window and then choose **Exit** in the Toolbar Setup - Standard window.
18. In the main Clippership window, click on the FACTSET custom button that you just created (screwdriver icon) and enter the FACTS/Clippership working directory created during installation.

Example: M:\ssi7\clipship\

Choose **OK**.

Setting up a UPS carrier account

Before you continue with this section, select *Help→Online Guide* in Clippership. Use the Index to find the topic **UPS-Online Compatible Compliance Online Configuration**. Print the topic once you locate it.

1. Select *Utilities→Carrier Setup* from the menu bar.
2. Choose **Account Information** and click **Select**.
3. Click **Add** in the Account Information window.
4. Enter the carrier name (UPS), address and phone number.
5. Select from **United Parcel Service** in the list box and choose **Configure**.
6. In the Configure United Parcel Service window, enter your company's UPS account number.
7. Choose the **Online** button and follow the instructions outlined in the **UPS – Online Compatible Compliance Online Configuration** topic.
8. If you upgraded to the multiple carrier version of Clippership, repeat these steps for the other carriers. Use Clippership's Online Guide to get online compliance instructions for each of the carriers.

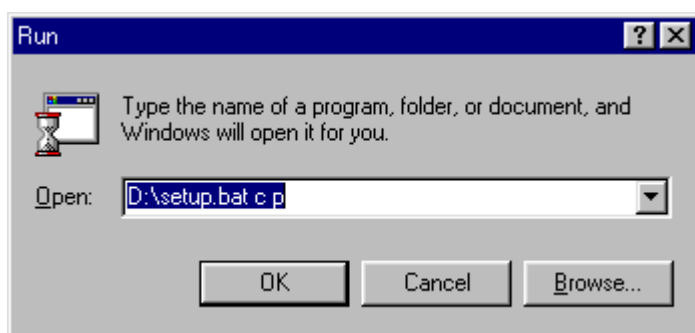
This completes the installation and configuration of the attended station. If you need to install and configure additional attended stations, do so before working on the polling station installation and configuration.

If your Clippership configuration consists only of one attended station or a single-user station, jump to the FACTS Configuration section on page 10-25.

Installing the Clippership polling station

1. Place the Clippership CD included in the FACTS Software Packet in the CD drive.
2. Select *Start→Run*.
3. Choose **Browse** and navigate to the **setup.bat** file on the CD. Choose **OK**.
4. After the setup.bat path in the Run command line, enter a space and the letter of the drive on which you want to install Clippership. Type another space enter the letter “p” to indicate a polling station setup.

If you do not enter the drive and setup type parameters, the batch file will not let you continue with the Clippership installation.




5. The batch file automatically starts the Clippership Install Shield when it is finished.
6. Follow the on-screen prompts in the Clippership Install Shield. The defaults should work for the majority of users.
7. Close the DOS window.
8. On the Clippership polling station, map a drive to the FACTS host or server.

UNIX users: You will need a product such as FacetWin to map the PC polling station to the UNIX host.

Installing TracerX on the polling station

You will need to restart your computer after installing TracerX.

1. Navigate to the CD drive and open the **txwin** folder.
2. Double-click on the  **Setup** file.
3. Follow the on-screen prompts. The defaults should work for the majority of users. Restart the computer.
4. After the computer restarts, navigate to the location where you installed TracerX and open the **txwin** folder.

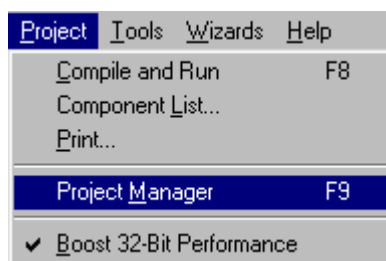
Example: C:\txwin

5. Create a new shortcut for the **txdev.exe** file (icon with the yellow X) and drag it to the desktop.
6. Do the same for the **txrun.exe** file (icon with the green X). When you are done, you should have two TracerX shortcuts on the desktop — one for Development and one for Runtime.
7. Once the shortcuts are on the desktop, you can begin configuring the polling station.

Configuring the Clippership polling station

Loading the TracerX polling project

1. If you received a license diskette, insert it into the floppy drive.
2. On the desktop, double click on the yellow TracerX icon to launch the TracerX Development System.
3. In the TracerX Development System window, select *Project→Project Manager*.



4. FACTU should appear highlighted in the Project Manager window. Click **Load**. When the project is loaded an asterisk appears under the status header and an **Unload** button replaces the load button.

If UNTITLED appears in the Project Manager window, highlight it and delete it.

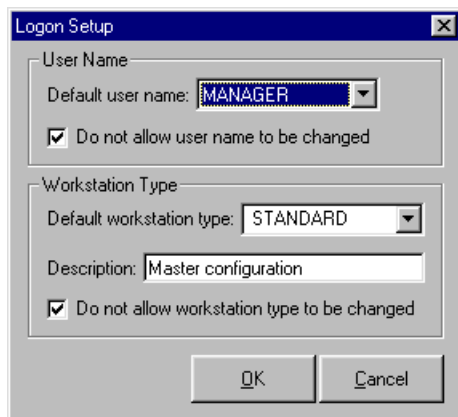
5. Once the FACTU project is loaded, click **Exit** in the Project Manager window.
6. In the menu bar, select *Project→Compile and Run* or press F8.
7. Click **OK** at the TracerX Startup window. You can now begin setting up your Clippership polling station.
8. If you did not place the Clippership license diskette in the floppy drive, a License File Error appears after you start Clippership for the first time.

If you have the diskette, insert it in the drive now and choose **OK**.

If you do not have the diskette, choose **OK** and then Yes to run Clippership in demo mode. Choose **No** to quit the configuration.

Logon Setup

1. In Clippership, select *Utilities→Workstation Setup→Logon*.
2. Set the default user name to MANAGER.



3. Make sure **Do not allow user name to be changed** is selected.
4. Set the default workstation type to POLLING.
5. Make sure **Do not allow workstation type to be changed** is selected.
6. Click **OK** and begin setting up user profiles.

User Profile Setup

1. In Clippership, select *Utilities*→ *User Profiles*.
2. In the User Profiles window, highlight Manager in the list box and click **Edit**.
3. Deselect both **Close Carrier** options in Profile and System Setup sections of the Edit User window for MANAGER. Choose **OK**.
4. In the User Profile window, click **Add**.
5. Enter POLLING in the **User Name** field and enter a password (optional) in the Add User window.

The screenshot shows the 'Add User' dialog box with the following settings:

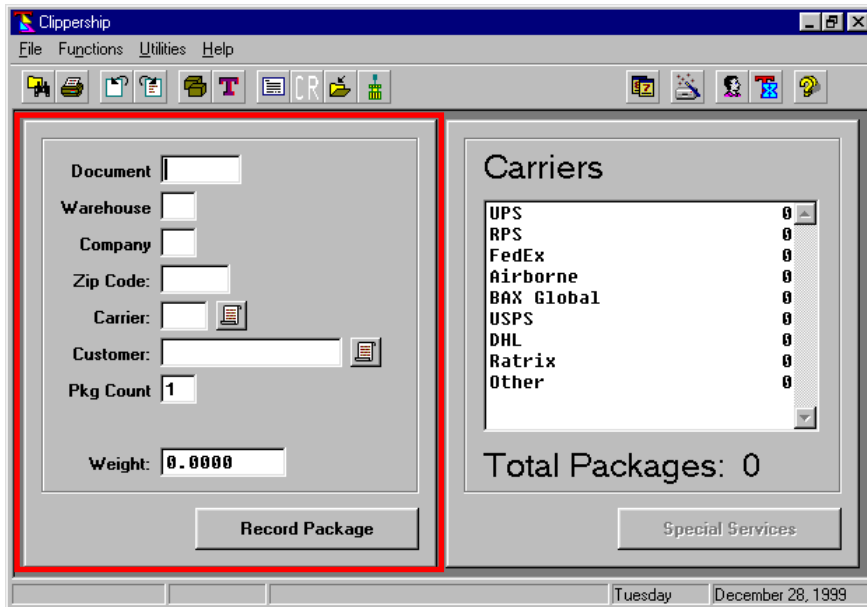
- User name:** POLLING
- Password:** (empty)
- Profile Section:**
 - ☒ Void/Search/Browse
 - ☐ Close Carriers
 - ☒ Print Reports
 - ☒ Record Packages
 - ☒ Carrier Setup
 - ☐ User Profiles
- Workstation Setup Section:**
 - ☒ Logon
 - ☒ Left Screen
 - ☒ Right Screen
 - ☒ Peripheral
 - ☒ Function Menu
 - ☒ Toolbar
 - ☒ Error Handling
 - ☒ Processing
- System Setup Section:**
 - ☒ Customer File
 - ☐ Close Carriers
 - ☒ Reports-EDI
 - ☒ Report Writer
 - ☒ Hold Setup
 - ☒ Function
 - ☒ Miscellaneous

The 'OK' button is highlighted.

6. Deselect the **Close Carriers** options in both Profile and System Setup.
7. Click **OK**.
8. Click **Exit** in the User Profile window.

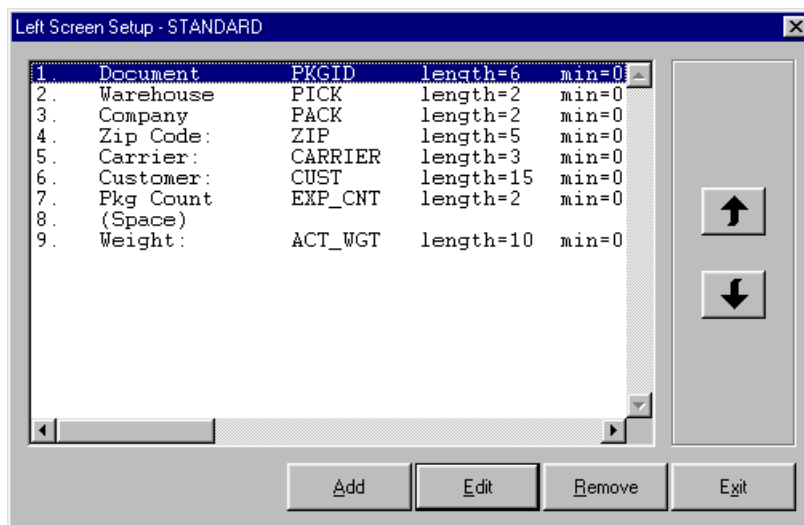
Left screen setup

The Left Screen Setup procedure enables you to create the fields that need to appear on the left side of the main Clippership screen so that users can properly process shipping information between FACTS and Clippership.



To configure the left screen:

1. Select *Utilities* → *Workstation Setup* → *Left Screen* to open the Left Screen Setup - STANDARD dialog box.



2. Use the **Add**, **Edit**, **Remove** and both arrow buttons to create the following entries in the order listed in this table.

Field Name	Description	Max. Field Length	Min.	Lookup
PKGID	Document	Length=6	Min=0	
PICK	Warehouse	Length=2	Min=0	
PACK	Company	Length=2	Min=0	
ZIP	Zip Code	Length=5	Min=0	
CARRIER	Carrier	Length=3	Min=0	CS_CARR.FIL
CUST	Customer	Length=15	Min=0	CS_CUST.FIL
EXP_CNT	Pkg Count (Space)	Length=2	Min=0	
ACT_WGT	Weight	Length=10	Min=0	
PO_NUM (optional)	Customer P.O.	Length=10	Min=0	

For instance, the Document field doesn't initially appear on the Left Screen Setup window.

To create it, either choose **Add** in the Left Screen Setup window to get the Add Field window or choose a field that doesn't appear in the table above and click **Edit**.

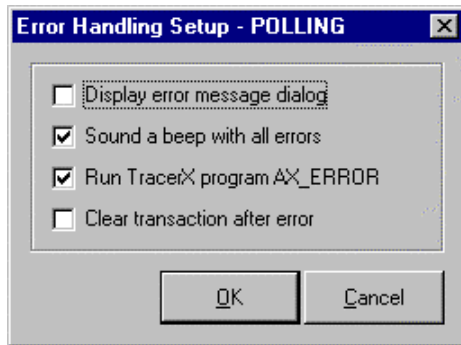
Make sure you remove any fields that do not appear in the table.

Use the arrow keys to put them in the listed order.

3. When you have created all the fields listed in Step 2 with the appropriate parameters, click **Exit** in the Left Screen Setup – Standard window.

Error handling

1. Select *Utilities→Workstation Setup→Error Handling* from the menu bar.
2. Deselect Display error message dialog.



Setting up the FACTSET custom function

FACTSET is the only custom function used on the polling station. To set this function:

1. Select *Utilities→System Setup→Custom Function* from the menu bar.
2. Click **Add** in the Custom Function Setup window.
3. Type FACTSET in the **Name** field and click **Add**.
4. Select **TracerX FACTSET.TXE** from the Functions window. Choose OK to exit. Choose **Exit** in the Add Function Window.
5. Make sure FACTSET appears in the Custom Function Setup window and choose **Exit**.

To create the tool bar button for this function:

1. Select *Utilities→Workstation Setup→Toolbar* from the menu bar on the main Clippership screen.
2. Select a *Separator Blank* option in the Toolbar Setup window and click **Edit**.
3. Select *Custom* in the **Type** field and select FACTSET in **Name** field.
4. Choose **Browse** next to the color bitmap field and navigate to C:\TXWIN\SETUP2. Click **Open**.
5. Choose **Browse** next to the B&W bitmap field and navigate to C:\TXWIN\SETUP1. Click **Open**.
6. Click **OK** in the Toolbar Edit window and then choose **Exit** in the Toolbar Setup - Standard window.

7. In the main Clippership window, click on the FACTSET custom button just created (screwdriver) and enter the FACTS/Clippership working directory created during installation.

Example: M:\ssi7\clipship\poll\

Choose **OK**.

8. Once the function and menu bar buttons have been created, exit and restart Clippership.

Setting up a UPS carrier account

Before you continue with this section, select *Help→Online Guide* in Clippership. Use the Index to find the topic **UPS-Online Compatible Compliance Online Configuration**. Print the topic once you locate it.

9. Select *Utilities→Carrier Setup* from the menu bar.
10. Choose **Account Information** and click **Select**.
11. Click **Add** in the Account Information window.
12. Enter the carrier name (UPS), address and phone number.
13. Select from **United Parcel Service** in the list box and choose **Configure**.
14. In the Configure United Parcel Service window, enter your company's UPS account number.
15. Choose the **Online** button and follow the instructions outlined in the **UPS – Online Compatible Compliance Online Configuration** topic.
16. If you upgraded to the multiple carrier version of Clippership, repeat these steps for the other carriers. Use Clippership's Online Guide to get online compliance instructions for each of the carriers.

This completes the installation and configuration of the attended station. If you need to install and configure additional attended stations, do so before working on the polling station installation and configuration.

Configuring FACTS

Ship Via F/M

This file maintenance program is used during initial FACTS configuration to create ship via codes.

Warehouse: 01 Atlanta Warehouse

Ship Via: BAX Global Ovnt TESTING

Description: TESTING

Freight G/L#: 640-01-1 Freight

Active: ☒

Handling Charge: 5.55

Use Clippership: ☒

Clippership Carrier Code: B01

Commercial or Residential: B - Both Commercial / Residential

Rate Shop: ☐

Buttons: Save, Delete, New, Exit

Status Bar: Enter Ship Via Description

1. In FACTS, run the Ship Via Listing program (*Sales Orders→Reports & Prints→Ship Via Listing*). Set each flag to ALL or BOTH so that you get a complete report of the ship via codes that have been created.
2. Review this report against the Carrier Code listing in Clippership. Select *Utilities→Carrier Setup* from the menu bar. Then select **Carrier Codes** from the dialog box that appears.
3. For each FACTS ship via code that corresponds to a carrier service supported by Clippership, select **Use Clippership** (in character mode, set the flag to Y) in Ship Via F/M.
4. Enter the three-character Clippership carrier code. **Check for typos.** If the carrier code is entered incorrectly, Clippership may send the wrong or UNDEFINED freight charge information to FACTS.
5. Indicate whether the ship via code is commercial, residential or both.
6. Indicate whether this ship via code corresponds to a Clippership rate shop. Refer to the Clippership users manual and the On-line Guide for more information about creating and using rate shops.

7. Add additional ship via codes if necessary. Refer to page of the *Sales Orders* manual for more information on creating new codes.

Warehouse F/M

Warehouse F/M is located in *Inventory Control*→*File Maintenances*→*Infrequent File Maintenances*. The Third Party tab includes four entries related to Clippership. Each of them affects how FACTS communicates with Clippership.

1. Set the **Use Clippership** flag to Y or N for the warehouse selected. This flag is the ON/OFF switch for the FACTS/Clippership integration.
 2. Enter the *full* path name to the **Clippership polling directory** (Example: m:\ssi7\clipship in Windows or /ssi7/clipship in UNIX). This is the directory on the server in which FACTS/Clippership flat files exist.
 3. Set the **Clippership timeout** value. This is the number of seconds (up to 999) FACTS waits for a Clippership response on Quote Entry freight estimates and rate shop searches before it displays a timeout error. Five to 30 seconds should be sufficient; however, the timeout value depends on your processor speed and the number of users tasking the polling station.
 4. Set the **Transmit to Clippership** flag to Y or N based on whether or not you are using a polling station. Select Y if a polling station is used.
- ☞ To allow users to enter freight and handling totals other than what Clippership provides, select the **Allow Manual Freight** option located on the Main Tab of Warehouse F/M.

Terminal F/M (single-user setups only)

Terminal F/M is located in *System Management* → *File Maintenance*. Make sure you select the **Clippership Workstation** option in each terminal ID for each Clippership user.

For instance, if there are three terminal IDs T1, T5 and Ta for one Clippership user, the option must be set in each ID record.

Clippership FAQs

Q What does it take to activate Clippership for use?

A Software Solutions must obtain the appropriate authorization files from Kewill for your use. These come directly to Software Solutions from Kewill via e-mail. Software Solutions then transfers those files onto diskettes and sends them, along with the dongles, to you. Activation requires the user to pay the Kewill yearly maintenance fee of \$525 per site, which is billed directly from Tracer. This maintenance fee provides updates to rates only.

Q What is included with the purchase of the standard Clippership module?

A Both the FACTS integration and the TracerX code changes are included with the standard Clippership module. This includes two Clippership users: one “attended” workstation at which the shipping clerks do their work and one “unattended” polling workstation which fulfills the function of providing live freight quotes, rate shop options and an automated to-do list. The “unattended” workstation must be installed on a separate PC that no one uses as a workstation.

Q What if the end user wants the same functions as performed by the old UPS Manifest System?

A This ability exists within FACTS as shipped. Nothing more is required. Remember, however, that the manifest is not UPS certified and Software Solutions does not warrant it as such.

Q Are the current FACTS rate tables UPS certified?

A No. UPS certification is not available if the end user does not want to use the rest of the Clippership (PC) software. One option is to use UPS provided software. This will, however, require rekeying the information from the FACTS system into the UPS system.

Q What if there is a need for additional carriers besides UPS?

A A multi-carrier version of Clippership is available as an upgrade, and it's also compatible with FACTS 6.07 and FACTS 7.0. You can obtain the upgrade from a TracerX reseller, such as Evcore-Atlanta.

Q Does the “attended” shipping station have to be used exclusively for that purpose?

A No. The “attended” station can be used for other activities such as warehouse, customer service, etc., but can not be used as a single user configuration.

Q What custom features are available?

A The FACTS/Clippership interface uses three custom functions: 1) one to establish the Change Request feature, which provides FACTS users a method of sending changes to shipping information to their shipping department; 2) one to create the Custom Close Carrier tool which the shipping department uses to indicate that carriers have picked up shipments for the day and 3) one to establish the FACTS/Clippership working directory, which enables real-time freight calculations and other communications between FACTS and Clippership.

Q Does using an “attended” workstation require the use of an “unattended” workstation?

A No. To use Clippership with FACTS, the “attended” workstation is a requirement. The “unattended” workstation is optional. The “attended” workstation is where the shipping clerks actually do their work — recording shipping transactions and generating carrier manifests, for example. The “unattended” workstation performs the function of providing live freight quotes, rate shop options and an automated to-do list. If both are used at a site, they need to be networked somehow and each station should be running Clippership from the same directory on the server.

Q How many attended and unattended stations do I need?

A You should only ever need one unattended polling station for each site. The number of attended stations you install depends on how much shipping you perform, how many people need to use Clippership and whether they can share a station or not. There’s no real limit to the number of attended stations you can have at a site. NOTE: Each station functions independently of the other so each attended station must connect (report) via modem to the respective carriers.

Q What if more than one location is involved or if more than one shipping station is needed?

A This will require the purchase of additional licenses. Software Solutions supplies you only the first set of licenses (“attended” and “unattended” workstation licenses) at no charge.

Q We’ve talked to people who have integrated Clippership with FACTS doing a “screen scrape.” Wouldn’t that have been easier?

A This functionality is included in FACTS 6.07. However, using this approach, you will not be able to get quotes on freight or enter freight from anywhere other than the Clippership “attended” workstation and, then, only while in Order Confirmation.

Q How is Remote Order Entry effected?

A The Remote Order Entry function will interact with Clippership in the same manner as regular Order Entry.

Q Who wrote the FACTS/ Clippership integration?

A There is actually two parts to the integration. Software Solutions designed the functionality of both, but coded only the FACTS side of the integration. Tracer Research wrote the TracerX changes to Clippership to Software Solutions' specifications.