

INTELLIWARE USA

Courier Logic

Quick Setup & Reference

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Courier Logic

Getting accurate details for your drop shipment projects are just a few clicks away!

Congratulations! You are well on your way to becoming a drop shipping guru! Courier Logic is a new tool for your company that will be able to generate detailed estimates for all of your UPS projects. These estimates can show you both the list price and account price for your entire project, including any fuel surcharges and other surcharges. This program will also validate addresses and fix any bad addresses, and provide you with commercial/residential information.

Installation

The newest version of Courier Logic may be downloaded from CourierLogic.com. Once it is installed, please use the integrated updater to ensure you always have the latest version.

Once you have downloaded the program you will need Administrator privileges to install the program on your machine. You won't need these privileges to change any settings within Courier Logic, nor to install updates.

Please note, that FedEx functionality of this software is currently provided as a beta module.

Optional Step 1: Define your Input File's Header Record

For this program to work, it must know what the field names of the file that you will send to Courier Logic are. Typically, you will always have the same type of file to send to your UPS machine, so you should need to configure these mappings only once.

As long as you use the same type of file with Courier Logic every time with the same header record, you shouldn't run into many problems at all. But even if you use a different file each time, Courier Logic makes it as easy as possible to remap your fields.

Once Courier Logic is running, click **Configure** → **Setup**. Then click the **Edit File Mappings Button**.

The following screen will appear:

Import File Setup

Please provide field names of import file:

UPS® Import File FedEx® Import File

Name Full Name

Company Company

Street 1 Street 1

Street 2 Street 2

Leave field empty if not applicable

City City

State St

Zip ZIP+4

Country Country

Weight Weight

Length LEN

Width WID

Height HEI

Help

To setup the header record definitions, simply indicate the name of the fields your input file will contain, as shown in the figure above.

As your FedEx file's headers may be different than your UPS file's headers, there is a record header definition for both FedEx and UPS. If the file you send to Courier Logic has the same header for both FedEx and UPS, simply enter the same field names on both the FedEx tab and UPS tab.

If you don't have a particular template to follow, just accept the defaults and Courier Logic will prompt you each time if there is a mismatch.

Step 2: Enter some Basic Details

Once you close the File Mappings screen, you will be back at the main setup screen, which looks like the following screen:

The screenshot shows a 'Setup' window with the following sections:

- Preferences:** File Type is set to 'Comma Delimited (*.csv)'. There is an 'Edit File Mappings' button. 'Show on Startup' has radio buttons for 'UPS®' (selected) and 'FedEx®'. A checkbox 'File Includes Header Record' is checked.
- Default Handling Charges:** Charge is \$ 1.20 per piece. Radio buttons for 'Off' (selected), 'Both', 'List Price Only', and 'Account Price Only' are present.
- Ship Packages From:** Fields for Company Name (ABC FULFILLMENT CO), Address (123 MAIN ST), City (ROSWELL), State (GA), Zip (30076), and Country 2 Digit Code (US) are filled.
- UPS® Account Settings:** Includes buttons for 'Add UPS® Account to Profile', 'Obtain Negotiated Rates for Account in Profile', and 'Reset UPS® Settings'. Radio buttons for 'Daily Pickup' (selected), 'Occasional Pickup (List Rates)', and 'Retail Rate' are shown.
- FedEx® Account Settings:** Includes a 'FedEx® Account Setup' button and radio buttons for 'Daily Pick Up' (selected) and 'Occasional Pick Up'.
- Purchase:** Below the text 'Below is your installation ID.', the ID 'C57C-E051-0F42' is displayed. A 'Purchase' button is to the right.
- Serial Number:** An empty text field is followed by a 'Validate' button. Below this, text reads: 'Copy and paste the serial number that you have obtained, then click the Validate button. This program will expire on 5/14/2016 with the current serial number.'
- Help:** A 'Help' button is located at the bottom left.

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DEFAULT HANDLING CHARGES

Enter a value in here to automatically add a handling charge onto your estimates. This handling charge will apply to each record on your list.

There are several options to the right:

Off – don't add a handling surcharge on the estimates. (You could also put a 0 in the charge price).

List Price Only – adds the handling charge to the list prices only.

Account Price Only – adds the handling charge to the account prices only.

Both – adds the handling charge to both account and list prices.

SHIP PACKAGES FROM

Enter your company's name and address that you will ship packages from. This will be used to determine the exact pricing from your company's location

UPS ACCOUNT SETTINGS

You will need to add your UPS account number in order to be able to get list rates. First, click **Add UPS Account to Profile**. There will be a short questionnaire about your company's details. At the end of the questionnaire, you have the option to enter an invoice in order to get account based rates. If you do not have a recent invoice handy, you may enter the invoice at a later time by clicking **Obtain Negotiated Rates for Account in Profile**.

Please allow 24-48 hours for negotiated rates to appear.

Clicking **Reset UPS Settings** will reset all UPS accounts and any registrations that you may have performed. All accounts, information, and negotiated rates will be reset.

Please also select your customer type: whether you have daily pickups scheduled, or if you'd like to see only list rates or retail rates.

FEDEX ACCOUNT SETTINGS

You will need to associate your FedEx® account with the program through usage of what are called "API Keys." Click the **FedEx® Account Setup** button to enter the FedEx® setup. Once you enter the FedEx® setup, click the **Obtain Authentication Key** button and you will be taken to Intellware USA's webpage

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that has a short questionnaire to complete. Once you complete this questionnaire, we will complete the paperwork on your behalf. This process should take only fifteen minutes, and only needs to be completed once for your company. Intellware USA makes this process as easy possible!

PURCHASE

Click the purchase button within setup, or click About -> Renew Subscription to purchase either a month subscription or a one year subscription. You will be taken to Courier Logic's purchase website. You will need your installation ID when ordering, so it will be easier for you if you get to the purchase webpage through the application rather than typing in our webpage address.

SERIAL NUMBER

If you have purchased the program, copy and paste the serial number into this text box and click validate.

AFTER SETUP

Once you have made changes in setup, you should restart the application to ensure all settings have been committed.

Using Courier Logic

Now that you completed setup, using Courier Logic is a breeze!

Step 1: Locate File to Analyze

The screenshot shows the Courier Logic application window. The title bar reads "Courier Logic". The menu bar includes "File", "Configure", and "Help". The main interface is divided into three sections:

- 1) Locate File to Analyze:** A text input field with a blue "..." button to its right, highlighted by a red rectangle.
- 2) Select Service Options / Applicable Options:** This section has three tabs: "UPS Service Options", "FedEx Service Options", and "Pricing Options".
 - Service Options:** A list of checkboxes for various UPS services, including UPS Ground, UPS 2nd Day Air, UPS 3 Day Select, UPS 2nd Day Air A.M., UPS Next Day Air Saver, UPS Next Day Air, UPS Next Day Air Early A.M., UPS Standard, UPS Worldwide Express, UPS Worldwide Express Plus, UPS Worldwide Expedited, UPS Worldwide Saver, and COM/RES Matching Only.
 - Packaging:** A list of radio buttons for packaging types: Customer Packaging (selected), Letter, Tube, UPS 10 KG Box, UPS 25 KG Box, Pallet, Small Express Box, Medium Express Box, Large Express Box, and UPS Pak.
 - COM/RES:** Radio buttons for Commercial, Residential, and Auto (selected).
 - Handling Charge:** Radio buttons for Off (selected), List Only, Acct Only, and Both. Below this is a "Charge \$" field with the value "1.20".
 - Account:** A dropdown menu showing "3864XF".
- 3) Locate Path to Output Results:** A text input field with a blue "..." button to its right.

At the bottom of the window, there is a UPS logo and a disclaimer: "UPS, the UPS Shield trademark, the UPS Ready mark and the Color Brown are trademarks of United Parcel Service of America, Inc. All Rights Reserved." Below the disclaimer is a "Render" button. A note at the bottom left states: "For estimating purposes only. Prices tendered may not reflect actual amount shown on bill."

Pictured is the Courier Logic screen. Click the **ellipses button** to the right of the text box to browse for a file to analyze. Alternatively, you may just drag a file from Windows Explorer into the text box.

- Your file must be a CSV file. Preferably, all fields should be quoted with double quotes.
- If you need to convert a file to CSV, you could always open the file in Microsoft Excel, and then save as a CSV.
- If possible, ensure all fields are Double Quoted to ensure smooth operation.
- Your CSV file must have the header record that you had defined in the initial setup. If you wish to use a different file header each time you use the program, then Courier Logic will prompt you for these fields each time you render a list.

Step 2: Select Services to Compare

You may select as many different services you wish to compare. There is a **UPS tab** for UPS service options, **FedEx tab** for FedEx service options, and a **Pricing Options tab** for pricing options, such as Saturday Delivery, Oversized Package, as well as others.

Select as many different services you'd like to compare, and Courier Logic will show the account price and the list price for each service that you select.

If you wish to ONLY determine **Commercial / Residential** attributes for each record, then click **COM/RES Matching Only** as this will not spend any time on requesting UPS for prices.

Please note that you may only select one company's options at a time.

Step 3: Select Commercial / Residential

If you know all your destination addresses are commercial or residential, then select the appropriate button and it will base pricing on this supplied information. Otherwise, leave **Auto** selected and Courier Logic will determine whether each record is Commercial or Residential, in addition to the pricing. The Auto switch will add additional time to the processing.

Step 4: Select Packaging Type

Select packaging type that you plan to ship with, or leave **Customer Packaging** selected.

Optional Step 5: Select Service Options

Select this tab to add options such as Saturday delivery, COD, Delivery Confirmation, etc.

Step 6: Render

Click the **Render** button and Courier Logic will take care of the rest. Once completed, it will place a **Text Tab Delimited** file in the folder you had selected before clicking Render.

Step 6: Analyze your Results

Navigate to the folder on your computer to where the output file was placed. Right click this file and click **Open with Excel** (or your favorite spreadsheet program) to view a spreadsheet of all your records. (Click Open and search for Excel if Open with Excel is not an option.)

You'll have a spreadsheet with both the list and account price for each service you have selected, complete with a Commercial / Residential flag. You could use this spreadsheet to inform your customer how much the project will cost. **Any applicable surcharges such as the Fuel Surcharge or Residential Delivery surcharge will automatically be added into the price that you see.**

You could also merge the COM/RES field back into your working file, so that you can send the proper file to your FedEx/UPS machine and know which records to mark as residential before sending it to your label machine.

Take note of the Commercial / Residential field if you had selected COMRES=Auto. Sometimes you may get a question mark (?) in this field. When UPS® doesn't have this particular information in their database, Courier Logic will place a question mark in this field and also plan worst case scenario and give you residential pricing for this record.

If a particular record could not go via a service you had selected, then you will have a **missing price** from this record. If there are any missing prices from any records, the total will be displayed with a question mark (?) alongside the

grand total. This is to alert you that the grand total is not quite accurate as there are a few missing prices.

Technical Support

Please contact tech@courierlogic.com for technical support. If you are having problems with a particular input file, please attach this file to your email so that we could troubleshoot the problem faster.

(M-F 9 AM – 5 PM EST)