

NetSuite WMS Advanced Shipping Integration Installation Guide



Copyright © 2005, 2017, Oracle and/or its affiliates. All rights reserved.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

If this document is in public or private pre-General Availability status:

This documentation is in pre-General Availability status and is intended for demonstration and preliminary use only. It may not be specific to the hardware on which you are using the software. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to this documentation and will not be responsible for any loss, costs, or damages incurred due to the use of this documentation.

If this document is in private pre-General Availability status:

The information contained in this document is for informational sharing purposes only and should be considered in your capacity as a customer advisory board member or pursuant to your pre-General Availability trial agreement only. It is not a commitment to deliver any material, code, or functionality,

and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described in this document remains at the sole discretion of Oracle.

This document in any form, software or printed matter, contains proprietary information that is the exclusive property of Oracle. Your access to and use of this confidential material is subject to the terms and conditions of your Oracle Master Agreement, Oracle License and Services Agreement, Oracle PartnerNetwork Agreement, Oracle distribution agreement, or other license agreement which has been executed by you and Oracle and with which you agree to comply. This document and information contained herein may not be disclosed, copied, reproduced, or distributed to anyone outside Oracle without prior written consent of Oracle. This document is not part of your license agreement nor can it be incorporated into any contractual agreement with Oracle or its subsidiaries or affiliates.

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Sample Code

Oracle may provide sample code in SuiteAnswers, the Help Center, User Guides, or elsewhere through help links. All such sample code is provided "as is" and "as available", for use only with an authorized NetSuite Service account, and is made available as a SuiteCloud Technology subject to the SuiteCloud Terms of Service at www.netsuite.com/tos.

Oracle may modify or remove sample code at any time without notice.

No Excessive Use of the Service

As the Service is a multi-tenant service offering on shared databases, Customer may not use the Service in excess of limits or thresholds that Oracle considers commercially reasonable for the Service. If Oracle reasonably concludes that a Customer's use is excessive and/or will cause immediate or ongoing performance issues for one or more of Oracle's other customers, Oracle may slow down or throttle Customer's excess use until such time that Customer's use stays within reasonable limits. If Customer's particular usage pattern requires a higher limit or threshold, then the Customer should procure a subscription to the Service that accommodates a higher limit and/or threshold that more effectively aligns with the Customer's actual usage pattern.

Beta Features

Oracle may make available to Customer certain features that are labeled "beta" that are not yet generally available. To use such features, Customer acknowledges and agrees that such beta features are subject to the terms and conditions accepted by Customer upon activation of the feature, or in the absence of such terms, subject to the limitations for the feature described in the User Guide and as follows: The beta feature is a prototype or beta version only and is not error or bug free and Customer agrees that it will use the beta feature carefully and will not use it in any way which might result in any loss, corruption or unauthorized access of or to its or any third party's property or information. Customer must promptly report to Oracle any defects, errors or other problems in beta features to support@netsuite.com or other designated contact for the specific beta feature. Oracle cannot guarantee the continued availability of such beta features and may substantially modify or cease providing such beta features without entitling Customer to any refund, credit, or other compensation. Oracle makes no representations or warranties regarding functionality or use of beta features and Oracle shall have no liability for any lost data, incomplete data, re-run time, inaccurate input, work delay, lost profits or adverse effect on the performance of the Service resulting from the use of beta features. Oracle's standard service levels, warranties and related commitments regarding the Service shall not apply to beta features and they may not be fully supported by Oracle's customer support. These limitations and exclusions shall apply until the date that Oracle at its sole option makes a beta feature generally available to its customers and partners as part of the Service without a "beta" label.

NetSuite WMS Advanced Shipping Integration Installation Overview

The NetSuite WMS Advanced Shipping Integration provides a connection between NetSuite and your parcel carrier shipping software (for example, FedEx Ship Manager, UPS WorldShip, or USPS Endicia). This connection enables you to automate some of your outbound processing tasks to streamline the shipping process. The NetSuite WMS Advanced Shipping Integration uses the NetSuite WMS Printer Driver and Integrator application to automatically:

- pull shipping data from NetSuite WMS Advanced to push it to your carrier shipping software.
- generate shipping labels for each carton packed using NetSuite WMS Advanced.
- print shipping labels to printers in your warehouse.
- pull tracking number information from your carrier shipping software and push it to NetSuite WMS Advanced.

The NetSuite WMS Printer Driver and Integrator application is installed on the same computer in your warehouse's shipping station that is used to run your parcel carrier's shipping software. As items are packed in the warehouse, the application runs a scheduled task to find all orders that are ready to be shipped. Using the information stored in the WMS Ship Manifest record, it creates shipping labels and prints them at the printer you configure in the application.

NetSuite WMS Printer Driver and Integrator Application Installation Prerequisites

Before you start to install the NetSuite WMS Printer Driver and Integrator application, verify that the following conditions are met:

- The computer on which you are installing the application runs on Windows XP, Windows Vista, Windows 7, or Windows 8.
- The computer has at least 80 GB of available space and 4 MB of RAM.
- You have administrator rights to install software on the computer and print server.
- You have carrier shipping software (for example, FedEx Ship Manager, UPS WorldShip, or USPS Endicia) installed on the same computer on which you are installing the Shipping Integration application.

Note: Before you begin, verify that the show internal ID preference is set in your NetSuite WMS Advanced account. Using the Administrator role, go to Home > Set Preferences > Defaults. Check the **Show Internal IDs** box. Click **Save**.

To install the NetSuite WMS Printer Driver and Integrator application:

1. Verify you are logged in to your NetSuite WMS Advanced account using the Administrator role.
2. Go to Documents > Files > File Cabinet.
3. On the left pane, click **SuiteBundles**.
4. Select the bundle number for your NetSuite WMS Advanced SuiteApp.

If you do not know the bundle number, go to Customization > Suite Bundler > Search & Install Bundles > List. If necessary, sort the list by the Name column or search to find the NetSuite WMS Advanced. The bundle number appears in the Bundle ID column next to the bundle name.

5. Click **Integration**.
6. Click **Download** next to NSWMS Print Driver Application.
7. Save the zip file locally on your computer.
8. Extract the contents of the zip file to a folder locally on your computer.
9. Select the NetsuiteCarrierIntegrator application file and create a shortcut for the application on your computer's desktop.

To log in to the NetSuite WMS Printer Driver and Integrator application for the first time:

1. Verify you are logged in to your NetSuite WMS Advanced account using the Administrator role.
2. Double-click the NetsuiteCarrierIntegrator shortcut on your computer's desktop to open the NetSuite Print Driver application.
3. If necessary, click **Run**.
4. Go to Settings > Login.
5. Check the **Sandbox** or **Production** box, depending on what environment you are using to test or use the NetSuite WMS Printer Driver and Integrator application.
6. In the **Role** field, enter the Internal ID for a role that has access to NetSuite WMS Advanced and Web Services access.
To find the internal IDs for roles, go to Setup > Users/Roles > Manage Roles.
For more information about web services access, see SuiteTalk (Web Services) in the NetSuite Help Center.
7. In the **Account ID** field, enter your NetSuite WMS Advanced account number.
To find the account number, go to Setup > Integration > Web Services Preferences.
8. Enter the email address and password for a user that has access to NetSuite WMS Advanced and Web Services.
9. Click **Submit**.
10. If you are prompted to restart the integration, click **Yes**.

After you log in to the NetSuite WMS Printer Driver and Integrator application for the first time, you do not have to log in using this procedure on subsequent logins as your login credentials are saved to the application's configuration file (your password is encoded).

To configure the NetSuite WMS Printer Driver and Integrator application:

1. Open the NetSuite WMS Printer Driver and Integrator application.
2. Go to Settings > Configuration.

Record Types

1. Log in to your NetSuite WMS Advanced account using the Administrator role.
2. Go to Customization > Lists, Records, & Fields > Record Types.
3. Make note of the internal IDs for the following record types:
 - WMS Ship Manifest
 - WMS Label Printing
 - WMS Commodity Shipment
 - WMS Open Task

- WMS External Labels
- 4. In the NetSuite WMS Printer Driver and Integrator application, in the **Record Types** section, enter the internal IDs from step 3 into the corresponding fields.

Flags

1. Check the **Get Shipment Data** box.
This setting generates the worldship.csv file that is used to communicate data from NetSuite WMS Advanced to the parcel carrier shipping software. Data is pulled from NetSuite WMS Advanced and written to the worldship.csv file. Data is pushed from the worldship.csv file to the parcel carrier software.
2. Check the box next to each of the following features you want to enable:
 - **International Shipment** – show commodity information in the worldship.csv file for orders shipping internationally
 - **Update UPS Tracking#** – read tracking number information from the UPS Access database and write it back to NetSuite records
 - **Update FedEx Tracking#** – read tracking number information from the FedEx Access database and write it back to NetSuite records
 - **HTML Pack Reports** – generate packing lists in HTML format for printing
 - **HTML Pick Reports** – generate packing lists in HTML format for printing
 - **BarTender Labels Generation** – generate a text file that the BarTender application uses to format and print labels

BarTender Labels Generation

If you have checked the BarTender Labels Generation box in the Flags section, choose one of the following options:

- **Static Printers** – always use the printer configured in the BarTender Commander
- **Dynamic Printers** – be able to choose a printer from the NetSuite WMS Advanced user interface

Printer Settings

Before you configure printer settings, verify you have configured a laser printer and a label printer as network printers and you know the name of both printers. If a printer is properly configured as a network printer, it will have an IP address identified as a port in its properties. For more information, see the help content available on your desktop computer.

1. In the **Zebra Printer** field, enter the name of the printer you use to print labels.
2. In the **Laser Printer** field, enter the name of the printer you use to print picking and packing reports.

ODBC Connection

In each of the following fields, enter the folder path where you want to save uploaded files. If necessary, click **Upload** next to the field to navigate to the appropriate location.

- **WorldShip Path** – where the worldship.csv file is saved
- **External Label Path** – where label files and picking and packing reports are saved
- **Image Path** – where packing list logos are saved

- **UPS MDB Path** – UPS database location where UPS tracking information is stored. You can only set this field if you have checked the Update UPS Tracking# box in the Flags section.
- **FedEx MDB Path** – FedEx database location where FedEx tracking information is stored. You can only set this field if you have checked the Update FedEx Tracking# box in the Flags section.

Other Settings

1. In the **Site ID** field, enter the internal ID for your warehouse location.
If you have only one warehouse location configured in your NetSuite WMS Advanced account, or you do not want to filter data by warehouse location, leave this field blank.
To find the internal ID for your warehouse location, log in to your NetSuite WMS Advanced account using the Administrator role. Go to Setup > Company > Classifications > Locations.
2. In the **Interval** field, enter the time period in milliseconds (1000 mS = 1 second) that you want to pass between each run of the shipping integration.

View Logs

To view logs, go to Settings > View Logs. Click one of the buttons to open the associated folder location you configured in the ODBC Connection. For more information on configuring folder locations, see [ODBC Connection](#).

Auto Ship Labels

To enable auto-ship labels, in the **Flags** section, verify that you have cleared the **Get Shipment Data** box and checked the **Enable Automatic Integration** box.

If you want to use auto-shipping with **FedEx**, check the **FedEx** box. If you want to use auto-shipping with UPS, select the **Endicia** box.

You can now configure the auto-shipping feature for each of the necessary carriers.

Click **Save**.