

# UPS Shipping User Guide

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## History

Date	Version	Details
April 2024	1.0	Updated
<b>May 2025</b>	2.0	Updated

## Introduction

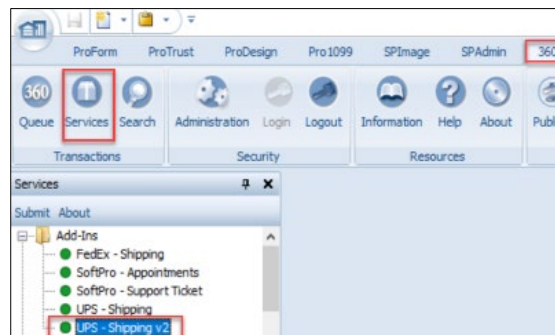
To maintain a streamlined closing process, save time, and be more efficient, SoftPro 360 users can prepare UPS shipments directly from ProForm. SoftPro Shipping Services seamlessly populates the name, address, and phone number of the contacts in the ProForm order. This allows for the quick selection of a contact and creating a UPS Shipping Label without ever leaving ProForm.

## Accessing the Vendor Services

From the **360** ribbon.

Click the **Services** button

1. Double-click the **Add-Ins** folder to expand
2. Double-click **UPS – Shipping**



3. From the **Order Linking** window.

If no order is open, enter the corresponding order in the **Selected Order Number** field

If a single order is open, the order number is shown in the **Open Order Numbers** field and the **Selected Order Number**

**NOTE:** The **Selected Order Number** field can be overwritten with an order that is not open.

- If multiple orders are open, all order numbers appear in the **Open Order Numbers** field and the first order is displayed in the **Selected Order Number** field. Highlight an order in the **Open Order Numbers** field to select the applicable order

4. Press the **OK** button to continue

## UPS Shipping – Account Information (Manage UPS Accounts)

First time users will need to enter the UPS account information.

If they do not currently have a UPS account, clicking the **Visit UPS.com link to open a new account** link allows them to create one.

See the Create UPS Account section for further details.

When an account has been created, follow these steps to add the account to SoftPro 360:

1. Enter the **UPS Account Number, Account Name and Postal Code**
2. Select the Account Usage option:
  - a. **My organization** if the account should be available to all users
  - b. **Just for me** if the UPS account should only be available to a single user.

### Invoice Details

To authenticate your account, you must enter the details for an existing UPS invoice. If you do not have an active invoice associated with this account, one must be generated prior to using this integration.

1. Enter the **Invoice Number, Invoice Date, Invoice Amount, Currency and Control ID** from your UPS invoice.
2. Press the **Add UPS Account** button to log in to UPS and validate your account.

Press Submit.

If there was a validation error, a pop-up screen would be displayed. Confirm the invoice details and re-enter or contact UPS for customer service.

**NOTE:** Users can add additional existing **UPS Accounts** by accessing the **Manage UPS Accounts** button found on the **UPS Shipping** screen.

If your UPS account and invoice are valid, the account will be added to the **Manage UPS Accounts** screen on the **Current UPS Accounts** tab and the **UPS Shipping** screen is displayed.

## UPS Shipping Screen

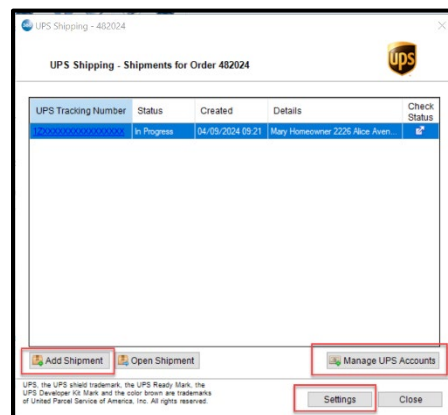
The **UPS Shipping** screen will display all shipments created for the linked ProForm order.

Options from this screen are:

1. **Add Shipment**

Click this button to create a new shipment.

If necessary, the Login Page may be displayed, alerting the user that they are not currently logged in to UPS. Press the UPS Log in button and follow instructions to log in. After successful authentication on UPS.com, users will be directed to a web page where they will receive instructions to close the web page and return to the 360 integration to submit the shipments.



Click [here](#) for more information about the **Create Shipment** screen.

2. **Manage UPS Accounts**

Click this button to add existing UPS accounts to this integration or view or remove associated accounts.

Click [here](#) for more information about the Manage UPS Accounts screen.

3. **Settings**

Click this button to modify Shipper Information or change default shipment settings.

Click [here](#) for more information on the Shipper Information screen.

## Create Shipment

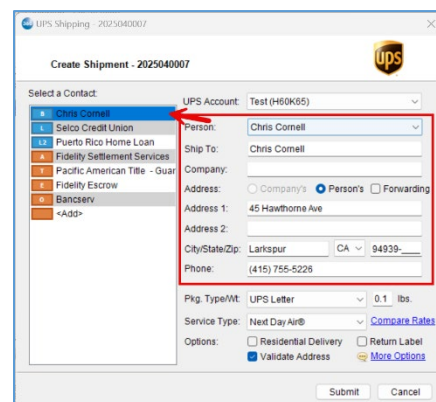
**Add Shipment** button directs users to the **Create Shipment** screen which lists the contacts entered into the linked ProForm order.

From the Create Shipment screen, select your UPS account. If there is more than one account, they will be available in the **UPS Account** drop down list.

The **Select a Contact** window contains all of the contacts stored with the Select ProForm order. Highlight the contact intended to ship to and (when entered into the ProForm order) the contact's name, address and phone number will populate the appropriate fields.

- **UPS Account**

A dropdown of available UPS accounts



- **Person**  
Defaults from the Person name of the selected contact
- **Ship To**  
Defaults from the Person name of the selected contact
- **Company**  
Defaults from the Company Name of the selected contact
- **Address Selection**
  - Company's  
Selecting this option copies the address from the company address of the selected contact
  - Person's  
Selecting this option copies the address from the person's address if one exists. If no address exists for this person, the company address is displayed
  - Forwarding  
If the contact has a forwarding address, this option will be enabled and may be selected
- **Address 1**  
This field defaults from Address 1 from the company, person or forwarding address (depending on Address Selection), of the selected contact
- **Address 2**  
This field defaults from Address 2 from the company, person or forwarding address (depending on Address Selection), of the selected contact
- **City/State/Zip**  
This field defaults from Address 2 from the company, person or forwarding address (depending on Address Selection), of the selected contact
- **Phone**  
This field defaults from the Home Phone # from the company, person or forwarding address (depending on Address Selection), If no Home Phone # exists, the Mobile phone is used.
- **Package Type / Weight**  
Valid options include:
  - UPS Letter
  - UPS Tube
  - UPS Pak
  - UPS Express Box
  - My Packaging
- **Service Type**
  - Next Day Air
  - Second Day Air
  - Next Day Air Saver
  - Next Day Air Early AM
  - Second Day Air AM
  - Three Day Select
  - Ground
  - UPS Worldwide Saver
  - UPS Worldwide Express Plus
  - UPS Worldwide Express
  - UPS Worldwide Expedited
- **Compare Rates link**  
Click this link to see shipping rates for each available Service Type (see below)



- **Options**

- Residential Delivery
- Validate Address
- Return Label

To create a Return Label:

- Highlight the Contact the package will be shipped from
- Check the Return Label check box, which changes the Ship To field to Ship From
- Click Submit

- **More Options Link**

Click this link to see the Additional Options screen (see below).

### International Shipping

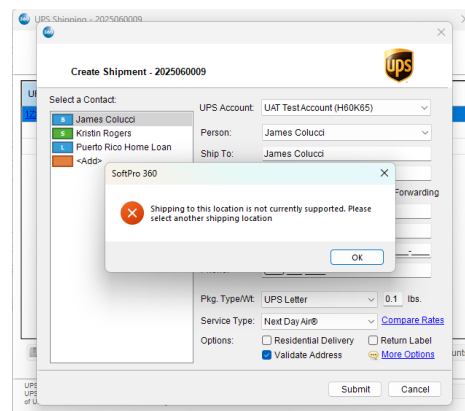
The UPS Integration supports limited international shipping to the following US territories:

- Puerto Rico (state code PR, zip code range 00600 to 00799 and 00900 to 00999)  
When shipping to Puerto Rico, The More Options link becomes required. Click this link and add the required Monetary Value.
  - Valid Service Types:
    - Second Day Air
    - Next Day Air
- Guam (state code GU, zip code range 96910–96932)
- Valid Service Types
  - UPS Worldwide Saver
  - UPS Worldwide Express
  - UPS Worldwide Express Plus
- US Virgin Islands (state code VI, zip code range 00801 to 00851)
  - Valid Service Types
    - UPS Worldwide Saver
    - UPS Worldwide Express
    - UPS Worldwide Express Plus
- Northern Mariana Islands (state code MP, zip code range 96950-96952)
  - Valid Service Types
    - UPS Worldwide Saver
    - UPS Worldwide Express
    - UPS Worldwide Express Plus

When shipping to these territories, addresses are formatted like US addresses. Company Name is required but is defaulted from the Ship to Name If no Company Name is entered.

If the selected contact has an address that is not supported by the UPS integration (currently US addresses and some US territories), the address fields are populated but greyed out and a message displays stating:

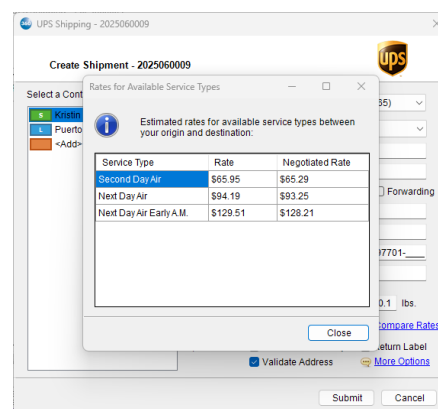
*Shipping to this location is not currently supported.  
Please select another shipping location.*



### Compare Rates

The **Compare Rates** link will provide estimated rates for all valid Service Types for the the shipment as currently entered. If desired, the Service Type can be changed based on rates displayed in this screen.

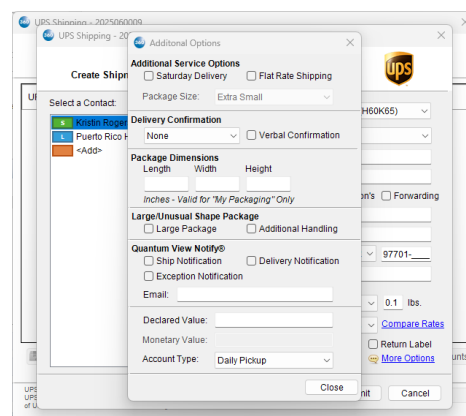
Press Close to close the window and return to the previous screen.



### More Options

The **More Options** link provides additional options that can be selected on a per shipment basis.

- **Additional Service Options**
  - Saturday Delivery
  - Flat Rate Shipping (UPS Simple Rate)  
Flat Rate shipping encompasses 5 package sizes (Extra Small, Small, Medium, Large and Extra Large) and 4 service types (Ground, Three Day Select, Second Day Air, Next Day Air)
- **Delivery Confirmation** options are None, Signature Required, Adult Signature Required and Shipper Release
- **Verbal Confirmation:** To confirm delivery of the shipment, a UPS representative will call on the day of delivery, using the preferred contact telephone number listed on the UPS Next Day Air® Early A.M.® package.
- **Package Dimensions:** Length, Width, Height
- **Large/Unusual Shape Package** – Large Package and Additional Handling
- **Ship Notification:** A Ship notification informs users when shipment information has been received by UPS (if entered into the ProForm order for the contact, the contact's email address will flow to the Email field)



- **Exception Notification:** An Exception notification informs users about the unforeseen events resulting in a change to the expected delivery day and includes the rescheduled delivery date. (If entered into the ProForm order for the contact, the contact's email address will flow to the Email field)
- **Delivery Notification:** A Delivery notification informs users when the shipment has been delivered. (If entered into the ProForm order for the contact, the contact's email address will flow to the Email field)
- **Declared Value**
- **Account Type** options are: Daily Pickup (set by default), Customer Counter, One Time Pickup, On Call Air, Letter Center and Air Service Center

When all values have been entered, press Submit to submit the shipment. A Busy message will be displayed during processing.

## Shipment Details Screen

After a successful submission, the **Shipment Details** screen will be displayed, where users can preview, print, publish or cancel UPS shipping label. The **Publish** button will publish the shipment label to order attachments.

To track the shipment, click the **Track** link, which will take users to the UPS tracking website.

To print the shipping label, press the Print Label button.

Click Close to close this window to return to the **UPS Shipping – Shipments** screen.

The **UPS Shipping** screen now displays a tracking number hyperlink for the shipment. Click the **Tracking Number** to link to the UPS tracking website.

The **Status** shows,

- **In Progress** before the package is delivered. The **Open Shipment** button is enabled when the **Status** is **In Progress** and can be used to view the **Shipment Details** screen.
- **Completed** once the package is delivered. The **Open Shipment** button is enabled when the **Status** is Completed. However, when users click on the **Open shipment** button, a message popup will be displayed stating - The UPS shipment has been delivered, hence users can't open the completed transactions.
- **Rejected**- The transaction submission is rejected if there's an error when submitting the shipment. The **Open Shipment** button is enabled when the **Status** is Rejected. However,

UPS Tracking Number	Status	Created	Details	Check Status
1ZXXXXXXXXXXXXX	Completed	04/08/2024 10:05	Mary Homeowner 2226 Alice Avenue	
	Canceled	04/03/2024 08:41	Mary Homeowner 2226 Alice Avenue	
	Rejected	04/08/2024 09:13	Mary Homeowner 2226 Alice Avenue	
	Rejected	04/02/2024 12:37	Mary Homeowner 2226 Alice Avenue	
1ZXXXXXXXXXXXXX	In Progress	04/02/2024 12:34	Mary Homeowner Test	
1ZXXXXXXXXXXXXX	Rejected	04/02/2024 12:26	Mary Homeowner Test	
1ZXXXXXXXXXXXXX	In Progress	04/02/2024 11:44	Mayan Gowda Test	
1ZXXXXXXXXXXXXX	In Progress	04/02/2024 11:35	Mayan Gowda Test	

when users click on the **Open shipment** button, a message popup will be displayed stating the rejected reason.

- **Canceled** – When users canceled the transaction. The **Open Shipment** button is disabled when the **Status** is Canceled.
- Users can click on the “**Check Status**” button to view the updated status.
  - The “**Check Status**” button will only be displayed for In-Progress transactions. For all other transactions, it will not be visible.
  - If the shipment is completed, the user will receive a pop-up message stating, “**Shipment is completed.**”, and the status column in the Shipments screen will be updated accordingly. If not, the user will be redirected back to the Shipments screen.

## UPS Shipping- Shipper Information

This screen is accessed by pressing the Settings button from the UPS Shipping screen.

Users contact information will be pre-populated based upon their SoftPro 360 Org table except the phone number. Users are required to input their phone number as it is a required field.

When phone number is entered, the next button will become enabled for further processing.

UPS Shipping - UPS TEST

UPS Shipping - Shipper Information

Name: Nisha 410060

Company Name: 360 Test Organization

Address 1: 4800 Falls of Neuse Rd

Address 2:

City/State/Zip: Raleigh NC 27609

Email: nisha.410060@fnt.com

Phone: ( ) - - \*

Default Shipment Settings

Delivery Confirmation: None

Shipment Weight:

Address Validation: ☐ Validate Addresses

Quantum View Notify: ☐ Ship Notification ☐ Exception Notification ☐ Delivery Notification

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Next Cancel

On this screen users will have the option to set defaults for **Delivery Confirmation, Address Validation, Ship Notification, Exception Notification** and **Delivery Notification**. Enabling these settings here will set them as the default for all labels created, however, they can modify the setting on a per label basis as needed.

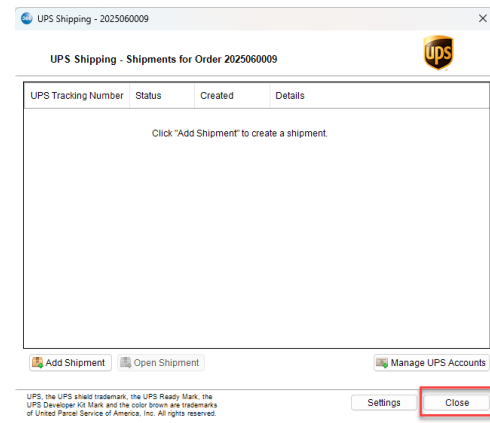
**Delivery Confirmation** options are None, Signature Required, Adult Signature Required and Shipper Release

- **Address Validation:** Address Validation is an automatic function that verifies the city, state, and postal code combination of any U.S. Ship To address. If UPS is unable to validate the combination, users will have the option to use a suggested address from an address database, revise the original address, or use the original address.
- **Ship Notification:** A Ship notification informs users when shipment information has been received by UPS
- **Exception Notification:** An Exception notification informs users about the unforeseen events resulting in a change to the expected delivery day and includes the rescheduled delivery date.
- **Delivery Notification:** A Delivery notification informs users when the shipment has been delivered

Click Next to continue and return to the UPS Shipping – Shipments screen.

## Exiting the UPS Integration

Pressing the Close button from the UPS Shipping – Shipments screen closes the integration and returns the user to the ProForm order.



## 360 Queue

For each shipment generated, a transaction will be added to the **360 Queue**.

Screen fields include:

- Provider  
Will be UPS for UPS transactions
- Service  
The type of serviced provided by this integration. UPS transactions will have Shipping as the service
- Status  
Transaction Status. Options are:
  - In Progress
  - Completed
  - Processing
  - Cancelled
- Linked Order  
The ProForm order associated with the transaction
- Linked Profile
- Created By
- Created On
- Completed On
- Provider Reference Number
- Description  
This field will contain the UPS tracking number in hyperlink format. Clicking this link takes the user to the UPS tracking website.
- Transaction Number

The “next step” is enabled for in-progress transactions, allowing users to navigate to shipments details if necessary.

Queue

Next Step

Views: All Transaction

Filter: UPS

Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Provider Reference Number	Description	Transaction Number
UPS	Shipping	Processing	2024100420	Default	Lavanya L	10/11/2024 3:30 AM			UPS Tracking # 1Z000000000000000000000000	410060-60-241011-948610
UPS	Shipping	In Progress	2025020836	Default	Lavanya L	2/9/2025 11:49 PM			UPS Tracking # 1Z000000000000000000000000	410060-60-241011-948612
UPS	Shipping	Cancelled	2025020880	Default	Lavanya L	2/21/2025 5:13 AM			UPS Tracking # 1Z000000000000000000000000	410060-60-250210-130523
UPS	Shipping v2	In Progress	2025050047	Default	Lavanya L	5/12/2025 1:27 AM			UPS Tracking # 1Z000000000000000000000000	410060-60-250221-146438
UPS	Shipping	Cancelled	2025050111	Default	Ravindra	11/8/2021 11:49 PM				410060-60-250512-211961
UPS	Shipping	Cancelled	syncEctrow	Default	prashant.choubey	2/19/2021 12:56 PM				410060-60-211019-355363
UPS	Shipping	Cancelled	syncEctrow	Default	prashant.choubey	2/19/2021 12:56 PM				410060-60-210219-273614
UPS	Shipping	Cancelled	JC300149	\Default\UC DS...	Jimmie Coleman	2/22/2021 11:47 AM				410060-60-210219-273615
UPS	Shipping	Cancelled	JC300149	\Default\UC DS...	Jimmie Coleman	2/22/2021 11:49 AM				410060-60-210222-283764
UPS	Shipping	Cancelled	JC300098	\Default\UC DS...	Jimmie Coleman	1/11/2021 10:15 AM				410060-60-210222-283765
UPS	Shipping	Cancelled	JC300139	\Default\UC DS...	Jimmie Coleman	2/19/2021 9:11 AM				410060-60-210111-261530
UPS	Shipping	Cancelled	JC300139	\Default\UC DS...	Jimmie Coleman	2/19/2021 9:11 AM				410060-60-210219-273484
UPS	Shipping	Cancelled	JC300140	\Default\UC DS...	Jimmie Coleman	2/19/2021 9:18 AM				410060-60-210219-273486
UPS	Shipping	Cancelled	JC300140	\Default\UC DS...	Jimmie Coleman	2/19/2021 9:18 AM				410060-60-210219-273489

138 of 138 results at 12:51 PM [Filter displaying 2000 rows]

Search Results

Errors and Warnings

Queue