



Setting Up the Masterform Interface

February 3, 2003

© 1989-2003 V-Technologies LLC
All rights reserved. StarShip is a
trademark of V-Technologies LLC.

V-Technologies LLC
61 Mattatuck Heights
Waterbury CT 06705

ph: 800.462.4016
fax: 203.574.1979
support: 203.574.1884

MASTERFORM INTERFACE GUIDE

OVERVIEW

☉ THE MASTERFORM OPTION

Masterform by LabelMaster is approved hazardous materials shipping software that generates the shipping papers required by UPS. Masterform supports carriers other than UPS, but the StarShip interface is only available for UPS domestic shipments at this time. The Masterform interface is a separate option and may be purchased by contacting the [V-Technologies Sales Department](#).

In this Interface Guide, you'll find information on:

- ⇒ [Masterform Installation](#)
- ⇒ [Masterform Setup](#)
- ⇒ [StarShip Setup for the Masterform interface](#)
 - [ODBC Setup](#)
 - [StarShip Setup](#)
- ⇒ [Processing Hazardous Shipments](#)

☉ THE MASTERFORM INTERFACE GUIDE

You should use this Masterform Interface Guide in conjunction with the StarShip's User's Guide, which provides more specific information related to setting up and using StarShip. In many places, the Masterform Interface Guide displays words as blue "links" that may jump you to related information in the User's Guide for your convenience. You can press the Back button in Acrobat Reader, or use the "Back" navigation arrow at the bottom of the page, to return to the page you were previously viewing.

MASTERFORM INTERFACE GUIDE

MASTERFORM INSTALLATION

☉ SINGLE-USER INSTALLATION

Each StarShip user needs to install his or her own copy of Masterform therefore creating his or her own Masterform database.

☉ MULTI-USER INSTALLATION

If you are running a multiple user scenario of StarShip, follow these additional steps in order to share the Exchange database used to communicate between StarShip and Masterform.

☉ HOW TO MOVE THE EXCHANGE DATABASE

#	ACTION
1	Copy Exchange.MDB from the Masterform installed directory (usually c:\MF_UPS) to the StarShip data directory.
2	Edit the MF.INI file in the Masterform installed directory to modify the Exchange location: <pre>[MASTERFORM for UPS] dbExchange=Q:\STARW\DATA\Exchange.mdb</pre>
3	StarShip will also automatically change the following entry in the MF.INI file to increase the maximum length of the package reference field from 7 to 14 characters: <pre>[MASTERFORM for UPS] WSVersion =5</pre>

MASTERFORM INTERFACE GUIDE

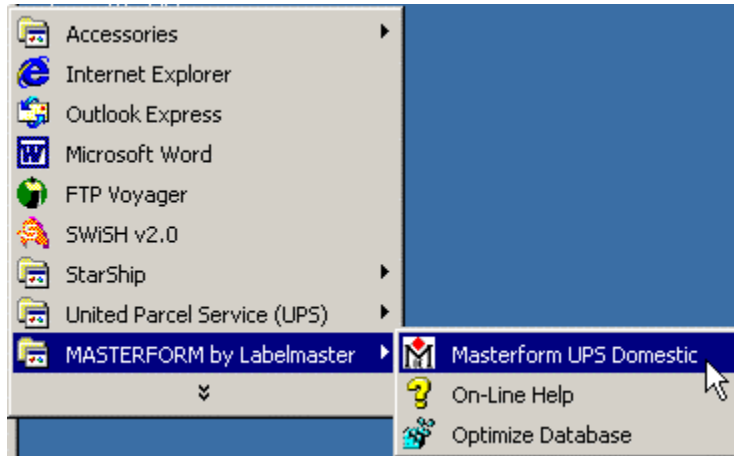
MASTERFORM SETUP

Once you have installed Masterform, please use the following setup procedure to configure it.

⦿ MASTERFORM BASIC SETUP

#	ACTION
---	--------

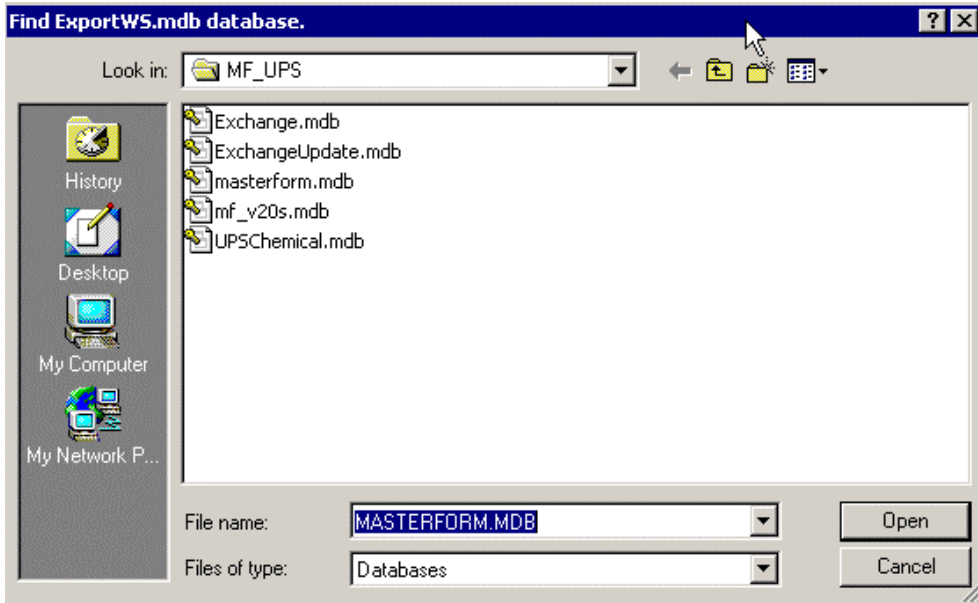
- 1 From the Windows Start menu, select **MASTERFORM > Masterform UPS Domestic**.



#

ACTION

- 2 Select the Masterform database and click Open.



- 3 Click Setup.
- 4 The MASTERFORM Form Fill Wizard appears. In the Account Field, Type in your UPS Account number. It must be the same UPS Account number registered in StarShip.

The "Setup Accounts" dialog box contains a table with the following data:

Account	Log #	Sequence
CTR1V111	0	0
*	0	0

At the bottom, the "Record:" field shows "1" and navigation buttons for first, previous, next, and last records.

#

ACTION

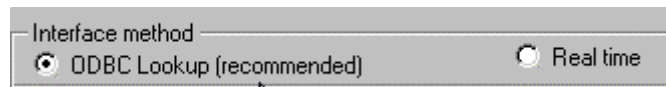
- 5 Set up the printer for the UPS Approved Shipping Paper by clicking either the Tractor or Laser button, depending upon your printer.



- 6 Set this method as default by selecting either Laser or Tractor from the Set Default Form drop-down list.



- 7 From the Interface method section, select ODBC Lookup.



- 8 Consult Masterform's help file for information about other settings and configure them according to your needs. Then, click Done.

① CREATE MASTERFORM TEMPLATES

Each Masterform template can include from 1 to 3 hazardous materials. The UN ID number, Proper Shipping Name, Hazardous Class, and Packing Group are stored in the template for each material.

#

ACTION

- 1 Select UPS Approved Shipping Paper from the menu.



#

ACTION

- 2 The Shipment Template appears. Without altering the default settings on the first dialog box, click Next.

The screenshot shows a dialog box titled "MASTERFORM Form Fill Wizard" with a subtitle "Shipment Template". It contains three dropdown menus: "Package Reference:" (empty), "Template:" (set to "<None>"), and "Select Type of Form to Print:" (set to "Laser"). A "Delete Template" button is located below the dropdowns. At the bottom, there is a row of buttons: "About...", a help icon, "History", "Help", "Cancel", "< Back", "Next >" (with a mouse cursor pointing to it), and "Finish".

#

ACTION

- 3 In the Shipper Information dialog, type in or select your information. Bold fields are required. Click Next.

The screenshot shows a dialog box titled "MASTERFORM Form Fill Wizard" with a sub-header "Shipper Information". The dialog contains several input fields:

- Emergency Telephone:** A text box containing "8607938657".
- UPS Account Number:** A text box containing "R1a551".
- Name and Address:** A text box containing "New Jersey Shipper", "Rich", "640 Winters Avenue", and "Paramus, NJ 07652". To the right of this box is a small icon of a document with a magnifying glass.
- Signature:** A text box containing "Fred Jones".

At the bottom of the dialog is a row of buttons: "About...", a magnifying glass icon, "History", "Help", "Cancel", "< Back", "Next >" (with a mouse cursor pointing to it), and "Finish".

#

ACTION

- 4 Type in or select your information from the Shipment information dialog box and click Next.

The screenshot shows a software dialog box titled "MASTERFORM Form Fill Wizard" with a sub-title "Shipment Information". The form contains the following fields and controls:

- Package Reference:** A dropdown menu with the value "320001".
- Date:** A text input field containing "1/29/2003".
- Receiving Address:** A section header for the address fields.
- Receivers Name:** A dropdown menu with the value "ABC Company".
- City:** A dropdown menu with the value "Cheshire".
- State:** A dropdown menu with the value "CT".
- Postal Code:** A dropdown menu with the value "06410".
- UPS Service:** A dropdown menu with the value "UPS 3rd Day Air (Air)".
- Transport Mode:** A group of three radio buttons: "Highway or Rail", "Passenger Aircraft" (which is selected and has a mouse cursor over it), and "Cargo Aircraft".

At the bottom of the dialog box, there is a row of buttons: "About...", a magnifying glass icon, "History", "Help", "Cancel", "< Back", "Next >", and "Finish".

#

ACTION

- In the Proper Shipping Name dialog box, click the magnifying glass button. Select a chemical by choosing its I.D. Number from the drop-down list.

MASTERFORM for UPS Chemical Table

Basic Description

Hazardous materials description and proper shipping names

Petroleum oil

Petroleum oil	I	NA1270
Petroleum oil	II	NA1270
Petroleum oil	III	NA1270

Or, choose its ID number from the I.D. Number field.

Hazard Class or Division	Packing Group	I.D. Number
3	I	NA1270
Ground Shipments		NA1203
Hazard Label(s) Required or Exemption	Maximum	NA1270
FLAMMABLE LIQUID		NA1325
		NA1350
Air Shipments		NA1361
Hazard Label(s) Required or Exemption	Maximum	NA1365
FLAMMABLE LIQUID	1 L	NA1556
		NA1613

Then, click Select.

- Complete the Proper Shipping Name dialog box, such as Technical Name and Other Required Information, and click Next.
- In the Air Shipment dialog box, type in or select the appropriate information for the Mass/Capacity and UOM fields. Fill in all required information.

MASTERFORM Form Fill Wizard

Air Shipment

Mass/Capacity	UOM	Extended:
25	L	25 L
Air Maximum Net Quantity Per Package	Unit of Measure	25 L

#

ACTION

- 8 Click Add to add another chemical to this template or click Finish if you are done creating this template. You may be prompted to provide additional information.

If you clicked Finish, the form displays on your screen.

- 9 On the Shipping Paper, select the icon in the upper right corner.

The screenshot shows a shipping paper form with the following text:

R1a111 8607938657

320007

Petroleum oil (Highly refined mineral oil), 3, NA1270, III

25 L

At the bottom, there are two fields for signature and date:

<u>Fred Jones</u>	<u>1/29/2003</u>
Signature	Date

In the upper right corner of the form, there is a small icon of a document with a magnifying glass, and a mouse cursor is pointing to it. Below this icon are four diamond-shaped symbols arranged in a row.

#

ACTION

- 10 In the Print and Save Template dialog box, type in a Name and Description for the template and click Done.

The screenshot shows a dialog box titled "MASTERFORM Form Fill Wizard" with a sub-title "Print and Save Shipment Template". It features a checked checkbox for "Save as template". Below this are two input fields: "Name" containing "Petroleum Oil" and "Description" containing "Highly refined mineral oil". A yellow highlighted warning message is present: "With the exception of shipments containing dry ice, hazardous materials packages must not exceed 70 lb (31.5 kg) gross weight. Lower limits apply to certain materials." At the bottom, there is a row of buttons: "About...", a magnifying glass icon, "History", "Help", "Cancel", "< Back", "Next >", and "Done".

MASTERFORM Form Fill Wizard

Print and Save Shipment Template

Save as template

Name: Petroleum Oil

Description: Highly refined mineral oil

With the exception of shipments containing dry ice, hazardous materials packages must not exceed 70 lb (31.5 kg) gross weight. Lower limits apply to certain materials.

Buttons: About... | [Magnifying Glass] | History | Help | Cancel | < Back | Next > | Done

MASTERFORM INTERFACE GUIDE

STARSHIP SETUP FOR THE MASTERFORM INTERFACE

⦿ ODBC SETUP

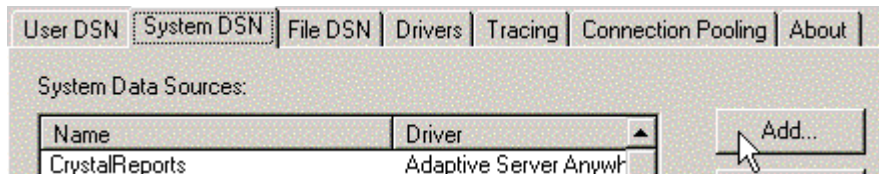
This setup procedure sets up the ODBC driver so that StarShip can correctly access the Masterform Exchange database.

#	ACTION
---	--------

- 1 From your Windows desktop, select **Start > Settings > Control Panel**.
Then,
 - for Windows 95, 98, or ME, double-click ODBC Data Sources.
 - Or, for Windows NT, 2000, XP, double-click Administrative Tools and then double-click Data Sources (ODBC).

The ODBC Data Source Administrator appears.

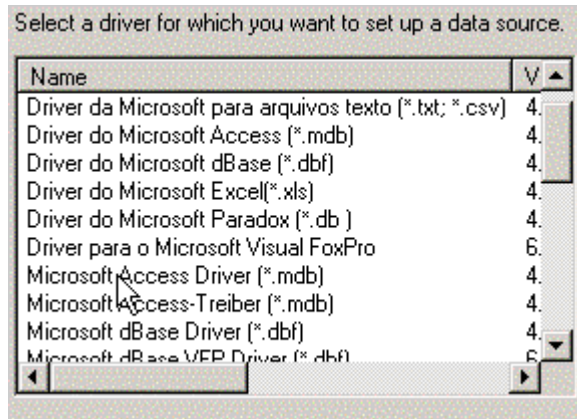
- 2 From the System DSN tab, click the Add button.



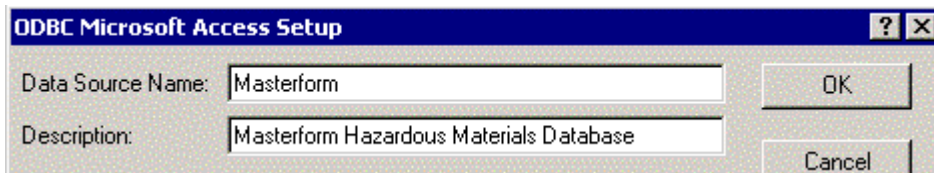
#

ACTION

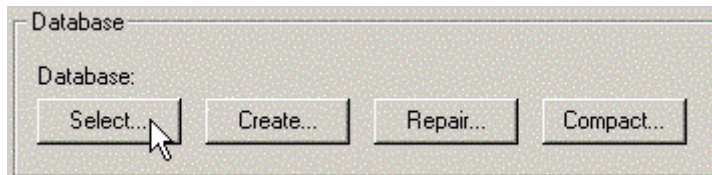
- 3 Select the Microsoft Access Driver (*.mdb) and click Finish.



- 4 Enter the Data Source Name and Description.



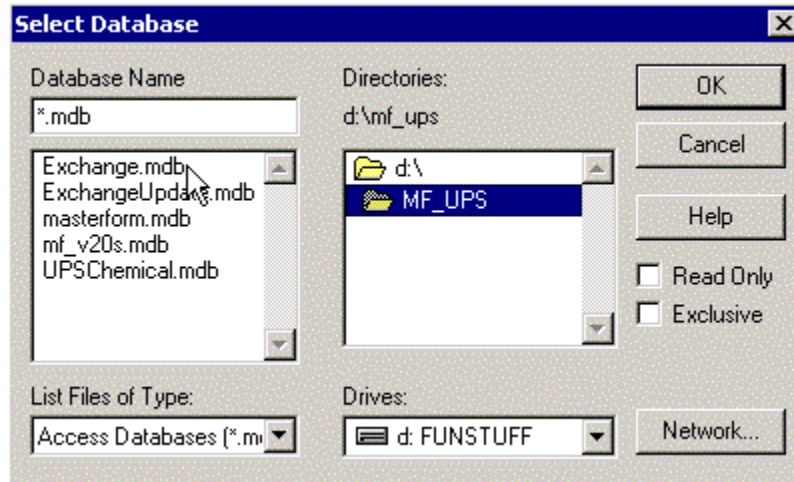
- 5 In the Database section, click the Select button.



#

ACTION

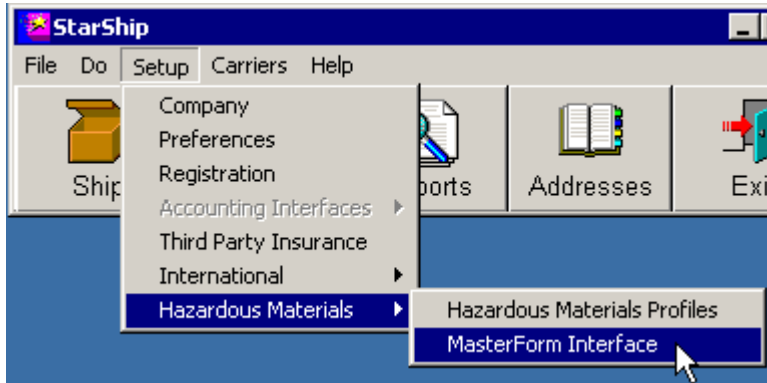
- 6 Navigate to where the Masterform **Exchange.mdb** file is located, select it, and click OK. Click OK again to save the data source.



- 7 Click OK to exit the Data Source Administrator.

◎ STARSHIP SETUP

Next, set up the StarShip interface for Masterform. You access setup from StarShip's main menu:



#

ACTION

- 1 On the Masterform Interface tab, select the Data Source that you configured in [ODBC setup](#).

Note: Be careful not to select the default data source created by Masterform, called HAZMAT. This points to a different database.



- 2 Type in the Emergency Contact Number. This phone number is included with every Hazardous shipment and must be completed in order to process a hazardous package.
- 3 Type in the Name of Signatory. This contact name is also included with every Hazardous shipment. This field is required in order to process a hazardous package.

#

ACTION

- 4 Check the Enable for UPS domestic box to enable the Masterform interface for UPS Domestic shipments.

MasterForm Interface	View Exchange Tables
Data Source for Exchange database:	Masterform
Emergency Contact Number:	(860) 793-8657
Name of Signatory:	Fred Jones
Enable for UPS Domestic:	<input checked="" type="checkbox"/>

⦿ VIEW EXCHANGE TABLES

This tab displays the data in the Masterform Exchange tables and should be used for diagnostic purposes. The following is a general description of each table:

UPS Templates: The Templates table lists the Masterform templates you created (See [Create Masterform Templates](#)). You must create one or more entries in this table before you can process a hazardous shipment in StarShip.

UPSIn: For each hazardous package you ship, StarShip writes the following information to the UPSIn table:

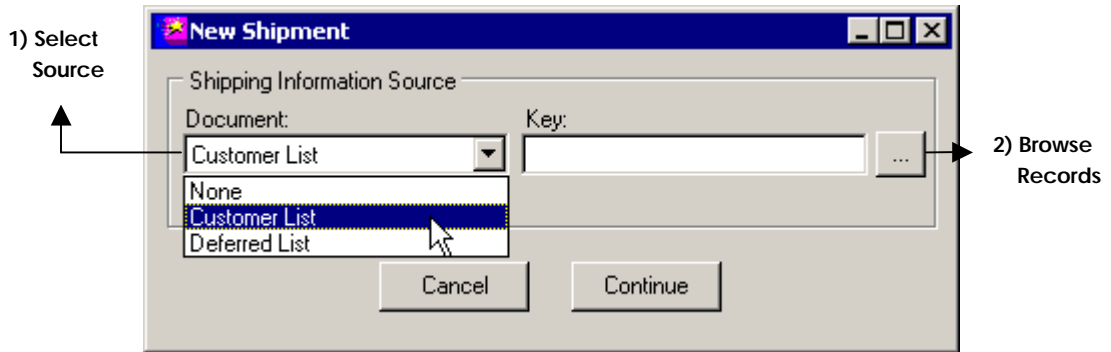
- ⇒ Sender and Recipient address: From the shipment header
- ⇒ Package Reference: From the transaction number, iteration number, and carton number.
- ⇒ Emergency contact number and Name of Signatory: From StarShip Masterform Interface setup.
- ⇒ UPS Account Number

UPSOut: When you process the hazardous shipment in Masterform and say yes to the “Save to Shippers Certification” prompt, information necessary to print the Package Level Detail (PLD) is written to this table.

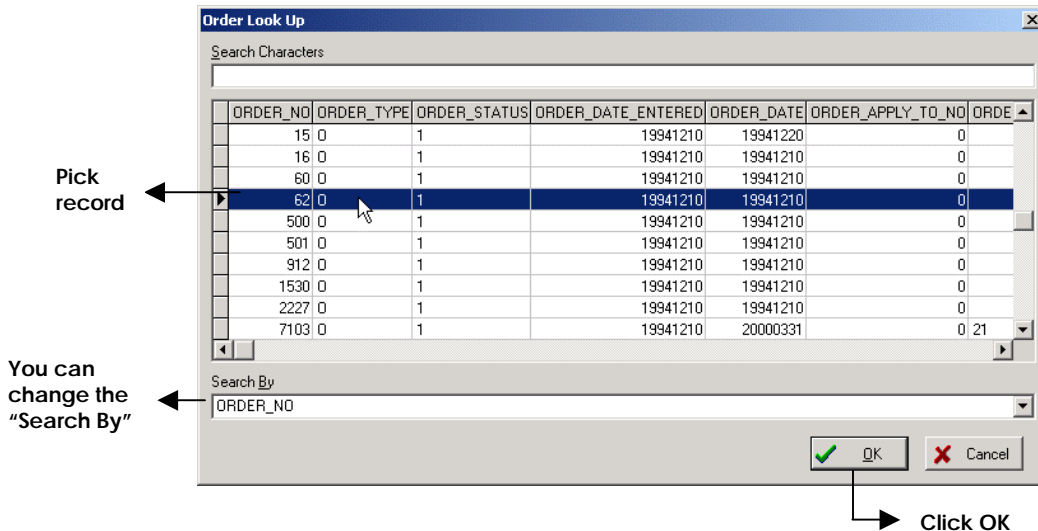
MASTERFORM INTERFACE GUIDE

PROCESS HAZARDOUS SHIPMENTS

The New Shipment dialog box allows you to select a source document to ship against. If you would like to ship without a source document, see [Ship Without a Source Document](#). Selections are usually Order, Customer or Address records, or the StarShip Customer and Deferred lists.



When connecting to orders, you can populate the Shipping window by typing or scanning the number while in the Key field. Press Continue. Or, browse records by clicking the "..." button.



◎ PROCESSING SHIPMENTS

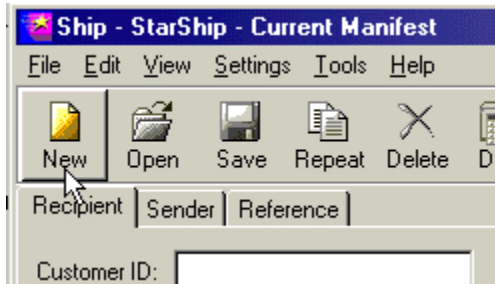
Processing Hazardous shipments includes:

- completing recipient address information,
- entering a package weight,
- selecting a Hazardous template under Package Options,
- printing the shipping papers in Masterform,
- saving the shipment.

And, shipping papers must be printed before you can post Hazardous shipments. The following steps walk you through the shipping process.

#	ACTION
---	--------

- 1 On the Shipping Window, press the **New** button.



- 2 When the New Shipment dialog box appears, select a Document. If you don't want to select a source document, click Cancel.
If the New Shipment dialog box doesn't appear, select **File > New Source**.
- 3 Select UPS as the Carrier and pick a domestic Service.
- 4 Enter the weight, or use a scale to read package weight. Also, enter any other required shipment information. (See the general shipping chapter)

<u>Weight:</u>	<input type="text" value="75.0000"/>	lbs	<input type="checkbox"/> Scale	Billed Weight: 75
<u>Billing:</u>	<input type="text" value="Sender"/>			

- 5 Select the [Package Options](#) tab.
In the Package Options list, enable the Hazardous check box.

The screenshot shows a software interface with two tabs: 'Package Options' and 'Shipment Options'. The 'Package Options' tab is active, displaying a list of checkboxes: C.O.D., Delivery Confirmation, Saturday Delivery, Hazardous (checked), Returns Plus, Additional Handling, Adult Signature Req'd, Verbal Confirmation, Ship Notification 1, and Ship Notification 2. To the right, the 'Dangerous Goods' section is highlighted, showing a price of \$20.00. Below this, there is a 'Template:' dropdown menu with 'OIL' selected. Further down, the 'Package Reference:' is '230001' with a note '(Ctrl-V pastes in MasterForm)'. The 'Status:' is 'Not printed (cannot post)'. At the bottom, there is a 'Launch MasterForm' button.

- 6 Select a template from the drop-down list. Settings:
Package Reference: Displays the current Package Reference code. The Package Reference must uniquely identify a package to the Masterform system. It can be up to 14 characters. See the [Appendix](#) for more information about how the Package Reference is calculated.
Status:
You can save the shipment in StarShip without printing the shipping papers. However, you must print the shipping papers in Masteform before you can Post hazardous shipments, and until you do so, the Status will read "Not Printed (cannot post)." When you print the shipping papers, the Package Level Detail (PLD) data is written to [the UPSOut table](#).
- 7 Click the Launch Masterform button if you would like to process the package in Masterform now.
(If not, you would save the shipment and print the shipping paper later, before you post shipments in StarShip. Skip to [Print Shipping Papers Later](#).)

#

ACTION

- 8 Process the package in Masterform.
- Enter the Package Reference on the Shipment Template screen, and click Next.
Tip: StarShip copies the package reference number to the clipboard. So in Masterform, you can position your cursor in the Package Reference field and press Ctrl + V to easily paste the reference number to your form.
 - Complete the Air Shipment screen and click Finish.
 - A warning dialog appears indicating that the labels shown in the Labels Required field must match the labels that will be on the package. If you have verified this, click OK.
 - Select **File > Print**. Or, right click on the shipping paper and select Print to print the shipping papers.

Note: These are the steps that StarShip requires you to perform in order to complete the shipment. However, you are advised to check the Masterform documentation and/or check with your UPS representative to determine if you need to perform additional steps.

- 9 When you receive the Save to Shippers Certification dialog box, click **Yes**. Saving the shipping papers to the Shippers Certification is the only way that StarShip is able to confirm that they have been printed. You must select Yes here in order to process shipments properly.
- See the explanation under [UPSOut Table](#) in the View Exchange Tables section for greater detail on this topic.



- 10 Press the Done button to complete the shipment in Masterform.

MASTERFORM Form Fill Wizard

Print and Save Shipment Template

Save as template

Name:

Description:

With the exception of shipments containing dry ice, hazardous materials packages must not exceed 70 lb (31.5 kg) gross weight. Lower limits apply to certain materials.

Buttons: About... | [Magnifying Glass] | History | Help | Cancel | < Back | Next > | Done

#

ACTION

- 11 Minimize Masterform and return to the StarShip shipping window. You will see that the Status has changed.

The screenshot shows a software window with two tabs: 'Package Options' and 'Shipments Options'. The 'Shipments Options' tab is active. On the left, there is a list of checkboxes for various shipping options: C.O.D., Delivery Confirmation, Saturday Delivery, Hazardous (checked), Returns Plus, Additional Handling, Adult Signature Req'd, Verbal Confirmation, Ship Notification 1, and Ship Notification 2. To the right of this list, the 'Dangerous Goods' section is expanded, showing a price of \$ 20.00. Below this, there is a 'Template:' dropdown menu set to 'OIL'. Further down, the 'Package Reference:' is '230001' with a note '(Ctrl-V pastes in MasterForm)'. The 'Status:' is 'Printed (can post)'. At the bottom of the window, there is a button labeled 'Launch MasterForm'.

- 12 If necessary, add more packages to the shipment by clicking Next and repeating the previous steps.
When you are done, click Save to save the shipment.

⦿ PRINT SHIPPING PAPERS LATER

Alternately, you can print the shipping papers later. If you decide to do this, save the shipment(s) and follow these steps before posting:

#	ACTION
1	In the StarShip Shipping window, reopen the Hazardous shipment that you want to post. To do this, click the Open button on the toolbar, select the shipment, and click OK.
2	Go to Package Options and highlight "Hazardous."
3	Process the package in Masterform, then print it. (Step 8 of the Processing Shipments procedure details what you need to do to process packages in Masterform.) Tip: StarShip copies the package reference number to the clipboard. So in Masterform, you can position your cursor in the Package Reference field and press Ctrl + V to easily paste the reference number to your form.
4	When you receive the Save to Shippers Certification dialog box, click Yes.



#

ACTION

- 5 Press the Done button to complete the shipment in Masterform.

MASTERFORM Form Fill Wizard

Print and Save Shipment Template

Save as template

Name:

Description:

With the exception of shipments containing dry ice, hazardous materials packages must not exceed 70 lb (31.5 kg) gross weight. Lower limits apply to certain materials.

Buttons: About... | [Magnifying Glass] | History | Help | Cancel | < Back | Next > | Done

#

ACTION

- 6 Minimize Masterform and return to the StarShip shipping window. You will see that the Status has changed.

The screenshot shows a software window with two tabs: 'Package Options' and 'Shipment Options'. The 'Shipment Options' tab is active. On the left, a list of checkboxes includes 'C.O.D.', 'Delivery Confirmation', 'Saturday Delivery', 'Hazardous' (checked), 'Returns Plus', 'Additional Handling', 'Adult Signature Req'd', 'Verbal Confirmation', 'Ship Notification 1', and 'Ship Notification 2'. On the right, the 'Dangerous Goods' section is expanded, showing a price of '\$ 20.00'. Below this, there is a 'Template:' dropdown menu set to 'OIL', a 'Package Reference:' field with '230001' and a note '(Ctrl-V pastes in MasterForm)', and a 'Status:' field with 'Printed (can post)'. At the bottom, there is a button labeled 'Launch MasterForm'.

See also [Changing the Service class of a saved shipment](#)

⦿ CHANGING THE SERVICE CLASS OF A SAVED SHIPMENT

What happens if you saved a Hazardous shipment, printed its shipping papers, and then realize that you need to change the Service class? For example, you need to change the Service on a package from **UPS Ground** to **UPS 3 Day Select**. The following procedure walks you through this scenario.

#

ACTION

- 1 In the StarShip Shipping window, reopen the Hazardous shipment. To do this, click the Open button on the toolbar, select the shipment, and click OK. This is an example of the Package Options tab before changing the service:

The screenshot shows the 'Package Options' dialog box with the 'Shipment Options' tab selected. On the left, a list of options includes 'Hazardous' which is checked. On the right, the 'Dangerous Goods' section is active, showing a price of \$20.00, a 'Template' dropdown set to 'OIL', a 'Package Reference' of 230001, and a 'Status' of 'Printed (can post)'. A 'Launch MasterForm' button is at the bottom.

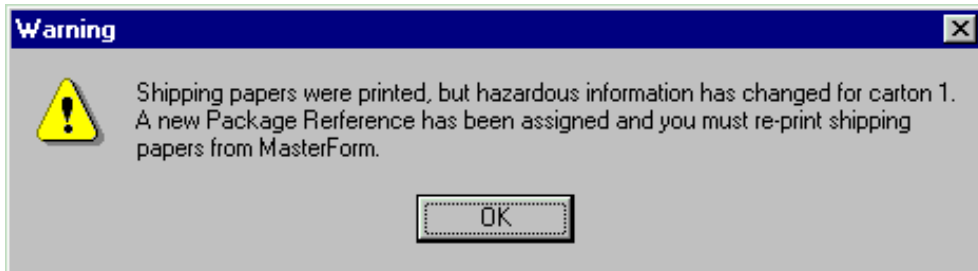
- 2 Change the Service.

The screenshot shows a dropdown menu for the 'Service' field. The current selection is 'Ground'. The dropdown is open, showing a list of options: 'Ground', '3 Day Select' (highlighted by a mouse cursor), '2nd Day Air', '2nd Day Air AM', 'Next Day Air', 'Next Day Air Saver', and 'Early A.M.'.

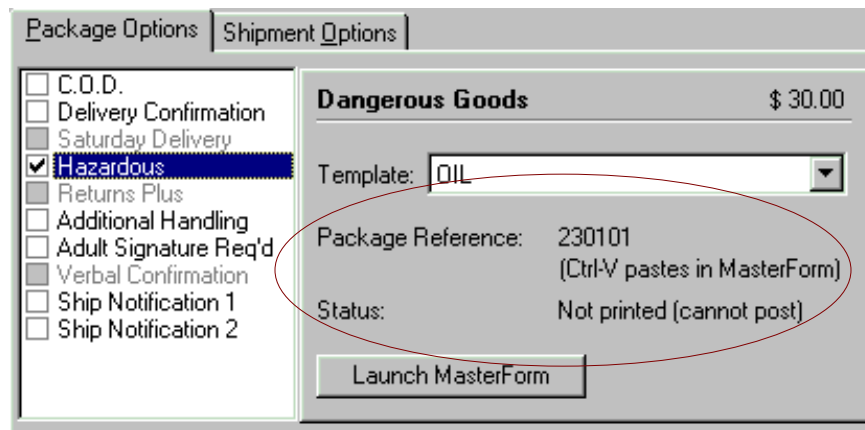
#

ACTION

- 3 Save the shipment. You will see this warning dialog. Click OK.



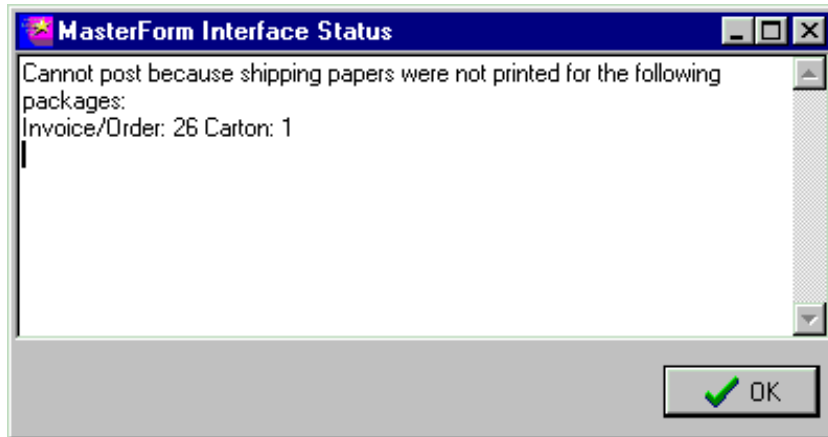
FYI: If you reopen the shipment, you'll see that StarShip has generated a new Package Reference #. Also, the Status returns to Not Printed (cannot post) until you reprint the shipping papers:



-
- 4 Launch Masterform to process and print the shipping papers, using the steps we outlined in the [Process Shipments](#) procedure.
-

⦿ POSTING SHIPMENTS

- ⇒ Before posting, verify that you have printed shipping papers for each Hazardous shipment. Then, follow the standard StarShip [Post procedure](#).
- ⇒ If you attempt to post without printing the shipping papers, you receive this dialog box error:



◎ VIEWING SHIPMENT HISTORY

You can view hazardous shipment history using the StarShip Ship window. You can only view the shipment in “History” mode, as indicated by the lower left-hand corner of the Shipping window.



#	ACTION
1	From the StarShip main menu, select Ship.
2	In the Ship - StarShip – Current Manifest window, click History.
3	Select a Search By criteria from the drop-down list and click ... to browse a list of all shipments processed within the timeframe specified in Setup > Preferences > Save Shipments for Inquiry.



-
- 4 Select the hazardous shipment you want to view and click OK.
-

#

ACTION

- 5 The data for the Hazardous shipment displays in the Shipping window. Click Package Option > Hazardous to view hazardous information. The tab displays the data that was sent in the [PLD](#) file for the fields shown.

The screenshot shows a software window titled "Shipping Options" with two tabs: "Package Options" and "Shipment Options". The "Shipment Options" tab is active. On the left, a list of options is shown with checkboxes: "C.O.D.", "Delivery Confirmation", "Saturday Delivery", "Hazardous" (checked), "Returns Plus", "Additional Handling", "Adult Signature Req'd", "Verbal Confirmation", "Ship Notification 1", and "Ship Notification 2". The "Hazardous" option is highlighted in blue. On the right, the "Dangerous Goods" section is displayed with a price of "\$ 20.00". Below this, there are three input fields: "Profile:" with a dropdown menu showing "230101" and a small icon; "Quantity:" with a text box containing "1"; and "Units:" with a text box containing "L". At the bottom left, there are four buttons: "<", "+", "-", and ">". At the bottom right, it says "1 of 1".

MASTERFORM INTERFACE GUIDE

APPENDIX A

This appendix provides additional information relating to StarShip and the Masterform Interface.

⦿ HOW IS THE PACKAGE REFERENCE CALCULATED?

The Package Reference is calculated for each package as follows:

ttttttttttnncc

Where:

tttttttttt is the transaction number and may be 1 to 12 characters.

nn is the iteration number. It always starts at 00 and increments if you edit a shipment and change hazardous information after printing the shipping papers.

cc is the carton number within the shipment (00 to 99).