# Hardcopy Manual

This manual is for reference only.  It is strongly advised to use the ShipRush Help File, which is organized properly and has working hot links.

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# Introduction

ShipRush is a powerful automation tool for users of contact management software. Certified by FedEx, and using the very latest in communication and integration technology, ShipRush offers you:

- One-click shipping from popular contact managers.
- Error-free shipping--no transcription or re-keying of addresses
- Enables the paper-less office because it eliminates hard copy airbill receipts and manifests.
- Centralized logging of shipments--you and your team always know what was sent and when
- Easy-to-find tracking information--a one-click URL is saved with the tracking information
- Logs all shipping activity in the database already used by your office
- Supports all FedEx shipping options, including Next Day Freight.
- Unique, Self-Evident-Interface (SEI) eliminates learning curve.
- Supports dedicated and dial-up internet connections

# System Requirements

ShipRush runs on a Pentium or higher PC. The PC must run in 800x600 resolution (or higher), and run one of the following operating systems:

- Windows95/98/ME
- NT 4 (Service Pack 3 or higher)
- Windows2000

Additionally, an internet connection and supported contact manager must be available on the PC. The internet connection can be either dial up or dedicated. Supported contact managers are:

- Microsoft Outlook2000
- ACT!2000 and ACT v4
- GoldMine v4 and v5 (dBase & SQL)
- SalesLogix2000 and v3

A laser printer is required to use ShipRush. FedEx labels must be printed on laser printers, not inkjet or inkjet printers.

Microsoft Internet Explorer v4 or higher must be installed on the PC before installing ShipRush. The latest version of Internet Explorer (currently version 5) can be downloaded at no charge from http://www.microsoft.com/windows/ie/

Lastly, you need a valid FedEx account to install ShipRush. To establish an account, contact FedEx at: 1-800-GOFEDEX or at http://www.fedex.com

For a detailed discussion on supported internet connections, firewalls, etc., please click here.

# FedEx Support for FaxRush®

Users of GoldMine and SalesLogix have the option of installing the FaxRush Office Automation Server with FedEx support. This unique server-based architecture enables:

- One-click shipping with no additional client software for templated shipments.
- Remote users who sync can ship using the central office mail room.
- Automated processes can trigger shipments in an automated selling cycle.
- Shipments can be sent to an entire group of contacts easily (ShipRush is one shipment at a time, but each shipment can be as easy as a single click).

Please follow this link to learn about installing and using FedEx Support for FaxRush.

# Software License & Acknowledgements

Z-Firm LLC hopes you enjoy ShipRush™ and that it helps you improve productivity and service. However, neither we, nor anyone else, promise it will work for you. If ShipRush doesn't work, or causes any problems or losses, your only remedy is a refund of the original purchase price within thirty days of purchase.

Likewise, if ShipRush helps make your office more efficient and helps your team offer better support, we do not expect a larger chunk of your revenue than you have already paid.

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Ownership

=========

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Grant of License

================

The ShipRush License comes in three versions. Consult your invoice to determine which license you have.

Single User License: This is for single-users of ACT!, GoldMine, and Outlook. If ACT!, GoldMine or Outlook is running on a network, see the Multi-User license below. The Single User License may be installed on a single PC. If uninstalled from that PC, it can be installed on another PC. At no time may the license be installed on more than one PC.

Multi-User Network License: Multi-user databases (including ACT!, GoldMine, SalesLogix, and Outlook when these products run on a network) must purchase either a Multi-User or Custom/Site License. For ACT!, GoldMine, and SalesLogix, this license must exceed the user license of the contact manager. The Multi-User license allows ShipRush to be installed on the number of PC's indicated on your invoice or license certificate.

Custom or Site License: Refer to your invoice or license certificate for details.

You may transfer this software to another party if the other party agrees to the terms and conditions of the agreement and completes and returns a registration card to Z-Firm LLC. The registration card is available by writing to Z-Firm LLC. If you transfer the software, you must simultaneously transfer all documentation and related disks.

Registration

============

Use of this software requires that your company register with Z-Firm LLC. ShipRush will automatically send registration information to Z-Firm LLC via internet or other means. Misrepresentation of registration information invokes automatic Termination of your license to use ShipRush. Automatic re-registration may be triggered if license information is updated or changed.

Evaluation

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Evaluation copies of ShipRush are limited to a certain duration.  If you choose not to purchase a ShipRush license during the period of the evaluation, you must remove ShipRush by uninstalling it.

Restrictions

==========

You may not copy the documentation or software except as described in the installation section of this manual. You may not distribute, rent, sub-license or lease the software or documentation, including translating, decompiling, disassembling, or creating derivative works. You may not reverse-engineer any part of this software, or produce any derivative work. You may not make telecommunication transmittal of this software.

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# Installing ShipRush

# Checking Your Internet Connection

Before installing ShipRush, test the internet connection:

1. Start the web browser
2. Browse to www.zfirmllc.com

If this is successful, continue:

If you have a dial up connection to the internet, click here to proceed.

Dedicated internet connections should find out if a proxy server is used for http traffic. The proxy server may have two configuration items that ShipRush will need:

- Name or address
- Port
- (userid/password are optional, and not used on the majority of proxy servers)

For example, your system administrator might tell you that the proxy address is **192.168.124.11** and the port is **3128**.

**There are three ways to find this information:**

1. Ask your network administrator or IS department for the information.
2. Look in your web browser. Internet Explorer users click here. Netscape users, click here.

3. Ball park that you do not need to explicitly set this up (many proxy servers, such as Linux IP Masquerade, and NAT solutions are 'transparent' and do not require proxy configuration in desktop applications). When the ShipRush installer asks for the internet connection method, simply leave the 'Proxy' check box unchecked.

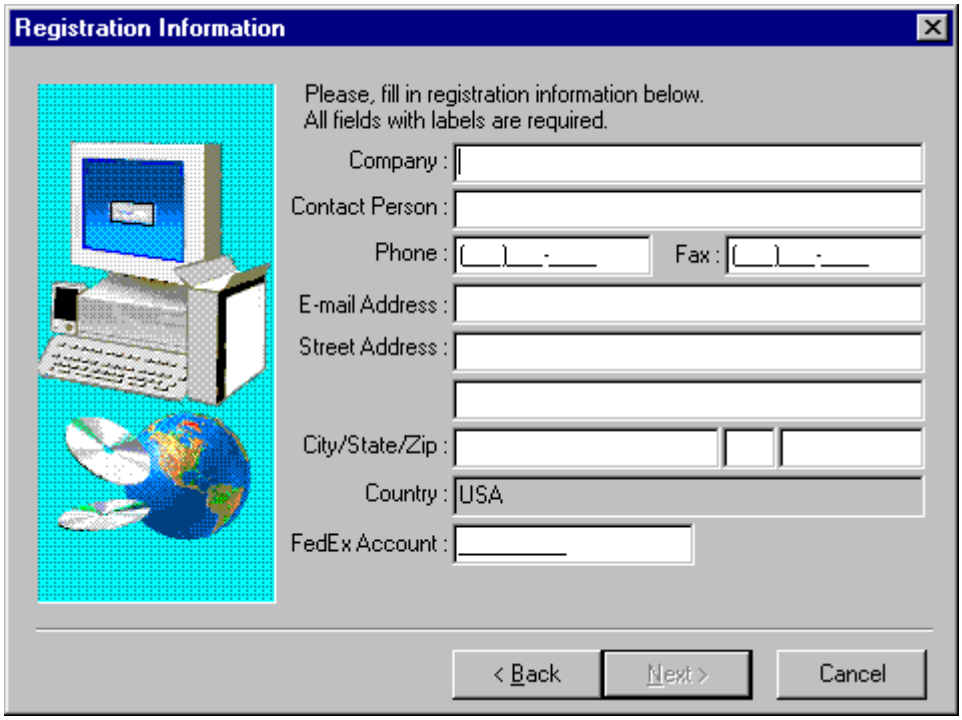
For a detailed discussion of internet connection methods, click here.

# Install ShipRush

The ShipRush program is packaged in an installation file called SHIPRUSH.EXE. If you downloaded this file from the internet, you were prompted for a folder to save the file to. Using Windows Explorer, navigate to this folder and double click on SHIPRUSH.EXE.

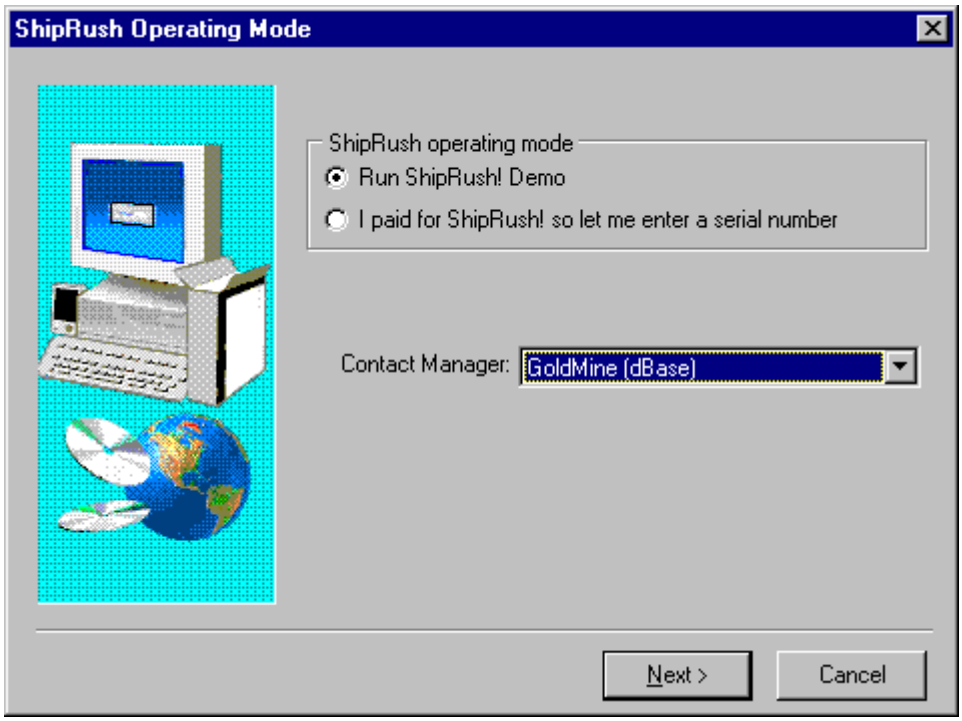
If you have ShipRush on CDROM, navigate to the ShipRush folder, and double click on SHIPRUSH.EXE.

The initial screens of the installer will guide you through the license agreements, and standard options. It is important to fill in the registration information page correctly:

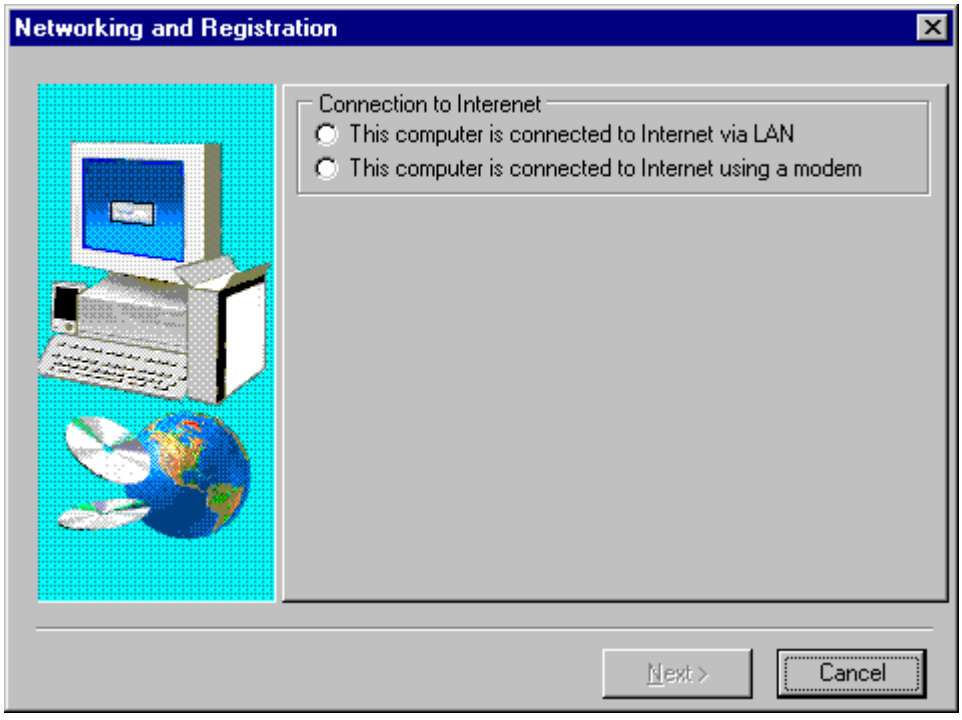



The address entered here is your FedEx Ship-From address. All other fields must be entered correctly or registration will fail.

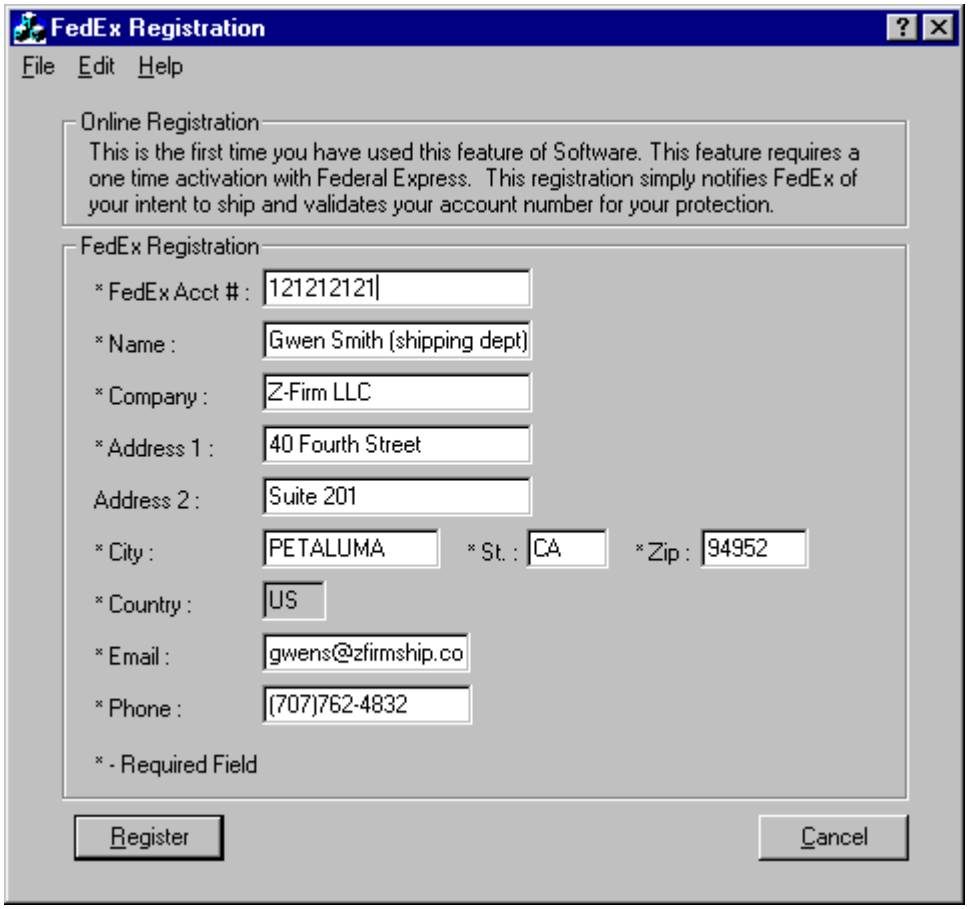
Next, select if you will run ShipRush as a demo, or registered. If you purchased ShipRush, you should have received a serial number. Selecting the paid option will allow you to enter it now.




Networking & Registration first asks you to specify the internet connection as network or dialup. If your network uses a proxy server, you will use that information now. For more information on internet connection types, click here.



The last screen of import is the FedEx Registration screen. All the information should be pre-populated. Just press the Register button. After a few moments, this screen should disappear and you will be done with the installation!




Installation Troubleshooting

# Using ShipRush

# Basics of ShipRush

Basic use of ShipRush is easy:

1. In your contact manager, navigate to the contact you want to ship to.
2. Invoke ShipRush from the embedded menu or toolbar or from the Start menu
3. Select the desired shipping options (type of service, packaging, declared value, etc.)
4. Press Send
5. Done! The shipping label will print, and the tracking details will be logged with the contact in the contact manager.

ShipRush adds itself to the menu and/or toolbar of ACT!, GoldMine, Outlook, and SalesLogix. See the appropriate section for more information.

When launched, ShipRush displays the default airbill. After the shipment, or if the shipment is cancelled, ShipRush sits in the Windows System Tray.

Clicking on its system tray icon reveals the application menu, as shown below. Select the appropriate option.

# Sending a Shipment COD

By default, when ShipRush is invoked, the USA airbill is displayed. To ship COD, follow these steps:

1. Navigate to the recipient contact in the contact manager
2. On the Windows System Tray, click on the ShipRush icon:

3. From the pop-up menu, select `COD Airbill'

Select the desired shipping options, including COD Amount. ***Be sure to select the desired payment type.***

For COD shipments, ShipRush will print two labels, one is the sending label, and the other is a return label to you that is used to return the COD payment to you. Hold both labels together, facing you, with the sending label on top. Fold them in half, so that the sending label shows on the outside and place in the pouch.

# Sending an International Shipment

International shipments can be initiated from the SysTray menu.

1. On the Windows System Tray, click on the ShipRush icon:

2. From the pop-up menu, select International Airbill

3. Fill in the shipping options. Note that Country must be selected from the list.

Be sure to set the Total Declared Value for Carriage and for Customs fields. Contact FedEx if you have questions on international shipments.

# Deleting a Shipment

You will be billed for all shipments processed with ShipRush. If a shipment is initiated in ShipRush, but you later decide not to send it, the shipment must be deleted using ShipRush. The shipment must be deleted the same business day that it is created.

To delete a shipment:

1. On the Windows System Tray, click on the ShipRush icon:


2. From the pop-up menu, select Delete Shipmment

3. Enter the shipment tracking number (this can be cut and pasted from the contact manager, or read from the FedEx shipping label)

4. Press the Delete button.

5. ShipRush will confirm that the shipment has been deleted.

# The Shipping Label

ShipRush prints the shipping label on regular 8.5x11 paper in your laser printer. The paper form is simply folded in half and placed in the pouch of a FedEx letter, bar code facing out.

If shipping boxes or other method that lacks the built-in pouch, use the FedEx supplied self-adhesive pouches, and place the label there. In many cases, it is advisable to use some packing tape to secure the pouch to the parcel.

# Launching & Using ShipRush

## Launching from Outlook

When ShipRush is installed for use with Outlook2000, a toolbar button is added to Outlook. (Note that Outlook should not be running during the installation of ShipRush.)

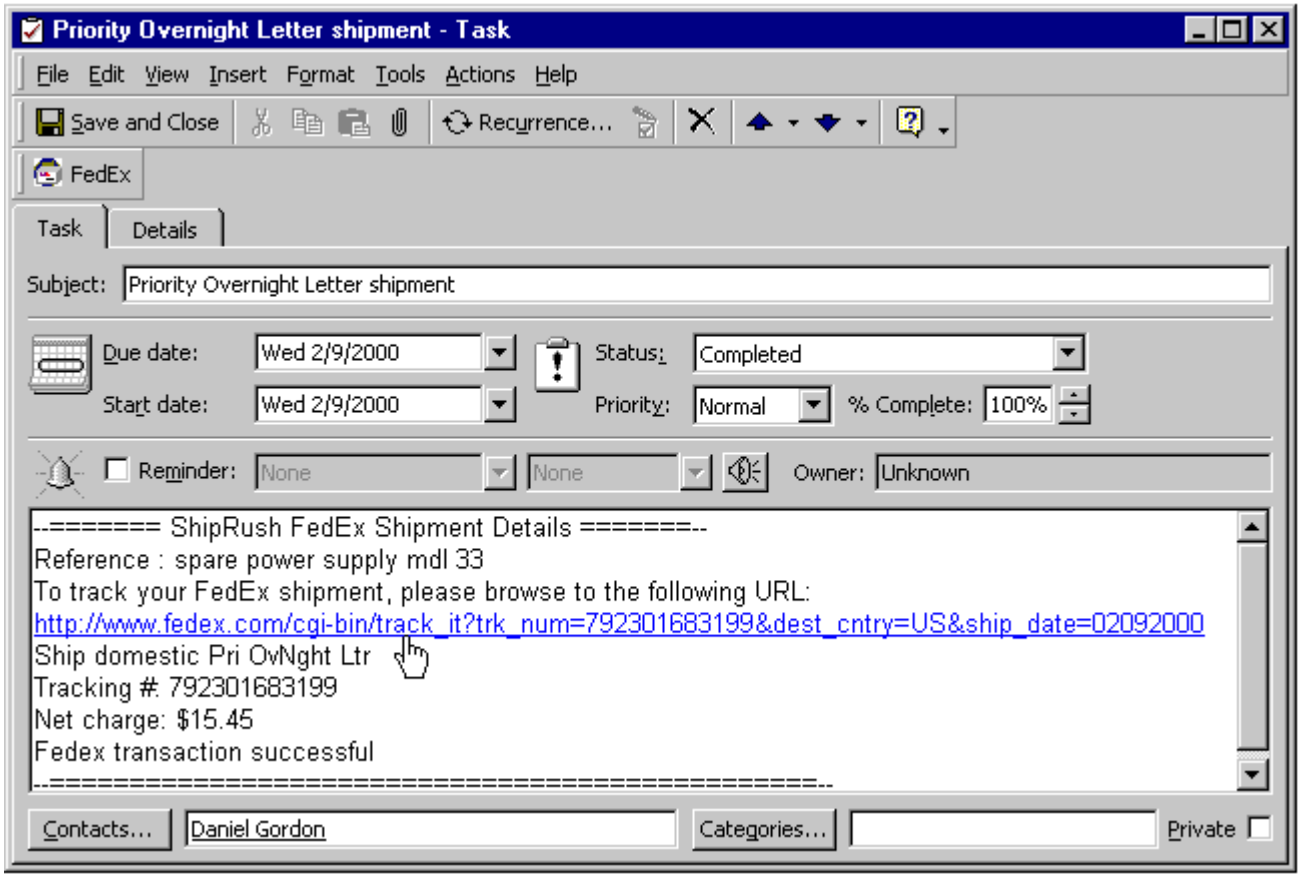
The button is only visible when in the Contact view. You can be in any Contact folder to invoke ShipRush. The FedEx button can be seen the Contact List view and in Contact view.

## Shipment Details & Tracking

Shipments are logged into Outlook in two places:  In the Activities tab of the contact and in the FedEx folder (the FedEx folder is created automatically when ShipRush runs for the first time).

To view the shipments sent to a specific contact, navigate to that contact on the Contact List, and double click to bring up the Contact view.  In the activities tab, you will see the shipment:

By double clicking on the shipment record, the full details are shown:




Here, all the details of the shipment can be seen, including the tracking number. Note how the Billing Reference entered on the airbill is noted as the **Reference:**

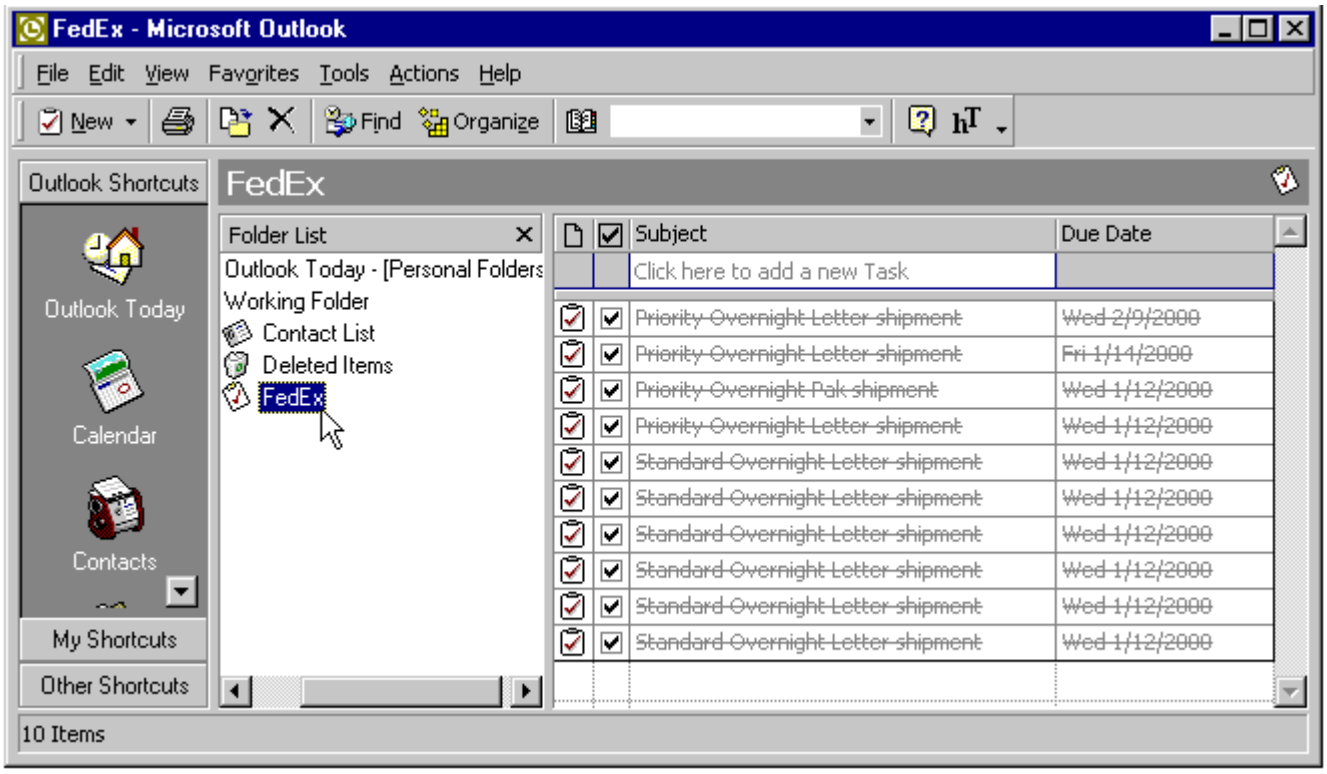
Notice that the activity is crossed out? This is Outlook's way of indicating that this activity is completed, not pending.

To track the shipment, just click on the highlighted URL. This will take you directly to the FedEx site and display the tracking information for the package.

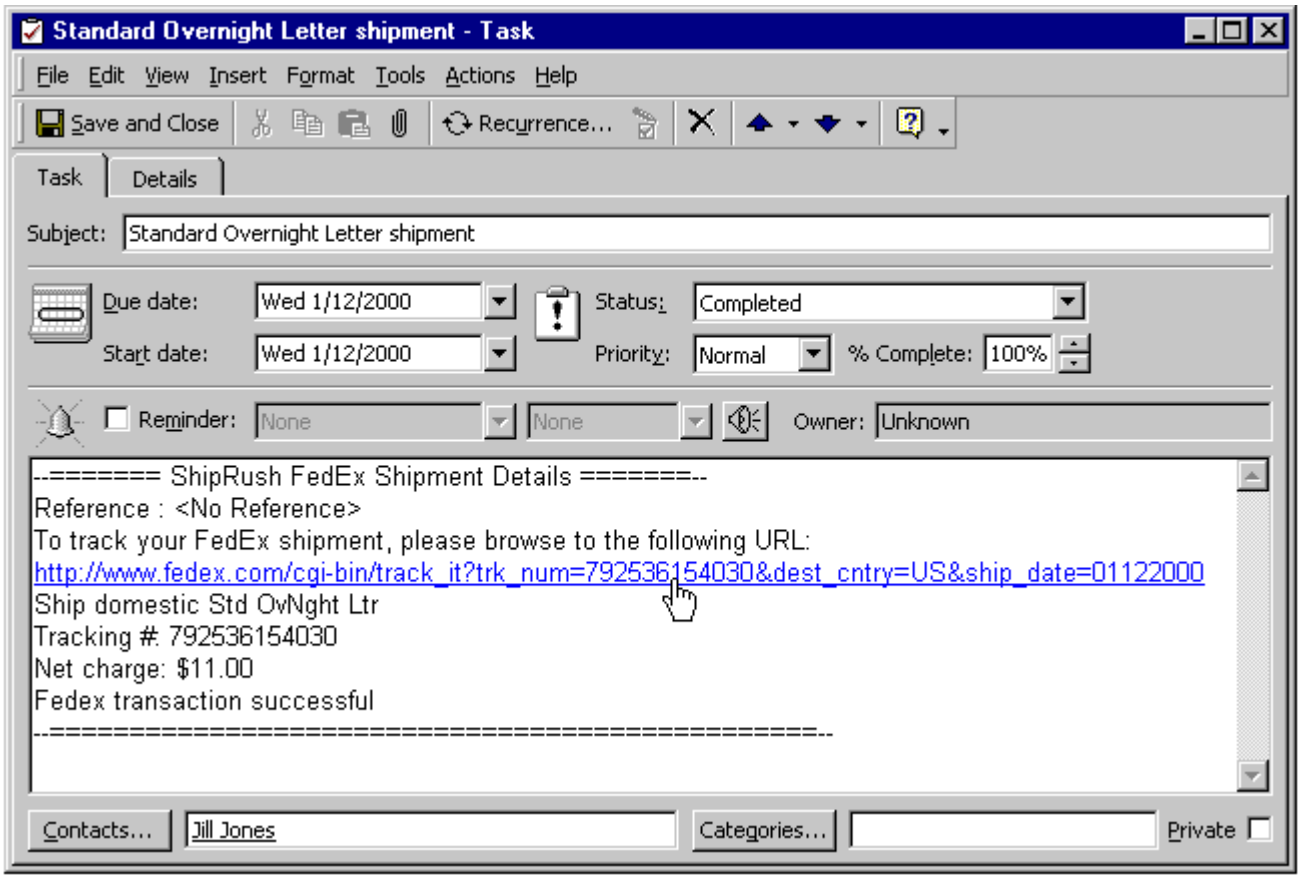
**Note** that no tracking information will be available (there may even be an error displayed) if you try to track a package that has not yet been picked up by a courier.

**The FedEx Folder**

Is created automatically in Outlook. Here, all shipments can be seen, no matter which contact it was scheduled for:




By double clicking on a shipment, all the shipping information is visible:




Notice the Contacts field in the lower left? Double click there and Outlook will take you to the Contact record the shipment went to.

# From SalesLogix

## Launching from SalesLogix

SalesLogix users have two options for launching ShipRush:

**From the icon in the Windows Start Menu**. To use this option, no further configuration is required. Just start using ShipRush.

**Manually create a menu and or toolbar shortcut inside of SalesLogix**.

There are a few ways to accomplish this:

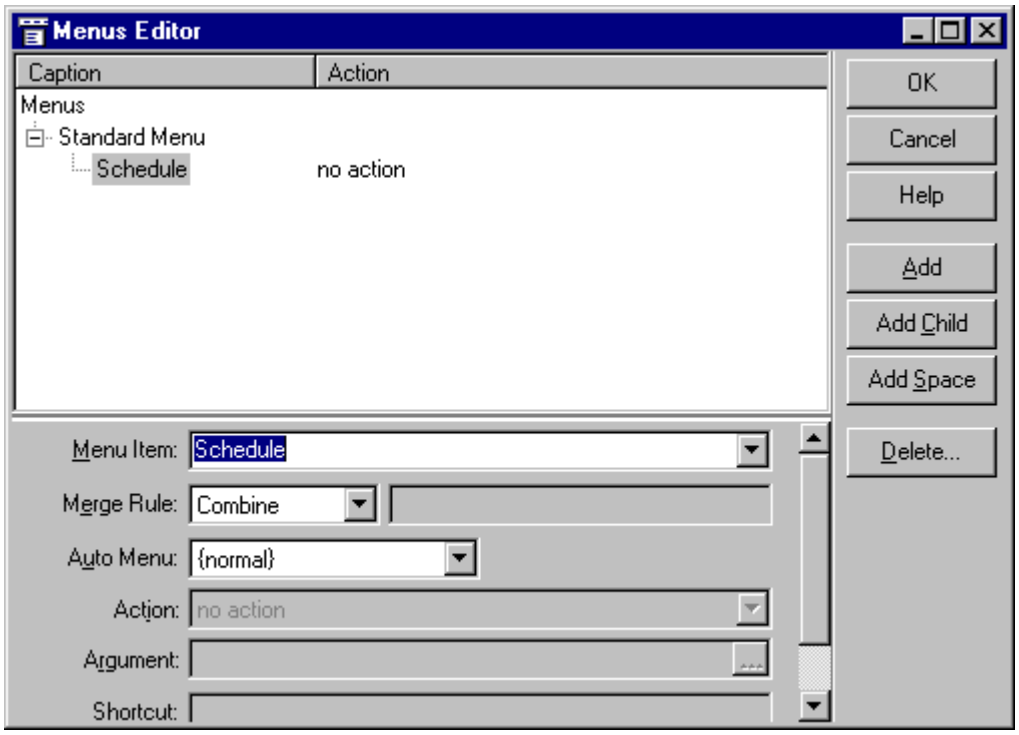
1. Manually customize SalesLogix at the client side. (Tools | Customize in the SalesLogix Client)
2. Install the Z-Firm-supplied SalesLogix bundle (shiprush.sxb in the ShipRush program directory).
3. Create your own custom bundle to suit the needs of the site (for consultants & advanced users)

In all three cases, a qualified SalesLogix administrator or consultant should perform the action.

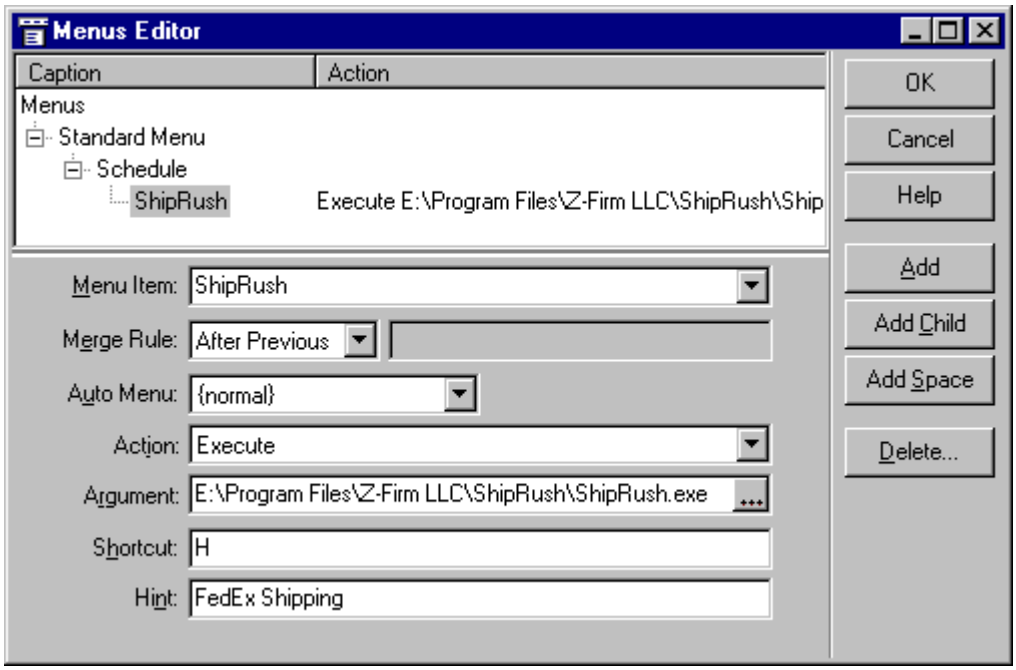
**Steps to manually customize:**

In SalesLogix v3 or v4:

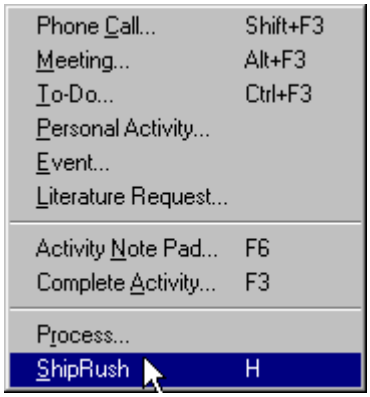
1. Select Tools | Customize | Menu.
2. Navigate to the Schedule Menu.




3. Select Add Child.
4. Fill in the screen as shown below



5. Press OK
6. Now in the Schedule menu, you will have an option to launch ShipRush:




Now you are ready to ship!

## Shipping & Tracking

### Shipping

To use ShipRush, first navigate in SalesLogix to the contact you want to ship to.

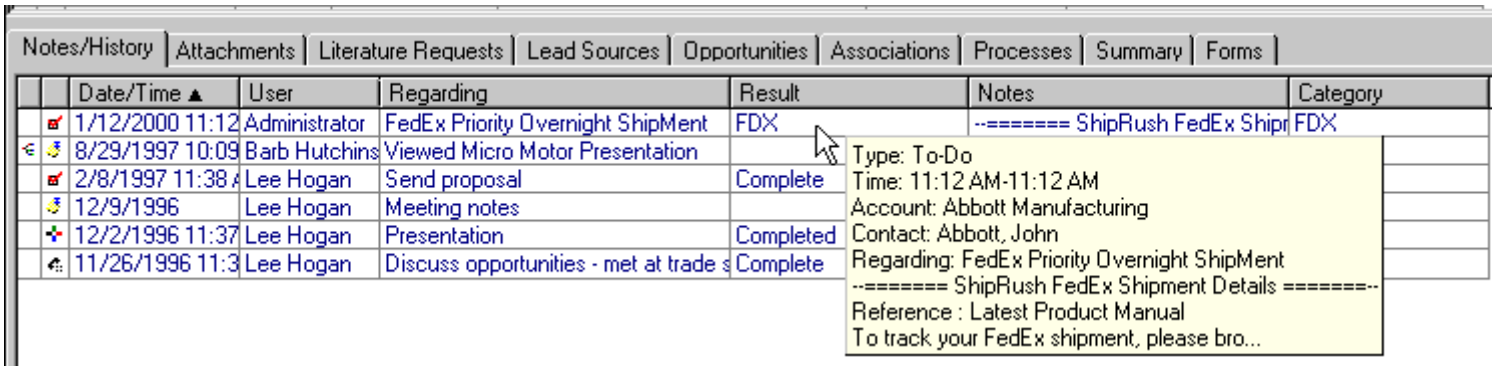
Then invoke ShipRush from the SalesLogix toolbar (or menu) or from the Windows Start menu.

ShipRush pops up the USA Airbill, pre-populated with the contact information:

Select the desired shipping options, and press Send with the mouse.

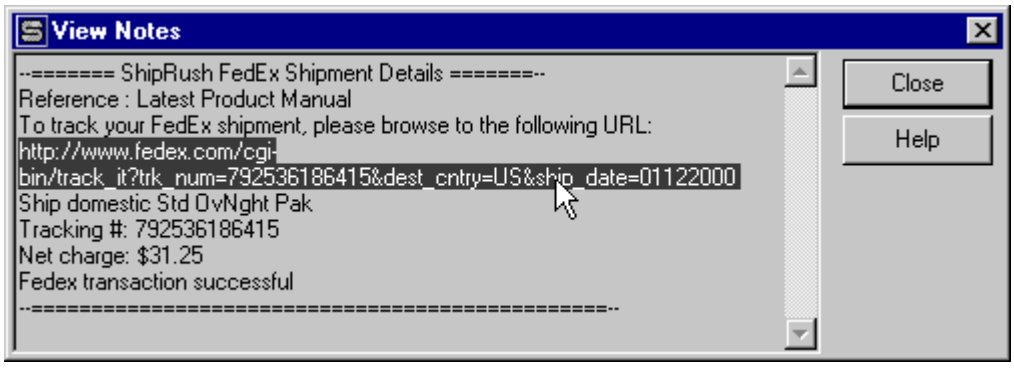
Select the printer to print the label on.

ShipRush now creates the shipment, and creates a tracking record in the History tab in SalesLogix:




### Tracking

Notice that there is a URL in the history record. This can be cut and pasted into a web browser to quickly track the package. Also notice that in this example, the Reference note. This is because we filled in the Billing Ref field on the airbill.




# ACT!

## Launching from ACT!2000

The first time ShipRush is run, it will add itself to the menu and toolbar of ACT!2000 (ACT! v4 users please click here for the steps.) Follow these steps to have a ShipRush menu selection and toolbar button available within ACT!2000:

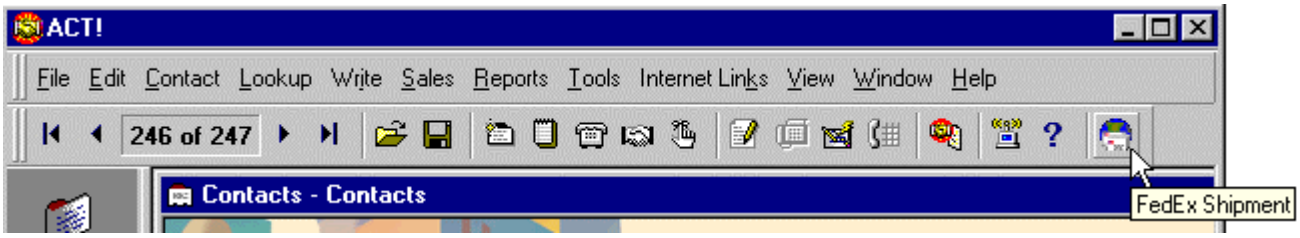
With ACT!2000 running, launch ShipRush from the Start Menu.

If you do not need to process a shipment now, press Cancel when the ShipRush airbill is displayed.

Exit from ACT!2000

Launch ACT!2000 and log in.

Now there should be a toolbar button (shown below) and a FedEx shipping menu option in the Tools menu of ACT!2000.




Now you are ready to ship!

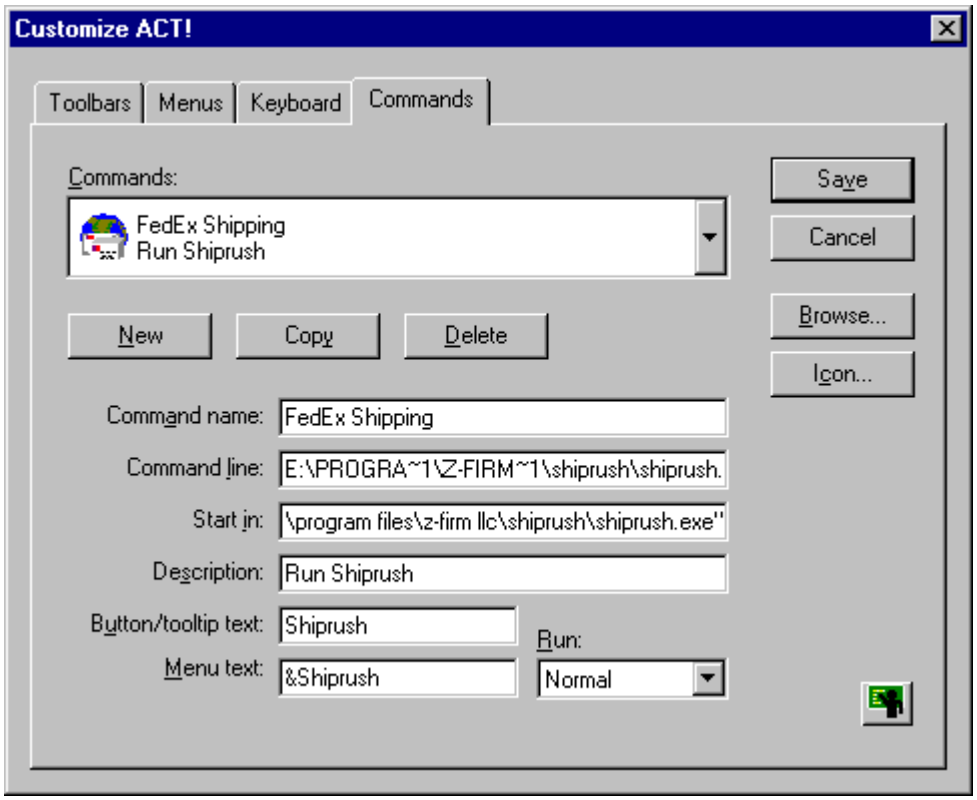
## Launching from ACT! v4

ACT! v4 users have two options for launching ShipRush:

**From the icon in the Windows Start Menu**. To use this option, no further configuration is required. Just start using ShipRush.

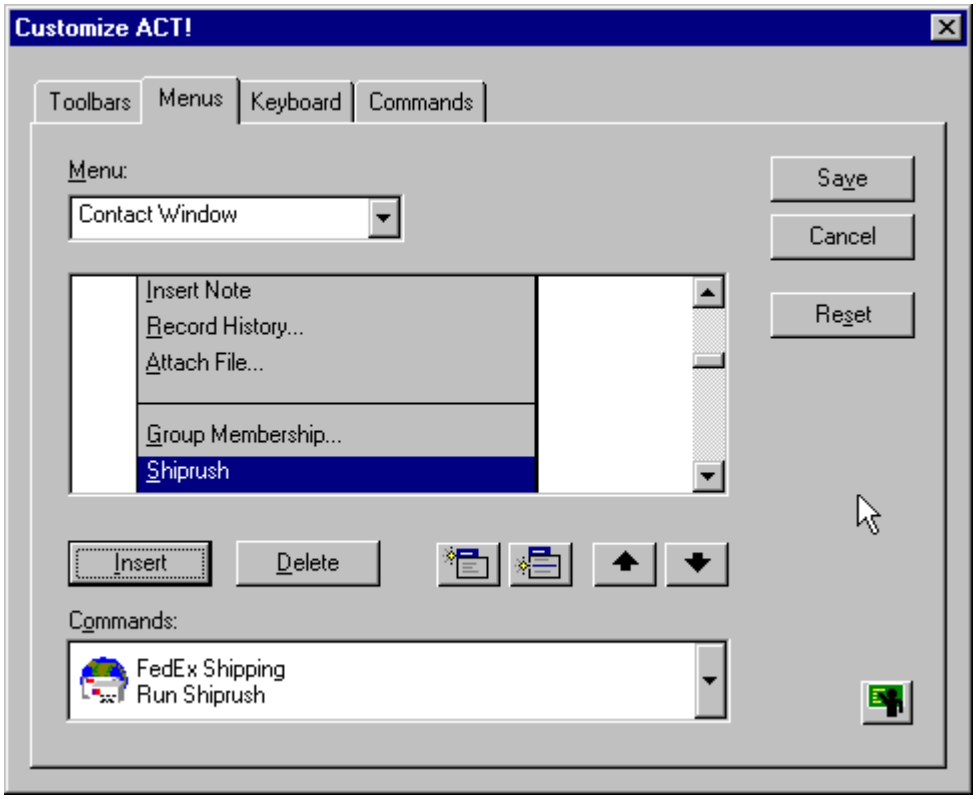
**Manually create a menu and or toolbar shortcut inside of ACT!**. This is done with the following steps:

1. In ACT!, go to Tools | Customize
2. In the Commands tab, select New
3. Fill in the screen as shown below. ShipRush is usually installed to "c:\program files\Z-Firm LLC\shiprush\shiprush.exe

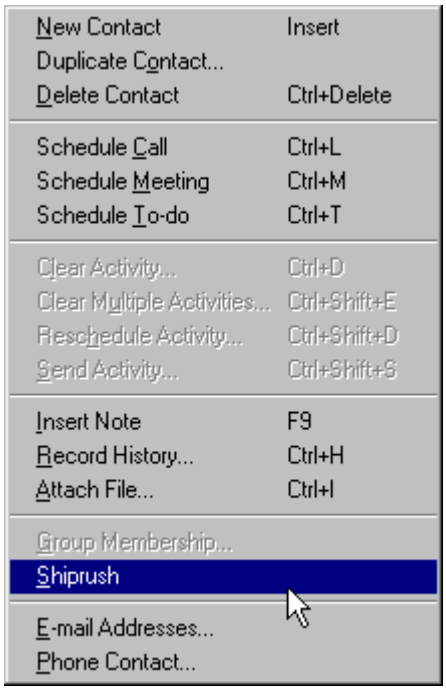



4. Press Save

5. Go to the Menus tab
6. Select the Contact Window




7. Select ShipRush in the command window (see above)
8. Navigate to the Contact menu (see above)
9. Click on Group Membership
10. Press Insert
11. Press Save
12. Press close
13. Now in the Contact Menu, there is a menu option to launch ShipRush.




Now you are ready to ship!

## Shipping & Tracking

### Shipping

To use ShipRush, first navigate in ACT! to the contact you want to ship to.

Then invoke ShipRush from the ACT! toolbar (or menu) or from the Windows Start menu.

ShipRush pops up the USA Airbill, pre-populated with the contact information:

Select the desired shipping options, and press Send with the mouse.

Select the printer to print the label on.

ShipRush now creates the shipment, and creates a tracking record in the History tab in ACT!2000:

### Tracking

Notice that there is a URL in the history record. This can be cut and pasted into a web browser to quickly track the package. Also notice that in this example, the Reference note. This is because we filled in the Billing Ref field on the airbill.

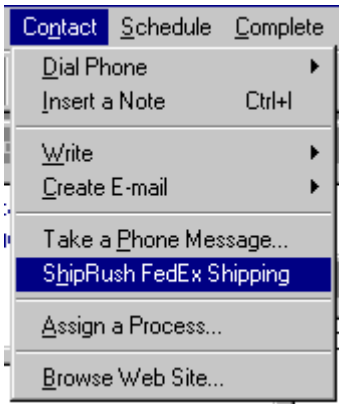
# From GoldMine

## Launching from GoldMine

The first time ShipRush is run, it will add itself to the GoldMine menus. Follow these steps to have a ShipRush menu selection available within GoldMine:

1. With GoldMine running, launch ShipRush from the Start Menu.
2. If you do not need to process a shipment now, press Cancel when the ShipRush airbill is displayed.
3. In GoldMine, select File | Log In
4. Log back in to GoldMine.

Now there will be a menu selection to launch ShipRush. In GoldMine v5, the menu selection will be under the Contact menu:




In GoldMine v4, the ShipRush menu item will be in the Schedule menu:

## Shipping

To use ShipRush, first navigate in GoldMine to the contact you want to ship to.

Then invoke ShipRush from the GoldMine menu or the Windows Start menu.

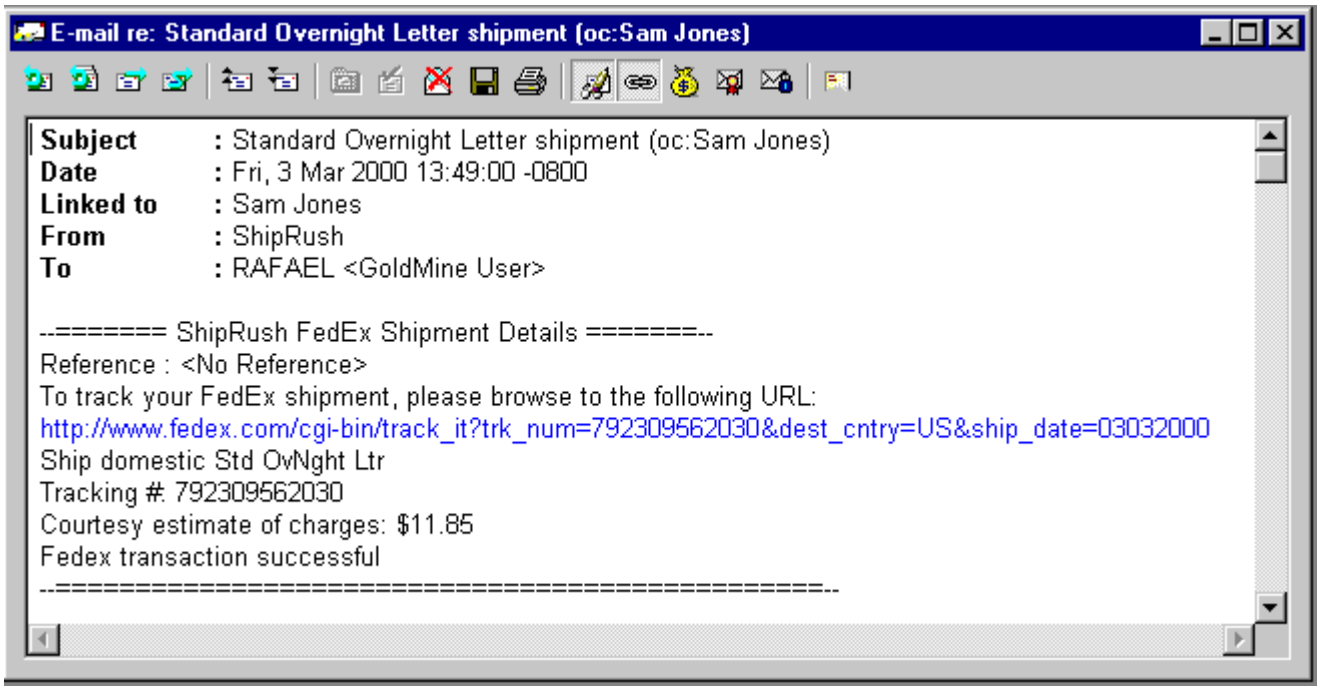
ShipRush pops up the USA Airbill, pre-populated with the contact information:

Select the desired shipping options, and press Send with the mouse.

Select the printer to print the label on.

ShipRush now creates the shipment, and creates a tracking record in GoldMine:

To see the shipping details, right-click on this history record and select Read. The shipping details appear:




### Tracking

Notice that there is a clickable URL to track the package. Also notice that in this example, the Reference is blank. This is because we left the Billing Ref blank.

## Reporting

To see all shipments, there are two options:

1. On screen, use the Real Time tab (View | Activity List, select Real Time). This lets you scroll through all the shipments, but they are mixed in with other GoldMine activities.

2. Create a report.

   Creating a report allows for the most flexibility. You will need a system administrator or user who can create custom reports using either the GoldMine report writer, or a tool like Crystal Reports or Access.

   The report should be based on the CONTHIST table in GoldMine (optionally linking in CONTACT1). Report on the desired date range (e.g. just today, or a whole month, as appropriate), and filter on the RESULTCODE field. This field is set to FDX by ShipRush.

   (If you want a code other than FDX, just go into ShipRush Settings and change it.)

# Advanced Shipping Options

## Billing Reference

The billing reference field in the upper left of the airbill is very useful.

What is entered in this field will appear in these places:

- In the contact manager record for the shipment
- On the FedEx invoice to identify the shipment

If the Print checkbox is selected, this reference will also print on the FedEx label.

This field is very useful. For example, several users may print their labels on the printer in the mailroom. By noting what to include in the shipment, the mailroom can fulfill the shipment without any additional intervention by the user. Users just click to ship!

## Bill to Other FedEx Account

When either Recipient or Third Party is selected, an edit becomes visible to enter their FedEx account number.

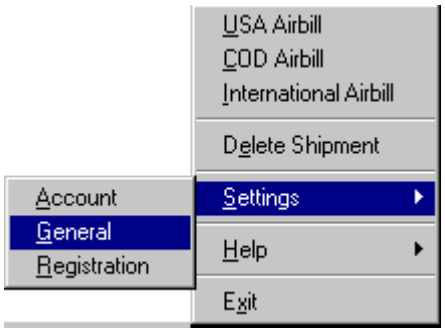
# Other Features and Options

# Setting the Default Airbill

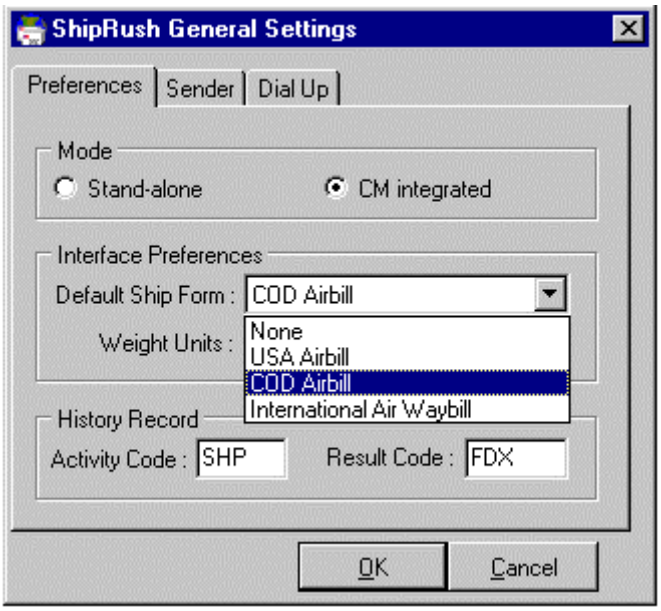
By default, ShipRush will automatically invoke the USA Airbill when launched. If you do a lot of COD or International shipping, you may want to change this setting. Here are the steps to change the default airbill.

1. On the Windows System Tray, click on the ShipRush icon:


2. From the pop-up menu, select Settings | General:




3. In the Preferences tab, set the Default Shipping Form as desired

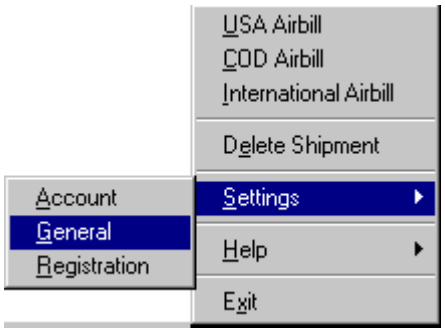



# Selecting Dial Up Networking

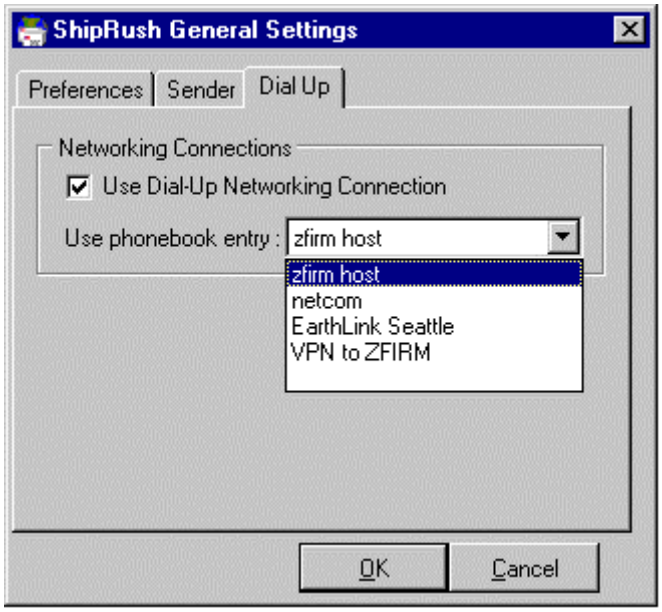
During installation, you selected either a network or dial-up networking connection to the internet. This can be changed at any time. For example, normally you may run your laptop in the office on the network, but from home use dial up networking. To change this setting, follow these steps:

1. On the Windows System Tray, click on the ShipRush icon:


2. From the pop-up menu, select Settings | General:




3. In the Dial Up tab, select the desired dial up networking connection, or uncheck 'Use Dial-Up Networking' to enable a network connection to the internet.




# Signature Release

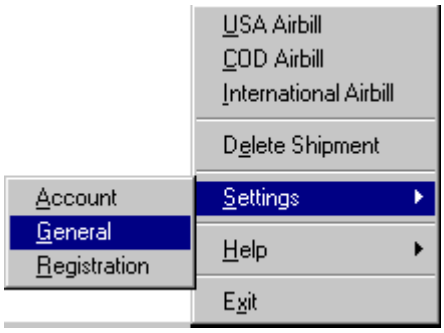
If you want the FedEx courier to deliver your packages without requiring a signature of the recipient, you must have a Signature Release form signed and on file at FedEx. Once this is done, you will have a Signature Release Authorization Number from FedEx.

When this number is entered into ShipRush, it will enable the Release Signature checkbox on the airbill.

If you have a Signature Release Authorization Number, it can be entered into ShipRush as follows:

1. On the Windows System Tray, click on the ShipRush icon:


2. From the pop-up menu, select Settings | General:




3. In the Sender tab, enter your Signature Release Authorization Number.

# Other Options

Other configuration options can be found in the Settings | General | Preferences area.

# Automating your Office with ShipRush

# Enclosure Codes

ShipRush lets you automate your office in new ways. When you use ShipRush, you can populate the Billing Reference field with enclosure codes. These enclosure codes will print on the FedEx shipping label.

The enclosure code will print on the shipping label above the barcode on the REF: line.

A useful application of this feature is to print the label on a printer in the mail room or reception area. The front office staff can look at the REF line and know what to stuff in the package. This streamlines the shipping process and enhances the efficiency of your office.

# Troubleshooting ShipRush

# Installation Errors

**Error during Unpacking ShipRush, or the unpacking process just disappears in-progress**

This means that the TEMP directory needs to be cleaned out. Please take these steps:

1. Close all applications, including system tray applications.
2. On the PC, use Explorer or File Manager to find either the c:\temp\ or c:\windows\temp\ directories (or both).
3. From the TEMP directories, delete the following:
4. Directories that start with a tilde (~) character (e.g. ~pft…, ~is…, etc.)
    - Files that have a .TMP extension
    - Files with a size of 0 bytes

Now retry the installation.

**Error: Uninstaller Failed to Initialize….**

This is benign, and can be ignored.

### Error during Registration: Error communicating with the FedEx Servers

Wait a few minutes and retry the registration (the installer will give you this option)

# No ShipRush Icon or Menu Selection

ShipRush automatically adds itself to the menu of GoldMine, and to the toolbar of ACT!2000 and Outlook. These applications need to be restarted after ShipRush has run once for the ShipRush selection to show up.

ACTv4 users need to manually add a menu option for ShipRush.

# Timeout Errors

In most cases, this simply indicates a transient network problem. Simply re-try the shipping operation.

# Reinstalling ShipRush

If ShipRush needs to be reinstalled, just run the installer. Note that the FedEx Registration screen will not be shown. This is only done once on a PC.

# Technical Discussions

# Supported Internet Connections

ShipRush works with both dedicated and dial up internet connections. The vast majority of internet connections will work with ShipRush. There are only a few types of connections that are problematic. This section documents the connectivity requirements of ShipRush.

## Dedicated Internet Connections

Dedicated connections come in many flavors. 'Home' type connections (e.g. DSL & Cable Modem) should work fine. Business connections need to support the following kinds of connections to the internet:

- http and https
- ftp upload and download (during installation)

## Firewalls & Proxy Servers

Supported firewalls and proxy servers include:

- NAT (Linux, Cisco, Flowpoint, and many other devices support NAT).
- Linux IP Masquerade (another name for NAT in most cases).
- Microsoft Proxy Server in IPX to IP mode.
- 'Transparent' proxy servers (e.g. proxy servers that do not require a proxy configuration set in the web browser).
- Standard http proxy servers, with our without plain text authentication (the Microsoft Proxy Server can also operate in this mode).

---

A general rule of thumb is: If the network connection is 'transparent' (e.g. no special proxy settings are needed in the web browser), and outbound connections are allowed on the standard tcpip ports for http, https, and ftp, then it should work fine.

### Dial Up Internet Connections

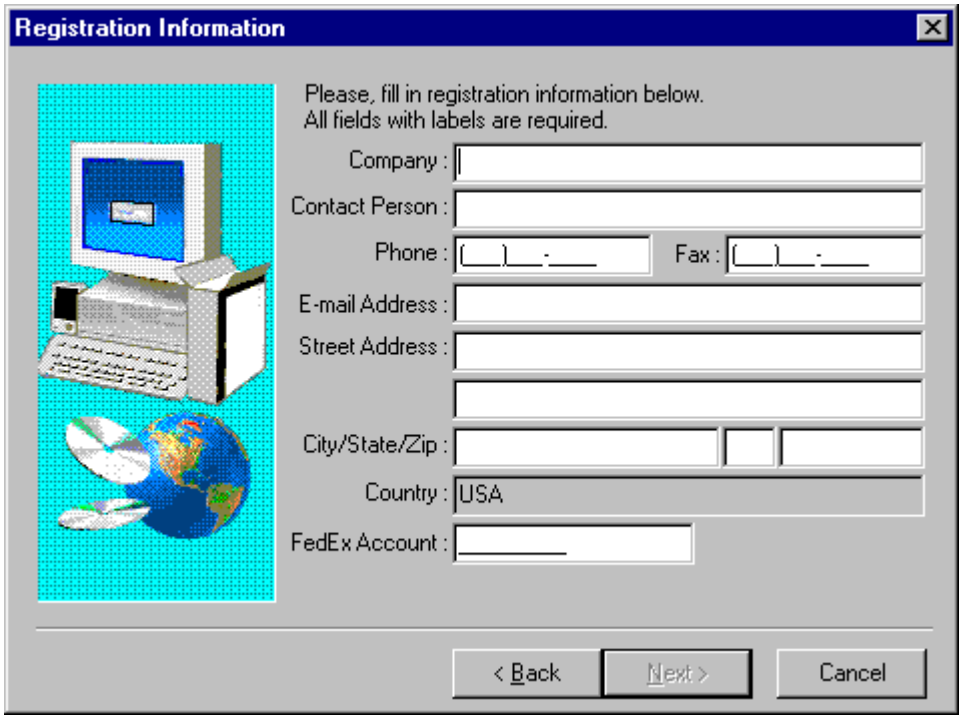
Standard ISP dial up accounts are fully supported. Examples of standard ISPs include Earthlink, Netcom, and hundreds of other national and local ISPs. To use a dial up network connection to the Internet, the dial up account should be configured and tested in Windows before installing ShipRush. Further, it is recommended that the configuration include the dial up networking password, so that the connection can be completely automatic.

### Other Devices

ISDN is supported as long as it works either 'transparently' (e.g. the internet connection is initiated by the ISDN hardware automatically when there is internet traffic), or as part of Windows dial up networking. Transparent ISDN connections are considered a dedicated connection to the internet.

# FedEx Account Details

Any valid FedEx account can be used with FaxRush. During ShipRush setup, a Registration Information screen is presented, which will request your address and FedEx account.



**The address used on this screen will be your ship-from address**. The city/state/zip must be the same as the address registered to the FedEx account. The other address details (e.g. street address, contact name) can be specific to the person using ShipRush and do not need to match the details on file at FedEx.

**Currently, only USA based users can use ShipRush**. Shipments can be sent anywhere in the world, but must originate in the USA. This should change later in 2000. Watch the Z-Firm LLC Web site for news (http://www.zfirmllc.com)

To establish an account, contact FedEx at: 1-800-GOFEDEX or at http://www.fedex.com

# FedEx Automation for the FaxRush Server

# Introduction

### FedEx Module for FaxRush

The FedEx Module for FaxRush allows the FaxRush Office Automation Server to process FedEx Shipments. The FaxRush Server has these key features:

- Zero-client footprint. Users just need SalesLogix or GoldMine.
- Nothing new to learn. Users just use the contact manager.
- No need to monitor other applications. All the activity is logged right in the Contact Manager.
- Accessible to remote users. Remote laptops that sync can use the central FaxRush Server.
- Drive-able from Automated Processes. Trigger shipments as part of an automated selling cycle.
- %100 integration with the Contact Manager.
- Ability to merge data from various database tables.
- Supports an unlimited number of network printers, with the ability to direct print jobs and shipping labels to desired printers job-by-job.

With the FedEx Module for FaxRush, shipments can be triggered in the following ways:

Scheduling activities in the contact manager to the desired printer.

One-click scheduling with macro buttons (and VBA in SalesLogix).

Automated Processes can trigger shipments, including enclosure codes.

End-user custom code (add ons to GoldMine, VBA in SalesLogix) can easily trigger shipments.

## System Requirements

- FaxRush 4.51 or higher Server up and running.
- Dedicated Internet Connection See Supported Internet Connections.
- Reliable internet access from the FaxRush Server PC.
- One or more laser printers (local or network) configured for printing from FaxRush.
- FaxRush license that includes FedEx support (additional cost for existing FaxRush users)
- FedEx account
- Windows NT recommended on the FaxRush Server PC.

## The Software License

The FedEx Module for FaxRush includes a license to install ShipRush on the FaxRush Server PC and on all PC's serviced by the FaxRush Server.

For example, ACME Corp. has 50 PC's. ACME has a 25 user SalesLogix license, and purchases a 25 user ShipRush license.

This license allows the FaxRush Server with FedEx to be installed to service SalesLogix. ShipRush can be installed on the 25 PC's that run SalesLogix. ShipRush cannot be installed on the other 25 PC's. An additional ShipRush license must be purchased for the other users.

# Concepts

## Template Driven Shipping

**Please Note**: Template driven shipping is a subject for advanced system administrators and consultants. Z-Firm does not support the planning or preparation of the business procedures necessary to implement template shipping.

Template based shipping means that the parameters of the shipment are pre-defined. For example, a template might specify that a shipment will be a box that weighs 5 LBS and will be shipped via Standard Overnight service. This template would be placed in the FaxRush \outfax\ directory and would then be available for FaxRush to use to process shipments.

There is no limit to the number of templates. Templates can include enclosure codes to print on the shipping label to direct the mail room on what to put in the package.

Template driven shipping has these benefits:

- One click from the contact manager.

- Triggered from automated processes
- Can be triggered by remote users who sync for fulfillment by the central mail room.

Additionally, FaxRush has certain advanced features to enable template-driven shipping:

- Override COD amount at run time. COD amounts can be specified in the activity, overriding the settings in the template.
- Set the enclosure codes/billing reference at run time. The Billing Ref field from ShipRush can be populated in the template, or left blank in the template and fed from the FaxRush &FXREF field. This allows the enclosure list to be built dynamically and set in the contact manager.

Template driven shipping is not appropriate for ad-hoc shipping (e.g. when the types of shipments cannot be predicted). For ad-hoc shipping, use ShipRush. Many organizations will find that ShipRush is useful for certain users who do a lot of ad hoc shipping, and their main 'line of business' operations can be automated with template driven shipping.

Template driven shipping requires planning. The planning should include:

- Asses shipping service needs (Priority, Standard, etc.)
- Build sample kits and weigh them packed and ready-to-ship.
- List required shipping parameters (e.g. declared value)
- Create a matrix of all the needed templates

The implementation phase would look as follows:

- Create the templates in ShipRush
- Test each template by scheduling interactively in the contact manager.
    - Confirm that the output is as desired.
    - Delete these shipments from a copy of ShipRush running on the FaxRush Server.
- Create macro buttons, automated process tracks, etc. as needed.
- Implement the new processes for some percentage of the fulfillment operation for a pilot.
- After the pilot period, evaluate, tune as needed.
- Turn on the new system for all fulfillment.

## Process Selling with Automated Fulfillment

Process selling involves all kinds of customer contact:

- Phone calls
- Letters
- Email messages
- Product literature

- Fax notes and brochures
- Product samples, updates, and replacements

FaxRush has long been used for fax and print automation for process selling. Always a great mail room automation server, FaxRush can now automate FedEx shipping.

For example, an automated process sales track might do this:

1. New prospect, large potential?
2. If large, schedule a phone call for a rep
3. Did the rep make contact?
4. If yes, is the prospect tagged as hot/warm/cold by the rep?
5. If hot, trigger PROS_SAMPLE.FRP to the laser printer in the mail room via FaxRush

PROS_SAMPLE.FRP is a FedEx box, 3 lbs, Std Overnight, that includes a full catalog, a video, and two product samples.

Notice how the process did all the evaluation work to decide what to do with the prospect. The rep only had to make the call that appeared on the call list in the contact manager. At the end of the call, the rep populated the Interest Level field in the contact manager, and the process did the rest. The mailroom clerk had to stuff the box and put on the label.

## Mail Room Automation

Firms that send have many different brochures, demo videos, etc. can use template driven automation very effectively. One way to do this is as follows:

In the mail room, organize the literature into cubbies labeled A1, A2, B1, B2, etc.

Create a mechanism for users to easily select desired literature by friendly name in the contact manager (in SalesLogix, this could be a custom pick list or form, in GoldMine, a toolbar solution or SalesMagic is ideal for this).

The shipping label prints with enclosure codes in place (e.g. B1, A2). The mail room clerk simply pulls, stuffs, and sends.

This automation has many advantages over the alternative:

- Minimal labor by sales rep. Keep the reps selling, not stuffing!
- Efficient mail room operation.
- No airbill to fill out.
- No errors transcribing the address.
- The activity is clearly logged in the contact manager.
- Tracking information is available to everyone in the workgroup.

## Opening the Mail Room to Remote Users

Mobile sales reps sometimes have the worst of all worlds. Lacking support staff, they still must keep a steady stream of communication with the customer and prospect. The FaxRush automation has always offered the remote users access to the central office fax server and mail merge/mailing label automation server. Now remote users can get all the advantages of mail room automation ( as described above ), without installing any software on their local PC. The remote user just schedules and syncs using GoldMine or SalesLogix sync.

# Installing FedEx Support for FaxRush

## Checking The Internet Connection

Before installing ShipRush, test the internet connection from the FaxRush Server PC:

3. Start the web browser
4. Browse to www.zfirmllc.com

   If this is successful, continue:

   Find out if a proxy server is used for http traffic. The proxy server will have two configuration items needed for installation.:

- Name or address
- Port
- (userid/password are optional, and not used on the majority of proxy servers)

   For example, your system administrator might tell you that the proxy address is **192.168.124.11** and the port is **3128**.

   **There are three ways to find this information:**

4. Ask your network administrator or IS department for the information.
5. Look in your web browser. Internet Explorer users click here. Netscape users, click here.
6. Ball park that you do not need to explicitly set this up (many proxy servers, such as Linux IP Masquerade, and NAT solutions are 'transparent' and do not require proxy configuration in desktop applications). When the ShipRush installer asks for the internet connection method, simply leave the 'Proxy' check box unchecked.

   For a detailed discussion of internet connection methods, click here.

## Setting up Printing in FaxRush

(For full documentation on the FaxRush Server, please see the FaxRush manual.)

1. Install the printer driver on the FaxRush PC.
2. Open Notepad and test printing to the printer.
3. In the contact manager, set up the virtual user.
4. Start FaxRush
5. Go to Settings | General | Users | Output
6. Select the printer driver created above from the Devices list.
7. Select the virtual user from the list on the right.
8. Press Set user

Now test from the contact manager. With FaxRush running and active, go to a test contact record. Schedule an activity with a reference of TEST.TIF to the virtual user. The FaxRush test page should come out of the printer.

## Install FedEx Support

The FedEx Module can be downloaded from the internet, or found on the FaxRush CDROM. The installer has the long name: FedEx_Support_for_FaxRush.exe On the FaxRush PC, please perform these steps:

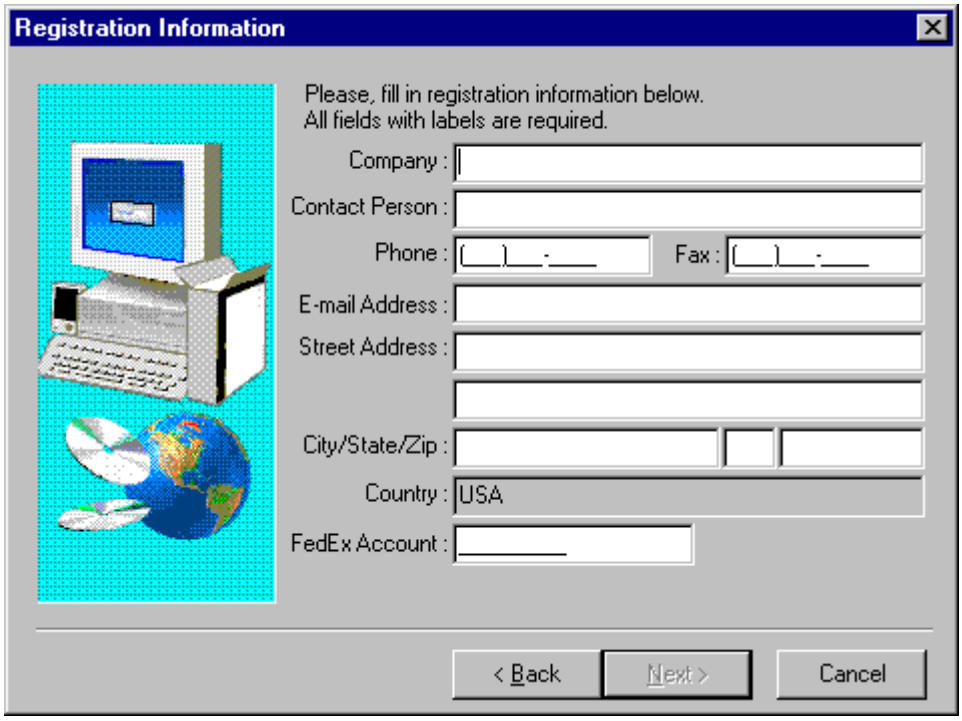
This PC should already have a working FaxRush installation, tested as discussed above

The FedEx-enabled serial number has been entered into FaxRush. Verify this by going to Help | About | Licensing, as shown below. Notice that in Special Features it specifies FedEx. If this is not displayed, go no further and contact your reseller or Z-Firm LLC:

Close all applications, including system tray applications.

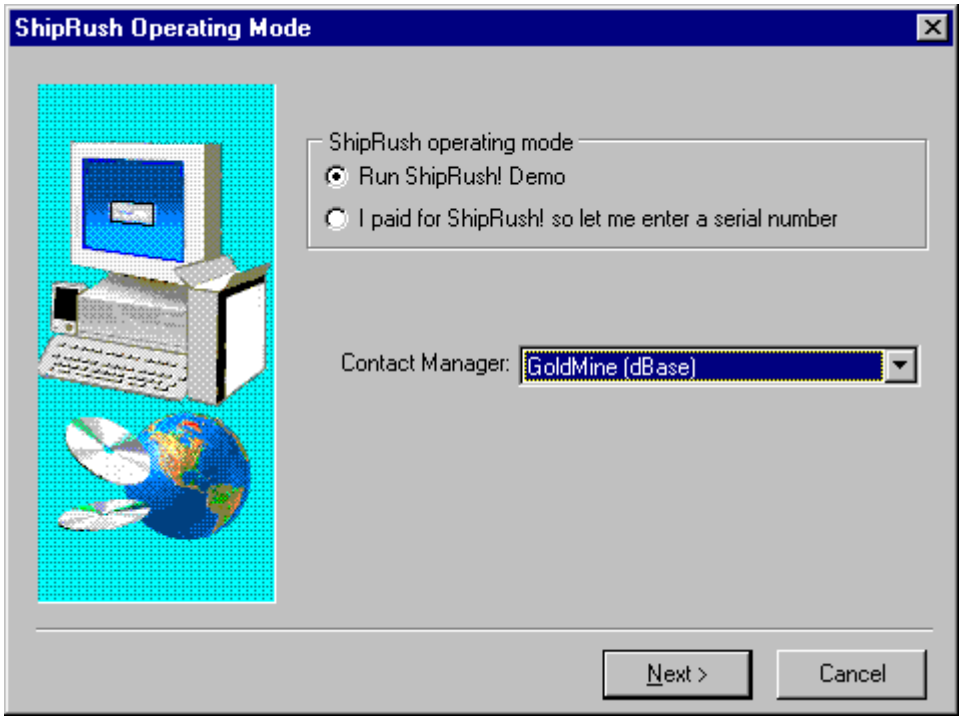
Run the FedEx_Support_for_FaxRush.exe file.

The initial screens of the installer will guide you through the license agreements, and standard options. It is important to fill in the registration information page correctly:

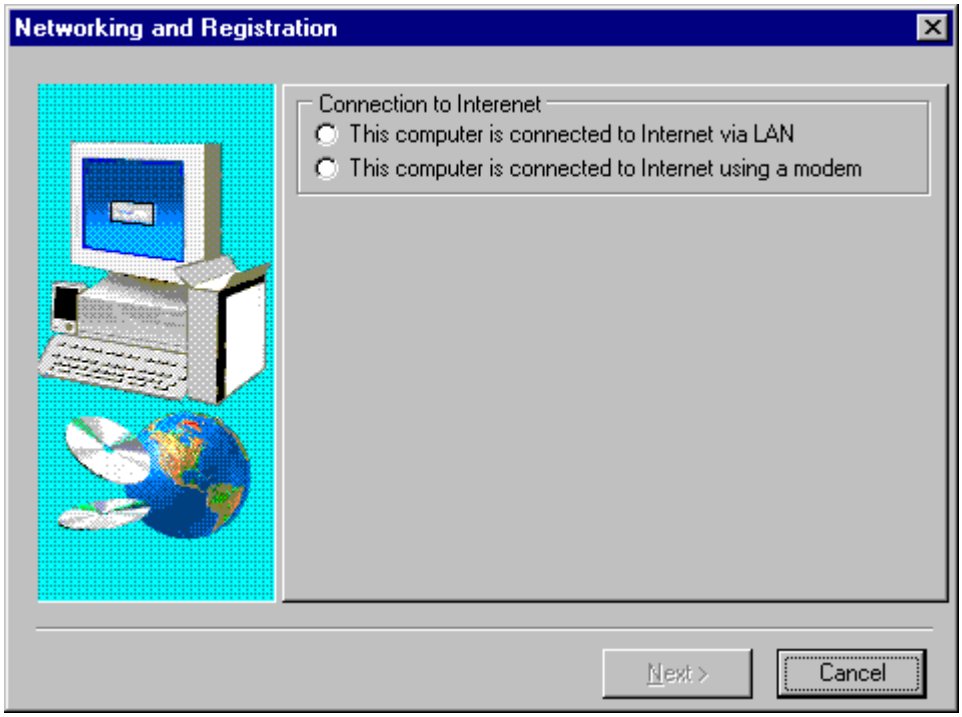



The address entered here is your FedEx Ship-From address. All other fields must be entered correctly or registration will fail.

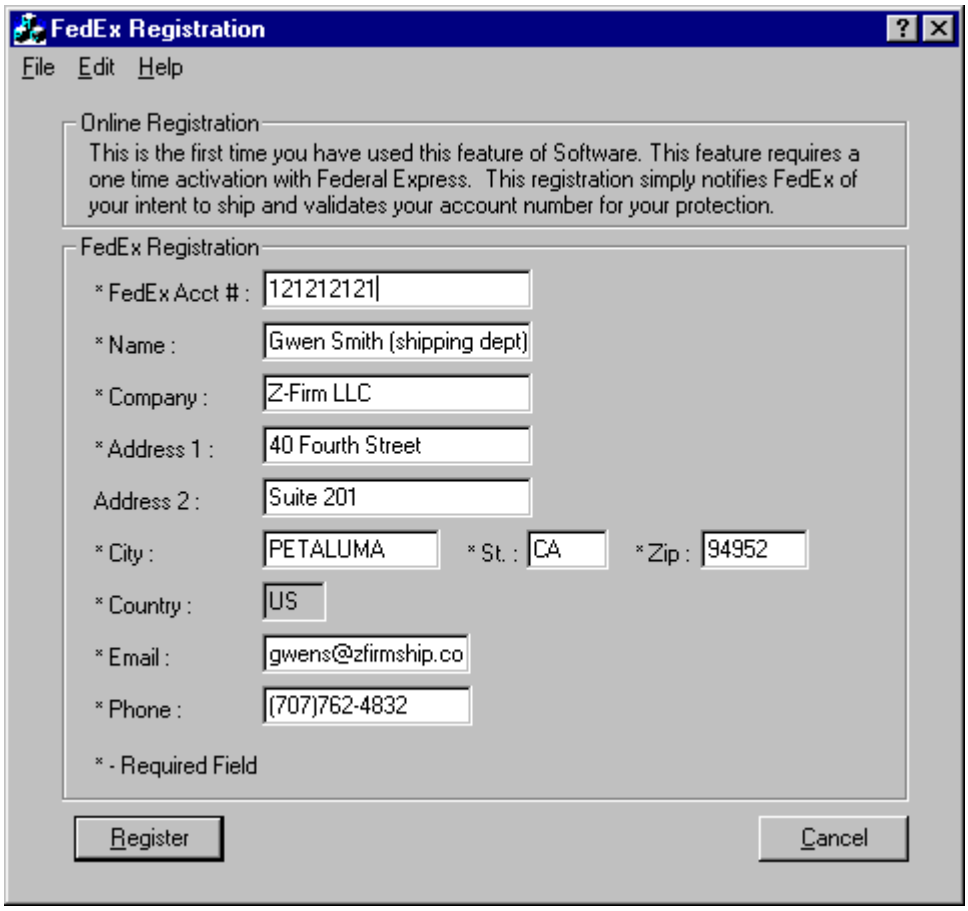
Next, select the option to enter your ShipRush Serial Number. This will allow ShipRush to run on the FaxRush Server.



Networking & Registration first asks you to specify the internet connection as network or dialup. FaxRush Servers must use dedicated internet connections. If the network uses a proxy server, you will use that information now. For more information on internet connection types, click here.




The last screen of import is the FedEx Registration screen. All the information should be pre-populated. Just press the Register button. After a few moments, this screen should disappear and you will be done with the installation!




Installation Troubleshooting

## Test the System

Activate FaxRush and run a test FedEx transaction. The easiest way to do this is:

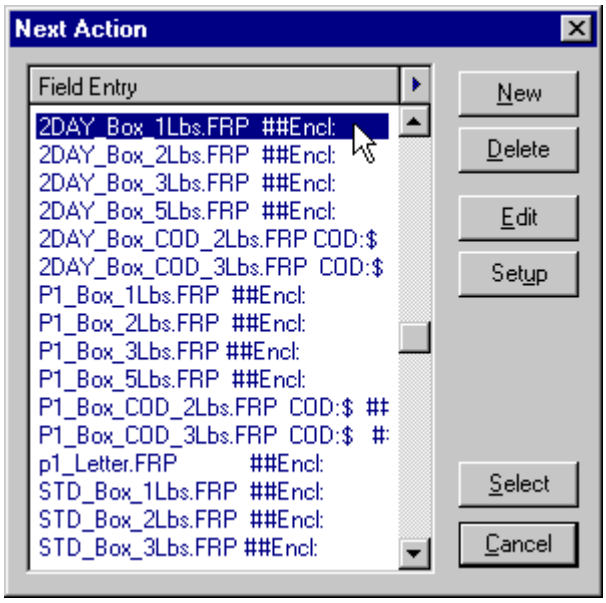
- Copy p1_Letter.FRP from \outfax\fedex_samples\ to \outfax\
- Schedule p1_Letter.FRP in the contact manager for the laser printer
- After a minute or two, the shipping label should come out of the printer, and the history record will be in the contact manager.
- Now start ShipRush on the FaxRush Server PC and enter the tracking number to delete the shipment.

# Using the FedEx Module for FaxRush

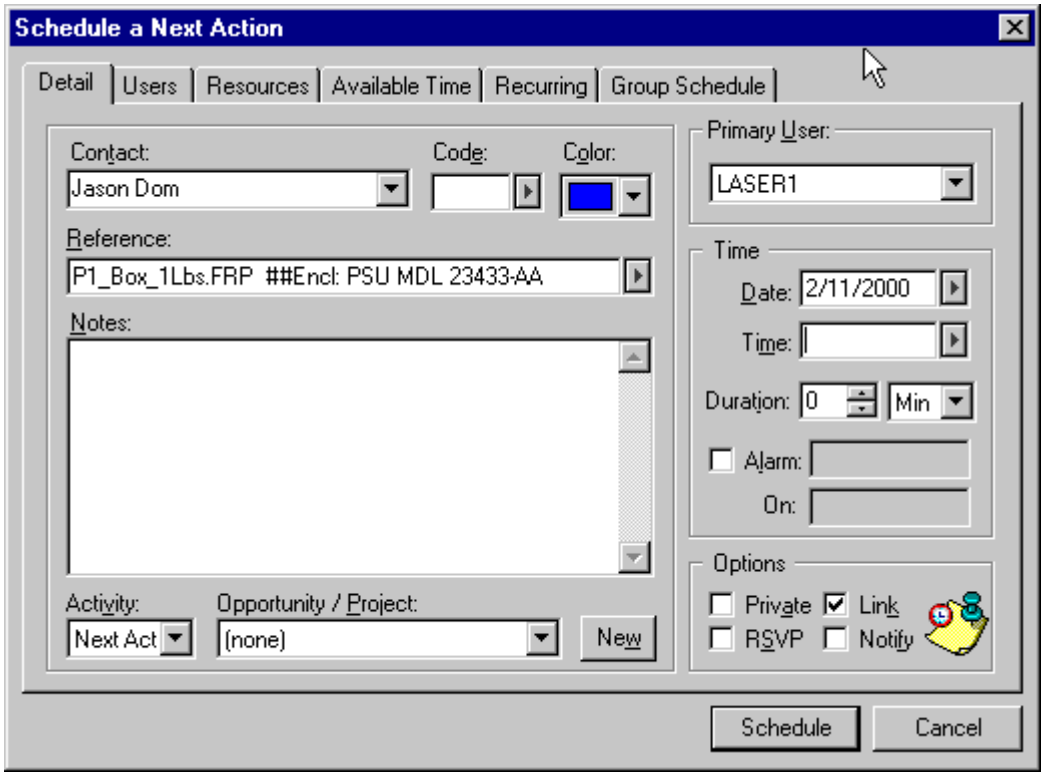
## GoldMine Users

### Scheduling Activities

This basic functionality is easy to set up. One the needed templates are in \outfax\, add these file names to the F2 lookup list on a GoldMine activity type. Any activity type can be used (Other Action, Next Action, Call, Appointment).




Just schedule to the printer as shown:




The history record in GoldMine then looks like this:

--======= RESULT =======--
To track your FedEx® shipment, click the following URL:
www.fedex.com/cgi-bin/track_it?trk_num=792559861010&dest_cntry=AD&ship_date=031000
Ship domestic Pri OvNght YPck
Tracking #: 792559861010
Courtesy estimate of charges: $22.25
FedEx transaction successful
Fedex shipping label printed on LASER1
--======= USERNOTES =======--

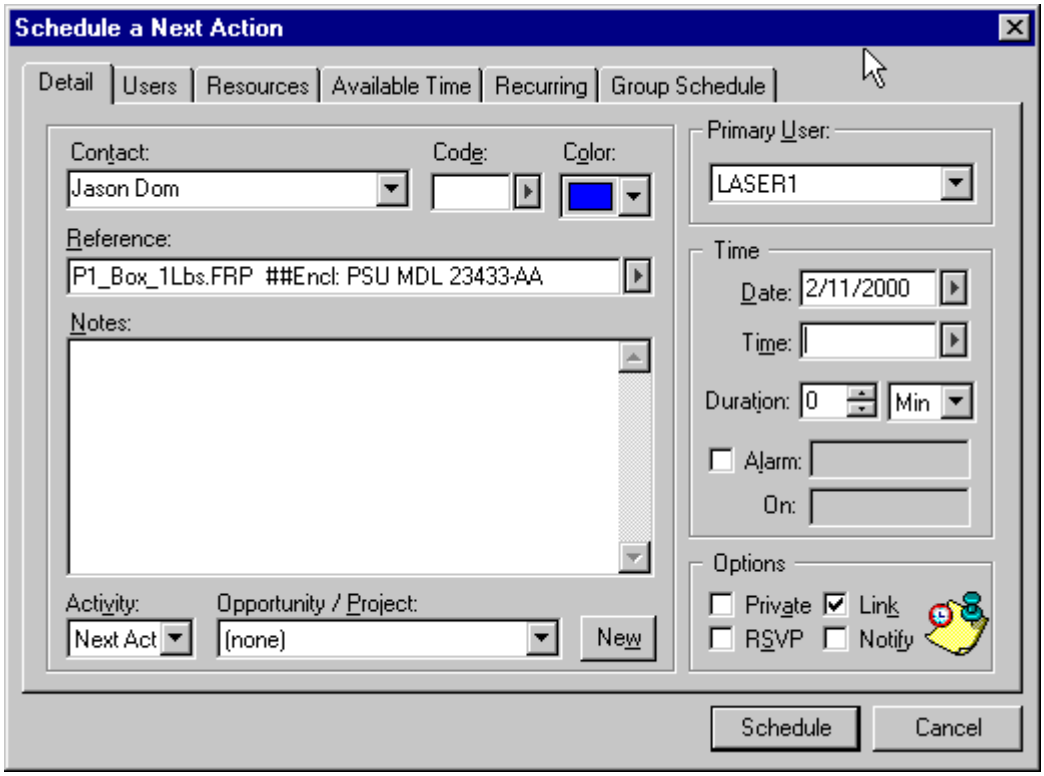
## Macro Buttons

GoldMine macro buttons can make the keystrokes needed for scheduling into a single button click. See the GoldMine documentation for more detail.

Other macrobutton tools can also be used. Such as Aim tools (http://www.aimsoft.com)

## Automated Processes

Automated processes can schedule activities. These activities simply need to have the parameters as shown




Also, see Advanced Options for more AP features.

## Reporting on FedEx Shipments

By reporting on the history file, search for the laser printer user and / or the result code created by FaxRush to run reports by day/week/month, by recipient (contact record), or by user.

## Driving Shipments Programatically

Driving Shipments Programatically

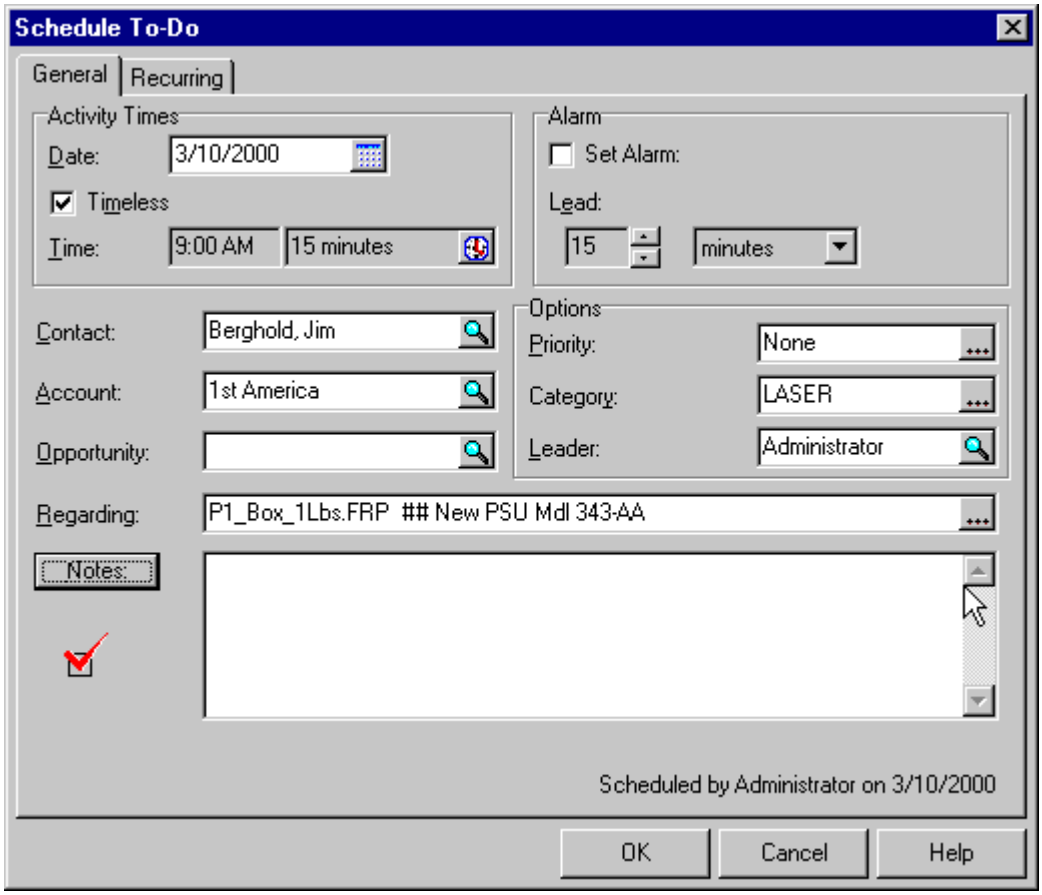
### Triggering a Shipment Programatically

Shipments can be triggered from any application that can interact with GoldMine. This interaction can be via the GoldMine DDE, COM, or DLL interfaces. A qualified programmer will be required to implement such a solution.

To trigger shipments from your applications, the best method is to schedule a shipment as shown in Scheduling Activities. Then write your code to create the same record in GoldMine. FaxRush will grab that job and process the shipment!

## Scheduling Activities

This basic functionality is easy to set up. One the needed templates are in \outfax\, add these file names to the picklist for the Regarding line of ToDo activities. Then schedule as shown:




## Macro Buttons

Macro buttons can trigger a simple VBA script that will create the same activity record as scheduling interactively, as shown above.

## Processes

Automated process tracks can be built to create the scheduled activities as well. Be sure to check the option to not wait for completion on the event.

# Administration & Configuration

## Creating Templates

Templates are text files with the file extension of .FRP (FaxRush Package). When the FedEx Module for FaxRush is installed, several ready-to-use shipping templates are automatically installed into a directory under the \outfax\ directory called \fedex_samples\. These templates can be copied to \outfax\, renamed if desired, and used.

Additional templates can be created to your specification using ShipRush. To create a template, follow these steps:

With GoldMine or SalesLogix running, launch ShipRush.

Set up the airbill with the parameters needed in the template (weight, service, etc.)

in a white are of the form, right-click and select Create Shipping Template as shown below:

Select the target directory and file name. It is best to name the FRP file with a descriptive name that describes the shipping parameters. Long file names are OK, but it is best to avoid spaces in the file name (use an underscore character '_' in place of a space).

# Contacting Z-Firm LLC

## Z-Firm LLC Headquarters

Z-Firm LLC

40 Fourth Street Suite 201

Petaluma, CA 94952

(707) 762-4832

www.zfirmllc.com

# Sales

The sales department can be reached from 8:30 AM to 5:00 PM, Pacific Time.

1-707-762-4832

# Technical Support

ShipRush includes installation support only during the first week after purchase. Technical support is available on the Z-Firm web site, www.zfirmllc.com. If you work with a reseller, then your reseller is the front line of support for your site.

Insert context-sensitive help into this document. It will generate map ID's for the topics that your developer can then link to dialogs, message boxes, and menu items.

# What's new in this release

List the new features for this release, and link to additional information about the features

# Trouble with saving files

Troubleshooting entries should list common problems, both from bugs and from common user errors. For example:

One reason you may have trouble saving files is a lack of free disk space. Check that you do have enough space on your hard drive.

# Z-Firm LLC Web site

http://www.zfirmllc.com

# Advanced Shipping Options

# Reporting on FedEx Shipments

# Driving Shipments from VBA

VBA Scripts can create the needed activity record.  Th

# Requirements

# Reference Materials

# Requirements

# Triggering a Shipment Programatically

# Reference Materials

# Internet Connection

How you connect to the internet. This could be dial up (with dial up networking and a modem), or dedicated (such as DSL, Cable Modem, or T1 line).

# Dedicated internet connections

Such as a cable modem, DSL, or T1 line. ISDN connections that automatically dial when there is internet activity also fall in this category.

# Proxy System Name or Address

The proxy name might be: proxy.acme.com

or just: acmeproxy

The proxy may not have a name, just an address. For example: 192.168.124.11

# IP Port of Proxy Server

This will be a number, usually between two and four digits long. For example: 80

# Finding the Proxy Server on IE5

Go to Tools | Internet Options.

Click on Connections

Select the LAN Settings button

If the checkbox 'Use a proxy server' is selected, you are using a proxy and should note the address and port.

If the checkbox 'Use a proxy server' is not selected, you are not using a proxy, and can continue with the installation.

# Checking for proxy setup in Netscape

Select Edit | Preferences

Click on Advanced

Select Proxies

If Direct Connection is selected, there is no proxy and you can proceed.

If Manual Proxy is selected, press View. Note the Address and Port for the HTTP protocol, as you will need this during ShipRush installation.

If Automatic Proxy is selected, you will need to contact your system administrator.

# Concept: Templated Shipments

Standard shipment configurations (e.g. 2 lb box sent standard overnight) are set up as template files for the FaxRush Server to use. GoldMine and SalesLogix users trigger these standardized shipments within the contact manager environment.

Compare to: Ad Hoc Shipments. ShipRush allows (and requires) the user to set up the shipping parameters on every shipment.

# SalesMagic

An automation front end for GoldMine. http://www.salesmagic.com

# GoldMine & SalesLogix

In GoldMine, go to File | Configure | Users and add a user (e.g. LASER).

In SalesLogix, add a new picklist item for the ToDo Category picklist (e.g. LASER).

In both systems, limit the length of the value to seven characters.

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