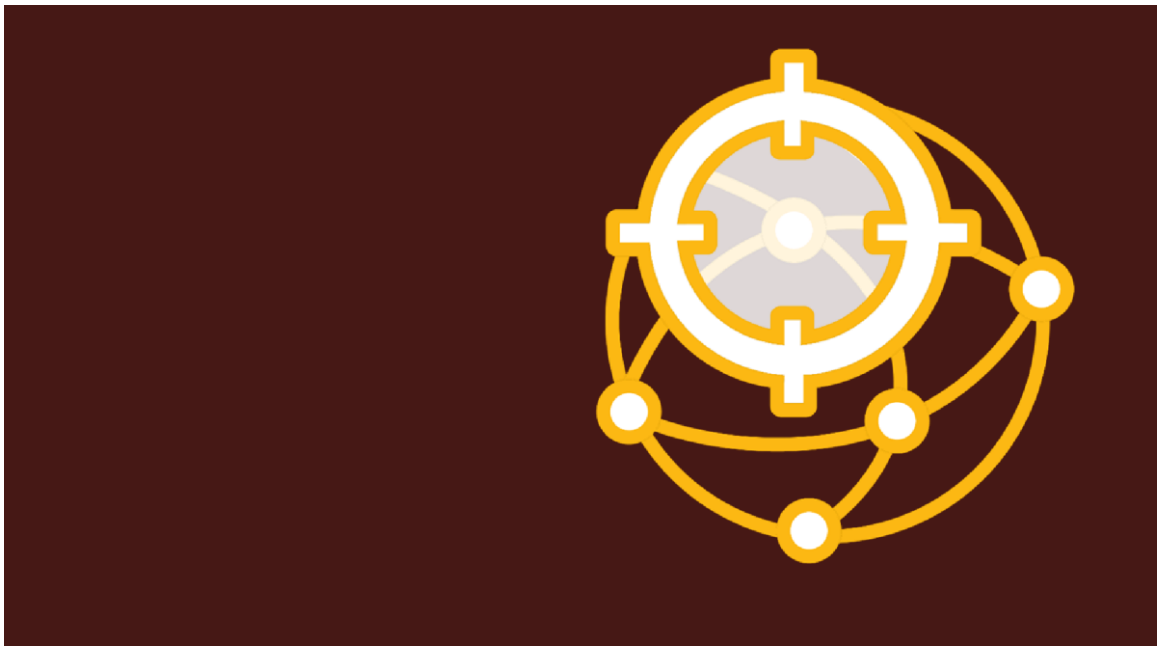
UPS Customer Solutions

ShipExec® UPS® Adapter

OAuth Migration for ShipExec® Software UPS® Adapter

2024



Contents

Introduction 3

Prerequisites 3

Overview 3

Step-by-Step Instructions 4

Configuring Authorization Method at Adapter Level 4

A. Select Authorization Code 6

B. Select Customer Client Credentials 9

C. Select Customer Authorization Code 12

Quick Setup Authorization Method at Shipper Level 15

Configuring Authorization Method at Shipper Level 15

a. Customer Client Credentials 18

b. Customer Authorization Code 21

c. Legacy Authentication 24

Introduction

The objective of this document is to provide end users with the step-by-step instructions to configure the new authorization methods for UPS adapter settings at both adapter level and shipper level.

Prerequisites

To setup the new authorization there are three primary setup considerations

1. A UPS.com new user will need to be created.
2. A UPS.com user will need shipper accounts added.
3. Authorize the UPS.com user in ShipExec or create a Developer App with Client ID Credentials to enter in ShipExec.
   Note: The same UPS.com user can be used for both UPS Adapter and the UPS Tracking Adapter.

Overview

ShipExec allows for two levels of authorization: Adapter and Shipper levels. An adapter level authorization acts as a default for all shipper configured. Shipper level authorizations override an adapter authorization.

If adapter level authorization is not set, then each shipper will need to have the authorization configured.

There are four types of authorization are available at the adapter level:

1. **Authorization Code** – requires a UPS.com user with shipper accounts added.
2. **Customer Client Credentials** – requires a UPS.com user with shipper accounts added and a developer application created. (…integrate UPS Technology into my business)
3. **Customer Authorization Code** – requires a UPS.com user with shipper accounts added and a developer application created. (…integrate with UPS technology to represent many users)
4. **Legacy Authentication** – Not using adapter authorization. Prior versions of ShipExec do not have an adapter authorization.

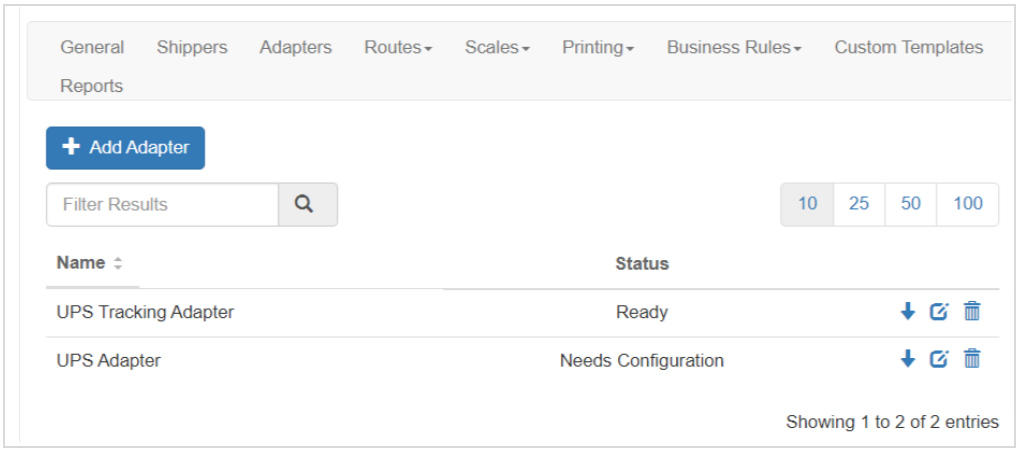
There are four types of authorization are available at the shipper level:

1. **Not Set - Uses Adapter Authorization Option** – Not using a shipper authorization.
2. **Customer Client Credentials** – Requires a UPS.com user with shipper accounts added and a developer application created. (...integrate UPS Technology into my business)
3. **Customer Authorization Code** – Requires a UPS.com user with shipper accounts added and a developer application created. (...integrate with UPS technology to represent many users)
4. **Legacy Authentication** – Will use username, password, and access key that was used prior to migration.

Step-by-Step Instructions

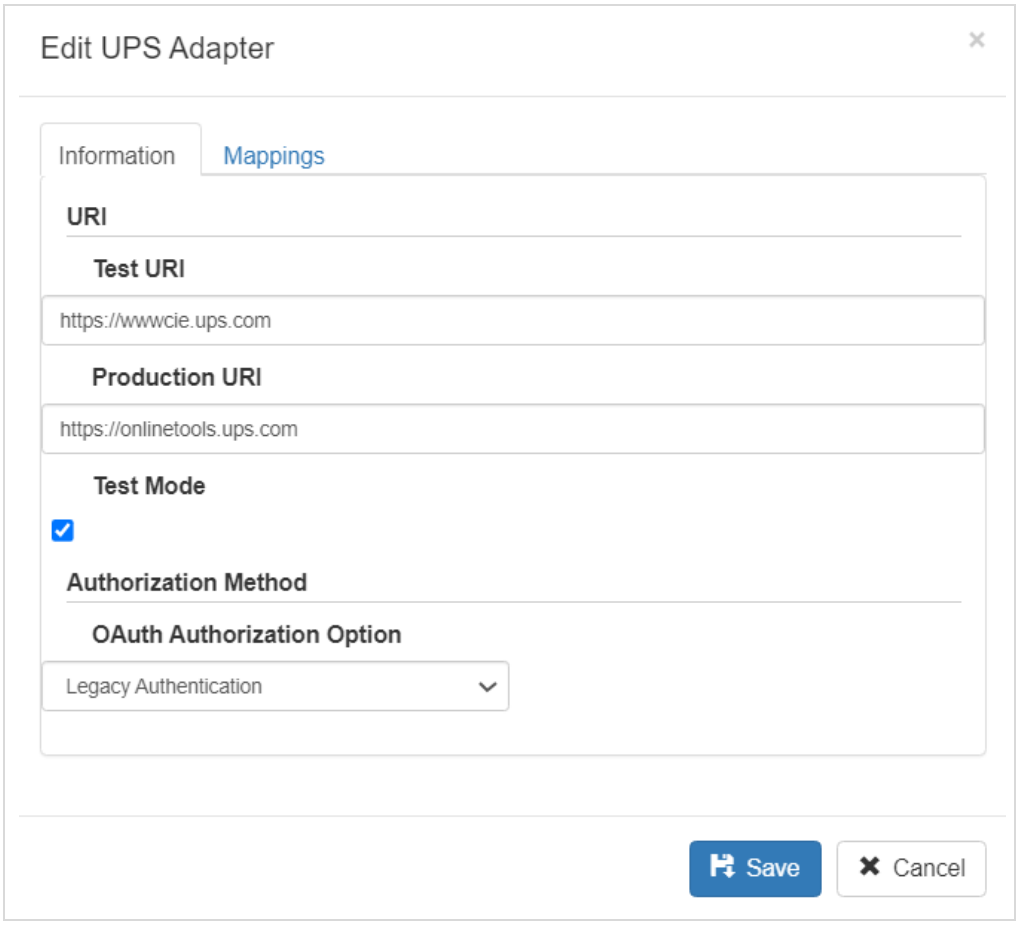
Configuring Authorization Method at Adapter Level

1. Log in to ShipExec Management Studio.
2. Click the **Adapters** tab and ensure you have added the UPS adapter already to the list.



3. Click the **Edit Configuration** icon alongside UPS Adapter.

4. The **URI** section is pre-populated, hence the test and production URIs are pre-defined.
   Note: Do not alter the pre-defined URIs for UPS Adapter.

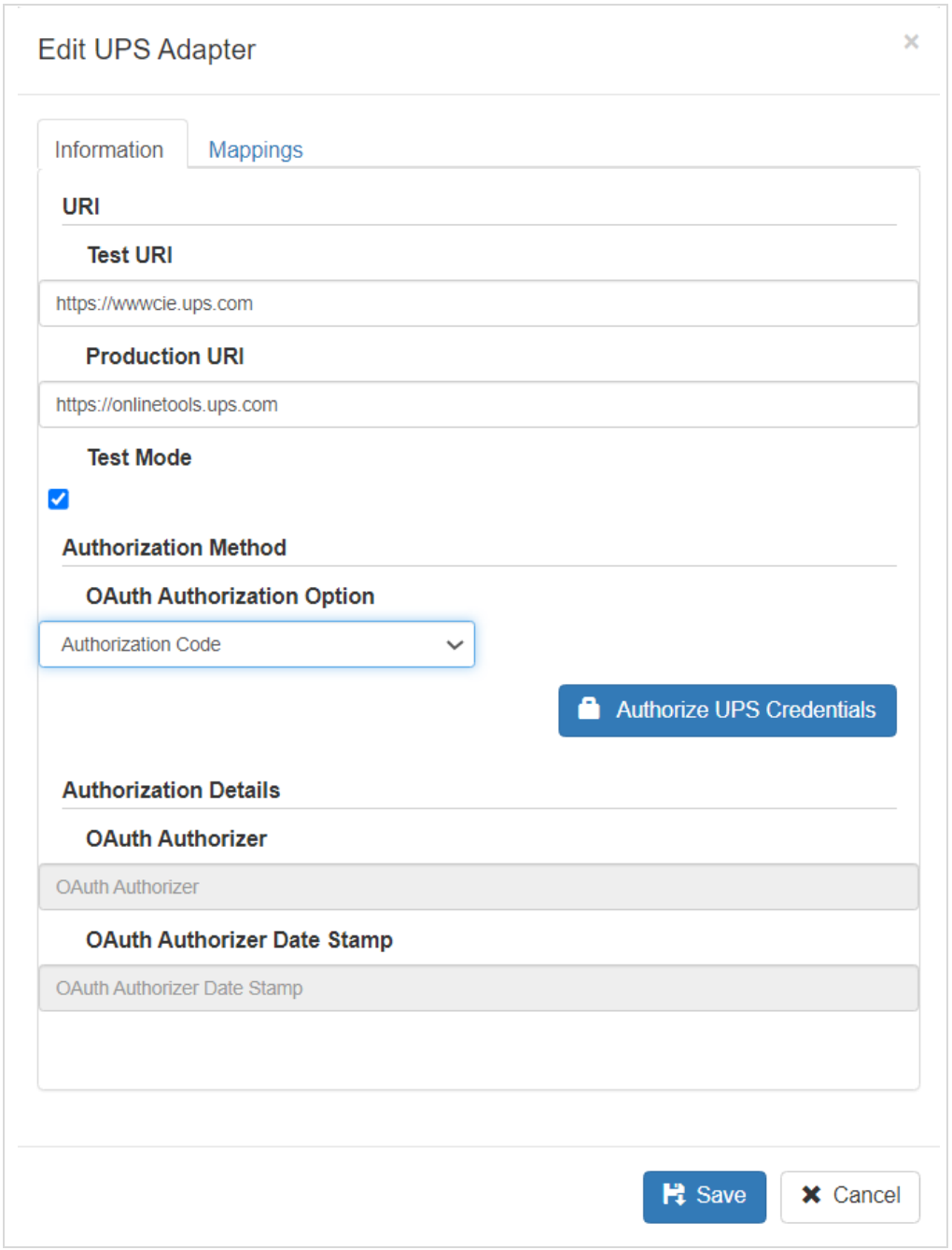


5. Under **Authorization Method**, click the **OAuth Authorization Option** drop-box and select the authorization method of your choice.
6. **Legacy Authentication** is the **default method** selected. Following are the other authorization methods available:
   A. Authorization Code
   B. Customer Client Credentials
   C. Customer Authorization Code

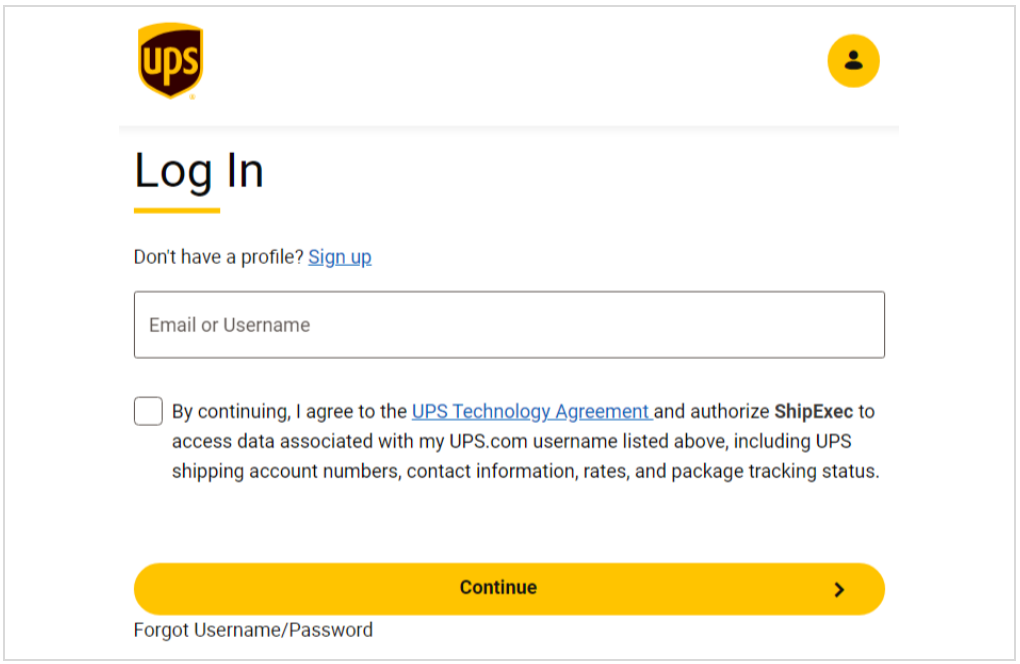
A. Select Authorization Code

Choosing **Authorization Code** will need **UPS Login credentials** to approve it as the authorization method for UPS adapter. Post successful verification, an authorization token will be generated for the session.

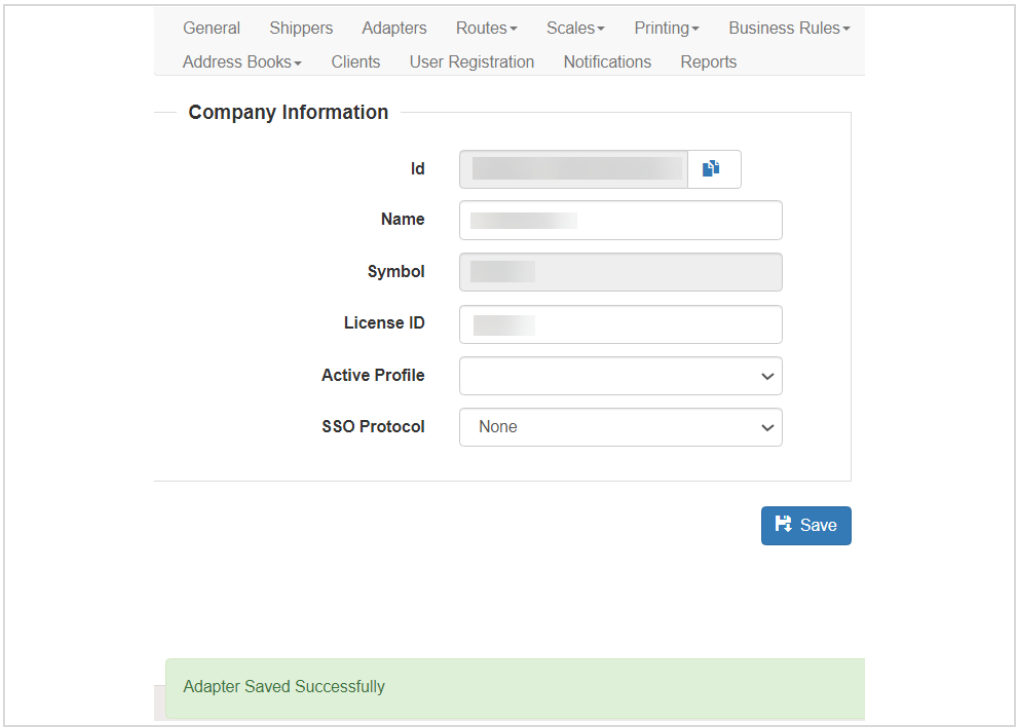
1. Under **the Information** tab, select **Authorization Code** as the authorization method.
   Note: The Test Mode checkbox should be unchecked on production systems.



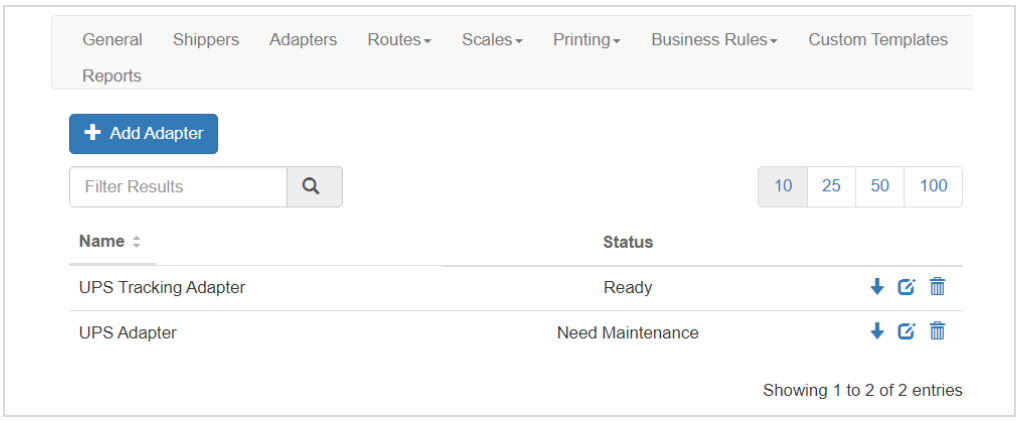
1. Click **Authorize UPS Credentials** and you will be taken to **[UPS Website](#)**, login with your UPS credentials.



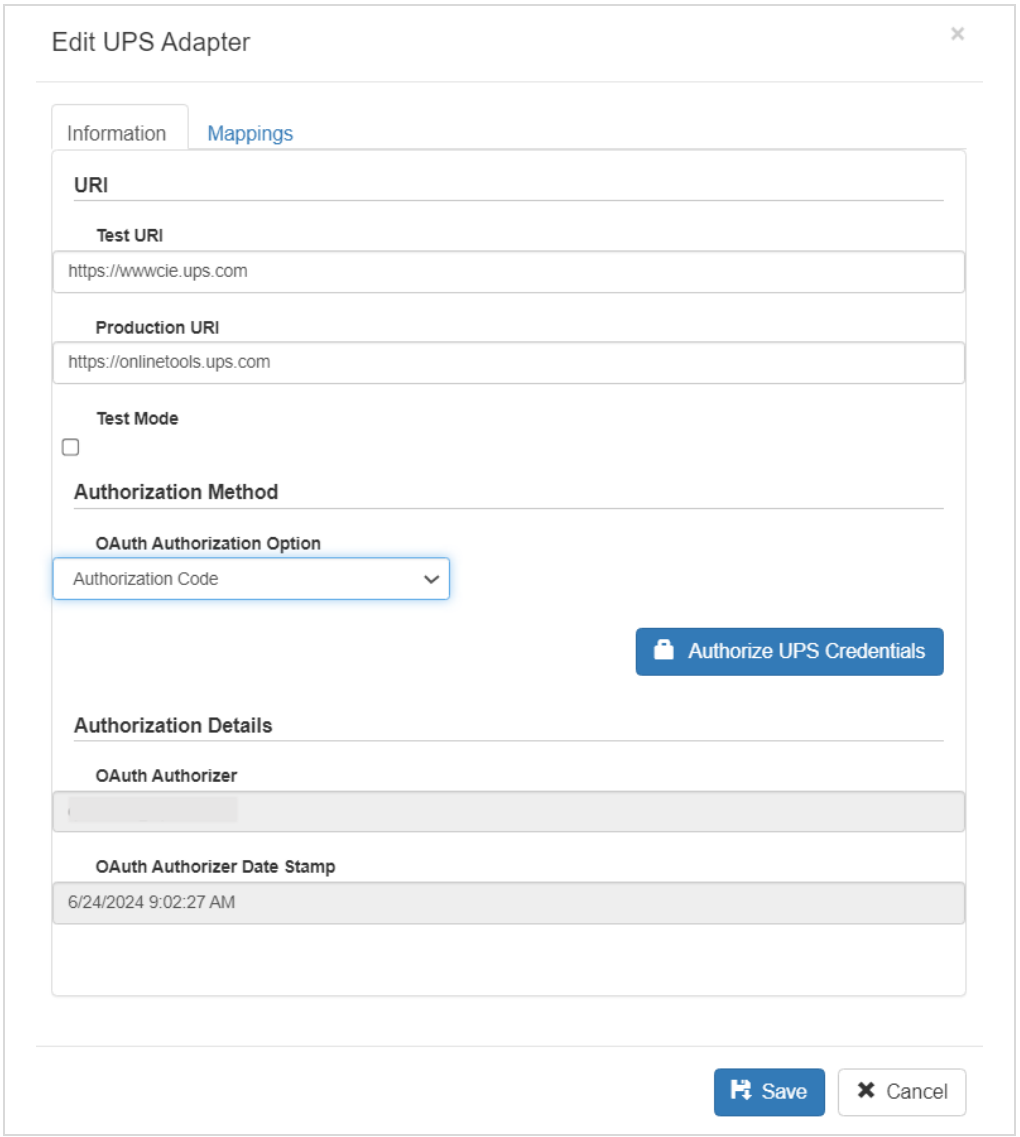
2. On successful authorization, you will get redirected to the Company Information page with the **Success** message.



3. After successful authorization, the **Status** of UPS Adapter will change to **Need Maintenance**.

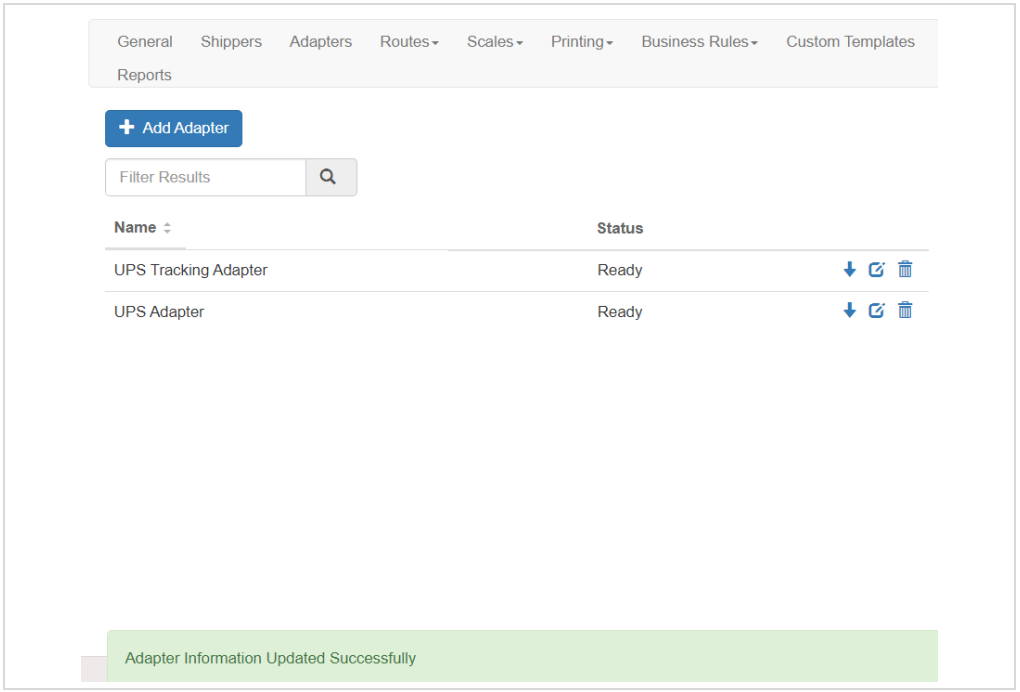


4. After successful authorization, **the Authorization Details** section will populate with authorizer name (the account name used to generate the token) and date stamp (the UTC time at which the token is generated) details.



5. Click **Save**.
6. Go to **Adapters** tab and click on the down arrow alongside **UPS Adapter** for running maintenance, this will update the Adapter Status to **Ready**.

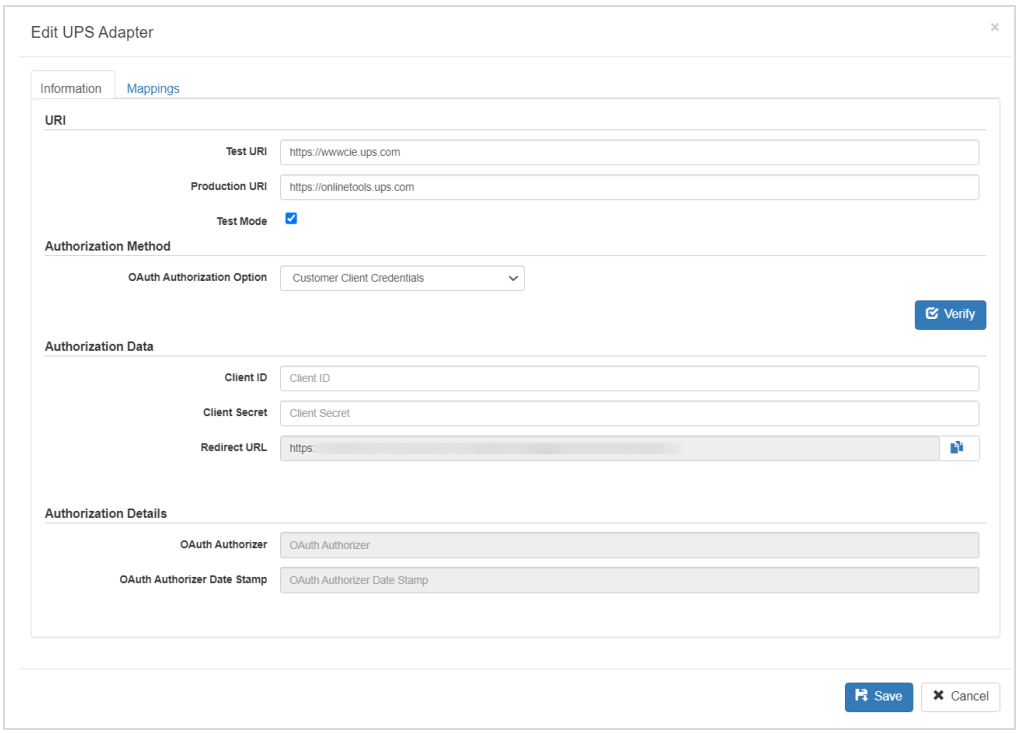
Note: To update the Adapter Status, there should be at least one shipper mapping in the adapter.



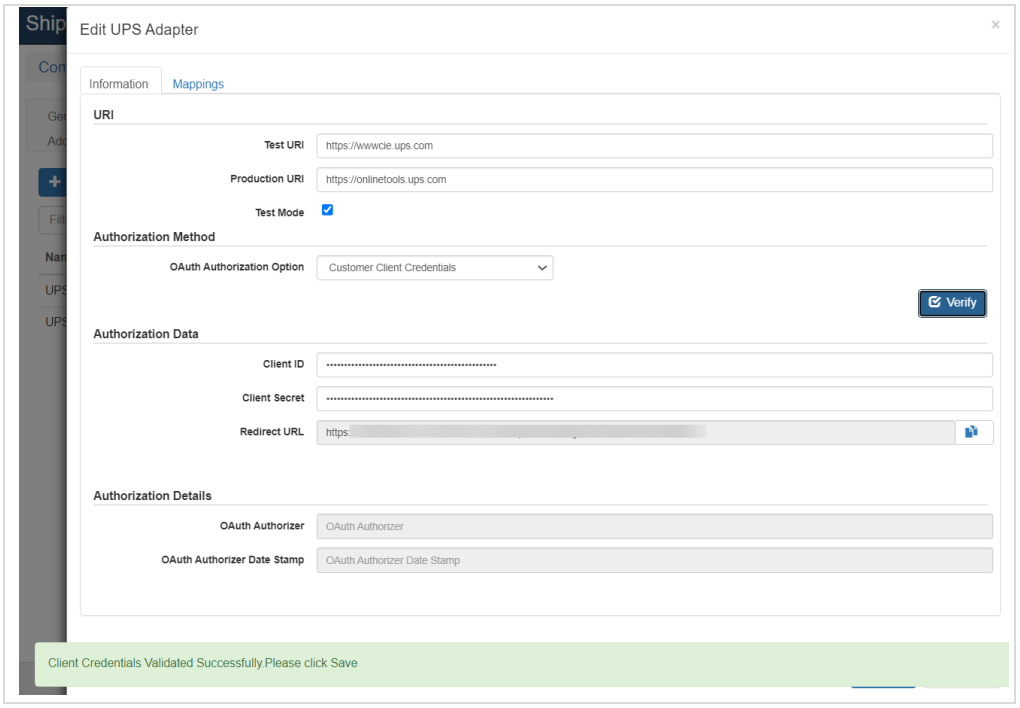
B. Select Customer Client Credentials

Choosing Customer Client Credentials will ask for the app-specific client credentials (client ID and client secret) generated at UPS Developers site. Post successful verification, an authorization token will be generated for the session.

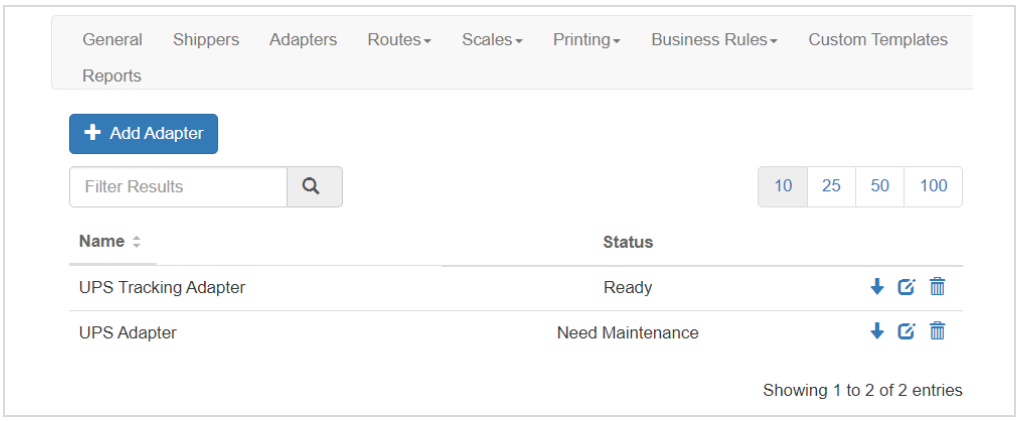
1. Under **the Information** tab, select **Customer Client Credentials** as the authorization method.



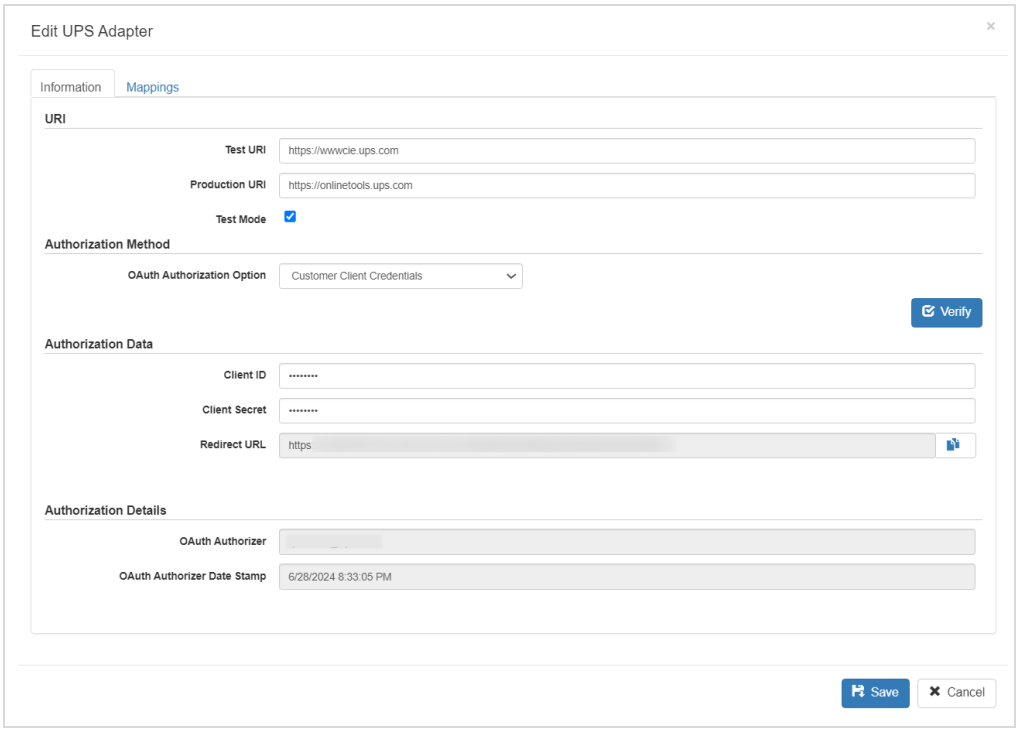
2. Enter the Client ID and Client Secret generated at [UPS Developers site](), click **Verify**.
3. On successful validation, you will get the **Success** message. Click **Save**.



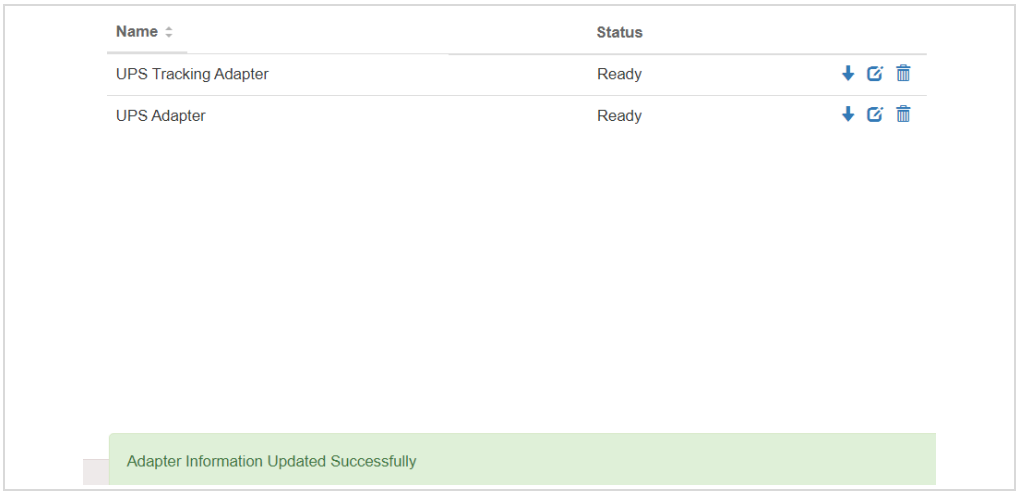
4. On saving the verified credentials, the Status of UPS Adapter will show as **Need Maintenance**.



5. Also, on saving the verified credentials, **Authorization Details** section will populate with authorizer name (the account name used to generate the token) and date stamp (the UTC time at which the token is generated) details.



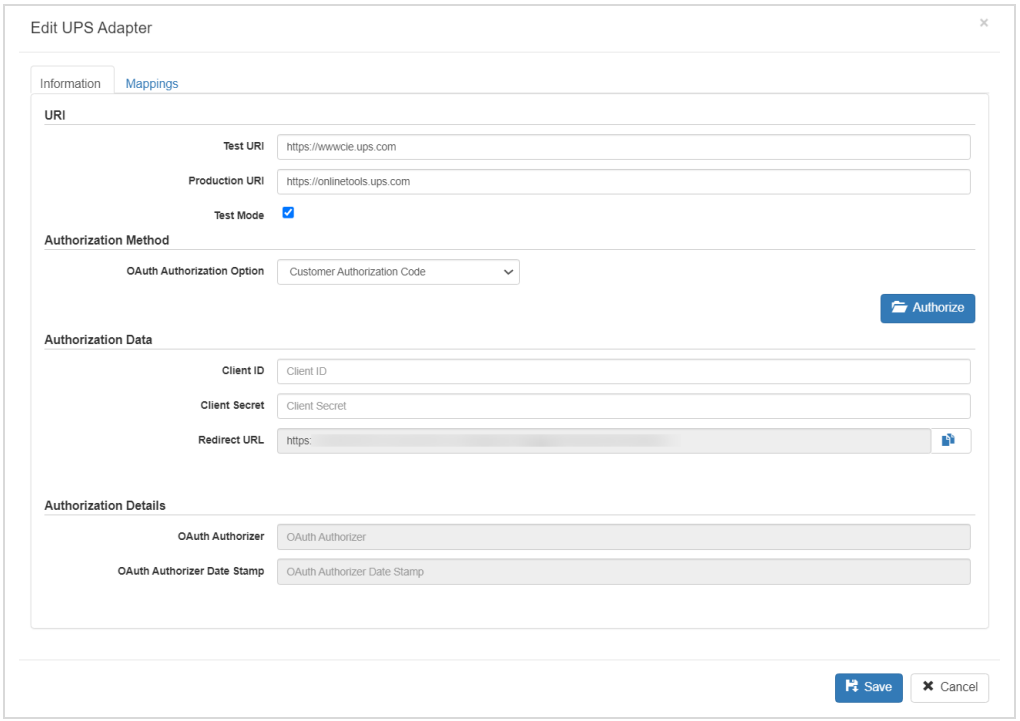
6. Go to **Adapters** tab and click on the down arrow alongside **UPS Adapter** for running maintenance, this will update the Adapter Status to **Ready**.
   Note: To update the Adapter status, there should be at least one shipper mapping in the adapter.



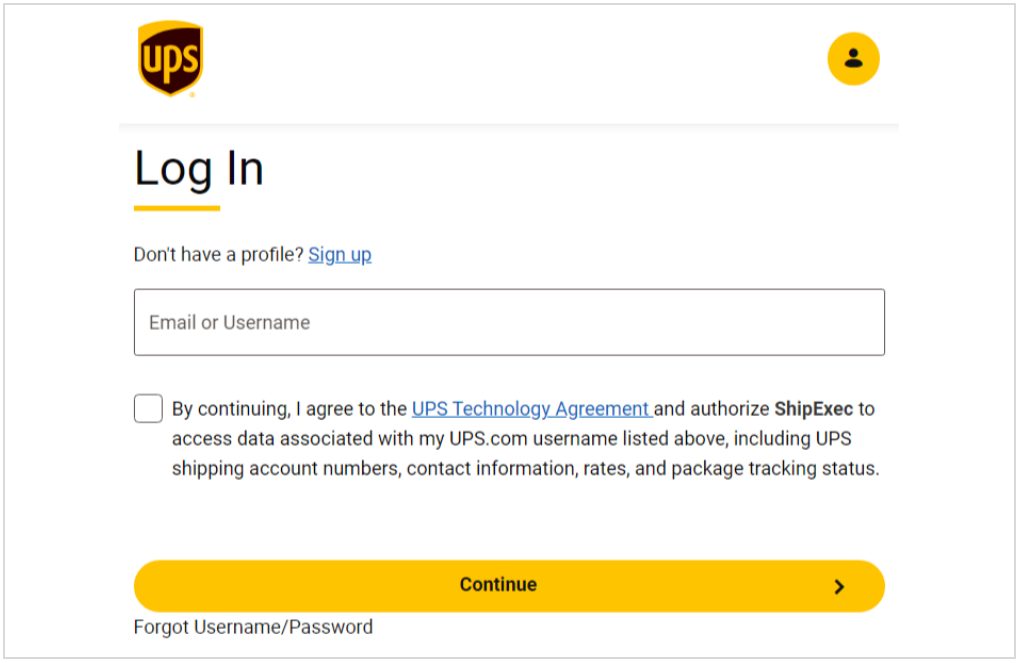
C. Select Customer Authorization Code

Choosing **Customer Authorization Code** will ask for the app-specific client credentials (client ID and client secret) generated at **UPS Developers site**. You also have an additional layer of security where you will need to provide customer-specific **UPS Login credentials** to approve it as the authorization method for UPS adapter. Post successful verification, an authorization token will be generated for the session.

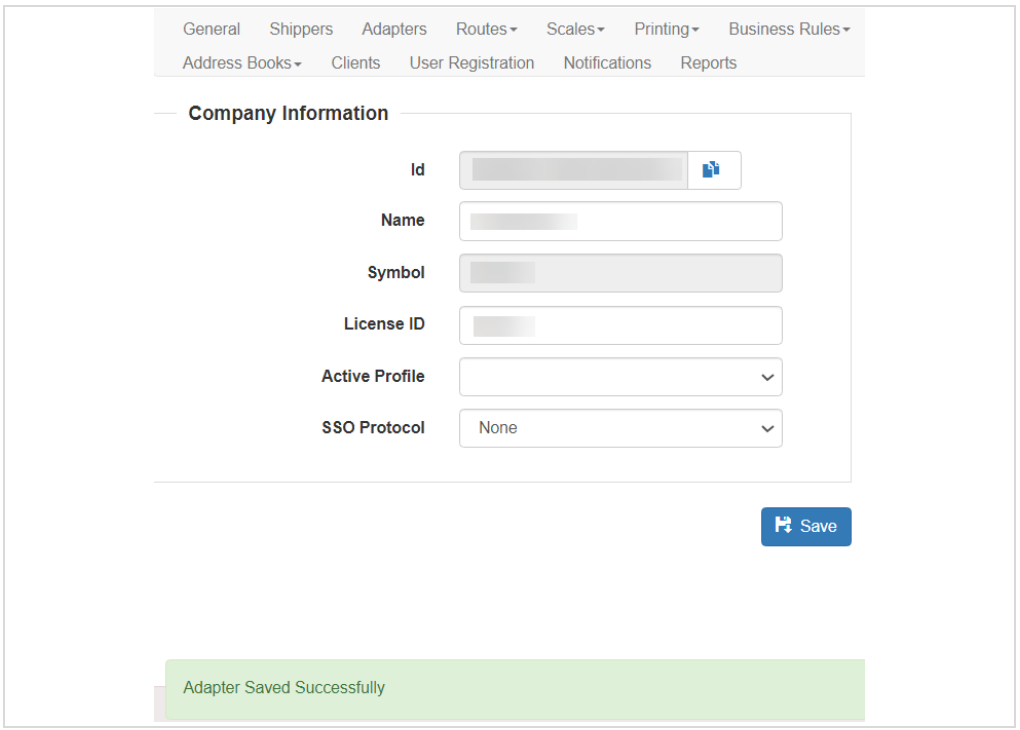
1. Under **the Information** tab, select **Customer Authorization Code** as the authorization method.



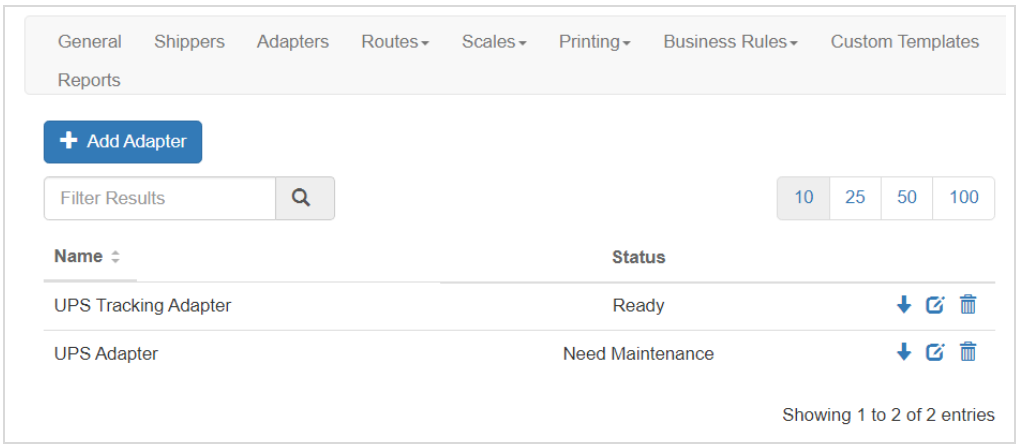
2. Enter the Client ID and Client Secret generated at **UPS Developers site**.
3. Click **Authorize** and you will be taken to **UPS Website**, login with your customer-specific UPS credentials.



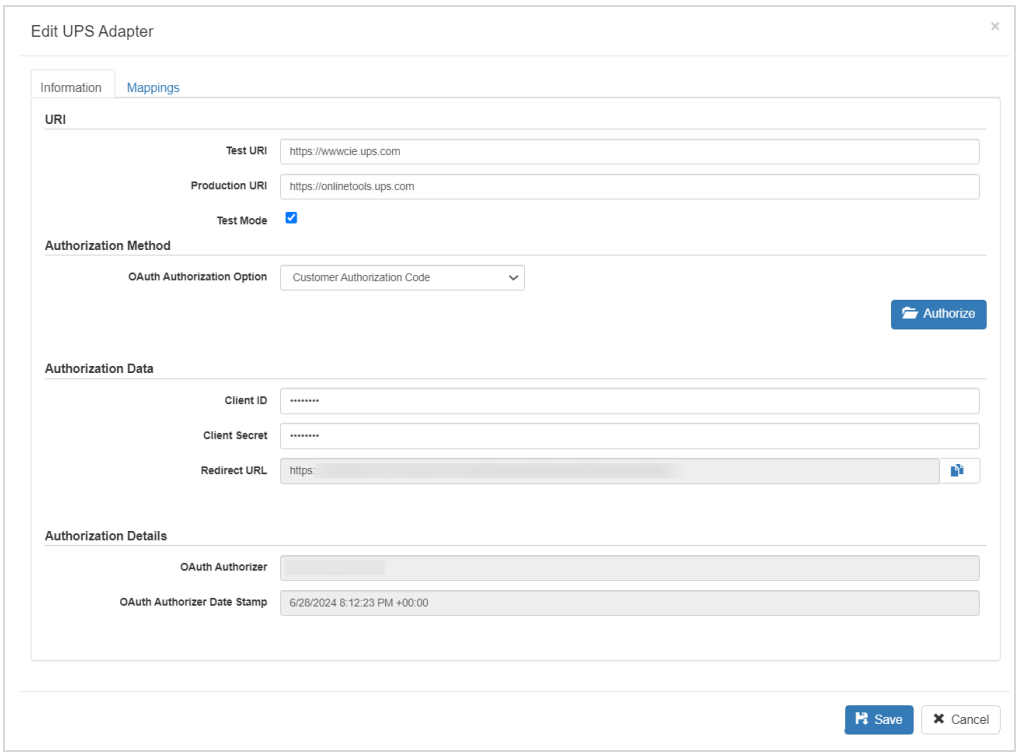
4. On successful authorization, you will get redirected to the Company Information page with the Success message.



5. After successful authorization, the **Status** of UPS Adapter will change to **Need Maintenance**.

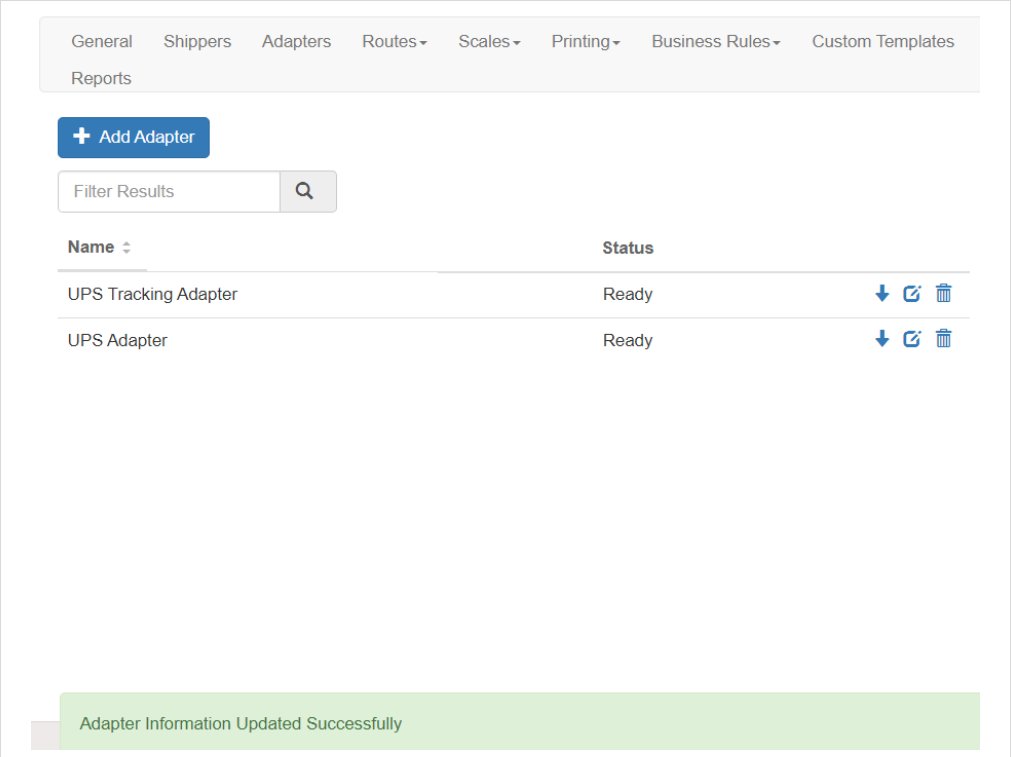


6. Also, on successful authorization, **the Authorization Details** section will populate with authorizer name (the account name used to generate the token) and date stamp (the UTC time at which the token is generated) details.



7. Click **Save**.

8. Go to **Adapters** tab and click on the down arrow alongside **UPS Adapter** for running maintenance, this will update the Adapter Status to **Ready**.
Note: To update the Adapter Status, there should be at least one shipper mapping in the adapter.



Quick Setup Authorization Method at Shipper Level

Note: There should be at least one shipper mapping in the adapter.

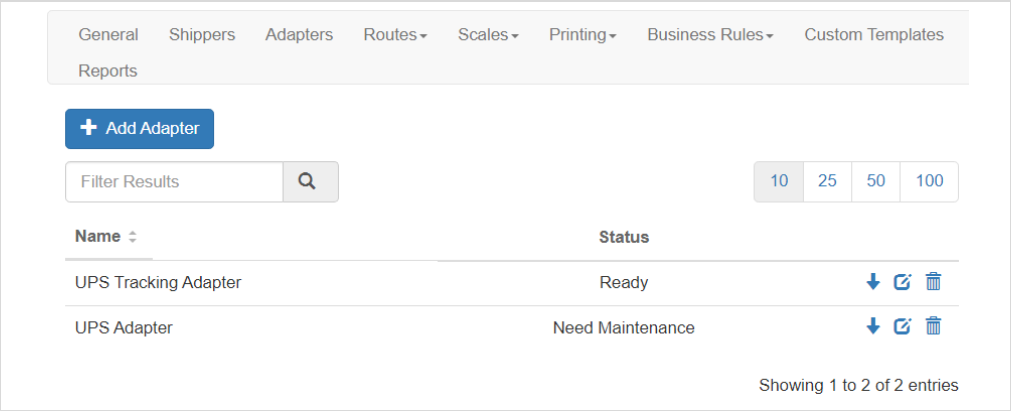
To quickly migrate, use the Adapter Authorization Code with all shippers being used in the ShipExec software UPS Adapter must also be added in the UPS.com user you will be authorizing with in ShipExec software UPS Adapter. This is the quickest and easiest way to get all shippers migrated. When the UPS Adapter is authorized, the Shipper(s) in the mapping tab will need to be set to **Not Set - Uses Adapter Authorization Option** to bypass the need to authorize at the shipper level.

Configuring Authorization Method at Shipper Level

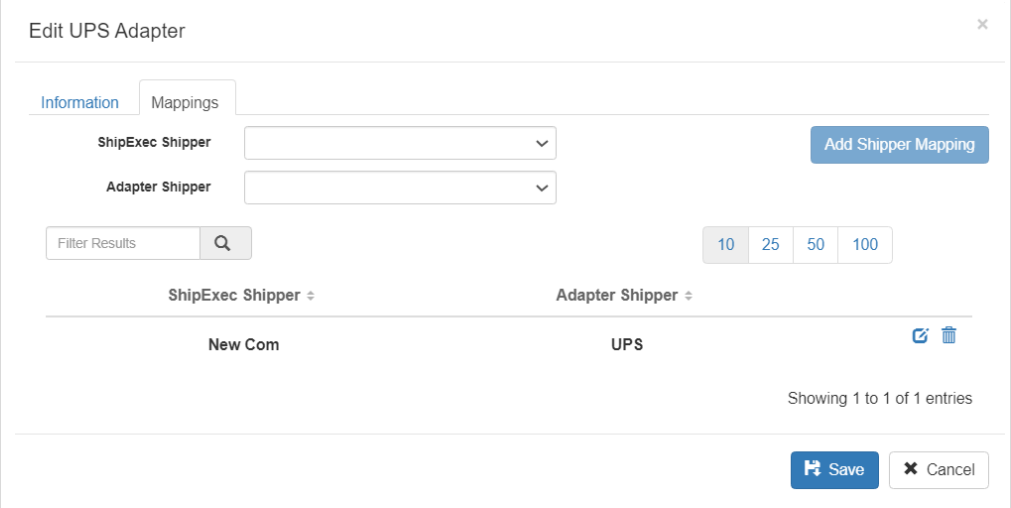
Note: There should be at least one shipper mapping in the adapter.

1. Log into ShipExec Management Studio.

2. Click the **Adapters** tab and click the **Edit Configuration** icon alongside UPS Adapter.

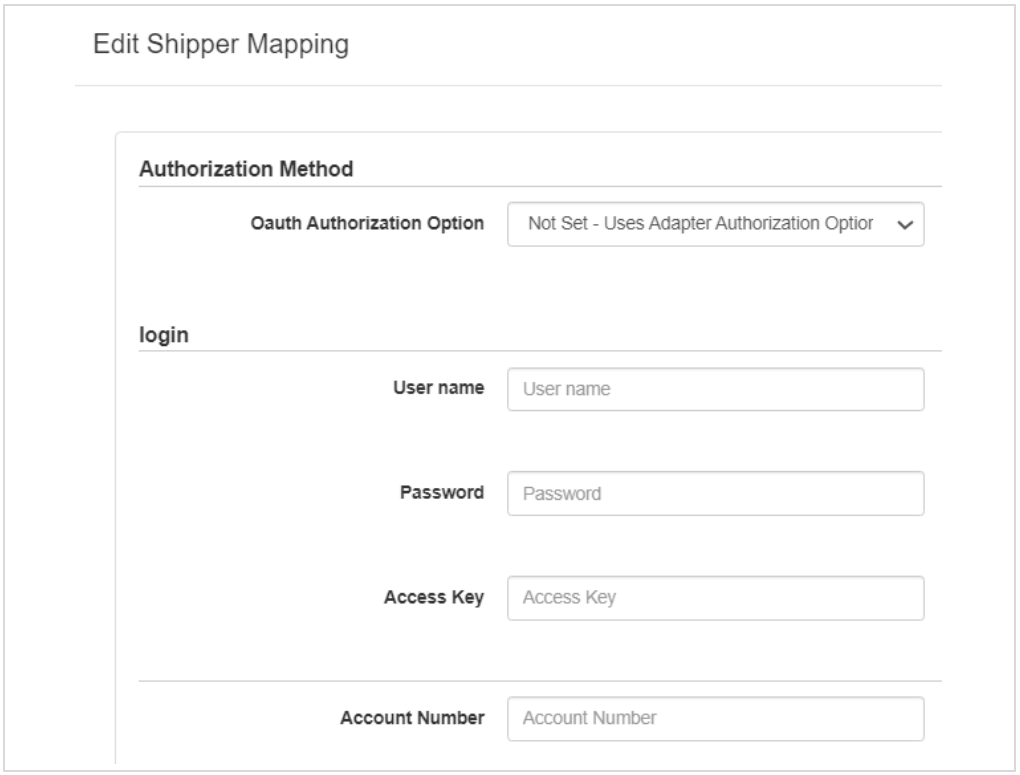


3. Under the **Mappings** tab, you will have the list of ShipExec shippers mapped with UPS Adapter.



4. If the shipper account you wish to configure is not listed, ensure you have added the account using **Add Shipper Mapping** option.
5. Click the **Edit Configuration** icon alongside the shipper account of your choice.

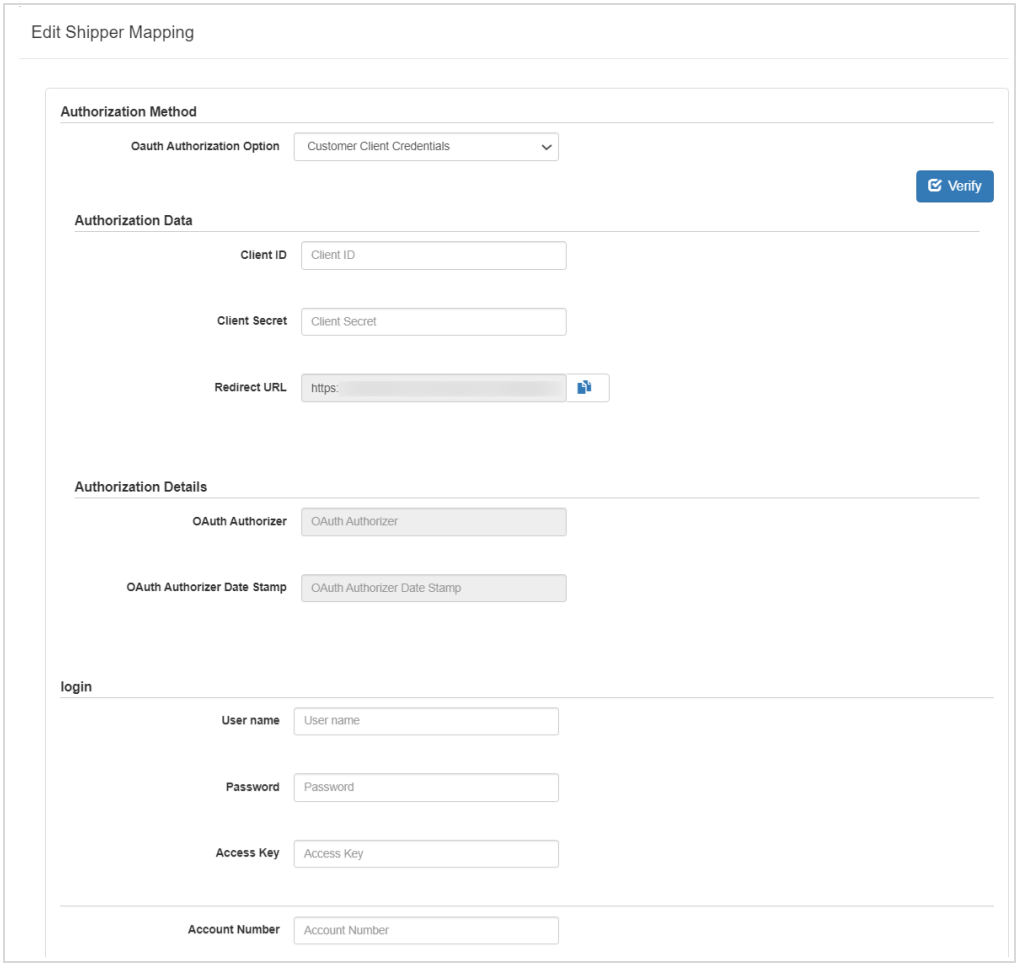
6. Under **Edit Shipper Mapping → Authorization Method**, you can configure the authorization method of your choice for each shipper accounts. Click the **OAuth Authorization Option** drop-box and select the authorization method of your choice.



7. By default, the shipper accounts will use the **adapter-level authorization method**.
8. Following are the other authorization methods available:
    a. Customer Client Credentials
    b. Customer Authorization Code
    c. Legacy Authentication

a. Customer Client Credentials

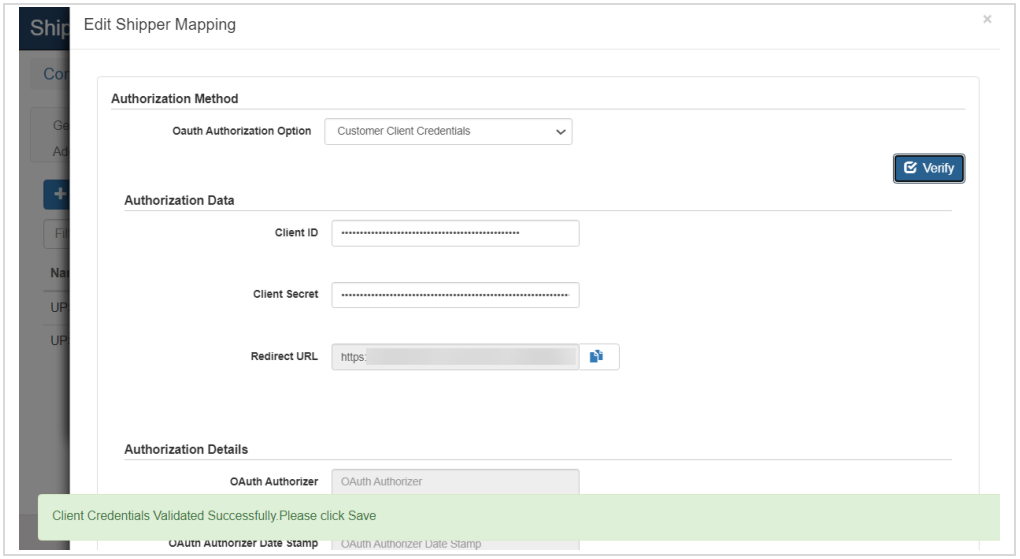
1. Under **Edit Shipper Mapping → Authorization Method → OAuth Authorization** option, select **Customer Client Credentials** as the authorization method.



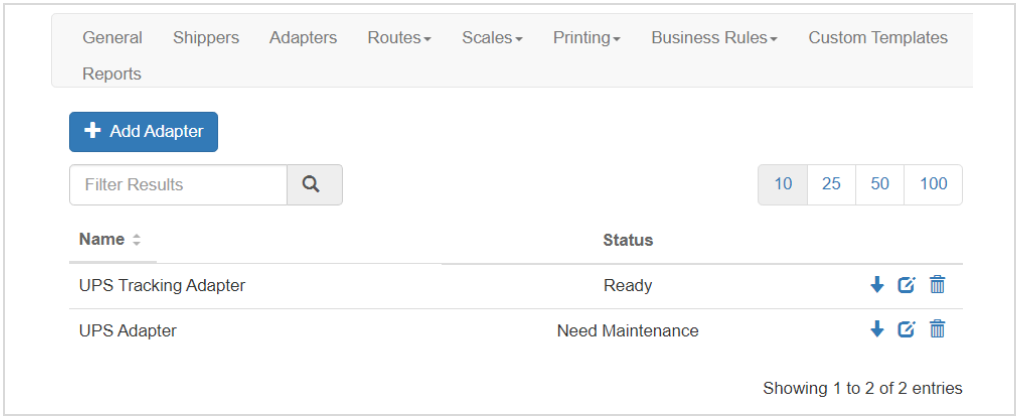
2. Enter the Client ID and Client Secret generated at **UPS Developers site**, click **Verify**.

3. On successful validation, you will get the **Success** message. Click **Save**.

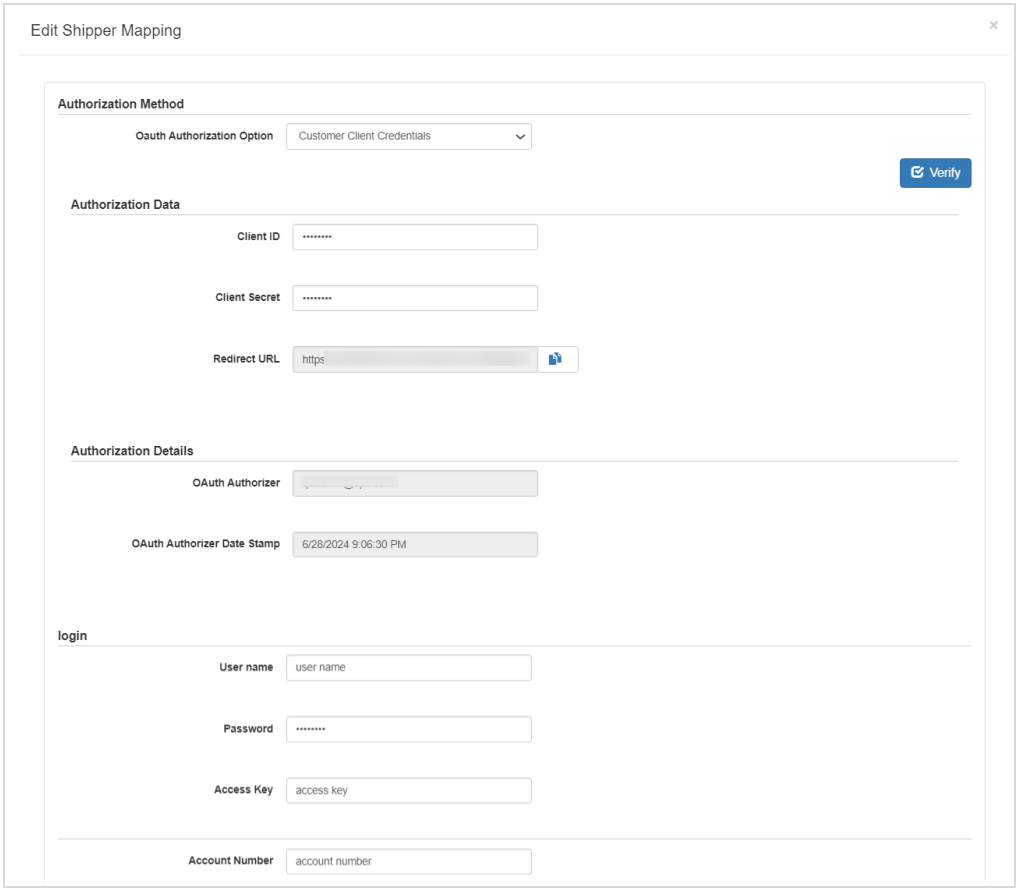
Note: You can save the verified credentials only if you enter the Username, Password, Access key, and Account number.



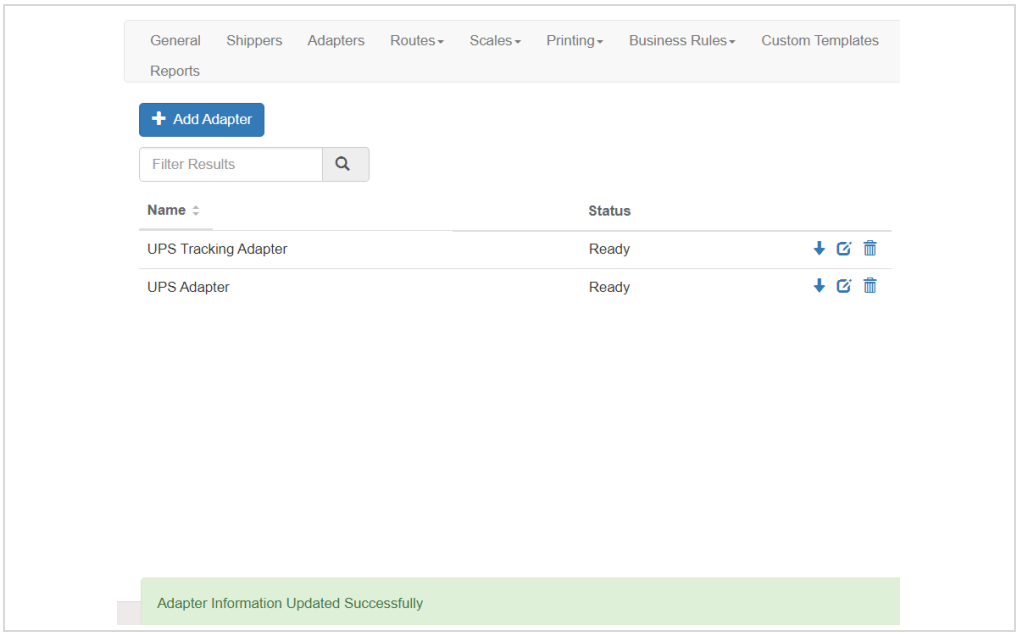
4. On saving the verified credentials, the **Status** of UPS Adapter will change to **Need Maintenance**.



5. Also, on successful verification, **the Authorization Details** section will populate with authorizer name (the account name used to generate the token) and date stamp (the UTC time at which the token is generated) details.

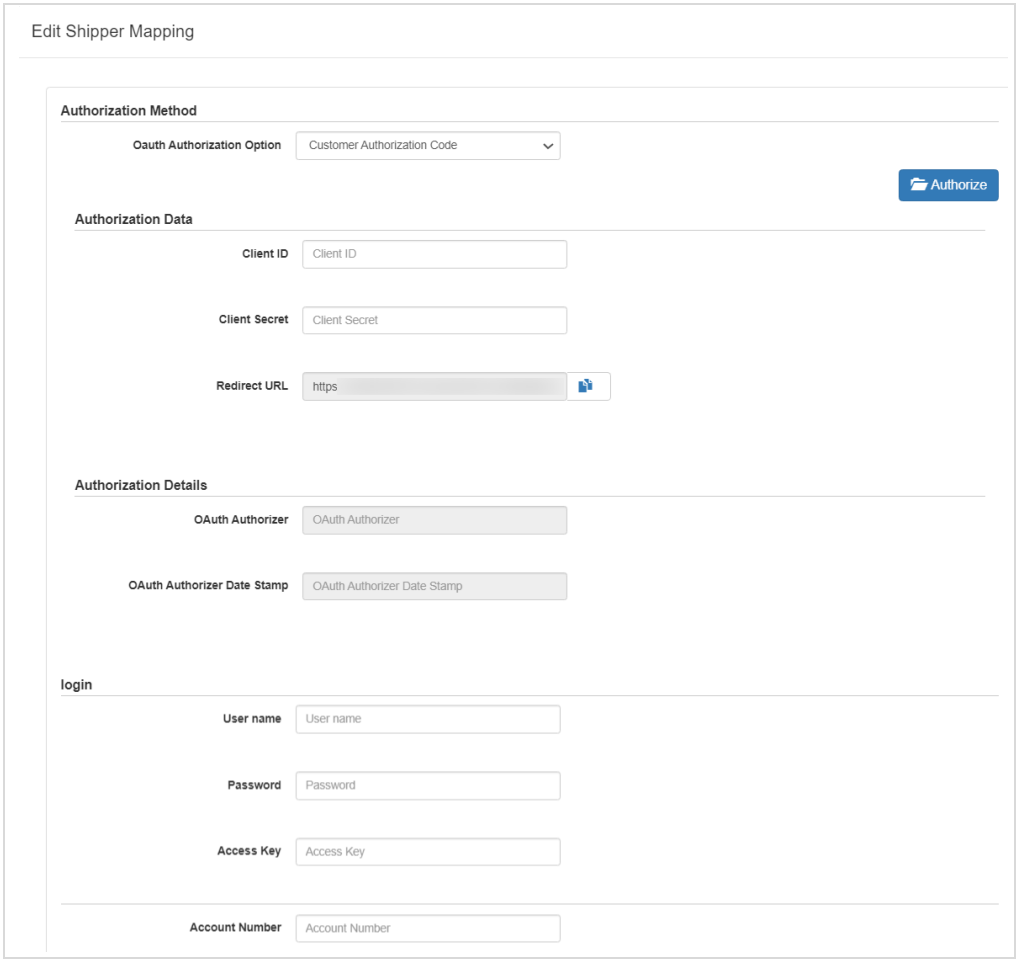


6. Go to **Adapters** tab and click on the down arrow alongside **UPS Adapter** for running maintenance, this will update the Adapter Status to **Ready**.



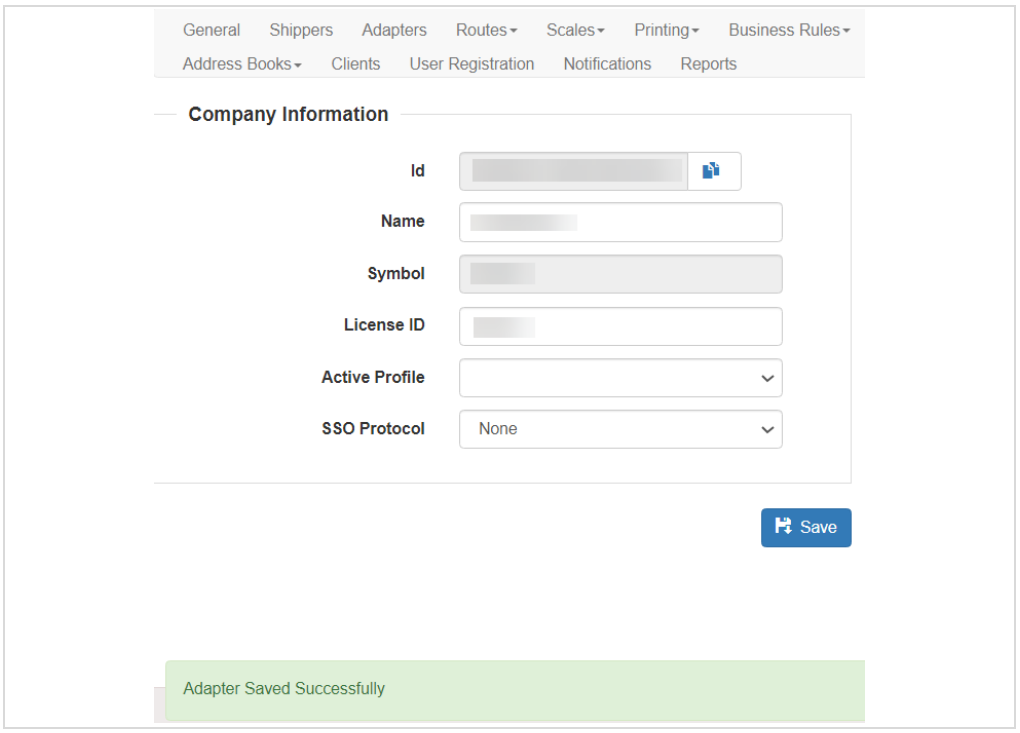
b. Customer Authorization Code

1. Under **Edit Shipper Mapping → Authorization Method → OAuth Authorization** option, select **Customer Authorization Code** as the authorization method.

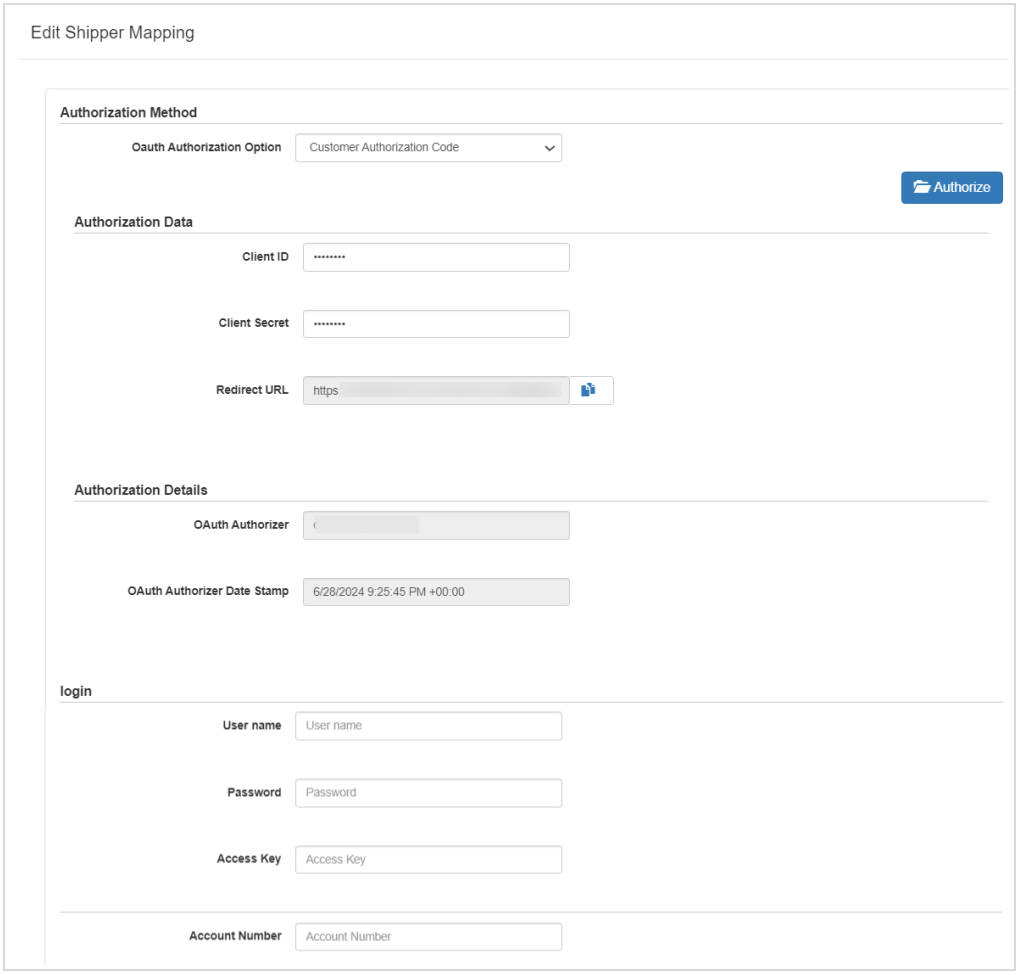


2. Enter the Client ID and Client Secret generated at **UPS Developers site**.
3. Click **Authorize** and you will be taken to **UPS Website**, login with your customer-specific UPS credentials.

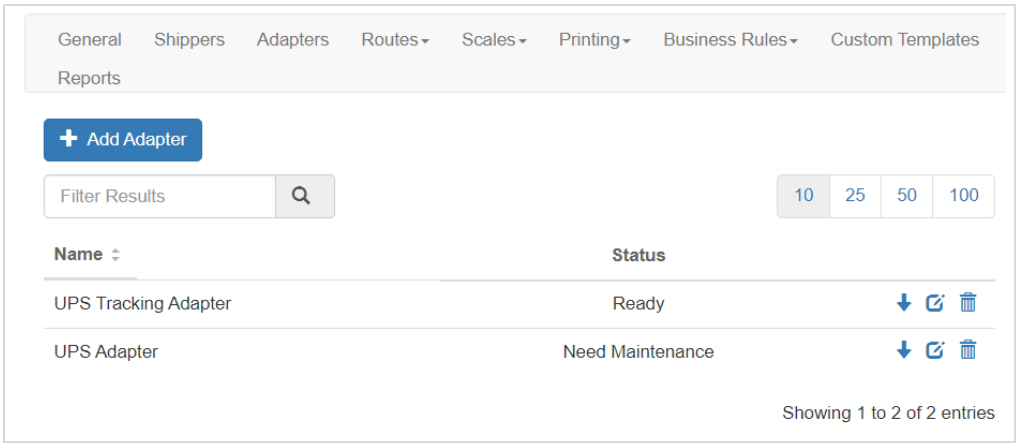
4. On successful authorization, you will get redirected to the Company Information page with the Success message.



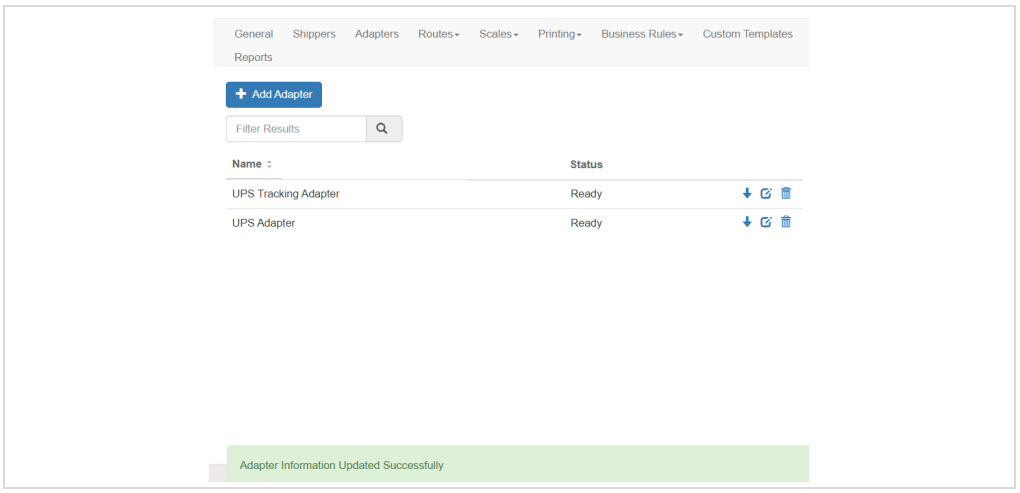
5. Also, on successful authorization, **the Authorization Details** section will populate with authorizer name (the account name used to generate the token) and date stamp (the UTC time at which the token is generated) details.



6. Under **Edit Shipper Mapping → Authorization Method → login**, enter login details such as Username, Password, Access Key, and Account number. Click **Save** and click **Save** again in the next window.
7. Now the **Status** of UPS Adapter under **Adapters** tab will change to **Need Maintenance**.



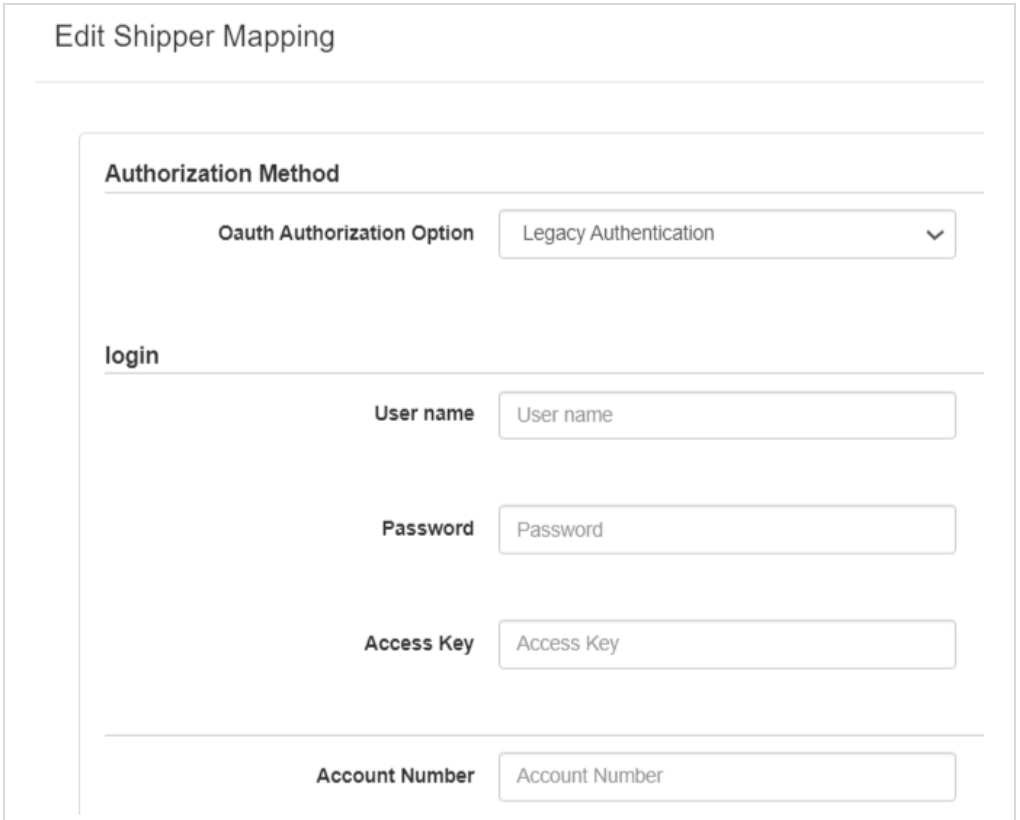
8. Go to **Adapters** tab and click on the down arrow alongside **UPS Adapter** for running maintenance, this will update the Adapter Status to **Ready**.



c. Legacy Authentication

Note: This authorization method will be removed in the upcoming release version 7.

1. Under **Edit Shipper Mapping → Authorization Method → OAuth Authorization** option, select **Legacy Authentication** as the authorization method.



2. Click **Save**.