

# ShipExec® UPS® Adapter

OAuth Migration for ShipExec® Software UPS® Adapter

2024



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## 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.

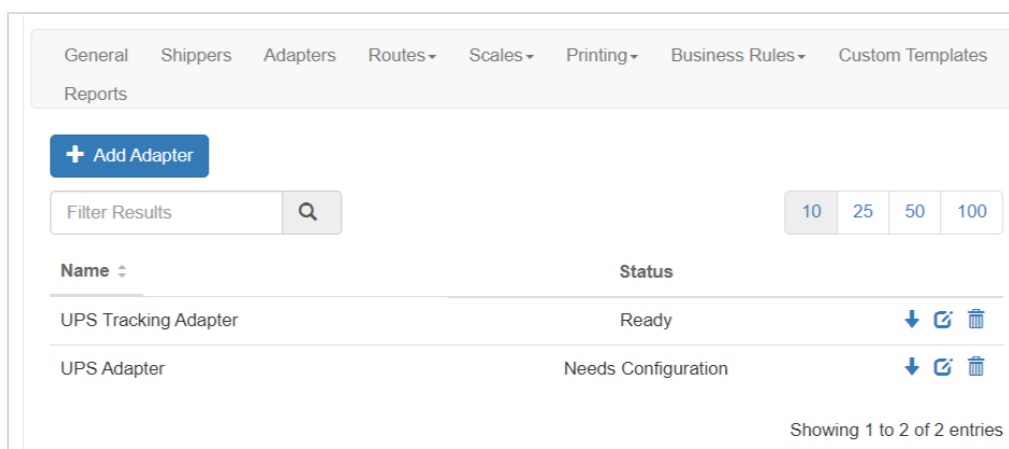
There are four types of authorization are available at the shipper level:

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*

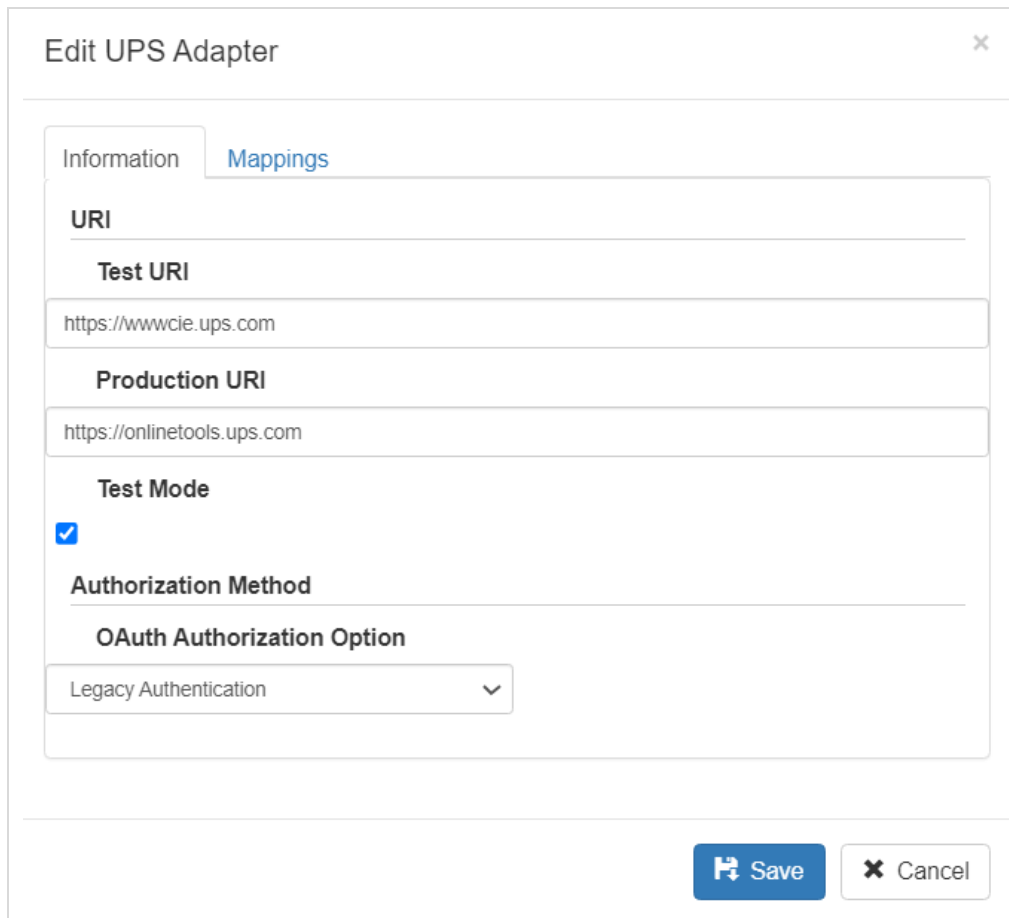
1. Log in to ShipExec Management Studio.
2. Click the **Adapters** tab and ensure you have added the UPS adapter already to the list.



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

- 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.



The screenshot shows a dialog box titled "Edit UPS Adapter" with a close button (X) in the top right corner. The dialog has two tabs: "Information" and "Mappings", with "Mappings" selected. The "Mappings" tab contains the following fields:

- URI**
  - Test URI**:
  - Production URI**:
- Test Mode**:
- Authorization Method**
  - OAuth Authorization Option**:

At the bottom right of the dialog, there are two buttons: "Save" (with a floppy disk icon) and "Cancel" (with an X icon).

- Under **Authorization Method**, click the **OAuth Authorization Option** drop-down and select the authorization method of your choice.
- Legacy Authentication** is the **default method** selected. Following are the other authorization methods available:
  - [Authorization Code](#)
  - [Customer Client Credentials](#)
  - [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.

### Edit UPS Adapter ✕

Information Mappings

**URI**

**Test URI**

https://wwwcie.ups.com

**Production URI**

https://onlinetools.ups.com

**Test Mode**

**Authorization Method**

**OAuth Authorization Option**

Authorization Code ▼

**Authorize UPS Credentials**

**Authorization Details**

**OAuth Authorizer**

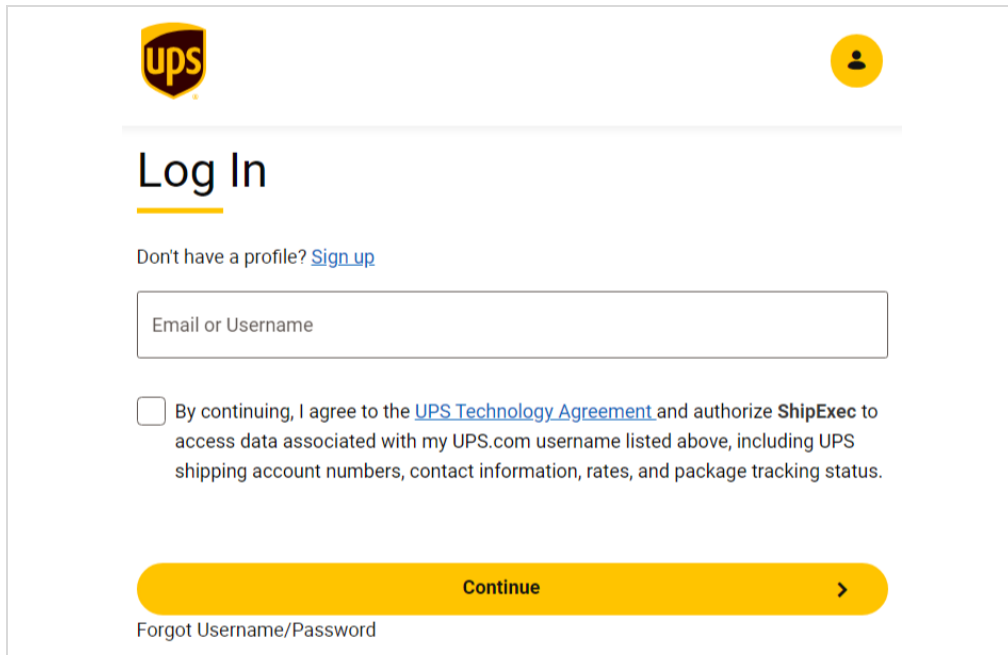
OAuth Authorizer

**OAuth Authorizer Date Stamp**

OAuth Authorizer Date Stamp

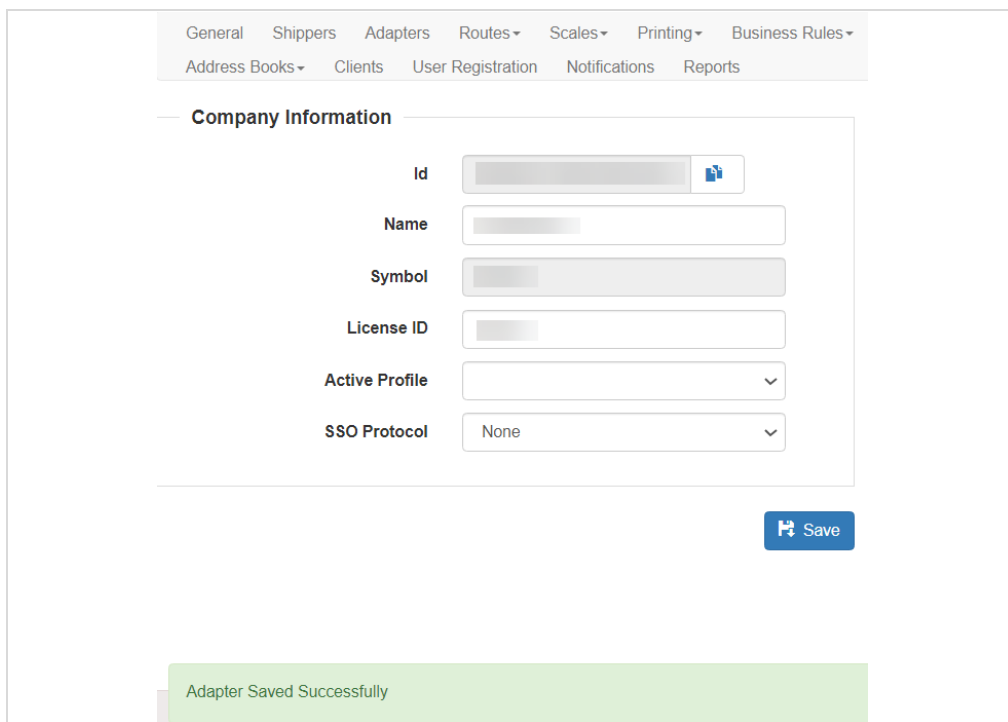
**Save** **✕ Cancel**

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



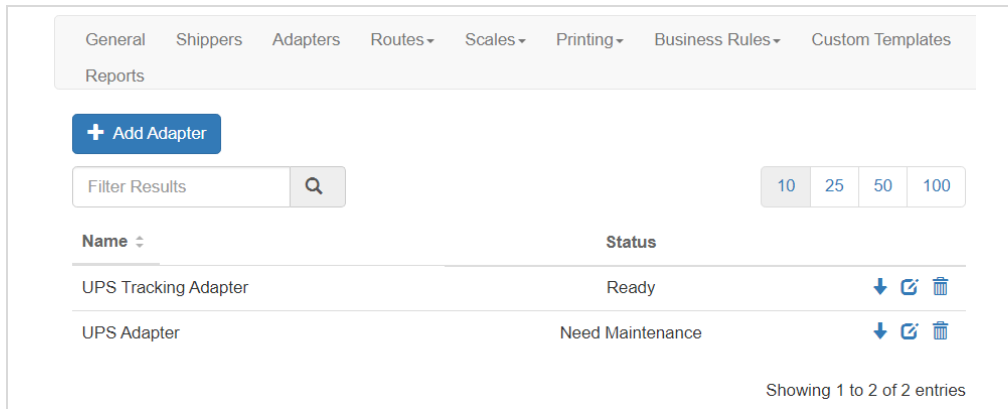
The image shows the UPS Log In page. At the top left is the UPS logo, and at the top right is a yellow circular profile icon. The main heading is "Log In" with a yellow underline. Below it, there is a link: "Don't have a profile? [Sign up](#)". A text input field is labeled "Email or Username". Below the input field is a checkbox with the text: "By continuing, I agree to the [UPS Technology Agreement](#) and authorize ShipExec to access data associated with my UPS.com username listed above, including UPS shipping account numbers, contact information, rates, and package tracking status." At the bottom, there is a large yellow button labeled "Continue" with a right-pointing arrow. Below the button is a link: "Forgot Username/Password".

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



The image shows the "Company Information" page in a web application. At the top, there is a navigation menu with items: "General", "Shippers", "Adapters", "Routes", "Scales", "Printing", "Business Rules", "Address Books", "Clients", "User Registration", "Notifications", and "Reports". The main section is titled "Company Information" and contains several input fields: "Id" (with a blue icon), "Name", "Symbol", "License ID", "Active Profile" (a dropdown menu), and "SSO Protocol" (a dropdown menu with "None" selected). A blue "Save" button is located at the bottom right of the form. At the bottom of the page, there is a green success message: "Adapter Saved Successfully".

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

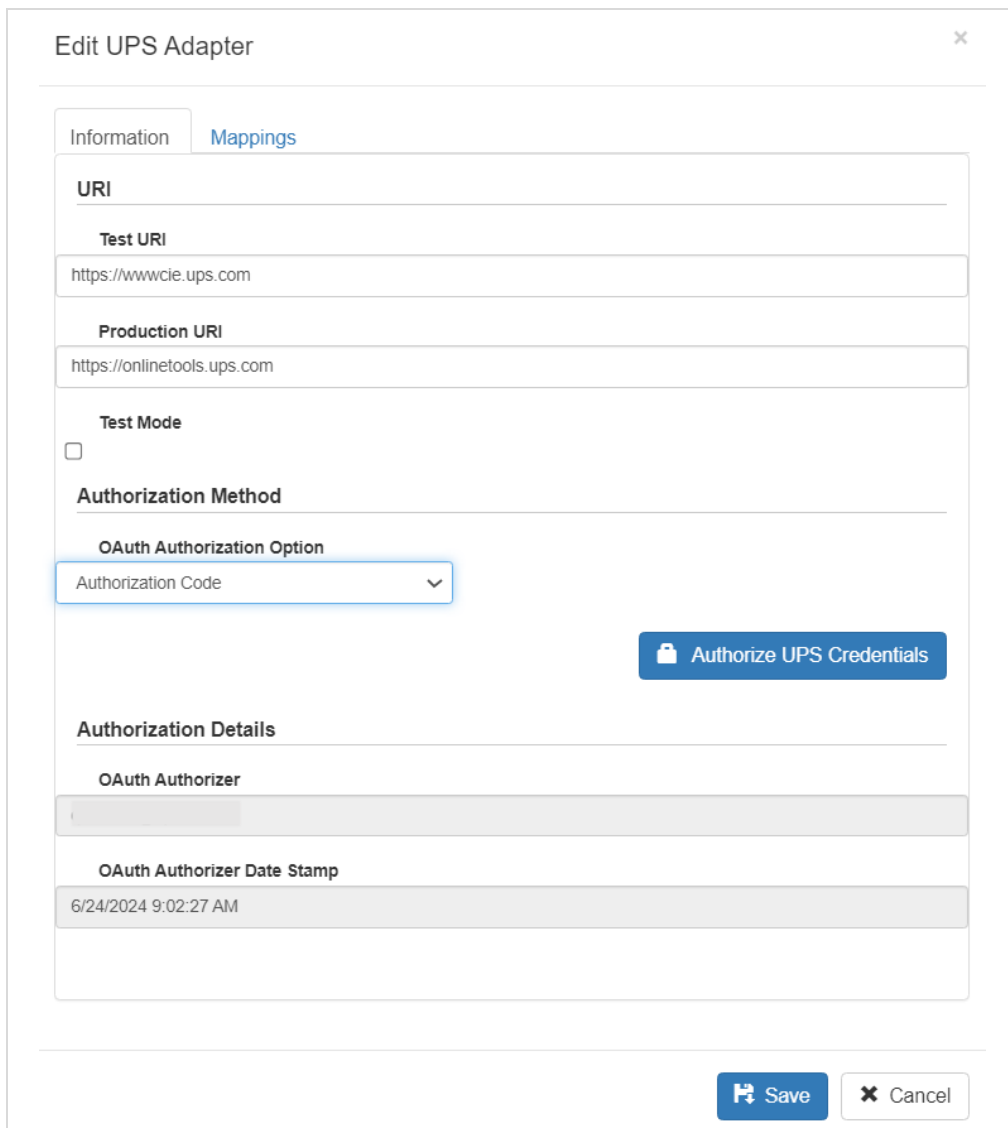


The screenshot shows a navigation menu with options: General, Shippers, Adapters, Routes, Scales, Printing, Business Rules, Custom Templates, and Reports. Below the menu is a '+ Add Adapter' button and a search bar labeled 'Filter Results'. To the right of the search bar are pagination options: 10, 25, 50, and 100. A table displays the following data:

Name	Status	
UPS Tracking Adapter	Ready	↓ ↗ 🗑️
UPS Adapter	Need Maintenance	↓ ↗ 🗑️

Showing 1 to 2 of 2 entries

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.



The 'Edit UPS Adapter' dialog box has a close button (X) in the top right corner. It features two tabs: 'Information' (selected) and 'Mappings'. The 'Information' tab contains the following fields:

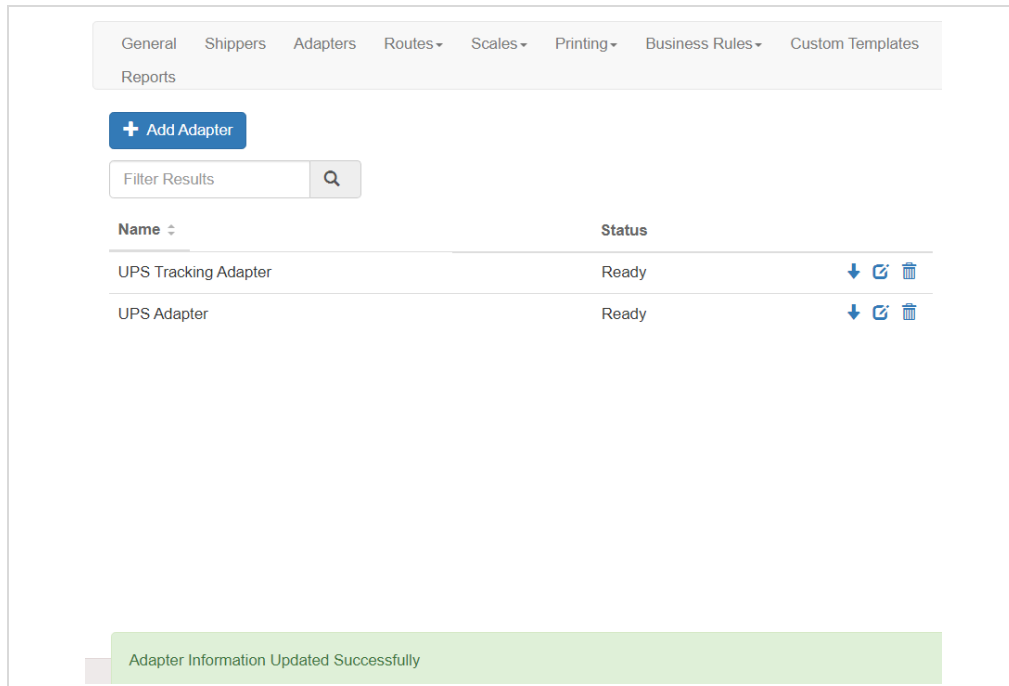
- URI**
- Test URI**:
- Production URI**:
- Test Mode**:
- Authorization Method**
- OAuth Authorization Option**:
- Authorize UPS Credentials**:
- Authorization Details**
- OAuth Authorizer**:
- OAuth Authorizer Date Stamp**:

At the bottom right, there are 'Save' and 'Cancel' buttons.



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.



The screenshot displays the 'Adapters' tab in a management interface. At the top, there is a navigation bar with tabs for 'General', 'Shippers', 'Adapters', 'Routes', 'Scales', 'Printing', 'Business Rules', and 'Custom Templates'. Below the navigation bar is a '+ Add Adapter' button and a search box labeled 'Filter Results'. The main content area contains a table with the following data:

Name	Status	
UPS Tracking Adapter	Ready	↓ ↗ 🗑️
UPS Adapter	Ready	↓ ↗ 🗑️

At the bottom of the interface, a green notification bar displays the message: 'Adapter Information Updated Successfully'.

## *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.

Information Mappings

URI

Test URI

Production URI

Test Mode

Authorization Method

OAuth Authorization Option

Verify

Authorization Data

Client ID

Client Secret

Redirect URL

Authorization Details

OAuth Authorizer

OAuth Authorizer Date Stamp

Save Cancel

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**.

Information Mappings

URI

Test URI

Production URI

Test Mode

Authorization Method

OAuth Authorization Option

Verify

Authorization Data

Client ID

Client Secret

Redirect URL

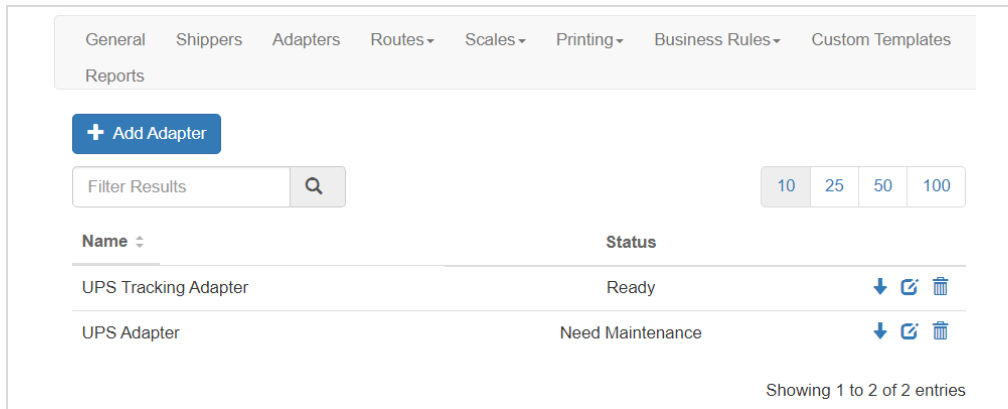
Authorization Details

OAuth Authorizer

OAuth Authorizer Date Stamp

Client Credentials Validated Successfully Please click Save

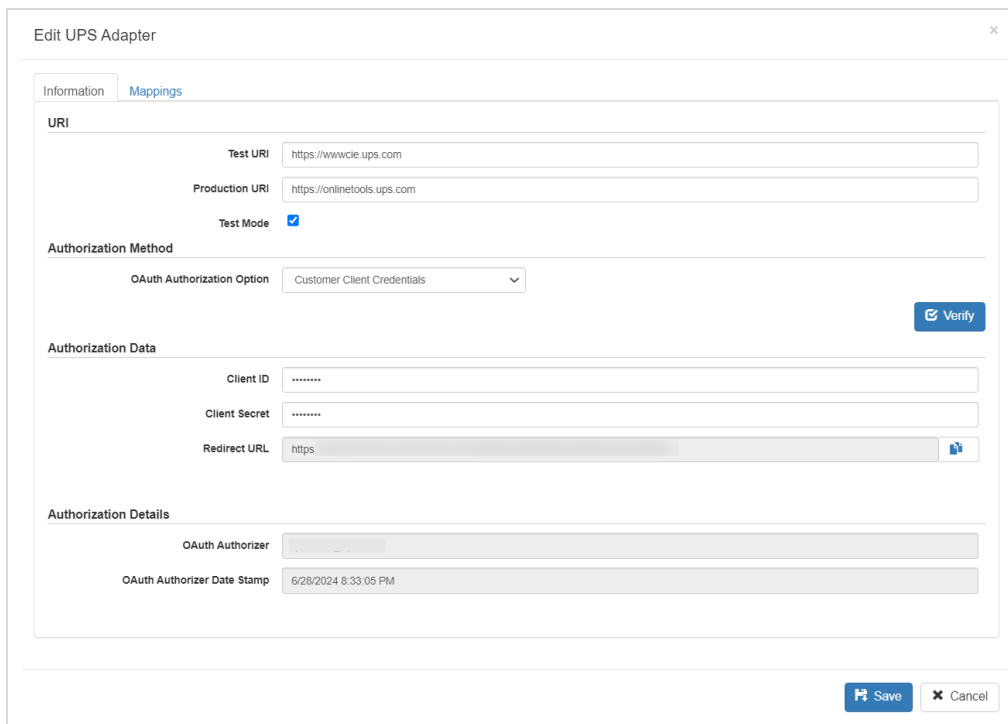
4. On saving the verified credentials, the Status of UPS Adapter will show as **Need Maintenance**.



The screenshot shows a management interface with a navigation bar at the top containing 'General', 'Shippers', 'Adapters', 'Routes', 'Scales', 'Printing', 'Business Rules', and 'Custom Templates'. Below the navigation bar is a '+ Add Adapter' button and a search box labeled 'Filter Results'. To the right of the search box are pagination options: '10', '25', '50', and '100'. The main content is a table with two columns: 'Name' and 'Status'. The table contains two rows: 'UPS Tracking Adapter' with status 'Ready' and 'UPS Adapter' with status 'Need Maintenance'. Each row has three action icons: a downward arrow, a refresh icon, and a delete icon. At the bottom right of the table, it says 'Showing 1 to 2 of 2 entries'.

Name	Status	
UPS Tracking Adapter	Ready	↓ ↻ 🗑️
UPS Adapter	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.



The screenshot shows the 'Edit UPS Adapter' form with two tabs: 'Information' and 'Mappings'. The 'Information' tab is active. The form is divided into several sections: 'URI' with 'Test URI' (https://wwwcie.ups.com) and 'Production URI' (https://onlinetools.ups.com); 'Test Mode' (checked); 'Authorization Method' with 'OAuth Authorization Option' set to 'Customer Client Credentials'; 'Authorization Data' with 'Client ID' (masked), 'Client Secret' (masked), and 'Redirect URL' (https); and 'Authorization Details' with 'OAuth Authorizer' (masked) and 'OAuth Authorizer Date Stamp' (6/28/2024 8:33:05 PM). A 'Verify' button is located to the right of the 'Authorization Method' section. At the bottom right, there are 'Save' and 'Cancel' buttons.

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.

Name	Status	
UPS Tracking Adapter	Ready	↓ ↻ 🗑️
UPS Adapter	Ready	↓ ↻ 🗑️

Adapter Information Updated Successfully

### 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.

Edit UPS Adapter

Information | Mappings

URI

Test URI:

Production URI:

Test Mode:

Authorization Method

OAuth Authorization Option:

Authorize

Authorization Data

Client ID:

Client Secret:

Redirect URL:

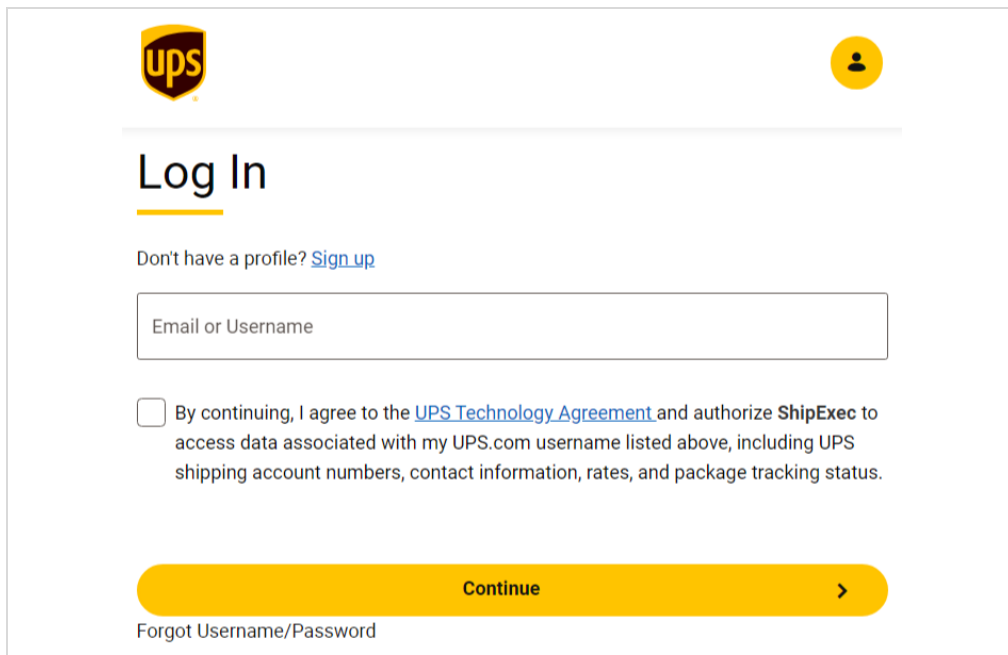
Authorization Details

OAuth Authorizer:

OAuth Authorizer Date Stamp:

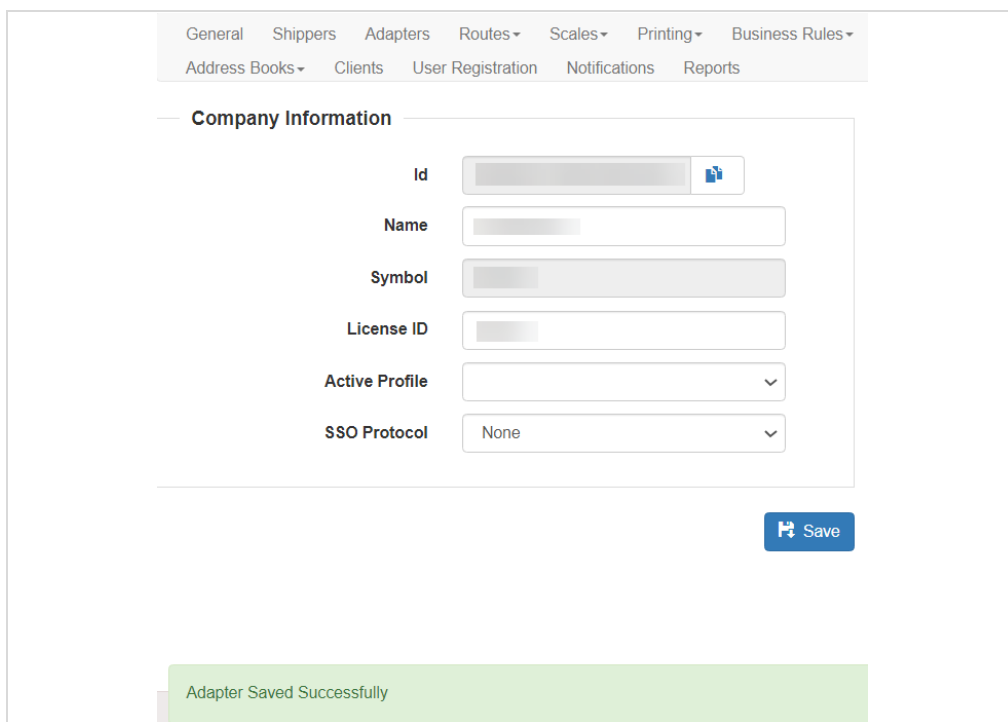
Save Cancel

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.



The image shows the UPS Log In page. At the top left is the UPS logo, and at the top right is a yellow circular profile icon. The main heading is "Log In" with a yellow underline. Below the heading is a link: "Don't have a profile? [Sign up](#)". There is a text input field labeled "Email or Username". Below the input field is a checkbox with the text: "By continuing, I agree to the [UPS Technology Agreement](#) and authorize ShipExec to access data associated with my UPS.com username listed above, including UPS shipping account numbers, contact information, rates, and package tracking status." At the bottom is a large yellow button labeled "Continue" with a right-pointing arrow. Below the button is a link: "Forgot Username/Password".

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



The image shows the "Company Information" page in a web application. At the top is a navigation menu with items: "General", "Shippers", "Adapters", "Routes", "Scales", "Printing", "Business Rules", "Address Books", "Clients", "User Registration", "Notifications", and "Reports". The main section is titled "Company Information" and contains several input fields: "Id" (with a blue icon), "Name", "Symbol", "License ID", "Active Profile" (a dropdown menu), and "SSO Protocol" (a dropdown menu with "None" selected). At the bottom right is a blue button labeled "Save". At the bottom left is a green success message: "Adapter Saved Successfully".

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

The screenshot shows a web interface for managing UPS Adapters. At the top, there are navigation tabs: General, Shippers, Adapters, Routes, Scales, Printing, Business Rules, and Custom Templates. Below these is a 'Reports' section. A blue button labeled '+ Add Adapter' is visible. A search bar labeled 'Filter Results' with a magnifying glass icon is present. To the right of the search bar are four buttons labeled '10', '25', '50', and '100'. Below this is a table with two columns: 'Name' and 'Status'. The table contains two rows: 'UPS Tracking Adapter' with status 'Ready' and 'UPS Adapter' with status 'Need Maintenance'. Each row has three icons on the right: a downward arrow, a refresh icon, and a trash icon. At the bottom right of the table, it says 'Showing 1 to 2 of 2 entries'.

Name	Status	
UPS Tracking Adapter	Ready	↓ ↻ 🗑️
UPS Adapter	Need Maintenance	↓ ↻ 🗑️

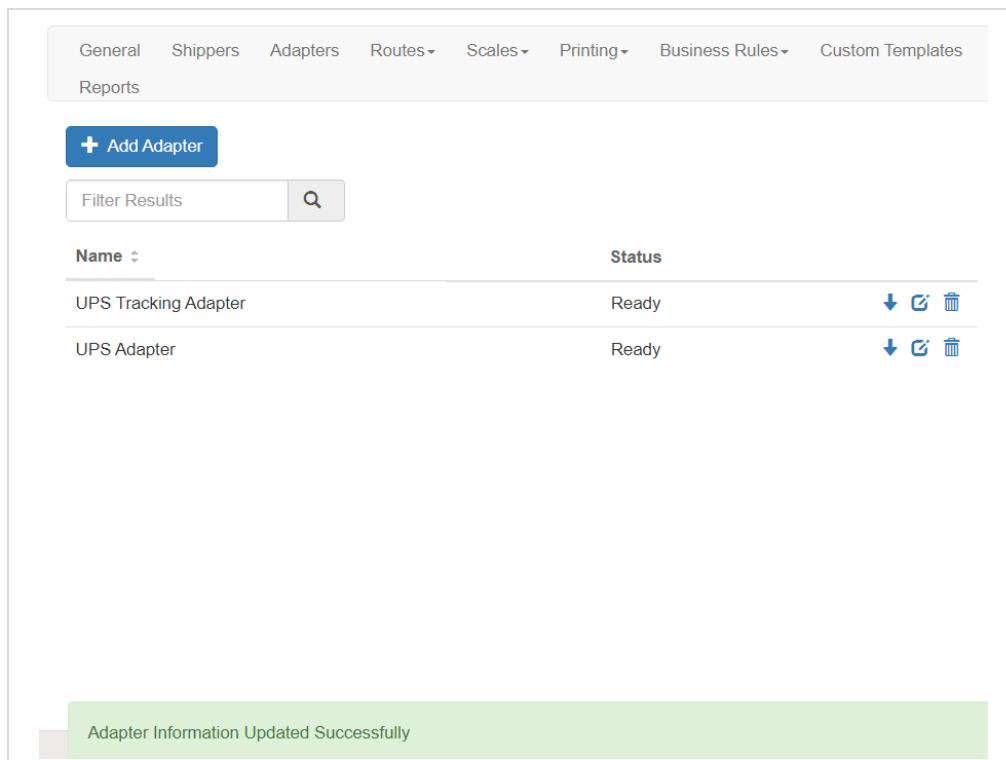
6. Also, on successful authorization, **the Authorization Details** section will populate with authorizer name (the account name used to generate the token) and date stamp (the UTC time at which the token is generated) details.

The screenshot shows the 'Edit UPS Adapter' form. It has a title bar 'Edit UPS Adapter' with a close button. Below the title bar are two tabs: 'Information' and 'Mappings'. The 'Information' tab is active. The form is divided into several sections: 'URI' with fields for 'Test URI' (https://wwwcie.ups.com) and 'Production URI' (https://onlinetools.ups.com), and a 'Test Mode' checkbox which is checked. 'Authorization Method' has a dropdown menu for 'OAuth Authorization Option' set to 'Customer Authorization Code' and an 'Authorize' button. 'Authorization Data' has fields for 'Client ID', 'Client Secret', and 'Redirect URL'. 'Authorization Details' has fields for 'OAuth Authorizer' and 'OAuth Authorizer Date Stamp' (6/28/2024 8:12:23 PM +00:00). At the bottom right, there are 'Save' and 'Cancel' buttons.

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.

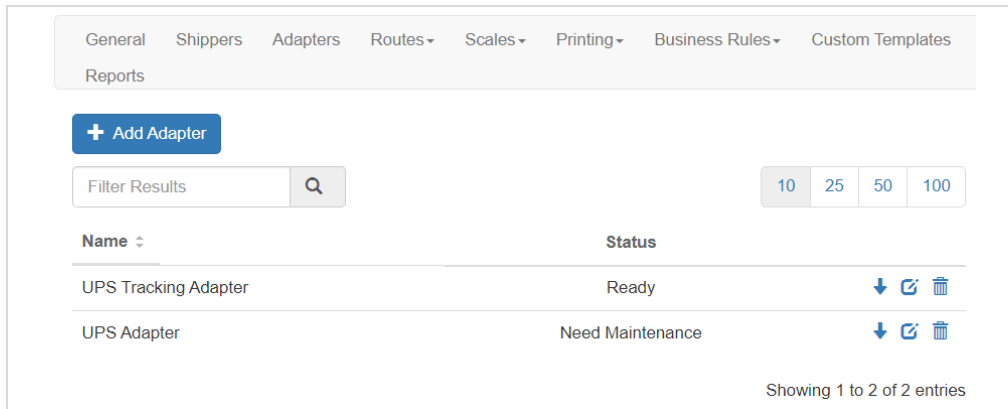
To quickly migrate, use the Adapter Authorization Code with all shippers being used in the ShipExec software UPS Adapter must also be added in the UPS.com user you will be authorizing with in ShipExec software UPS Adapter. This is the quickest and easiest way to get all shippers migrated. When the UPS 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

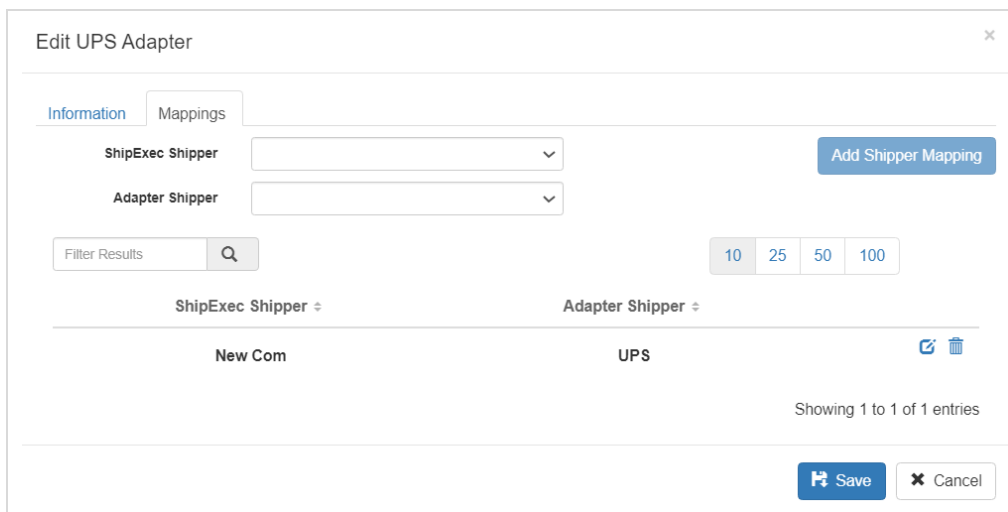
**Note:** There should be at least one shipper mapping in the adapter.


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.

The screenshot shows a web form titled "Edit Shipper Mapping". Under the "Authorization Method" section, there is a dropdown menu for "OAuth Authorization Option" currently set to "Not Set - Uses Adapter Authorization Option". Below this, there is a "login" section with three input fields: "User name", "Password", and "Access Key". At the bottom of the form, there is an "Account Number" input field.

7. By default, the shipper accounts will use the **adapter-level authorization method**.
8. Following are the other authorization methods available:
- [Customer Client Credentials](#)
  - [Customer Authorization Code](#)
  - [Legacy Authentication](#)

## a. Customer Client Credentials

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

The screenshot shows the 'Edit Shipper Mapping' form. The 'Authorization Method' section is highlighted, showing the 'OAuth Authorization Option' dropdown set to 'Customer Client Credentials'. Below this, the 'Authorization Data' section contains fields for 'Client ID', 'Client Secret', and 'Redirect URL'. The 'Authorization Details' section contains fields for 'OAuth Authorizer' and 'OAuth Authorizer Date Stamp'. The 'login' section contains fields for 'User name', 'Password', 'Access Key', and 'Account Number'. A 'Verify' button is located in the top right corner of the form.

Edit Shipper Mapping

Authorization Method

OAuth Authorization Option: Customer Client Credentials

Verify

Authorization Data

Client ID: Client ID

Client Secret: Client Secret

Redirect URL: https

Authorization Details

OAuth Authorizer: OAuth Authorizer

OAuth Authorizer Date Stamp: OAuth Authorizer Date Stamp

login

User name: User name

Password: Password

Access Key: Access Key

Account Number: Account Number

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.

The screenshot shows the 'Edit Shipper Mapping' form. Under 'Authorization Method', 'Customer Client Credentials' is selected. The 'Authorization Data' section has fields for Client ID, Client Secret, and Redirect URL. A green banner at the bottom displays the message: 'Client Credentials Validated Successfully. Please click Save'.

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

The screenshot shows the 'Adapters' page with a table listing adapters. The 'UPS Adapter' entry has a status of 'Need Maintenance'.

Name	Status	
UPS Tracking Adapter	Ready	↓ ↻ 🗑️
UPS Adapter	Need Maintenance	↓ ↻ 🗑️

Showing 1 to 2 of 2 entries

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.

The screenshot shows the 'Edit Shipper Mapping' form with the following sections:

- Authorization Method:** OAuth Authorization Option is set to 'Customer Client Credentials'. A 'Verify' button is present.
- Authorization Data:** Client ID, Client Secret, and Redirect URL (https) are entered.
- Authorization Details:** OAuth Authorizer and OAuth Authorizer Date Stamp (6/28/2024 9:06:30 PM) are populated.
- login:** User name, Password, Access Key, and Account Number are entered.

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**.

The screenshot shows the 'Adapters' tab with a table of adapters. The 'UPS Adapter' status is 'Ready'. A green notification bar at the bottom indicates 'Adapter Information Updated Successfully'.

Name	Status	
UPS Tracking Adapter	Ready	↓ ↻ 🗑️
UPS Adapter	Ready	↓ ↻ 🗑️

Adapter Information Updated Successfully

## b. Customer Authorization Code

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

The screenshot displays the 'Edit Shipper Mapping' form with the following sections and fields:

- Authorization Method:** OAuth Authorization Option is set to 'Customer Authorization Code'. An 'Authorize' button is visible on the right.
- Authorization Data:**
  - Client ID: Client ID
  - Client Secret: Client Secret
  - Redirect URL: https
- Authorization Details:**
  - OAuth Authorizer: OAuth Authorizer
  - OAuth Authorizer Date Stamp: OAuth Authorizer Date Stamp
- login:**
  - User name: User name
  - Password: Password
  - Access Key: Access Key
- Account Number:** Account Number

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.

The screenshot displays a web application interface for managing company information. At the top, there is a navigation menu with the following items: General, Shippers, Adapters, Routes, Scales, Printing, Business Rules, Address Books, Clients, User Registration, Notifications, and Reports. Below the navigation, the main content area is titled "Company Information" and contains a form with the following fields:

- Id**: A text input field with a blue icon on the right.
- Name**: A text input field.
- Symbol**: A text input field.
- License ID**: A text input field.
- Active Profile**: A dropdown menu.
- SSO Protocol**: A dropdown menu with "None" selected.

Below the form, there is a blue "Save" button with a floppy disk icon. At the bottom of the page, a green banner displays the message "Adapter Saved Successfully".

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.

Edit Shipper Mapping

---

**Authorization Method**

OAuth Authorization Option

[Authorize](#)

---

**Authorization Data**

Client ID

Client Secret

Redirect URL  [🌐](#)

---

**Authorization Details**

OAuth Authorizer

OAuth Authorizer Date Stamp

---

**login**

User name

Password

Access Key

---

Account Number

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**.

General Shippers Adapters Routes Scales Printing Business Rules Custom Templates Reports

[+ Add Adapter](#)

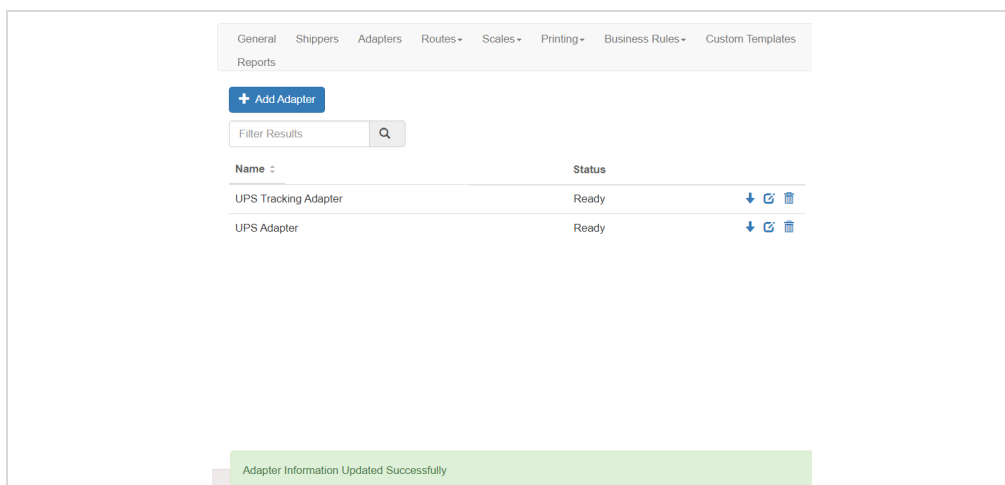
Filter Results

10 25 50 100

Name	Status	
UPS Tracking Adapter	Ready	<a href="#">↓</a> <a href="#">🔗</a> <a href="#">🗑️</a>
UPS Adapter	Need Maintenance	<a href="#">↓</a> <a href="#">🔗</a> <a href="#">🗑️</a>

Showing 1 to 2 of 2 entries

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.

**Edit Shipper Mapping**

**Authorization Method**

OAuth Authorization Option: Legacy Authentication

**login**

User name: [User name]

Password: [Password]

Access Key: [Access Key]

Account Number: [Account Number]

2. Click **Save**.