# [Thermal Printing Tutorial](#)

A Thermal Printer is required to print thermal labels. We accommodate two types of thermal labels:

1. PDF Labels in Thermal Label Sizes (used by Purolator)
2. ZPL (Zebra Printer Language) Labels (used by FedEx, DHL, CanPar and others)

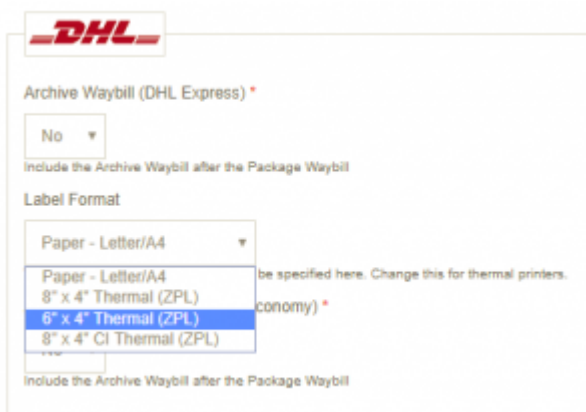This document covers producing ZPL / Zebra labels using a Zebra Thermal Label printer.

Administrative Setup

Activating Thermal Labels for a customer is done by visiting "Configure Courier
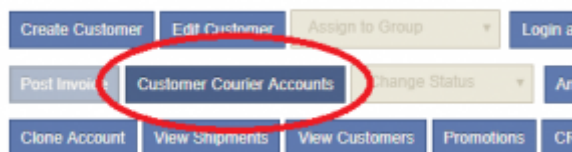
Accounts".

Here you can select the appropriate label format for each carrier:

The "ZPL" labels will require the additional configuration covered by this document.

Printing Thermal Labels

When viewing the completed shipment, in the Label section if Thermal Labels are present you will see a "Print Thermal Labels" button.

When you click on this button you will see the Thermal Printing Page for the
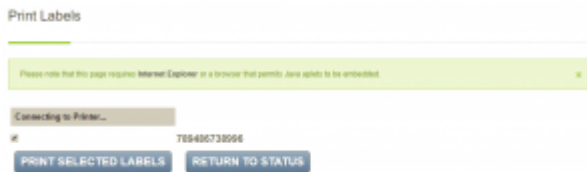
shipment.

This page allows you to select the labels and the target printer. When this page loads it delivers a Java Applet that will communicate with the locally installed Zebra Printer. If you see "Connecting to Printer..." without resolving to printer names, then the Java Applet is not functioning correctly. If that happens, see the Configuring Java Section.

From here, check the labels you want to print and click Print Selection. Your Thermal Printer should immediately produce the labels.

Configuring Java

It is necessary to have a functioning Java framework installed. A number of steps need to be taken to properly prepare Java.

Internet Explorer

Internet Explorer is required. Currently Java only functions with Internet Explorer. We recommend using the latest version available, currently Internet Explorer 11.
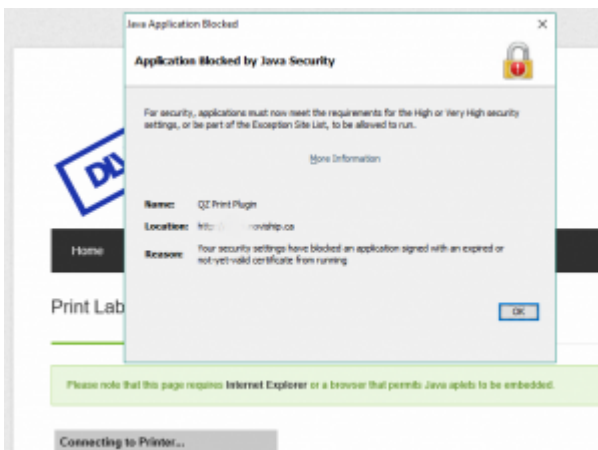
Installing Java

If you do not have Java installed, please follow these steps.

Visit **java.com** and find the appropriate download page.
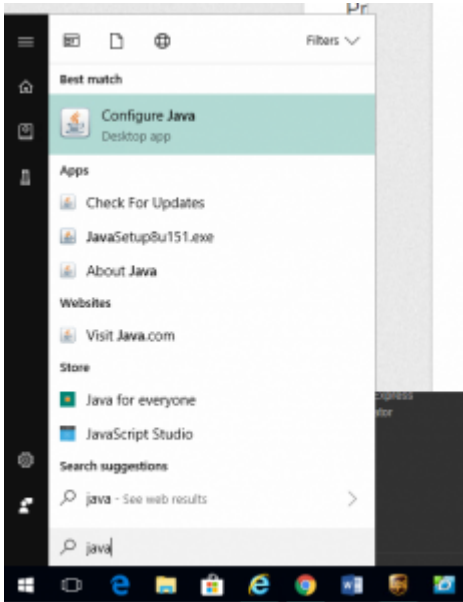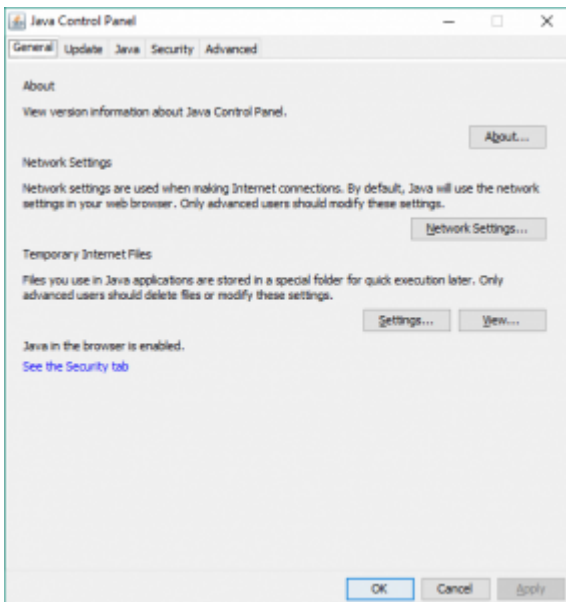

Configure Java Security

If upon visiting the Thermal Printing Page you see a warning or pop-up from Java you will need to approve it and configure the Java Security options to allow the plugin to execute.
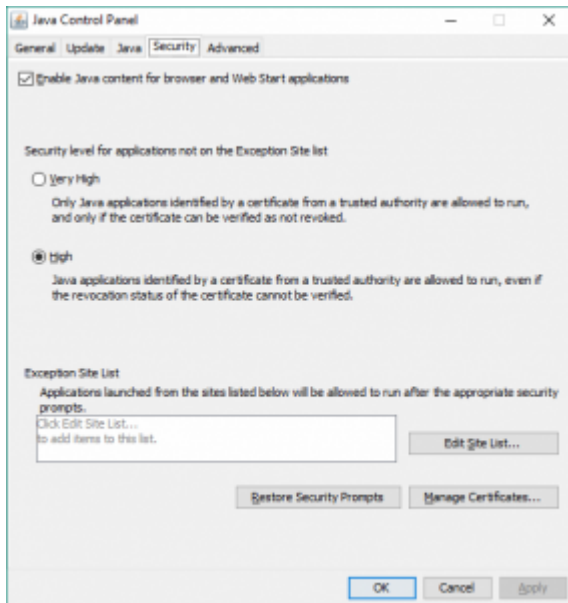

To configure Java Security use Windows Search to find the **Configure Java** applet.
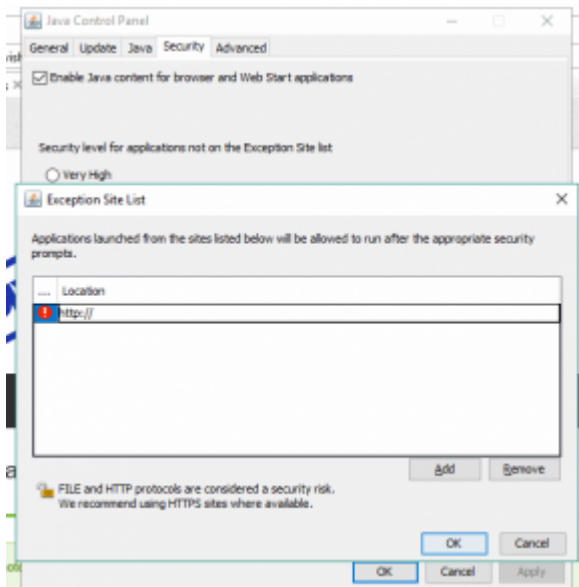
When running the **Configure Java** applet you should see the following dialog.

Find the Security tab and look for the **Exception Site List**.

Click on **Edit Site List**…

Here you should add the URL of the site you wish to access. Ensure that the prefix http:// or https:// match the Noviship site. You only need the name of the site (for example "http://site.noviship.ca").

Click **OK** to save the changes. You may see a warning if the site is "http" and not "https" but you should approve anyway.
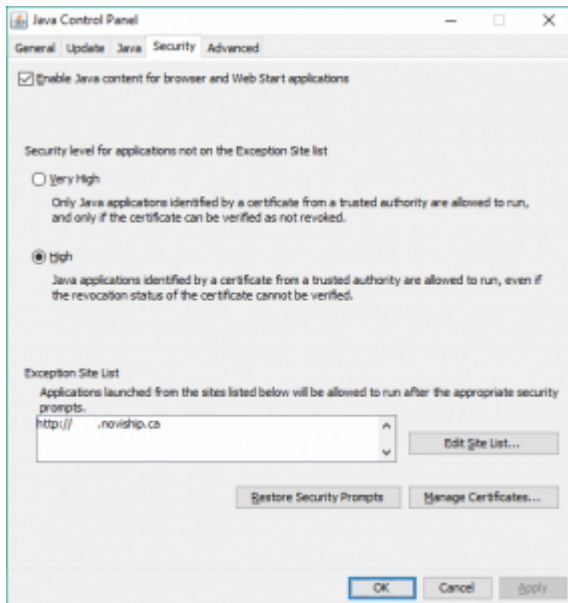
Ensure the site has been correctly added.

Now click **OK**. It is necessary to entirely restart Internet Explorer for these changes to take place and this may require a computer restart. Please do this and return to the Thermal Printing Page.

[Accounting in Noviship - Transactions and Invoices](#)

Accounting in Noviship is actually fairly simple. However it does not map precisely on to traditional accounting, partly because it is fundamentally simpler and because it is just a component in your organisation's accounting process.

In Noviship there are only two objects involved in accounting: **Transactions** and **Invoices**.

An [earlier article provided a quick introduction](#) and this article expands on it.

Transactions

Transactions are objects representing an amount of money. **Transactions** identify the customer to whom the amount applies and also the type of the transaction. There are three flavours of transactions: "**Customer**" (which affects the customer's balance), "**Reseller**" (which affects the reseller's balance) and "**Cost**" (which reflect charges billed by the carrier).

For accounting purposes, the flavour of transaction isn't really important. What you do need to know is that "**Cost**" transactions go on a "**Cost**" invoice while the rest go on a "**Customer**" invoice.

Noviship keeps a journal of all transactions. Transactions cannot be edited or deleted once created. Negating a transaction is accomplished by creating an equal negative transaction.

Transactions are created at several stages. First when a shipment (or pickup or other billable object) is created and again when the price of the object is adjusted (typically during reconciliation). There are also manual transactions which are created outside the scope of a billable objects.

Transactions are "**billable**" if they connect to a reconciled shipment in a **billable state**, for a **billable customer**. So transactions for non-billing shipments or non-

billing customers are not "billable".

Invoices

Invoices are very simply a list of **transactions**. Transactions can only be attached to a single invoice. We call this step "Posting a transaction to an invoice". The amount on the invoice is simply the sum of all transactions attached to it.

Invoices are usually created by gathering all the billable transactions for a customer and **attaching** them to the new invoice object. This is called "Posting an invoice". It is **not** the same as Posting to a Ledger in Accounting – it is just an expression that has a similar meaning.

Posting an invoice typically includes sending that invoice out as a PDF by e-mail to its recipient. We have another operation called "**Filing an Invoice**" which is the same thing but no e-mail is generated.

We have a concept called "**Reference Invoices**". These are just invoices that are not meant to reach the customer. We put transactions here that we don't want to end up in the accounting system. Remember that transactions cannot be deleted or modified so when we need to get rid of them, putting them in a Reference invoice is a good way to keep track.

Cancelling an Invoice

The expression "Cancelling an Invoice" is very important to understand. It **doesn't mean the customer isn't going to pay it** or that you want the invoice to go in the trash. It specifically means the transactions are **detached** from the invoice and go back into the billing queue. They are now available to be posted to future invoices.

The distinction is important. If you cancel an invoice and post another invoice for the same customer the transactions will simply go on the new invoice instead. **Cancelling an invoice does not delete or negate transactions.** You do this simply to release transactions for another invoice.

Sum to Zero

When rendering (drawing or writing) an invoice, if the transactions for an object (such as a shipment) add up to zero, the object does not appear on the invoice. This is important: if you want to remove a shipment from an invoice, just make sure the transactions on that invoice for that shipment sum to zero.

This means if you refund a shipment, negative transactions will be created such that they all add up to zero. If the positive transactions were already posted to an invoice, it leaves the negative transactions for the next invoice which will appear as credits.

If, however, you cancel the invoice with the positive transactions then the next invoice will include those positive transactions bringing the price to zero, hiding the shipment.

Select Invoices

This is discussed further [here](). Essentially this is a technique to limit which transactions (the selected ones) go on an invoice. It is a tool to separate transactions for some reason. Sometimes you need to get rid of transactions so selecting them and filing a Reference Invoice gets the job done.

Carry Forward Transactions

This is a special case. Customers can be set to "Carry Forward" mode or "Credit" mode. Credit mode means that if the sum of all transactions on an invoice is negative, the invoice becomes a Credit Note.

Carry Forward mode prevent Credit Notes from being created by creating a positive transaction on the invoice to make the total zero, and an equal negative transaction that will go back into the billing queue for future invoices. You would use this mode if you want to carry a running balance for a customer. For example, the customer pays $100 in advance making their first invoice (if there are no shipments) -$100. Carry Forward makes this invoice $0 and puts a -$100

transaction back into the queue for the next invoice.

The Summary

Transactions go on Invoices. This procedure is called "Posting". Cancelling an Invoice releases those transactions.

[Quickbooks Invoice Export](#)

We are pleased to announce a major feature for accounting departments. It is now possible to batch export customer invoices to Quickbooks, saving a considerable amount of time taking and error prone manual work.

One of the most complex issues accountants struggle with when it comes to integrating Quickbooks with our system is the handling of taxes. Shipping taxes in Canada are not flat applications of local provincial law which makes it impossible for Quickbooks to apply its own automatic taxation rules. Using our export system makes this trivial as taxes are pre-calculated and entered directly into the appropriate tax accounts.

This tutorial will introduce the Quickbooks Export feature and guide you through configuration.

Configuring Quickbooks

When invoices are created in Quickbooks there are two elements to consider. We will not be itemizing the contents of the Noviship invoice, just the total amount and the taxes. The pre-tax total on the invoice will be associated with a single Quickbooks account and invoice item.

Invoice Account

You will need to know which account invoices will be posted to. Typically this is "Accounts Receivable" but your configuration may differ. Check your **Chart of Accounts** for the name.

Sales Account

Next you will need to have a suitable Account for the sales portion of the invoices. Typically the Account would be labelled something like "Sales". To set up a sales account, go to **Lists | Chart of Accounts** and find a suitable account or create a new one.
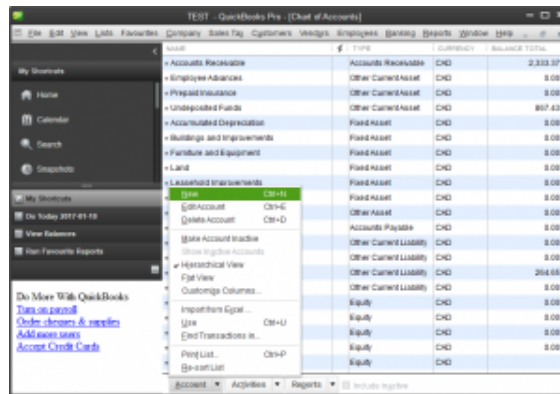
Adding an account in Quickbooks
(Lists | Chart of Accounts | New)

You should use an "Income" type account to represent sales but the rest of the configuration is up to you.

Creating a new Account

Sales Item

Next you should ensure you have a suitable item to match to the sales part of the invoice. You can do this by viewing your item list (**Lists | Item List**) and determining which one to use or if you need to create a new item.
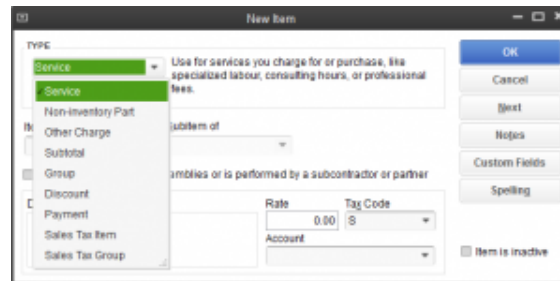
New Item

The item type should be "Service" but that's not critical, and you should associate it with the sales account you selected earlier.

Quickbooks Tax Setup

Because Noviship will enter the sales tax items directly (rather than have Quickbooks calculate them) you will need to be familiar with the tax items and accounts.

You can view your tax setup by going to Sales Tax | Manage Sales Tax.
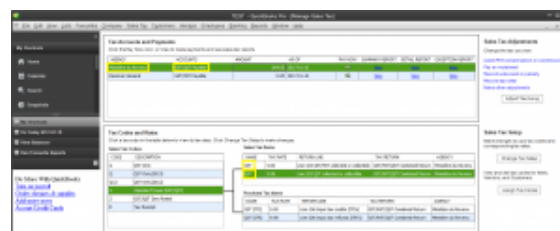
Viewing your Sales Tax Configuration
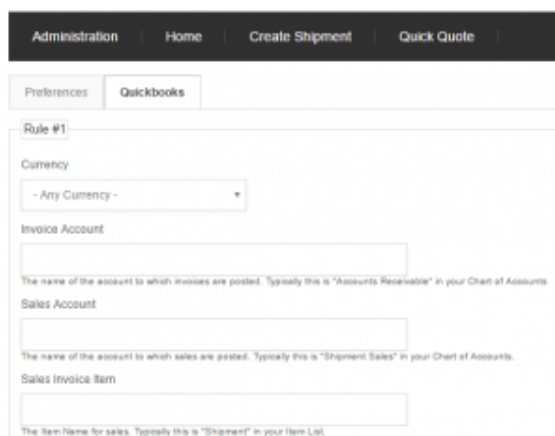
For each tax line item in an invoice, Noviship will need to match it to three things in Quickbooks: the **Agency**, the **Tax Account** and the **Tax Item**.

Note in the screenshot that the Agency, Accounts and the Sales Tax Item Names are highlighted. The Agency determines the format of the sales tax return and

your choice will depend on your province. In Quebec, for example, sales tax is remitted to the Ministère du Revenu for both federal and provincial tax.

Setting up Noviship

To configure Noviship to export Quickbooks data, log in to your operating account (ensure you are not impersonating a customer) and go to **Home | Preferences | Quickbooks**.

Quickbooks Configuration

The Quickbooks configuration comprises a number of rules, one per currency. If you operate a single currency business then you can use only one rule and leave the currency as "Any Currency".

In the "Invoice Account", "Sales Account" and "Sales Invoice Item" fields enter the Invoice Account, Sales Account and Sales Item you selected in Quickbooks earlier. Ensure the spelling and formatting is exactly the same.

Next you will need to match each **Sales Tax** to the appropriate account in Quickbooks.

Sales Tax Setup

For each Sales Tax, match the "Tax Account", "Tax Agency" and "Tax Item" to the names you selected in Quickbooks earlier. Again ensure the spelling is an exact match (copy and paste if you can).

Once you have completed this form, submit the changes to activate the Quickbooks Export feature.

Customer Names

When exporting an invoice, Noviship will include the customer data necessary to create a Customer Account in Quickbooks if one does not exist. If you already have customer accounts in Quickbooks, it is possible that you have different names compared to the accounts in Noviship. In Noviship you can (optionally) enter an Accounting Name (**Administration | Customers | Edit** and set the **Accounting Name** field.

Accounting Name

This is the name that precisely matches your accounting records. If you are exporting invoices, this name will be used for identification. This field is optional.

Accounting Name

If this field is blank, the system will simply use the regular customer name.

Exporting an Invoice

Go to **Administration | Invoices** and simply select (check) the invoices you wish to export. Then click the button named "Export to Quickbooks" to produce a **Quickbooks IIF** file.
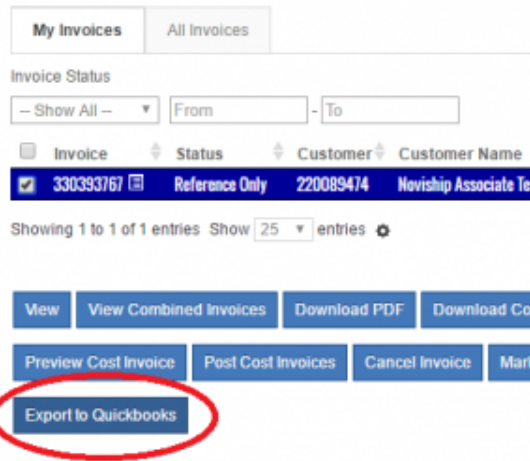
Export to Quickbooks

This file can be imported into Quickbooks via **File | Utilities | Import | IIF Files...**
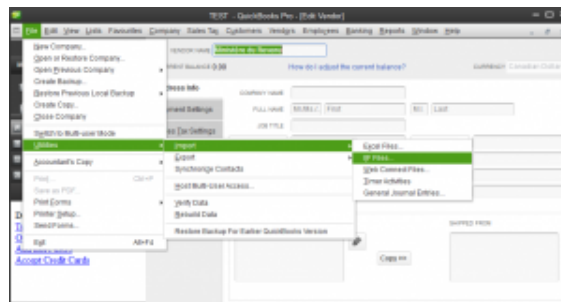
Import IIF

This process will import the selected invoices and also, if necessary, create the matching customer accounts using Noviship customer data.

Notice

Important: You must disable "Use account numbers" in the Quickbooks Company Preferences. Quickbooks will be unable to match our data to existing accounts otherwise due to a limitation in the Quickbooks importer.
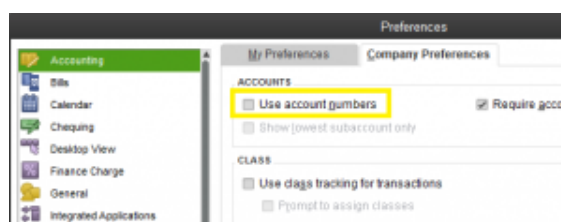
Disable Use Account Numbers

Important: Quickbooks allows you to have accounts that are sub-accounts of other accounts. You cannot do this for any of the accounts in this guide. The Invoice Account, Sales Account, Sales Item and Tax Accounts must all be at the root – i.e. they cannot be sub-accounts.

Credit Management

We have introduced a few recent changes to assist with customer credit and I will discuss them and techniques for managing customer credit in this article.

Billing Review

The Noviship system records transactions for each billable event. Transactions are automatically created when these events occur:

- Shipments are submitted to carriers
- Shipments are (re-)assigned to customers
- Corrections are Approved
- Pending Shipments are Approved
- Billable Pickups are Booked

There are also **Manual Transactions** that are entered by administrators directly into a customer account.

Transactions accumulate on customer accounts but only qualify for billing when they are **reconciled**. Shipment transactions are considered **reconciled** when the shipment is marked reconciled and is not in a **pending** state. This happens automatically during EDI reconciliation. Non-Shipment transactions are always considered reconciled.

When an invoice is posted for a customer, reconciled un-posted transactions are posted to the invoice. This leads to a number of **balances** that we record :-

- The **Transactional Balance** is the sum of all transactions on an account.

This is a good indicator of activity but not credit in itself because some of those transactions will never be reconciled. For example, if a customer submits a shipment to a carrier but it is never picked up it will never appear on a carrier bill.

- The **Unreconciled Balance** is the sum of all unreconciled transactions within the last 30 days. We presume that if a carrier hasn't billed a shipment in 30 days that it probably won't be billed. Therefore this is a useful way to monitor what we expect to bill the customer in the near future. It is also the best way to control short-term credit.
- The **Invoice Balance** is the sum of all posted, unpaid invoices. This is a good measure of the effective credit for a customer because it takes into account pre-payment and post-payment methods.
- The **Posting Balance** (displayed as the **Invoice** column in the customer list) shows what will appear on the invoice if it is immediately posted.
- We have introduced a new balance called **Estimated Debt** which is the sum of the **Unreconciled Balance**, **Invoice Balance** and **Posting Balance**. This represents what we believe the customer owes at any instance.

Setting Limits

In the customer properties page you can an **Unreconciled Shipment Credit Limit** and a general **Credit Limit**. The **Unreconciled Shipment Credit Limit** puts a cap on the **Unreconciled Balance** while the general **Credit Limit** puts a cap on the **Estimated Debt**. Setting these to zero implies that there is no limit. Setting them to "1" is approximate to having a zero limit.

Unreconciled Shipment Credit Limit

200

Shipping will be disabled if the total of unreconciled shipment charges for the previous 30 days exceeds this amount. Set to 0 to use the group setting.

Credit Limit

200

Shipping will be disabled if the combined unreconciled shipment balance, invoice balance and next invoice exceed this amount. Set to 0 to disable or 1 for effectively no credit allowance.

Credit Fields on the Customer Account

If a customer attempts to submit a shipment which would bring either of these balances over the given limits, the shipment will be refused indicating they would exceed their credit limits.

You can set either or both of these but they server slightly different purposes. Capping the **Unreconciled Balance** can prevent customers from shipping high numbers or values of shipments quickly without any checks while still granting them a much higher long-term credit through the general **Credit limit**.

Post-Payment

Generally you will be invoicing your customer and receiving payment at a later date. When you receive a payment you should use the **Pay Invoice** button on the Invoicing page. See [Invoice Payments](#) for more information. If you do not indicate that the payment has been received then the system will not be able to properly measure credit. In a Post-Payment model your invoices will generally be greater than a zero amount.

Pre-Payment
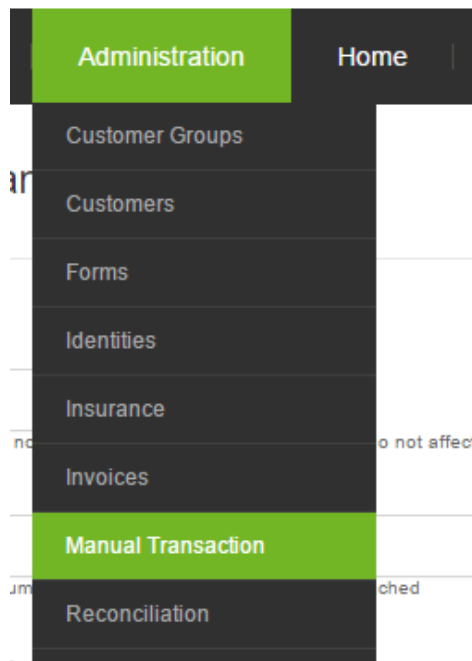
Manual Transaction Menu

In cases where you do not wish to extend credit to a customer you can use a pre-payment model. You exercise this by setting the general **Credit Limit** to "1" or some small number. Do not use zero as this indicates that the credit system is not being used. Do not set the unreconciled limit to "1" as this will effectively disable all shipping.

When you receive a pre-payment from a customer you will need to enter this as a

Manual Transaction. You should use the **Adjustment** category (not Bill Payment) and the amount should be negative and tax-free. Because the transaction is an **Adjustment** it does not need to be reconciled. This means it contributes to the Posting Balance.

Transaction Type

| Adjustment ▾ | **Use Adjustment**

Note: Bill Payments do not appear on Invoices and Credit Notes do not affect the customer Balance. If you wish to credit a customer account use a negative Adjustment.

Customer

| 220080795 | ▾ |

Select the Customer Number to which this transaction is to be attached

Creditor

| Partner (me) ▾ |

Amount

Transaction Amount

| -250 | **Negative Amount**

| Net ▾ | **No Tax**

Tax #1

| None ▾ |

Tax #2

| None ▾ |

Calculate Taxes

Description *

| Pre-Payment |

This information will appear on customer invoices and statements

Notes

| Received cheque #3325 from customer |

A brief description that will appear on the invoice. For corrections this should include an explanation (including the correction)

Submit

Pre-Payment Manual Transaction

Front Page Analysis on Invoice

| Automatic Selection ▼ |

This selection determines which analysis box (if any) appears on the front page of the invoice

Analysis Pages on Invoice

☐ Reference Breakdown

☐ Courier Service Breakdown

☐ User and Usergroup Breakdown

☐ Customer Breakdown for Resellers

Select which analysis pages appear at the end of the customer invoice

☐ Enable Credit Notes

This option allows negative invoices to be posted in the form of credit notes. Otherwise credits are carried forward to the next invoice.

Leave Unchecked

Invoice Alignment

| None ▼ |

Limit shipments on invoices to a given period

Disable Credit Notes

Ensure that **Enable Credit Notes** is un-checked. Credit Notes are a means to issue negative invoices but that does not work with the pre-payment model.

When Credit Notes are disabled if you post a negative invoice (which would usually be the case) a **Credit-Carry Forward** transaction is created to raise the invoice amount to zero and a reverse is created on posting for the next invoice. The customer's pre-payment is therefore reduced with each invoice.

Summary

Total Net Shipments	82.37
Other Charges	-100.00
Sub-Total	-17.63
HST @ 13%	10.72
TOTAL	-6.91
Credit carried forward	6.91
DUE NOW	0.00

Courier Service Usage

	Num	Net	Gross
Purolator			
Express Pack	4	72.94	82.43
Express Envelope	1	9.43	10.66
	5	82.37	93.09
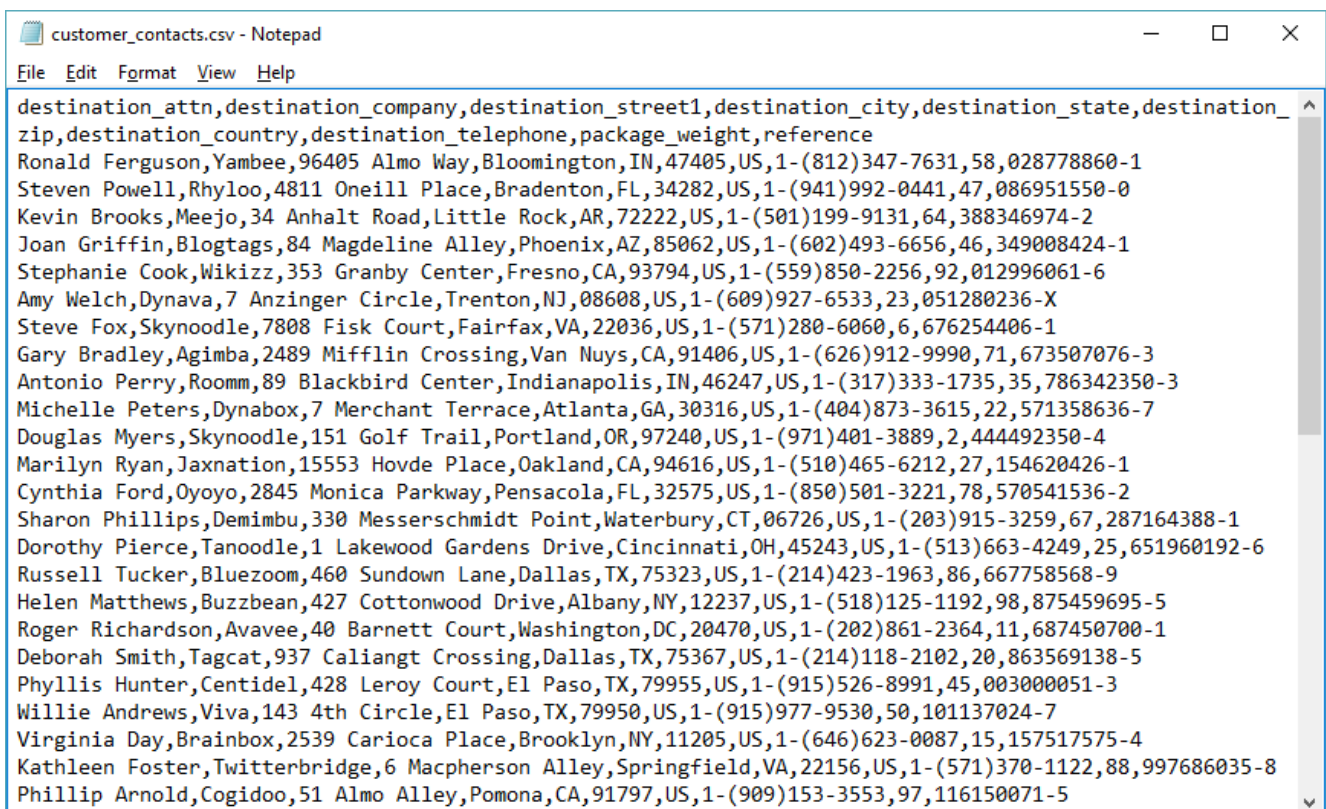
⟵ **Credit to appear on next invoice**

Basic Contact Importing

The system is able to import contacts into customer address books from a variety of formats. This tutorial will take you through the process of importing a basic CSV file containing contacts which applies to most cases.

Examine your File

Open the file you have in Notepad or a text editor to check that it looks similar to the illustration. A **CSV** file is a "Comma Separated Value" file where each line contains one contact and each field is separated by a comma and always in the same order. Often there is a header line at the start. This is the type of file that can be easily exported from Excel. Sometimes you will see quotes around each value and that is fine too.

Typical CSV format text

You will need the following columns in the file for basic importing:

- A column for the country code. This is the [ISO-3166](ISO-3166) code for each country ("CA" for Canada, "US" for the United States, "GB" for the United Kingdom, etc).
- A column for the province or state code (at least for Canadian and American addresses). For example, "QC" for Quebec, "NY" for New York, etc.
- A column for the city
- A column for the Postal Code or ZIP code (for countries where this is used)
- A single column for the contact name. If you have separate columns for First and Last names that's OK as long as they are in that order. You can use Excel to reverse them if necessary.
- A single column for the company name.
- A single column for each line of the street address.

If your file contains more than **500 contacts**, you should use Excel to split the file into parts so that each file contains fewer. The number of contacts you can import at once is determined by your browser and computer specifications so you can experiment.

Create an Address Book

You will need to be impersonating your customer so that when you click on **Home | Address Books** you see their address books and not your own. (Otherwise you'll import the contacts into your own account.)

Click New Address Book to create the new book for imports

You should create a new address book for the import in case you need to repeat

the process. This way you can delete the entire address book in one step.

In **Home | Address Books** click **New Address Book** and label it appropriately.

Select a suitable name and description

Importing the Contacts

Then in **Home | Address Books** click **Import Contacts** to begin.

Click Import Contacts to begin

The next page will ask you to select the target address book and select the format. In this tutorial we will be using the "Customer CSV" format which will

suit most cases. Only use one of the other formats if you know your file is in exactly that format.

Address Book

Contacts ▼

The contacts you import will be added to this address book

File Formats

Custom CSV ▼

Import File

Choose File No file chosen

Submit

Choose your target address book and select Custom CSV

Upload the file and click **Submit** to proceed.

You will now see a table containing all the entries in this file. If the file is large, this may take some time. Remember to split large files into 500 to 1000 contacts at a time.

Search: [   ]

	destination_attn	destination_company	destination_street1	destination_city	destination_state	destination_zip	destination_country	d
✔	Ronald Ferguson	Yambee	96405 Almo Way	Bloomington	IN	47405	US	1
✔	Steven Powell	Rhyloo	4811 Oneill Place	Bradenton	FL	34282	US	1
✔	Kevin Brooks	Meejo	34 Anhalt Road	Little Rock	AR	72222	US	1
✔	Joan Griffin	Blogtags	84 Magdeline Alley	Phoenix	AZ	85062	US	1
✔	Stephanie Cook	Wikizz	353 Granby Center	Fresno	CA	93794	US	1
✔	Amy Welch	Dynava	7 Anzinger Circle	Trenton	NJ	08608	US	1
✔	Steve Fox	Skynoodle	7808 Fisk Court	Fairfax	VA	22036	US	1
✔	Gary Bradley	Agimba	2489 Mifflin Crossing	Van Nuys	CA	91406	US	1
✔	Antonio Perry	Roomm	89 Blackbird Center	Indianapolis	IN	46247	US	1
✔	Michelle Peters	Dynabox	7 Merchant Terrace	Atlanta	GA	30316	US	1
✔	Douglas Myers	Skynoodle	151 Golf Trail	Portland	OR	97240	US	1
✔	Marilyn Ryan	Jaxnation	15553 Hovde Place	Oakland	CA	94616	US	1
✔	Cynthia Ford	Oyoyo	2845 Monica Parkway	Pensacola	FL	32575	US	1
✔	Sharon Phillips	Demimbu	330 Messerschmidt Point	Waterbury	CT	06726	US	1
✔	Dorothy Pierce	Tanoodle	1 Lakewood Gardens Drive	Cincinnati	OH	45243	US	1
✔	Russell Tucker	Bluezoom	460 Sundown Lane	Dallas	TX	75323	US	1

Import Selection   Parse Selected Addresses

The initial screen showing the contact import data

In this page you will need to assign a label to each column of data you wish to import. You do this by scrolling to the column and clicking the drop-down at the top then selecting the appropriate field.

Make sure you use Country Code and Province Code

*Important Columns: Always select **Country Code** for the two character country code column. You don't need to use the "Country" column. Always select **Province Code** for the two character province or state column. You don't need to use the "Province" column.*

Un-check any lines you don't want to import such as the header.

Make sure you have assigned all the useful columns

If you need to adjust specific data you can click on the cell to edit it.

Click a cell to start editing it

When you are happy with the data, click **Import Selection** to begin. As each contact is imported the checkbox will be removed.

Name (Attention) ▼	Company Name ▼	Street 1 ▼	City ▼	Province Code ▼	Postal Code ▼	Country Code ▼	Tel
destination_attn	destination_company	destination_street1	destination_city	destination_state	destination_zip	destination_country	d
Ronald Ferguson	Yambee	96405 Almo Way	Bloomington	IN	47405	US	1
Steven Powell	Rhyloo	4811 Oneill Place	Bradenton	FL	34282	US	1
Kevin Brooks	Meejo	34 Anhalt Road	Little Rock	AR	72222	US	1
Joan Griffin	Blogtags	84 Magdeline Alley	Phoenix	AZ	85062	US	1
Stephanie Cook	Wikizz	353 Granby Center	Fresno	CA	93794	US	1
Amy Welch	Dynava	7 Anzin			08608	US	1
Steve Fox	Skynoodle	7808 F			22036	US	1
Gary Bradley	Agimba	2489 N			91406	US	1
Antonio Perry	Roomm	89 Bla			46247	US	1
✓ Michelle Peters	Dynabox	7 Merc			30316	US	1
✓ Douglas Myers	Skynoodle	151 Go			97240	US	1
✓ Marilyn Ryan	Jaxnation	15553 Hovde Place	Oakland	CA	94616	US	1
✓ Cynthia Ford	Oyoyo	2845 Monica Parkway	Pensacola	FL	32575	US	1
✓ Sharon Phillips	Demimbu	330 Messerschmidt Point	Waterbury	CT	06726	US	1
✓ Dorothy Pierce	Tanoodle	1 Lakewood Gardens Drive	Cincinnati	OH	45243	US	1
✓ Russell Tucker	Bluezoom	460 Sundown Lane	Dallas	TX	75323	US	1
✓ Helen Matthews	Buzzbean	427 Cottonwood Drive	Albany	NY	12237	US	1
✓ Roger Richardson	Avavee	40 Barnett Court	Washington	DC	20470	US	1

Importing Addresses

Please Wait...

Import Selection **Parse Selected Addresses**

Contacts are now being imported

You should now see the completed import list with ticks showing successful imports.

Name (Attention) ▼	Company Name ▼	Street 1 ▼	City ▼	Province Code ▼	Postal Code ▼	Country Code ▼	Tel
⊘ Gary Harris	Gabtune	6 Manitowish Crossing	Newark	DE	19725	US	1
⊘ Anthony Stewart	Janyx	26 Raven Park	Morgantown	WV	26505	US	1
⊘ Brandon James	Avamba	933 Hooker Plaza	Kansas City	MO	64114	US	1
⊘ Kathy Kennedy	Gabcube	63999 Redwing Court	Pittsburgh	PA	15255	US	1
⊘ Phyllis Stanley	Yamia	45909 Merrick Hill	Delray Beach	FL	33448	US	1
⊘ Victor Simpson	Demizz	383 Kings Junction	Worcester	MA	01605	US	1
⊘ Michael Campbell	Midel	252 Stephen Point	Toledo	OH	43610	US	1
⊘ Betty Cole	Realcube	76804 Hauk Plaza	Boston	MA	02104	US	1
⊘ Bruce Lawrence	Digitube	89478 Doe Crossing Crossing	Greenville	SC	29610	US	1
⊘ Evelyn Roberts	Oodoo	4875 Fair Oaks Circle	San Francisco	CA	94126	US	1
⊘ Fred Peters	Oyope	51713 Village Pass	Trenton	NJ	08650	US	1
⊘ Janice Mcdonald	Katz	19547 Oak Valley Junction	Colorado Springs	CO	80915	US	1
⊘ Alice Bowman	Oyoba	032 Sutherland Road	Duluth	MN	55811	US	1
⊘ Kevin Russell	Avavee	6552 Banding Alley	Brooklyn	NY	11220	US	1
⊘ Michael Armstrong	Aivee	59 Myrtle Pass	Saint Paul	MN	55115	US	1
⊘ Amy Martinez	Meedoo	17533 Raven Junction	Flint	MI	48550	US	1
⊘ Sara Evans	Vitz	3 Rutledge Drive	Hialeah	FL	33018	US	1
⊘ Linda Henry	Flashdog	0996 Fairfield Place	Riverside	CA	92513	US	1
⊘ Kathy Vasquez	Devshare	08809 Ilene Court	Kansas City	MO	64160	US	1
⊘ Kathy Wagner	Zoomzone	1 Pawling Terrace	New York City	NY	10150	US	1

Import Selection **Parse Selected Addresses**

Check that all the contacts you want were successfully imported by looking for the tick on the left

When the job is done you can click on another menu link to leave.

Invoice Alignment

Invoice Alignment is our term for limiting the contents of an invoice to a particular period. Typically you would use this when a customer only wants shipments for one month at a time on their invoices.

For example, if your customer wants an invoice in July that only has June shipments in it, even though they have billable July shipments, you would use this feature.

This is a per-customer setting so you edit it in the Customer Properties.
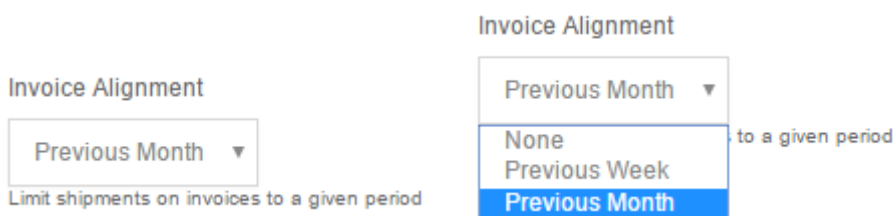
Setting Invoice Alignment to **None** has no effect. Setting it to **Previous Week** means that the shipment date *must not be in the current week* in order to appear on the invoice. Shipments older than the previous week will appear so this cut-off only affects the most recent shipments. Setting it to **Previous Month** has a similar effect but the cut-off date is pushed back to the end of the last calendar month.

Batch Shipments

Our interface has been designed primarily around creating and submitting a single shipment at a time. However for heavier users it is useful to process multiple shipments at once. Some users will regularly have a list of shipments that need to be submitted that has been produced by another system. In this document we will introduce a new feature aimed at addressing these cases.

What are Batch Shipments?

Each shipment in our system can be viewed and processed independently. However, shipments can also exist in containers called "Batch Shipments". Working with shipments inside a batch allows one to modify, quote, ship and void multiple shipments at once.

In addition it is possible to import shipments into a batch from a CSV file which can be useful for integration with external order systems.

You can access the Batch Shipments through **Home | Batch Shipments**
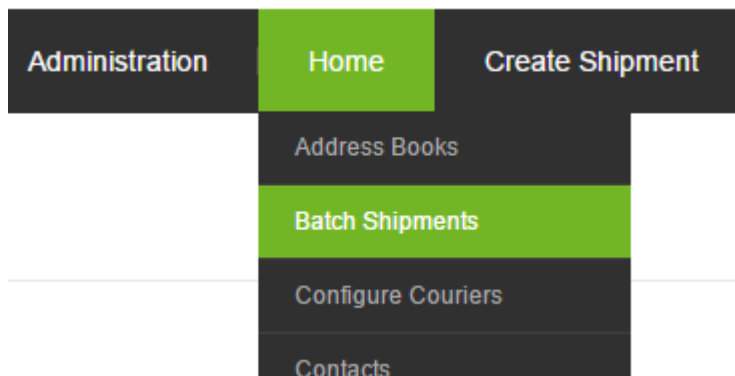
During development this menu option is only available to partners but the URLs (/batch/new, /batch/1) are available to all shippers.

When you create a new Batch you will see the Batch Shipment page.

Batch Shipment - 8

BATCH OPTIONS

Shipment Date [   ] Packaging Type [▼] Units [▼]

BATCH STATUS

Total Shipments 0   Quoted 0   Manifested 0
In-Transit 0   Delivered 0   Exceptions 0   Void 0

SHIPMENTS

☐   Shipper Attn   Shipper Company

[ADD SHIPMENT]   [IMPORT]   [QUOTE]   [SUBMIT]   [VOID]   [DELETE]

[DOWNLOAD WAYBILLS]   [EXPORT]

An empty batch shipment

You can now add shipments to this batch in two ways:

Manual Entry

Click "Add Shipment" to add a shipment to the batch. When you click the button a new row will be added and you can edit the fields directly. Note that not all shipment fields are currently available in this interface but you can treat each shipment as a regular individual shipment by clicking on the **Shipment Number** (the first item in the row).

Importing from a CSV file

If you have a flat file consisting of one row per shipment, you can import it into the batch by clicking on "Import". When you do this you will be asked to upload the file.

Importing a CSV file containing multiple shipments

The interface that appears once you upload the CSV file allows you to assign a meaning (field) to each column. You do this by scrolling to the column of interest and selecting a field from the drop down box at the top of the column.

Each shipment you import will have the default shipper and consignee according to the user account that owns the batch. (The owner is the user account that created the batch.) Therefore you only need to import the columns that contain non-default data – typically the consignee address and package weight.

Saving your Field Map

If you do this import regularly you can save the map you have created by clicking "Save Map" and giving it a name. After that you can click "Use a Saved Field Map" to retrieve it in future batch shipments.

Saving the column assignments in a customer account makes regular batch imports much quicker

If the CSV file you imported includes a header, remember to de-select that row. Once ready you can click "Import Selection" to create the shipments.

Click Import Selection to import the selected shipment rows

When you have finished importing the shipments you can click "Return to Batch"

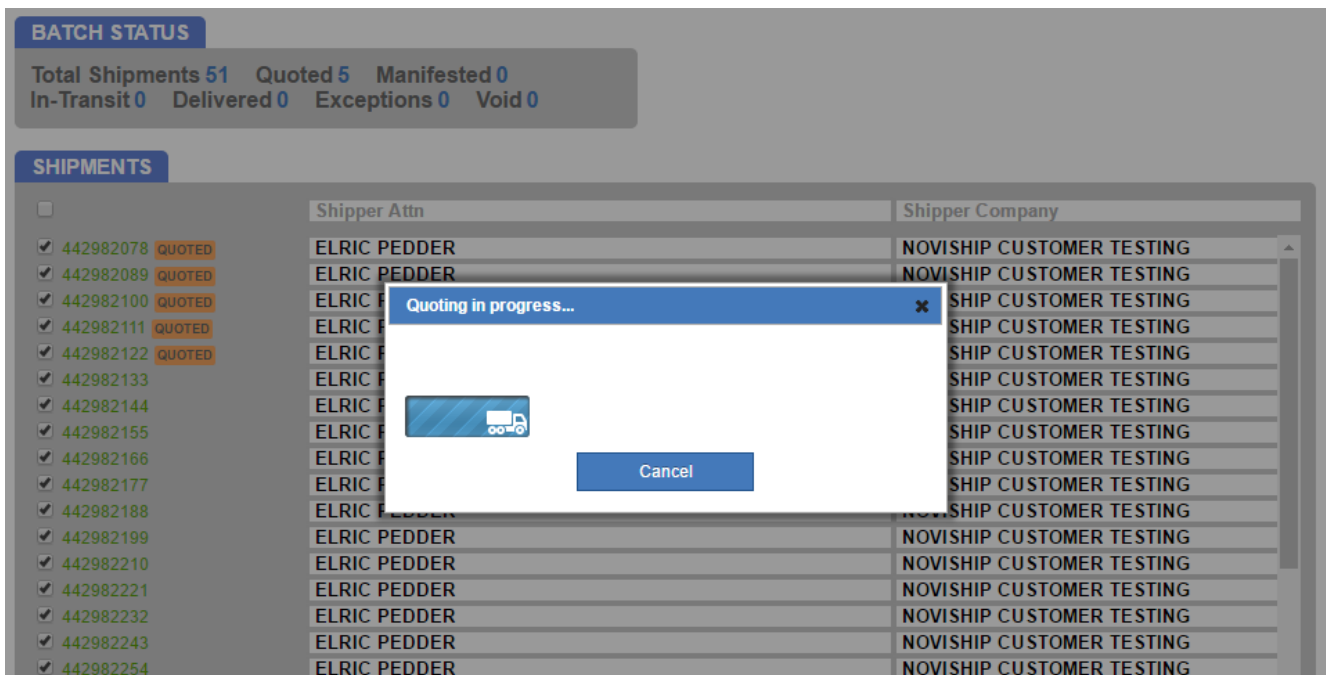to return to the batch shipment editor.

Editing Shipments

Each row in the Batch Shipment Editor can be modified. If you enter data into the column header it is applied to all shipments in the batch.

Quoting Shipments

When your shipments are ready you can check them and click "Quote" to retrieve quotes.

Quoting Shipments

Each shipment that has been quoted will have the quote options displayed in the last column. By default the cheapest quote is selected.

Submitting Shipments

Once a shipment has been quoted you can "Submit" it which means it will become manifested and the waybills will be generated.

Each manifested shipment will have an icon beside the shipment status which provides access to the documents (waybills, manifests, etc).

Access shipment documents by clicking on the document icon

You can also click "Download Waybills" to retrieve a single PDF containing every waybill for the shipments in this batch.

Exporting Data

The "Export" button produces a CSV file with data for each shipment, including status and tracking number.

De-Caching Invoices

Although invoices are, effectively, just a collection of transactions (see Invoicing Concepts for some background) the underlying data can change. For example, customer specific data (such as the customer's address) could be modified. Shipment details can also change over time. However once you "post" an invoice the created PDF is static. Even if you change the customer's address, when you download a posted invoice it looks exactly as it did when you posted it.

This can be a useful element in transactional accounting as the document is unchanging. However if a customer asks you to re-print their invoice with a different address you would be faced with having to cancel the invoice and produce a new one.

We have now introduced the concept of "de-caching" invoices. When an invoice is de-cached it means we eliminate the PDF and the next time it is downloaded or viewed the PDF must be re-constructed with the latest data.

Invoice De-Cache Command

Invoicing Concepts

Invoicing can be seen as complex and sometimes awkward but understanding the process will certainly help. Operators often expect invoices to be "editable" in as much as one can put anything on them or make arbitrary changes. In fact the invoice is simply a collection of transactions.

Courier Invoice
440000001 - $40.00
440000002 - $10.00

#	Shipment	Amt	Invoice
#1	440000001	$50.00	330000001
#2	440000002	$30.00	330000001
#3	440000001	$-10.00	330000001
#4	440000002	$-20.00	

Invoice 330000001
440000001 - $40.00
440000002 - $30.00

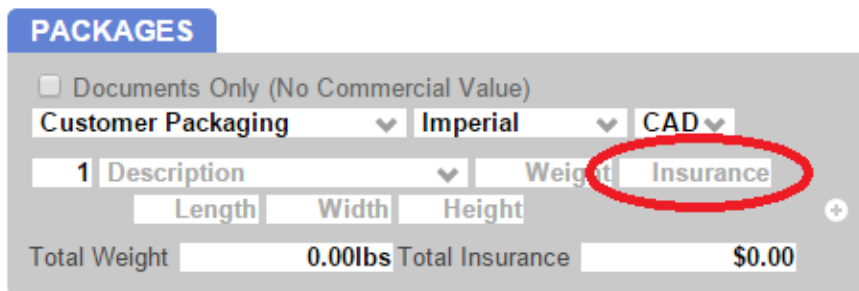| Invoice Preview |
|---|
| 440000002 - $-20.00 |
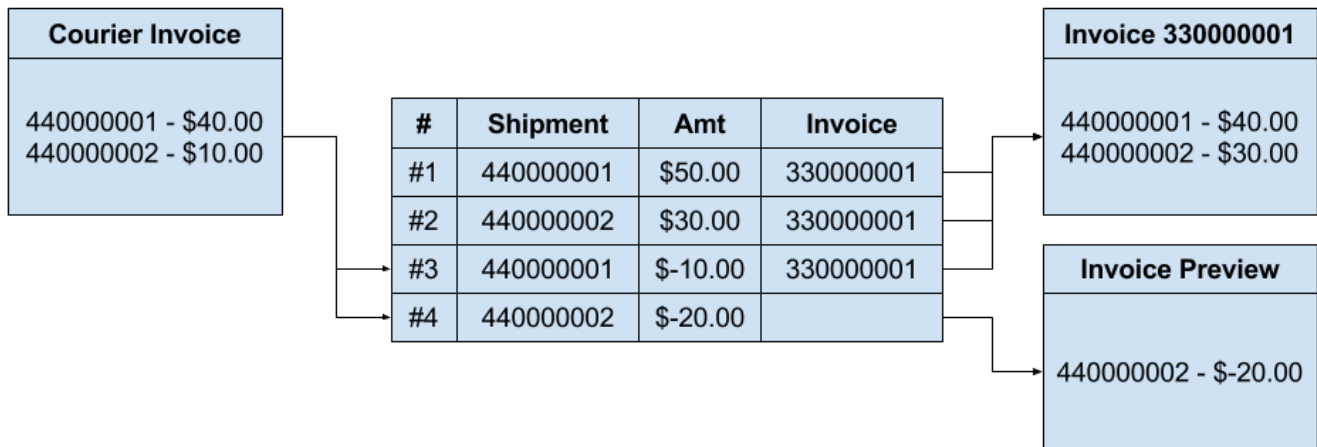
Transaction Invoicing

Transactions are generated during various operations in the system, most often when reconciling carrier invoices. Each shipment typically has many transactions which add up (for each category) to the total chargeable amount. Each transaction can either be un-assigned or assigned to a single invoice. The invoicing system automatically combines transactions for a shipment so that no shipment appears twice on a single invoice. However, a shipment can appear on multiple invoices.

If, for example, you edit the price of a shipment that has already been invoiced then the un-assigned transactions generated by the system (after editing) will represent the difference from the previous total bill. Imagine a shipment that has been invoiced for $50 but you change the price to $40. Internally an un-assigned -$10 transaction has been created. If you preview a new invoice for that customer it will contain this -$10 credit. However, if you cancel the original invoice (unassigning the previous transactions) the new preview will contain simply the updated $40 charge.

Insurance Provisions

Many carriers provide an optional insurance service and customers can take advantage of this service by specifying the value of the items in the package insurance field.

Package Insurance Field

This information is passed to the carrier during quoting and if insurance is available the price will be included in the quote.

Carrier insurance is typically expensive compared to third-party insurance and account holders often receive no discounts. This provides an opportunity to benefit (and profit) from third-party services.

Insurance Provisions

Multiple Insurance Provisions can be created representing multiple third-party insurance providers or differing configurations/pricing schedules for the same provider. The provision defines properties such as the limits, minimum charge, currency and the premium rates.

Description

Marsh Insurance

Caption

Insurance

This text will appear on the customer charge breakdown

Customer Group

DLVRD Logistics ▾

Currency

CAD - Canadian Dollar ▾

This is the currency in which the premiums are calculated. The result will be converted to the customer currency for pricing.

Customer Charge Formula

Minimum Amount 0	Maximum Amount 9999	Base Charge 0	Minimum Charge 10	Premium Rate 0.02 %
Minimum Amount 0.00	Maximum Amount 0.00	Base Charge 0.00	Minimum Charge 0.00	Premium Rate 0.00 %
Minimum Amount 0.00	Maximum Amount 0.00	Base Charge 0.00	Minimum Charge 0.00	Premium Rate 0.00 %
Minimum Amount 0.00	Maximum Amount 0.00	Base Charge 0.00	Minimum Charge 0.00	Premium Rate 0.00 %
Minimum Amount 0.00	Maximum Amount 0.00	Base Charge 0.00	Minimum Charge 0.00	Premium Rate 0.00 %

Categories

Category #1

ID

GENERAL

A short unique identifier for this category (e.g. JEWELRY/ART)

☑ Allowed

Unchecking this will prevent the user from selecting this category

Caption

General Merchandise (New/Used/Refurbished)

The description shown to the customer in the category list

Maximum allowable value for this category

9999.99

This is the maximum requested insurance value that can be covered in this policy

Notice

<p>Break-bulk, flat rack or open top container shipments excluding rust, oxidization, discoloration, scratching, chipping, denting or marring, unless caused by an insured peril. </p>

<p>IF the goods are Used/Refurbished, the following conditions also apply: </p>

Excluding rust, oxidization, discoloration, scratching, chipping, denting and marring, unless caused by an insured peril.
Excluding mechanical and/or electrical derangement, unless caused by an insured peril.
Subject to the Second-Hand Replacement Clause: In the event of claim for loss or damage to any part of the Insured interest in consequence of a peril covered by the Policy, the amount recoverable hereunder shall not exceed such proportion of the cost of replacement of the parts lost or damaged as the insured value bears of the value of new machinery plus additional charges for forwarding and refitting the new part or parts if incurred.

This is the detailed notice presented to the customer when this category is chosen

Insurance Provision Configuration

Each customer can be assigned to a specific Insurance Provision or none (i.e. insurance is provided by the carrier if available). Once assigned to a provision, all requests for insurance will be processed using the configuration defined for the insurance provision.

Each customer can also have an insurance premium value. If empty or zero, the premium calculated in the provision is used. If the number is positive, this is the premium (e.g. "2" is 2% of the insurance value). If negative, this is a percentage discount on the calculated premium. Regardless of this value, if the insurance provision has a minimum fee this will override the customer specific premium.

Insurance Category

When a shipment is being prepared and the insurance requested changes from zero for a customer assigned to a provision, the "Insurance" section will appear.

In this section the customer is asked to select an Insurance Category.

Selecting Insurance Category

This category is used to provide the customer with details about the insurance. It does not affect the premium. However, you may configure some categories as being "Disallowed" and with this method you can prevent the customer from attempting to insure certain categories of goods.

Insurance Category Disallowed

The notice is a good place to indicate restrictions and deductibles.

Insurance Category Customer Notice

Quotes

When the carrier quotes are produced a line item is added based on the insurance provision. Note that this fee is not included in the cost portion.

Insurance Charge in Quote

Resellers

At this time it is not possible to grant a different insurance premium to resellers.