### **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.

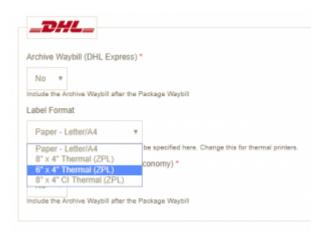
## **Administrative Setup**

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.

(F)	Print Waybills and Documents ®						
Ť	PRINT THERMAL LADELS	Please Print 3 Copies of each Waybill					

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

Print Labels		
Pressenties that this page require	a <b>Internet Explorer</b> or a lorowser that permits Java splish to be embedded.	
Connecting to Printer		
PRINT SELECTED L/	TENDS738999 REFURN TO STATUS	

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**

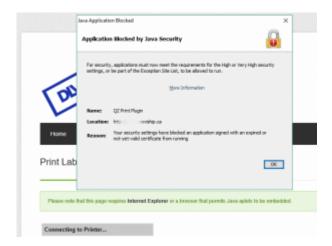
If you do not have Java installed, please follow these steps.

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

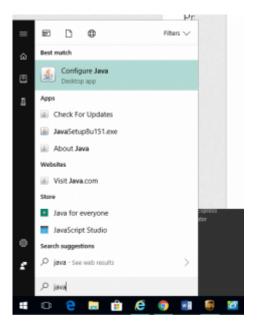


### **Configure Java Security**

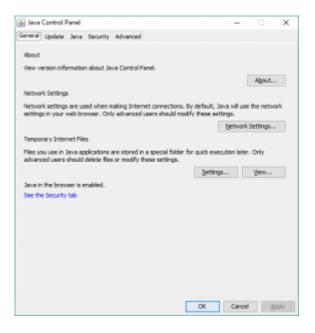
If upon visiting the Thermal Printing Page you see a warning or pop-up from Java you will need to approve it and configure the Java Security options to allow the plugin to execute.



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**.

💰 Java Control Panel	-		×
General Update Java Security Advanced			
C gnable Java content for browser and Web Start applications			
Security level for applications not on the Exception Site list			
○ Very High			
Only Java applications identified by a certificate from a trusted author and only if the certificate can be verified as not revoked.	rity are allow	ed to run	•
(e) tigh			
Java applications identified by a certificate from a trusted authority a the revocation status of the certificate cannot be verified.	re allowed to	o run, eve	nif
Exception Site List Applications launched from the sites listed below will be allowed to run a promote.	fter the app	ropriate se	ecurity
Click Edit Site List			
to add items to this list.	Edit S	ite List	
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QK	Cancel		sply

Click on Edit Site List...

Java Control Panel	-	-	- ×
ist General Update Java Security Advanced			
> Drable Java content for browser and Web Start applications			
Security level for applications not on the Exception Site list			
() Very High			
🚠 Exception Site List			×
prompta. Location			
FILE and HITTP protocols are considered a security risk. We recommend using HITTPS sites where available.	êdd		Benove
	êdd O		Bemove Cancel

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.

🔓 Java Control Panel		– 🗆 X
General Update Java Security Adv	anced	
고 Enable Java content for browser and	Web Start applications	
Security level for applications not on th	e Exception Site list	
○ Very High		
Only Java applications identified b and only if the certificate can be v		uthority are allowed to run,
() tiph		
Java applications identified by a co the revocation status of the certif		ity are allowed to run, even if
Exception Site List Applications launched from the sites	isted below will be allowed to r	un after the appropriate security
prompts.		
http:// noviship.ca		
		Edit Site List
	Bestore Security Prompts	Manage Certificates

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 <u>earlier article provided a quick introduction</u> 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 <u>here</u>. 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.

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	NAME	i⊈ines.	DUMBER 1	BALANCE TOTAL
By Diverinalis	<ul> <li>Accounts Receivable</li> </ul>	Accounts Receivable	CHD	2,333.3
al morene	- Employee Advances	Other CurrentAsset	CHD	8.0
A Hone	- Prepaid Insurance	Other CurrentAsset	CHD	8.0
	- Undeposited Funds	Other CurrentAsset	CHD	897.4
🕅 Calendar	<ul> <li>Accumulated Depreciation</li> </ul>	Fixed Addet	CHD	8.0
. Search	- Buildings and Improvements	Fixed Asset	CHD	8.0
w, casts	+ Furniture and Equipment	FieldAppet	CHD	8.0
Snapshola	+Land	FieldAppet	CHD	8.0
	< Leasehold Improvements	FieldAppet	CHD	8.0
My Shortcuta	Bee CaleN	FieldAppet	CHD	8.0
Do Today 2017-01-10	EditAccount Chri-E Delete Account Chri-D	Other Asset	CHD	8.0
Very Relevant		Accounts Payable	CHD	8.0
	<ul> <li>Make Account Inactive</li> </ul>	Other Current Liability	CHD	8.0
Ran Favourita Raporta	Sitrow Ingeliee Accounts	Other Current Liability	CHD	0.0
	Flat Very	Other Current Liability	CHD	204.0
	Oustomige Columns	Other Current Liability	CHD	8.0
Do More With QuickBooks	import from Escal	Early	CHD	0.0
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uld more pairs	Find Transactions in.	Early	CHD	0.0
Iccept Credit Cards		Early	CHD	0.0
	PrintList. Chri-P Be-sortList	Equity	CHD	

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.

Paperson and an and an and an and an and an		Use for servic	Use for services you charge for or purchase, like specialized labour, consulting hours, or professional fees.			
Service ·		specialized ta				
1	Non-inventory Part					Beat
B)	Other Charge	jubitem of				Notes
1	Subtotal Group	umbling or in a	amblies or is performed by a subcontractor or partner		adaar	Custom Field
1	Discount	ampines or is p				Spelling
C	Deserved		Rate	Tag Code		
	Payment		0.00	8	*	
	Sales Tax Rem		Account			
	Sales Tax Group					Item is inactive

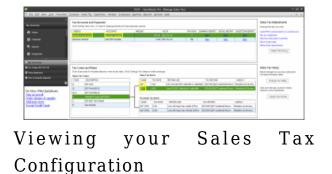
New Item

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.



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**.

Preferences	Quickbooks								
Rule #1									
Currency									
- Any Current	ų -								
Invoice Account									
	count to which invoice	are pos	sted. Ty	pically this	is "Accourt	ts Reo	evable" in	your Char	t of Accourt
Sales Account									
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the name of the a	and a second s	e prose	a. qpa	***	orspream	Cares	in pour on	an er Add	0.0110.

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.

GST	
Tax Account	
The name of the account to which this tax is posted. Typically this is "Taxes Payable" Tax Agency	in your Chart of Accounts
The name of the Tax Agency to which tax is remitted. This is configured in Manage So	ales Tax.
Tax them	
The name of the Tax item associated with this tax code. This item appears in your ite	m List and is typically the name of the tax.

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 n	naiches your accounting neo	ords. If you are exporting	involces, this name	will be used for identifica-	tion. This field is option

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.

My Invoices	All Invoices			
Invoice Status				
- Show All -	From	- To		
Invoice		Customer	Customer N	lame
330393767 🗉	Reference Only	220089474	Noviship Asso	ciate T
Showing 1 to 1 of 1	entries Show 25	i v entries o	•	
Showing 1 to 1 of 1	entries Show 25	ō 🔻 entries 🧔	•	
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View Co	ombined Invoices roice Post Cost	Download Pl	DF Downlo	

Export to Quickbooks

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

	Bee Company Open or Restore Company Open Breesus Company		International and a state	indere de Terrera	Same Charle Offe		
	Create Basings Basions Previous Local Deckup Create Copy globe Company	,	tress Info mand Datlings		MANUZ FILM	10 Lat	
1	Systems Bull-saw these		es [acdetings	101111			
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	nge Ab-	1				Cognitio	

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.

			Preferences	
12	Accounting	My Preferences	Company Preferences	
	Dills	ACCOUNTS		
۵.	Calendar	Use account gun	nbers 🛛 🖉 Require gccou	
9	Chequing	Show (owest subaccount only		
-	Desktop View	CLASS		
96	Finance Charge			
2	General	Use cla <u>s</u> trackin		
<b>2</b> 8	Integrated Applications	Prompt to as:	sign classes	

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.

## **<u>Credit Management</u>**

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

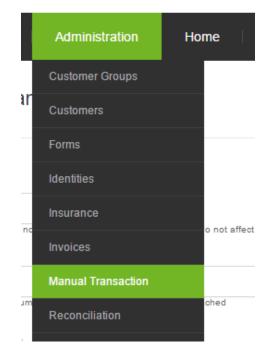
If a customer attempts to submit a shipment which would bring either of these balances over the given limits, the shipment will be refused indicating they would exceed their credit limits.

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 <u>Invoice Payments</u> 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 prepayment 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	Ŧ	Use Adjustment
		ar on Invoices and Credit Notes do not affect the credit a customer account use a negative Adjustment.
Customer		
220080795		v
Select the Customer	Number to	which this transaction is to be attached
Creditor		
Partner (me)	7	
Amount		
Transaction Am	ount	
-250		Negative Amount
Net 🔻		No Tax
Tax #1		
None 🔻		
Tax #2		
None 🔻		
Calculate Tax	es	

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)	



#### **Pre-Payment Manual Transaction**

Front Page Analysis on Ir	voice
Automatic Selection	v
This selection determines whi invoice	ch analysis box (if any) appears on the front page of the
Analysis Pages on Invoic	e
Reference Breakdow	'n
Courier Service Brea	kdown
User and Usergroup	Breakdown
Customer Breakdown	1 for Resellers
Select which analysis pages a	appear at the end of the customer invoice
	ive invoices to be posted in the form of credit notes. rried forward to the next invoice.
Invoice Alignment	Leave Unchecked
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.

		<b>Courier Service Usage</b>			
			Num	Net	Gross
Summary		Purolator			
Summary		Express Pack	4	72.94	82.43
		Express Envelope	1	9.43	10.66
Total Net Shipments	82.37		5	82.37	93.09
	-100.00				
Other Charges	-100.00				
Cub Tatal	17.00				
Sub-Total	<u>-17.63</u>				
HST @ 13%	10.72				
TOTAL	-6.91				
Credit carried forward	6.91	Credit to appe	ear on next i	nvoice	
DUE NOW	0.00				
DOLINOIT	0.00				

### **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.

🔲 customer_contacts.csv - Notepad — 🗆	×
<u>File Edit Format View H</u> elp	
destination_attn,destination_company,destination_street1,destination_city,destination_state,destination zip,destination country,destination telephone,package weight,reference	- ^
Ronald Ferguson, Yambee, 96405 Almo Way, Bloomington, IN, 47405, US, 1-(812) 347-7631, 58, 028778860-1	
Steven Powell, Rhyloo, 4811 Oneill Place, Bradenton, FL, 34282, US, 1-(941)992-0441, 47, 086951550-0	
Kevin Brooks,Meejo,34 Anhalt Road,Little Rock,AR,72222,US,1-(501)199-9131,64,388346974-2	
Joan Griffin,Blogtags,84 Magdeline Alley,Phoenix,AZ,85062,US,1-(602)493-6656,46,349008424-1	
Stephanie Cook,Wikizz,353 Granby Center,Fresno,CA,93794,US,1-(559)850-2256,92,012996061-6	
Amy Welch,Dynava,7 Anzinger Circle,Trenton,NJ,08608,US,1-(609)927-6533,23,051280236-X	
Steve Fox,Skynoodle,7808 Fisk Court,Fairfax,VA,22036,US,1-(571)280-6060,6,676254406-1	
Gary Bradley,Agimba,2489 Mifflin Crossing,Van Nuys,CA,91406,US,1-(626)912-9990,71,673507076-3	
Antonio Perry,Roomm,89 Blackbird Center,Indianapolis,IN,46247,US,1-(317)333-1735,35,786342350-3	
Michelle Peters,Dynabox,7 Merchant Terrace,Atlanta,GA,30316,US,1-(404)873-3615,22,571358636-7	
Douglas Myers,Skynoodle,151 Golf Trail,Portland,OR,97240,US,1-(971)401-3889,2,444492350-4	
Marilyn Ryan,Jaxnation,15553 Hovde Place,Oakland,CA,94616,US,1-(510)465-6212,27,154620426-1	
Cynthia Ford,Oyoyo,2845 Monica Parkway,Pensacola,FL,32575,US,1-(850)501-3221,78,570541536-2	
Sharon Phillips, Demimbu, 330 Messerschmidt Point, Waterbury, CT, 06726, US, 1-(203)915-3259, 67, 287164388-1	
Dorothy Pierce, Tanoodle, 1 Lakewood Gardens Drive, Cincinnati, OH, 45243, US, 1-(513)663-4249, 25, 651960192-6	
Russell Tucker, Bluezoom, 460 Sundown Lane, Dallas, TX, 75323, US, 1-(214)423-1963, 86, 667758568-9	
Helen Matthews, Buzzbean, 427 Cottonwood Drive, Albany, NY, 12237, US, 1-(518) 125-1192, 98, 875459695-5	
Roger Richardson, Avavee, 40 Barnett Court, Washington, DC, 20470, US, 1-(202)861-2364, 11, 687450700-1	
Deborah Smith, Tagcat, 937 Caliangt Crossing, Dallas, TX, 75367, US, 1-(214)118-2102, 20, 863569138-5	
Phyllis Hunter, Centidel, 428 Leroy Court, El Paso, TX, 79955, US, 1-(915)526-8991, 45,003000051-3	
Willie Andrews, Viva, 143 4th Circle, El Paso, TX, 79950, US, 1-(915)977-9530, 50, 101137024-7	
Virginia Day, Brainbox, 2539 Carioca Place, Brooklyn, NY, 11205, US, 1-(646)623-0087, 15, 157517575-4	
Kathleen Foster, Twitterbridge, 6 Macpherson Alley, Springfield, VA, 22156, US, 1-(571)370-1122, 88, 997686035-8	
Phillip Arnold,Cogidoo,51 Almo Alley,Pomona,CA,91797,US,1-(909)153-3553,97,116150071-5	Υ.

#### 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 <u>ISO-3166</u> 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.

Addressbook Name	
Contacts	
A short name to identify this Address Book	
Description	
Imported	
A description of this address book for administrative purposes	
<ul> <li>Allow Ship-From</li> <li>Users who do not have permission to edit the shipping address will on</li> </ul>	ly be able to :
Access Control	
Select who can access this address book	
Visible to Everybody v	
B-1	
Submit	

Select a suitable name and description

#### **Importing the Contacts**

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

		Search:
Name		♦ Visibility
Recently Used	Recently used addresses are automatically added	noviship-customer
Contacts	Imported	noviship-customer
	tries Show 25 v entries ¢	novising-customer

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	Ŧ		
The contacts you in	nport will be add	ded to this address boo	k
File Formats			
Custom CSV		v	
Import File			
Choose File	No file chose	en	
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:		
<b>~</b>	<b>v</b>	v	v	v	•	Ŧ	v	r
•	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	Оуоуо	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	ТХ	75323	US	1.

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.

Province Code	Postal Code	Ŧ	Country Code 🔹	Tele
DE	19725		Name (Attention)	1 🔺
WV	26505		Company Name	1
МО	64114		Country	1
PA	15255		Country Code Province Code	1
FL	33448		Province	1
MA	01605		Email Extension Telephone Postal Code City Residential Flag Street 1	1
OH	43610			1
MA	02104			1
SC	29610			1
CA	94126		Street 2	1
NJ	08650 Street 3 Tax ID		1	
CO	80915		Reference	1
MN	55811		Address	1

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.

						Search:		
∕^	Name (Attention) <b>v</b>	Company Name 🔻	Street 1 🔻	City •	Province Code •	Postal Code 🔹	Country Code •	Te
	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	Оуоуо	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.

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.

Company Name 🔻	Street 1 🔹	City	Province Code	Postal Code 🔹
Gabtune	6 Manitowish Crossing	Newark	DE	19725
Janyx	26 Raven Park	Morgantown	WV	26505
Avamba	933 Hooker Plaza	Kansas City	MO	64114
Gabcube	63999 Redwing Court	Pittsburgh	PA	15255

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.

						Search:		
	Name (Attention) <b>v</b>	Company Name 🔻	Street 1 🔻	City 🔻	Province Code 🔻	Postal Code 🔻	Country Code	Tele
	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 Contor	Erasna	CA.	93794	US	1
	Amy Welch	Dynava	7 Anzin Importing Ad	dresses		08608	US	1
	Steve Fox	Skynoodle	7808 F Please Wait			22036	US	1
	Gary Bradley	Agimba	2489 1			91406	US	1
	Antonio Perry	Roomm	89 Bla			46247	US	1
	Michelle Peters	Dynabox	7 Merc			30316	US	1
	Douglas Myers	Skynoodle	151 Gc			97240	US	1
	Marilyn Ryan	Jaxnation	15553 Hovde Place	Oakland	CA	94616	US	1
	Cynthia Ford	Оуоуо	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	ТХ	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.
Imp	oort Selection Parse	Selected Addresses						•

Contacts are now being imported

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

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

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**

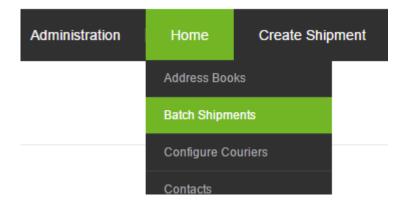
Our interface has been designed primarily around creating and submitting a single shipment at a time. However for heavier users it is useful to process multiple shipments at once. Some users will regularly have a list of shipments that need to be submitted that has been produced by another system. In 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	<b>v</b>	
BATCH STATUS				
	Quoted 0 Manifested 0 ed 0 Exceptions 0 Void 0			
SHIPMENTS				
	Shipper Attn		Shipper Company	
4				E.
ADD SHIPMENT	IMPORT QUOTE		DELETE	
DOWNLOAD WAY	BILLS			

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.

#### Batch Shipment Import

				Search:	
<b>√</b>	Ŧ	Ŧ	Ŧ	Ψ	
-	destination_attn	destination_company	destination_street1	destination_city	des
1	Ronald Ferguson	Yambee	96405 Almo Way	Bloomington	IN
1	Steven Powell	Rhyloo	4811 Oneill Place	Bradenton	FL
1	Kevin Brooks	Meejo	34 Anhalt Road	Little Rock	AR
•	Joan Griffin	Blogtags	84 Magdeline Alley	Phoenix	AZ
1	Stephanie Cook	Wikizz	353 Granby Center	Fresno	CA
1	Amy Welch	Dynava	7 Anzinger Circle	Trenton	NJ
•	Steve Fox	Skynoodle	7808 Fisk Court	Fairfax	VA
1	Gary Bradley	Agimba	2489 Mifflin Crossing	Van Nuys	CA
1	Antonio Perry	Roomm	89 Blackbird Center	Indianapolis	IN
1	Michelle Peters	Dynabox	7 Merchant Terrace	Atlanta	GA
1	Douglas Myers	Skynoodle	151 Golf Trail	Portland	OR
1	Marilyn Ryan	Jaxnation	15553 Hovde Place	Oakland	CA
<b>√</b>	Cynthia Ford	Оуоуо	2845 Monica Parkway	Pensacola	FL
1	Sharon Phillips	Demimbu	330 Messerschmidt Point	Waterbury	CT
1	Dorothy Pierce	Tanoodle	1 Lakewood Gardens Drive	Cincinnati	OH
	Russell Tucker	Bluezoom	460 Sundown Lane	Dallas	TX

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.

e v	Consignee Street 1	<ul> <li>Consignee City</li> </ul>	Consignee Province	e/State/County •	Consignee Postal Code / ZIP	Ŧ
	destination_street1	destination_city	destination_state		destination_zip	-
	96405 Almo Way	Bloomington	IN		47405	
	4811 Oneill Place	Bradonton	FI		34282	
	34 Anhalt Road		×		72222	
	84 Magdeline Alley	Enter a label to describe this field map			85062	
	353 Granby Center	Order System Export			93794	
	7 Anzinger Circle				08608	
	7808 Fisk Court		OK Cancel		22036	
	2489 Mifflin Crossing				91406	
	89 Blackbird Center	Indianapolis	IN		46247	
	7 Merchant Terrace	Atlanta	GA		30316	
	151 Golf Trail	Portland	NR		972ፈበ	

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.

Use	a Saved Field Map 🔹						Search:		
	Consignee Attn	Ŧ	Consignee	Company Name	Consignee Street 1	v		Ŧ	Cons
	destination_attn		destination_cor		destination_street1		destination_city		desi 🔺
	-		Yambee		-				
0 0	Ronald Ferguson Steven Powell		Rhyloo		96405 Almo Way 4811 Oneill Place		Bloomington Bradenton		IN FL
0	Kevin Brooks		Meejo		34 Anhait Road		Little Rock		AR
0	Joan Griffin		Blogtags		84 Magdalina Allav		Phoenix		AZ
0	Stephanie Cook		Wikizz	Importing Addresses	×		Fresno		CA
Ø	Amy Welch		Dynava	Please Wait			Trenton		NJ
0	Steve Fox		Skynoodle				Fairfax		VA
Ø	Gary Bradley		Agimba				Van Nuys		CA
Ø	Antonio Perry		Roomm				Indianapolis		IN
Ø	Michelle Peters		Dynabox				Atlanta		GA
Ø	Douglas Myers		Skynoodle				Portland		OR
	Marilyn Ryan		Jaxnation		15553 Hovde Place		Oakland		CA
	Cynthia Ford		Оуоуо		2845 Monica Parkway		Pensacola		FL
	Sharon Phillips		Demimbu		330 Messerschmidt Point		Waterbury		CT
	Dorothy Pierce		Tanoodle		1 Lakewood Gardens Drive		Cincinnati		OH
	Russell Tucker		Bluezoom		460 Sundown Lane		Dallas		TX
	Helen Matthews		Buzzbean		427 Cottonwood Drive		Albany		NY
	Roger Richardson		Avavee		40 Barnett Court		Washington		DC
•	D.1 10.50				007.0.12 1.0 2		D II		-

Click Import Selection to import the selected shipment rows

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

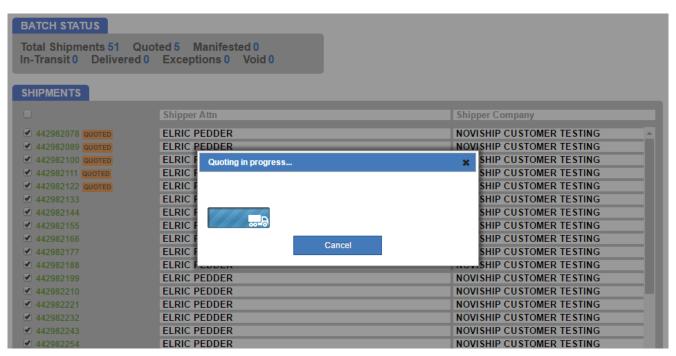
to return to the batch shipment editor.

#### **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).

n-Transit 0 Delivered	Quoted 199 Manifested 3 0 Exceptions 0 Void 0	
	Shipper Attn	Shipper Company
QUOTED	JOHN SMITH	NOVISHIP TESTING
440101761 QUOTED	JOHN SMITH	NOVISHIP TESTING
	JOHN SMITH	NOVISHIP TESTING
440101783 QUOTED	JOHN SMITH	NOVISHIP TESTING
440101794 QUOTED	JOHN SMITH	NOVISHIP TESTING
440101805 QUOTED	JOHN SMITH	NOVISHIP TESTING
440101816 QUOTED	JOHN SMITH	NOVISHIP TESTING
440101827 QUOTED	JOHN SMITH	NOVISHIP TESTING
440101838 QUOTED	JOHN SMITH	NOVISHIP TESTING
440101849 QUOTED	JOHN SMITH	NOVISHIP TESTING
440101860 QUOTED	JOHN SMITH	NOVISHIP TESTING
440101871 QUOTED	JOHN SMITH	NOVISHIP TESTING
440101882 QUOTED	JOHN SMITH	NOVISHIP TESTING
440101893 QUOTED	JOHN SMITH	NOVISHIP TESTING
☐ 440101904 MANIFESTED	JOHN SMITH	NOVISHIP TESTING
🗌 440101915 MANIFESTED (****		NOVISHIP TESTING
440101926 QUOTED	Waybills and other Documents	NOVISHIP TESTING
440101937 QUOTED	-	NOVISHIP TESTING
440101948 QUOTED	1. Label #123456789012 🖨	NOVISHIP TESTING
2 440101959 QUOTED	JOHN SMITH	NOVISHIP TESTING
440101970 QUOTED	JOHN SMITH	NOVISHIP TESTING
440101981 QUOTED	JOHN SMITH	NOVISHIP TESTING
440101992 QUOTED	JOHN SMITH	NOVISHIP TESTING
440102003 QUOTED	JOHN SMITH	NOVISHIP TESTING
440102014 QUOTED	JOHN SMITH	NOVISHIP TESTING
440402025	IOUN CMITH	

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**

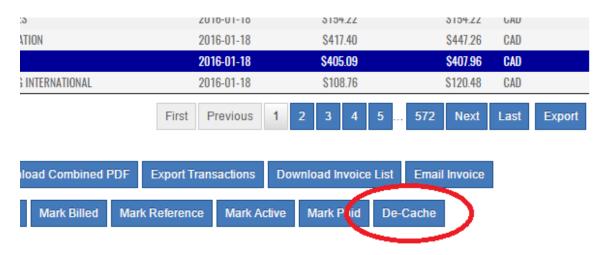
The "Export" button produces a CSV file with data for each shipment, including status and tracking number.

### **De-Caching Invoices**

Although invoices are, effectively, just a collection of transactions (see <u>Invoicing</u> <u>Concepts</u> 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.



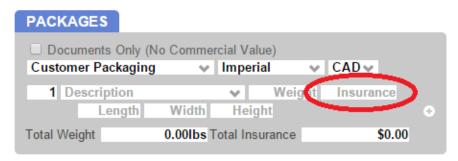
Transaction Invoicing

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.

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tomer Group										
DLVRD Logistics	•									
rency										
CAD - Canadian D	ollar									
is the currency in wh	hich the prem	niums are calculated. The	result will be co	onverted to the o	ustomer cu	rrency for pricing.				
Customer Charge	e Formula									
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**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.

Documents Only (No Con Customer Packaging	nmercial Value)	CAD		Category Select an insurance category
Qty Description	✓ 5lbs	\$1000.00		SHIPME General Merchandise (New/Used/Refurbished)
5"	5" 5" bs Total Insurance	\$1000.00	٠	Glass, Ceramics, Marble, Granite, Tiles, Pottery and Other Shipment Similar Breakables
Total Weight 5.00	bs rotal insurance	\$1000.00		Payment Hand Held Electronic Devices/Gaming Satur Devices/Laptops/Tablets/Cell Phones and Other Portable Communication Devices
				Customer 4423402 Radioactive/Hazardous/Restricted or Controlled Items
				□ Notify Wine/Beer/Alcohol

#### 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.

PACKAGES	INSURANCE
□ Documents Only (No Commercial Value)         Customer Packaging       ✓ Imperial       ✓ CAD ✓         Qty       Description       ✓ 5lbs       \$1000.00         5"       5"       5"       ✓	Category Radioactive/Hazardous/Restricted or Controlled Warranted Professionally Packed in a transportation of dangerous or hazard in this category
Total Weight 5.00lbs Total Insurance \$1000.00	Subject to normal trade loss deductible.

**Insurance Category Disallowed** 

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

PACKAGES	INSURANCE
Documents Only (No Commercial Value)         Customer Packaging       Imperial       CAD         1       Description       5lbs       \$1000.00         5"       5"       5"         Total Weight       5.00lbs       Total Insurance       \$1000.00	<ul> <li>Category General Merchandise (New/Used/Refurbished) </li> <li>Break-bulk, flat rack or open top container shipments excluding rust, oxidization, discoloration, scratching, chipping, denting or marring, unless caused by an insured peril.</li> <li>IF the goods are Used/Refurbished, the following conditions also apply:         <ul> <li>Excluding rust, oxidization, discoloration, scratching, chipping, denting and marring, unless caused by an insured peril.</li> <li>Excluding mechanical and/or electrical derangement, unless caused by an insured peril.</li> <li>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.</li> </ul> </li> </ul>

#### **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.

FedEx.	_// Du	rolator	FedEx.
Ground	- Turun	υιατοι	Express
GROUND	GR	OUND	EXPRESS SAVER
\$26.38 \$27.70 incl tax © Friday January 22	ОΠ	5 incl tax hursday uary 21	\$30.25 \$31.76 incl tax () Thursday January 21
<u> </u>			
<b>Customer View</b>			
Freight Cost	\$15.20		
Discount	-\$4.26		
Fuel Surcharge	\$0.44		
Insurance	\$15.00		
SubTotal	\$26.38		
GST @ 5%	\$1.32		
Total	\$27.70		
Partner View			
Account Price		List Price	
Freight Cost	\$10.94 CAD	Freight Cost	\$15.20 CAD
FedEx Ground Fuel	\$0.44 CAD	FedEx Ground F	uel \$0.61 CAD
SubTotal	\$11.38 CAD	SubTotal	\$15.81 CAD
GST @ 5%	\$0.57 CAD	GST @ 5%	\$0.79 CAD
Total	\$11.95 CAD	Total	\$16.60 CAD

Insurance Charge in Quote

### **Resellers**

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