# [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)

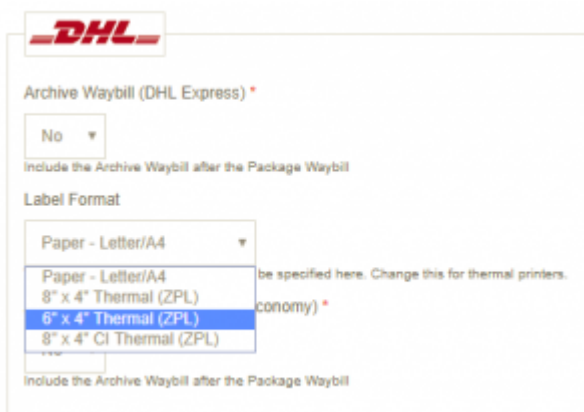This document covers producing ZPL / Zebra labels using a Zebra Thermal Label printer.

Administrative Setup

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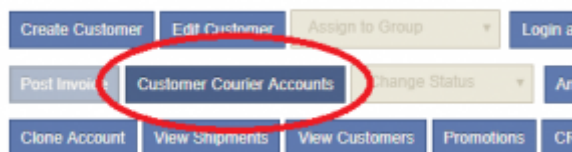
Accounts".

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
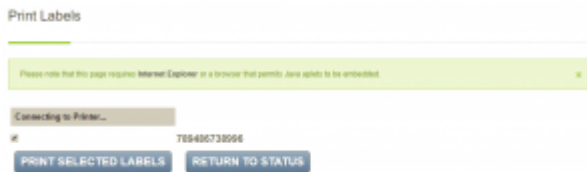
shipment.

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.
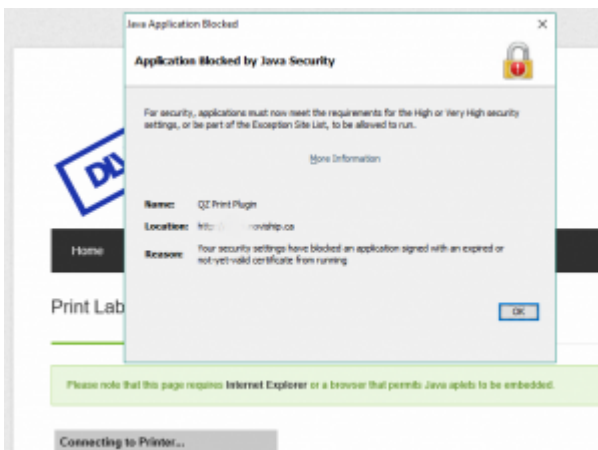
Installing Java

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

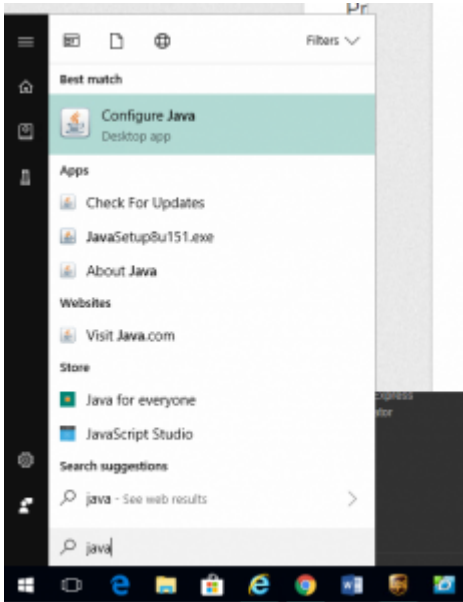Visit **java.com** and find the appropriate download page.
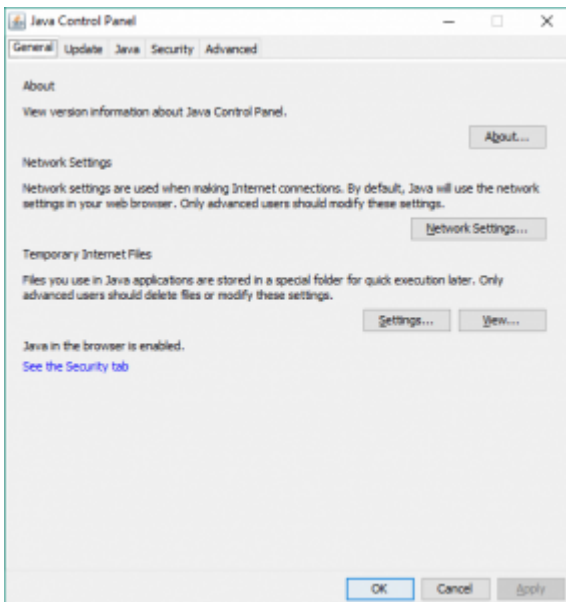

Configure Java Security

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.
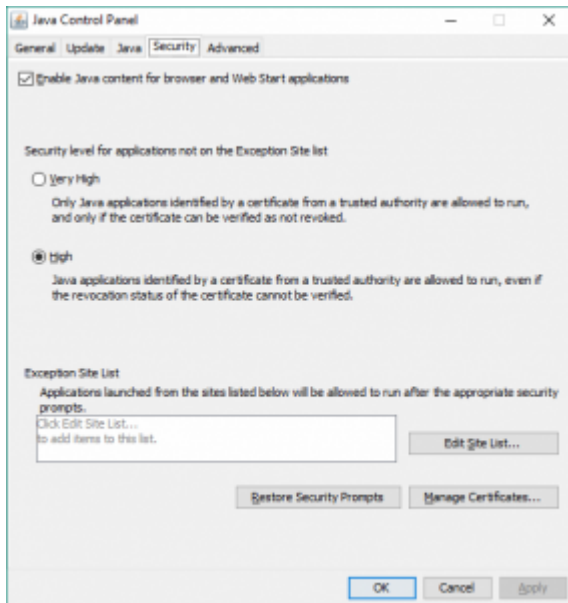

To configure Java Security use Windows Search to find the **Configure Java** applet.
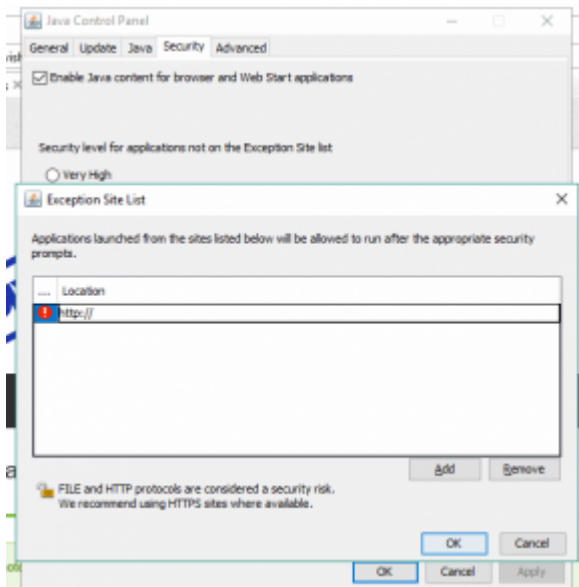
When running the **Configure Java** applet you should see the following dialog.

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.
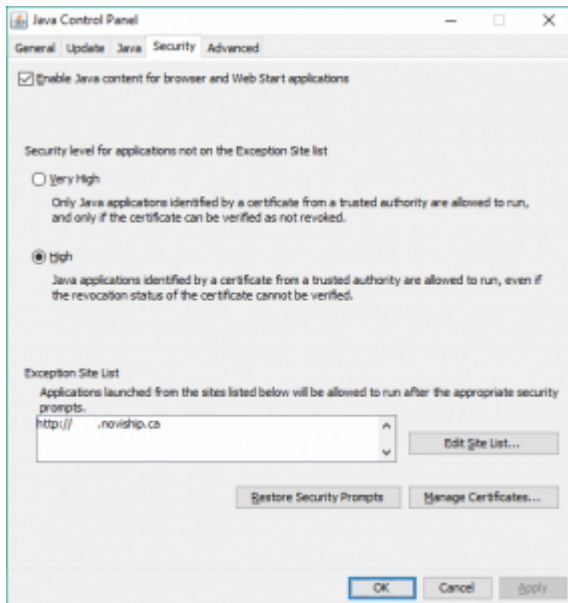
Ensure the site has been correctly added.

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.
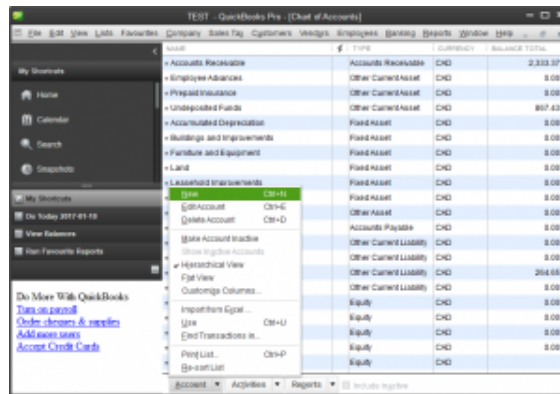
Adding an account in Quickbooks
(Lists | Chart of Accounts | New)

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.
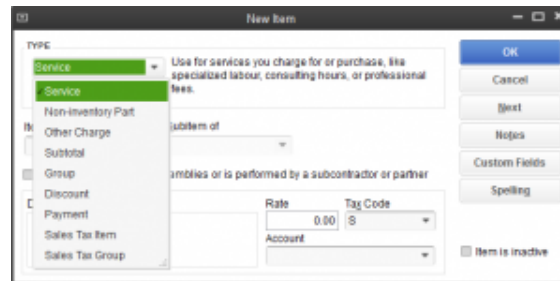
New Item

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.
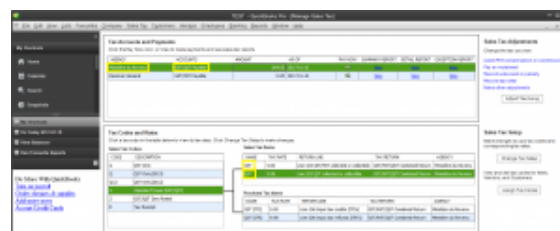
Viewing your Sales Tax Configuration
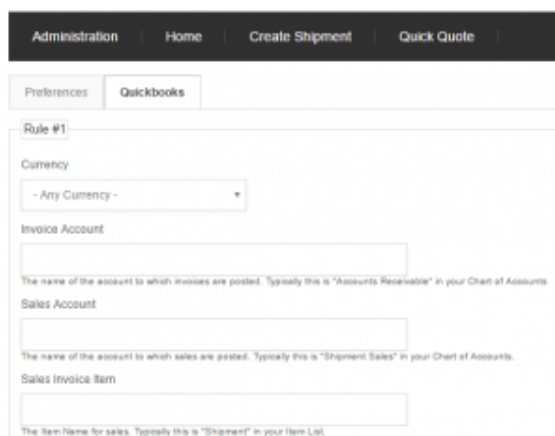
For each tax line item in an invoice, Noviship will need to match it to three things in Quickbooks: the **Agency**, the **Tax Account** and the **Tax Item**.

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

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.
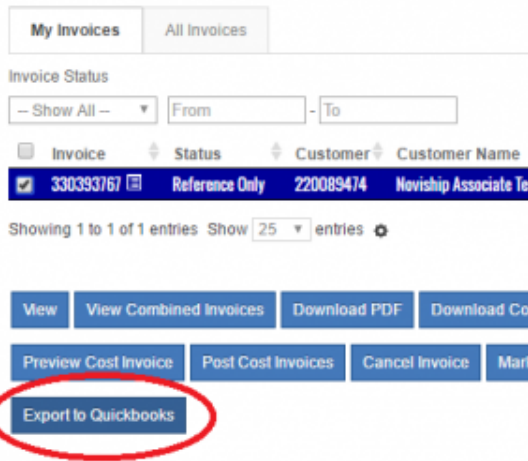
Export to Quickbooks

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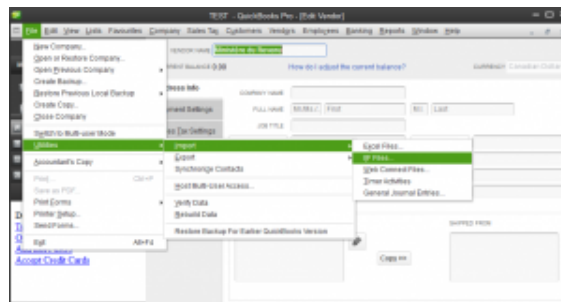
Import IIF

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.
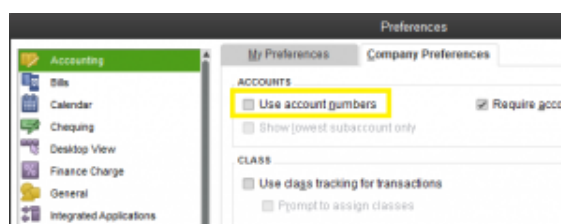
Disable Use Account Numbers

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
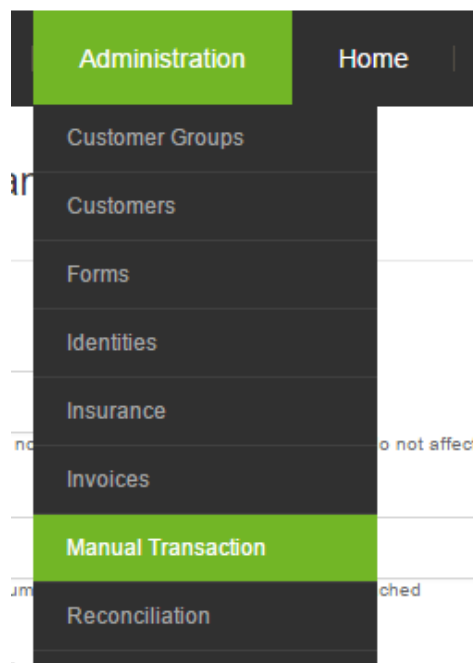
Manual Transaction Menu

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

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.

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

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
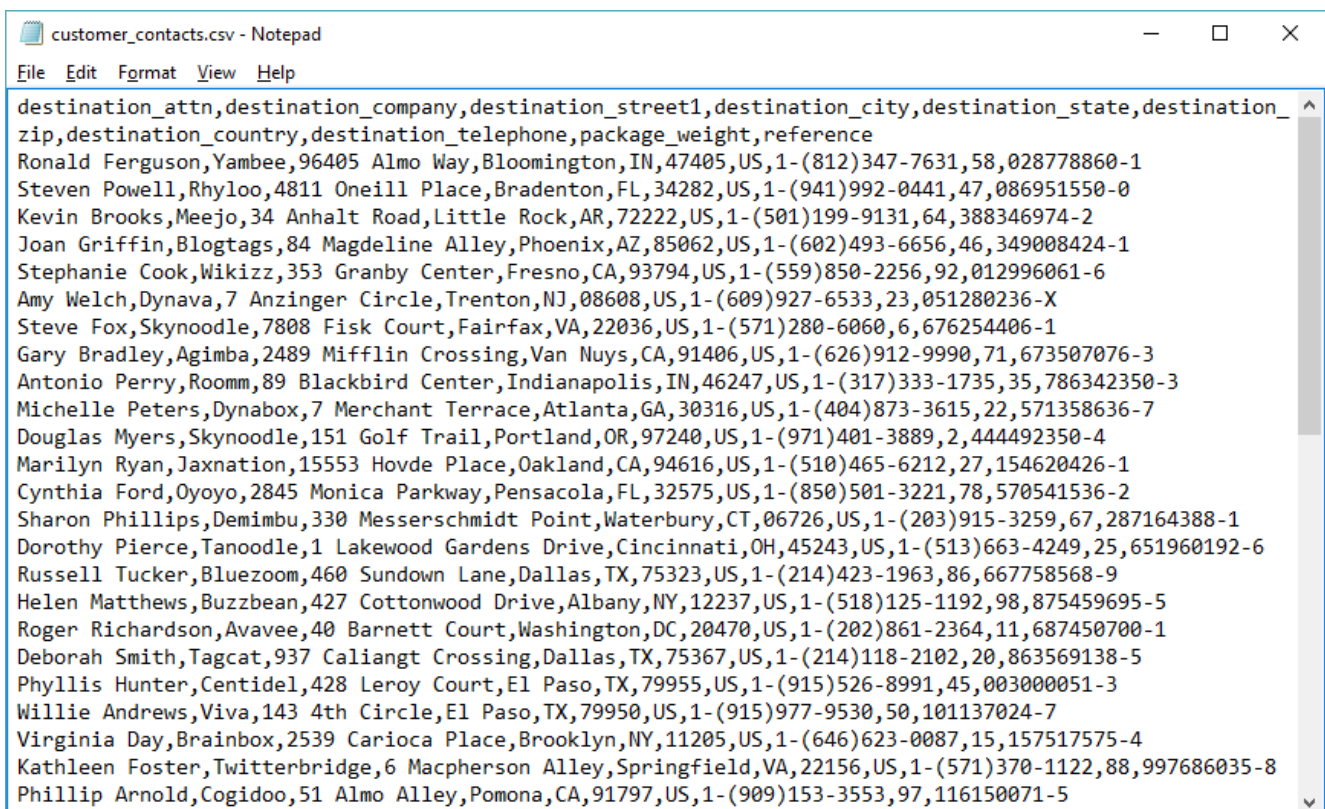
⬅ **Credit to appear on next invoice**

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](#) 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

☐ Allow Ship-From
        Users who do not have permission to edit the shipping address will only be able to :

Access Control

Select who can access this address book

Visible to Everybody   ▼

Submit

Select a suitable name and description

Importing the Contacts

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

Successfully applied the submitted data   ×

Search:

	Name	Description	Visibility
☐	Recently Used	Recently used addresses are automatically added	noviship-customer
☐	Contacts	Imported	noviship-customer

Showing 1 to 2 of 2 entries Show 25 ▼ entries ⚙   Export

View Address Book **Edit Address Book** **Delete Selection** **New Address Book** **Import Contacts**

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.

Contacts are now being imported

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

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.

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.
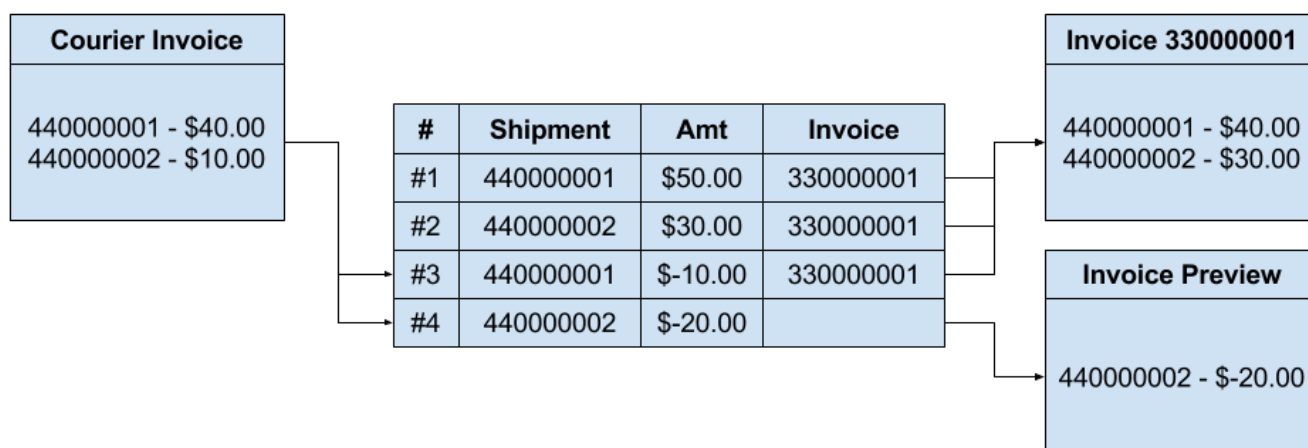
Transaction Invoicing

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.

The Reseller Model

The Noviship system comprises a customer facing shipping interface as well as a financial back-office system for billing and reconciliation. When a customer requests a quote and receives prices there are many processes involved in that calculation. The cost of the shipment is calculated by rating with a specific carrier account while the price displayed to the customer is based on some agreed formula. Later on an invoice can be created to charge that customer for the shipment, credited to the account holder.

Noviship provides two types of billing: **Customer** and **Cost**.

Cost billing provides a means for the account holder to charge the billing entity (the entity that manages the customer accounts) for shipments on their accounts. Cost billing is always in the same currency as the shipment cost and the base price for each shipment is precisely the cost from the carrier. Markups and service fees are charged separately to make reconciliation with carrier bills easier.

Customer billing is based on offers made to the customer account. Offers set the markup or discount for each service offered by the carrier. In addition customer billing can be in a different currency from the cost with currency markups applied.

The steps between knowing the cost and charging the customer have become

more elaborate as the system has evolved and prior to the Reseller Model it was this:
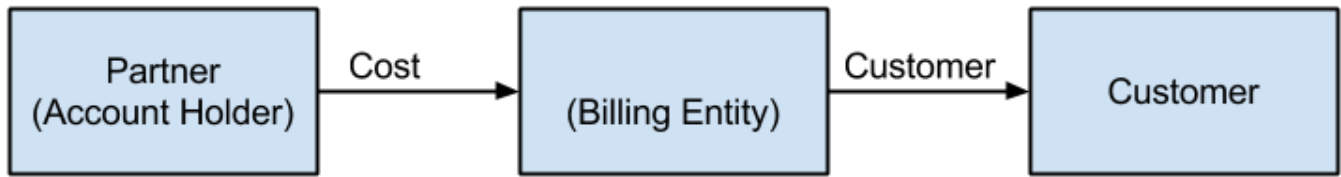
In the above illustration the Partner charges the billing entity using Cost billing and and that entity charges the customer using Customer billing.

This model has changed to allow both a reseller and the customer to be billed (using Customer billing) for the same shipment. The reseller is billed based on what they would have been charged for the shipment (i.e. using their offers). In making this change we now call the billing entity the "Associate".
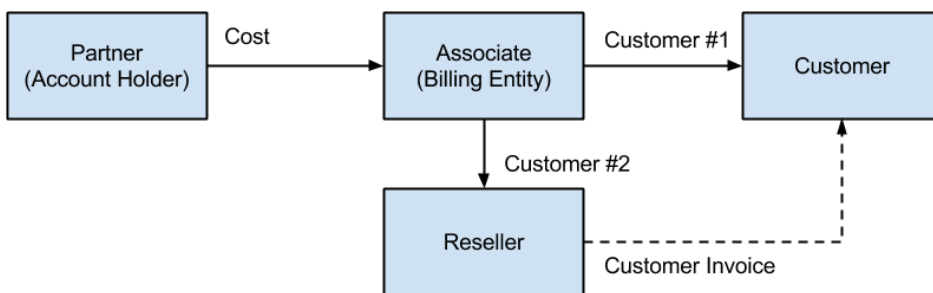
In the above illustration there are now two Customer bills for a shipment. Note that it is the Reseller that issues the Customer Invoice to the Customer. More specifically, it is the Reseller's logo and billing information that appears on the invoice.

The settings are configured in the customer account (**Administration | Customers** and use the **Edit** button).
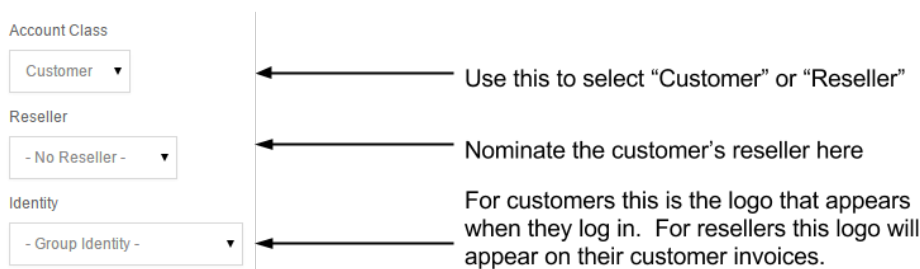
An **Identity** is the combination of logo, name, contact details, tax numbers and so

on visible to the customer. A customer's Identity appears on each page when they are logged in and generally represents their billing entity. It is important to set a Reseller's identity as this will be used on their customer invoices.
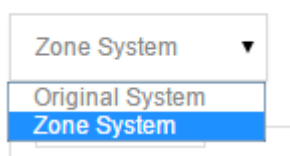
Invoices are issued the same way as they were prior to the Reseller model but now a separate invoice is issued to both the Reseller and the Customer.

How to use the new Offer System

This document explains how to set pricing for customers using the new offer system. Each customer is assigned to either the original provision based pricing system or the new zone based pricing system. The new system allows pricing at the zone-specific level and therefore better matches the pricing structure used by the carriers.

To activate this system for a customer you should edit the customer account and select "Zone System" in the offer model.

Offer Model

Zone System ▼

Original System
Zone System

Now when you click the "Edit Offers" button for a customer you will see the new single-page pricing system.

Editing Offers for Example Customer (220000000)

When you click the "+" icon beside an offer the zone/weight/packaging table will appear. You do not need to use this table as entering a discount or markup in the offer box will set the price for all zones, weights and packaging.

The zone table is a complex document and may take some time to load on your browser. If the loading time is too great consider switching to Chrome which can render this information much faster than Internet Explorer.

A useful, separate feature is the price cache. If the system has previously quoted a shipment for a specific zone and weight then the discount the account received will be displayed beside the edit box.

As a short-cut you can enter pricing for an entire zone or an entire weight line by entering an amount into the legend box above or to the left of the table.