Sendmyshipment.com Solutions
How-To Ship Manual

SEND*mySHIPMENT.com*

SHIPPING SIMPLIFIED

Version 1.1, July 2017

Contents

Ship Screen

The Ship screen is the defaulted home page, it is where all the magic, I mean shipping happens!

All grey module can be expanded or collapsed by simply clicking anywhere on the grey. Each module will be expanded and discussed in detailed

Sender/Recipient

Sender

Upon creation of your Sendmyshipment.com account a **default** location will be set, this is the location that a majority, or even all of your shipments will be shipped from. You can input a different sender address by simply erasing all fields and entering in a new address.

Please Note that the Sender code should not be erased (you will get no rates if the sender code is empty).

Recipient

The **Recipient** module is identical to the **Sender** the only difference is that, it does not auto-populated with an address. There are a couple of ways to enter an address; manually typing in all information, or by accessing the address database by clicking the blue button to the right of the recipient id

Manual entries can be saved to the address book by adding a Recipient Id and toggling the **Save/Update Address Book** to **Yes**. When the order is shipped this entry will now be saved in the address book.

Updating an address can also be done here as well by changing the required fields and toggling the **Save/Update Address Book** to Yes. When the order is shipped the Recipient ID will now be saved with the changed information in the address book.

Mandatory Fields to complete a shipment

- Country
- Company
- Street Address
- City
- State/Province
- Zip/Posta
- Tel #

EAlerts

Anytime a shipment is sent, the option of sending an eAlert to the sender, recipient, broker, or an alternative email address is available. If an email is entered in the **Sender** or **Recipient** entry the email address will automatically appear in the **Send email to** section. The option to add an alternative email in the **Other Email Address** field is also present in this section.

The **Send email on** section, is the type of eAlerts that will be sent, the options are ship, exceptions, and delivery.

Defaulting the eAlerts to "on" our "off" and the type of alerts to be sent can be done in the shipping preference

If a shipment contains Documents or Commodities this information can also be included in the eAlert by toggling, **Add Package Contents to the e-Alert**, to yes

Additionally, you can add a **personal message** that will show up in the eAlert as well

Billing

In the billing section, the option to choose who will pay for each shipment is available. Bill to sender is defaulted on each shipment but this can be easily changed by the drop down.

When **Recipient**, **Third Party**, or **Collect** is selected, the account number that will be billed for the shipment needs to be entered under **Account**. When an account number is entered, all rates will be zeroed out as the rates are for the account number enter and for privacy reason the rates cannot be displayed.

Packages

Small packages

This is where details about the package is entered, the **Measurements Type** can be changed from pounds to kilograms, and can be defaulted for all shipments in *Field Preferences*.

Under **Packaging** the option to choose what type of packaging needed is found in the drop down. The options are **Customer, Envelop, Pack, Box, Tube, 10 KG Box, 25 KG Box**.

Envelop, Pack, Box, Tube, 10 KG Box, 25 KG Box should only be used if one of these packaging types were provided to you from the carrier, it would you usually have the carrier Logo on it, otherwise please use **Customer** If you are using your own packaging.

With the use of a scale, **weight** can automatically update in Sendmyshipment.com, otherwise manual entry is required

The dimensions are not mandatory but rates are more accurate if they are entered. **Dimension codes** can be entered if standard sizes boxes/packages are used. To access the **dimension codes**, click the blue button and chose the dimensions that have been previously uploaded in the dimension database.

Shipment Level

When shipping multiple packages, the option of **shipment level** or **package level** becomes available. When at shipment level the information enter pertains to all packages. For example, if you entered in 3 packages at 15 pounds with dimension of 5 x 5 x 5, the weight of all 3 packages combined is 15 pounds and each box is 5 x 5 x 5.

Package Level

When at package level you have the option to customize each package with its respective weight and/or dimensions
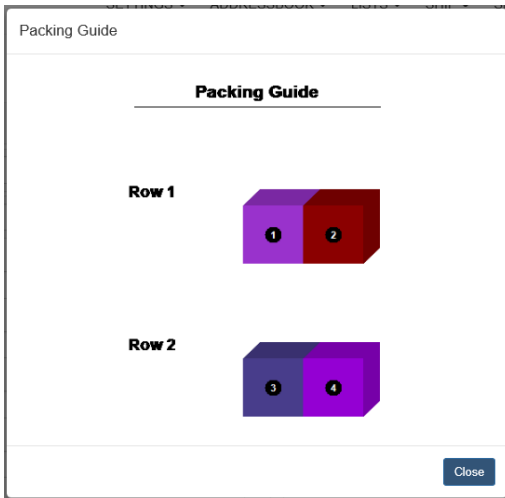
Freight

When shipping a skid, the Freight tab should be used. Weight and dimensions are entered the same way as small packages.

The **Packing Guide** gives a breakdown of how multiple skids would/should be packaged during delivery.

Additional Info

Information enter in this section is optional.

Department codes: commonly used when different departments are shipping with the same carrier accounts, department codes would be useful to track shipments by departments, it also helps with billing by department.

Shipment Reference/PO Number: If order numbers are used when shipping, this fields should be utilized

Ship date: is always defaulted to the current date, the option to future date shipments is also available.

Shipment protection: To insure the contents of your package, add the value in this field.

Currency: is the currency type that will be used in customs if payment is required.

When shipping at package level you will need to select the downwards pointing arrow beside the package to populate additional information per package.

Rates

Once the **sender**, **recipient** and **package** information has been entered rates will appear, these rates are taken directly from their respective carrier service.

List displays rates without discounts, where **Your** displays discounted rates. Discounts are based on agreements you have with your respective carrier accounts.

When a carrier is highlighted in green that means that carrier and services has been selected as the shipment method. Clicking the **green finger** also locks in carrier choice.

The **dollar sign** gives a breakdown of how the selected rate is calculated

Order by: will determine the order in which rates will be displayed, the options are by Cheapest or by Fastest

The remaining tabs provide filter options to include when rate searching, each tab has different options, you will learn more during your online training, or simply click each tab to see what options are available.

Whenever changes are made on the shipping page make sure to click **Refresh Rates** to make sure all changes are calculated in the rates.

> Please note the carriers you see in Sendmyshipment.com are your carrier accounts. If you have new accounts, please reach out to info@sendmyshipment.com with the account number to be added to your Sendmyshipment.com account.

Shipment Option

Shipment options are additional options available for each carrier. Each carrier has different shipment options, therefore only the carrier selected in the rate module will be displayed in this section.
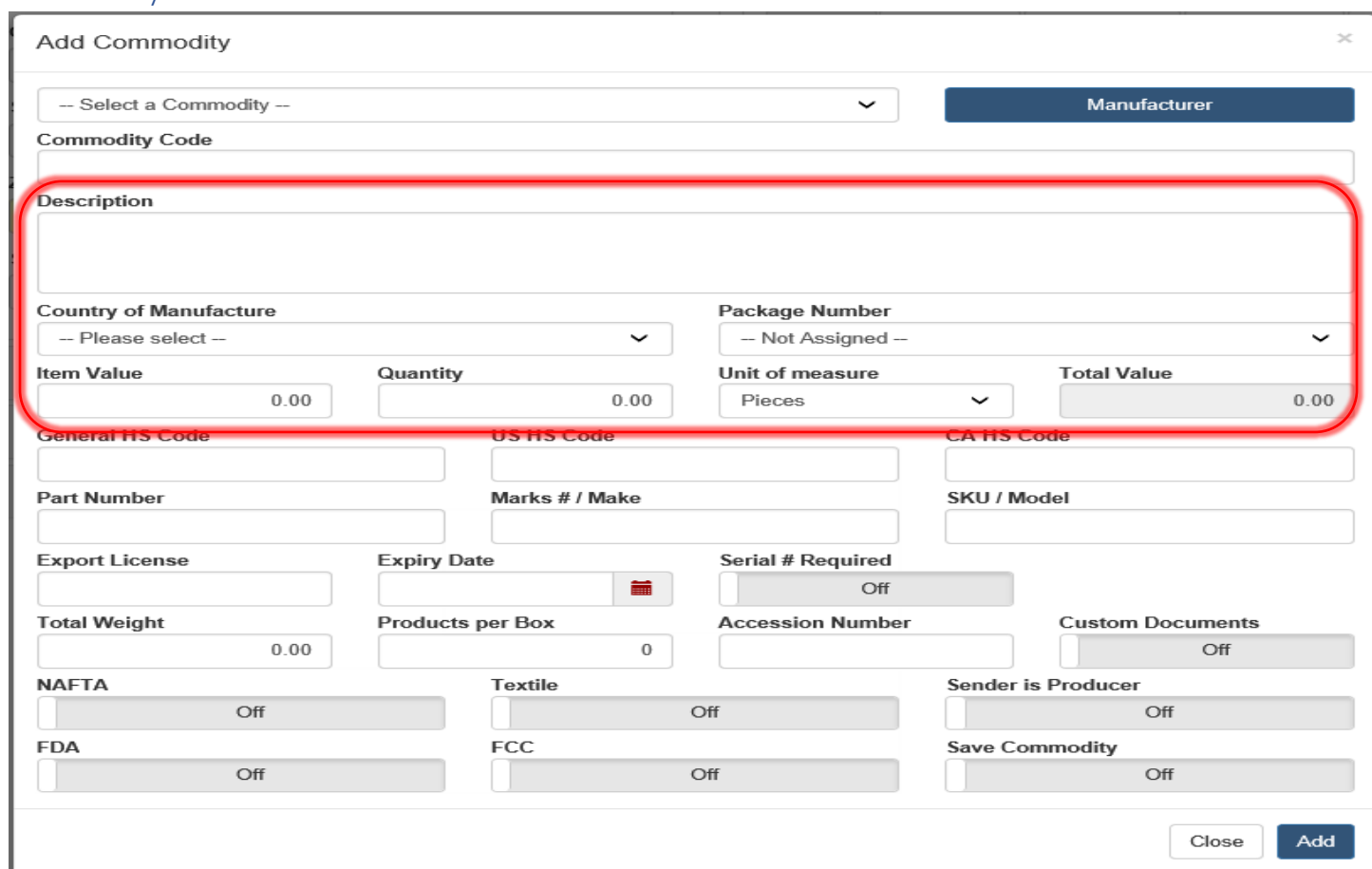
Contents

When shipping an international shipment, a document or commodity is required.

An error message will display when trying to ship an international package without **Documents** and **Commodities**.

Commodity

When adding a commodity, the highlighted information is mandatory, the remaining fields are optional but the more information entered the better for customs.

To save time, regularly used commodities can be saved to the commodities database and they will appear in the drop down **Select a Commodity**.

Documents

When adding a document, select the type of document needed from the drop down **Select type of Document**, then fill out the remaining information.

When all information highlighted is entered click **Add.**

Ship

Once all information is entered correctly the last step is to click ship. Once shipped a link to the label(s) will be available to print.

Shipping List

Current Shipments

All shipments made for the day can be found under **Current Shipments**, shipments will be separated by carrier, services, and ship from location. The **Actions** to the right of the carriers contains the following options.
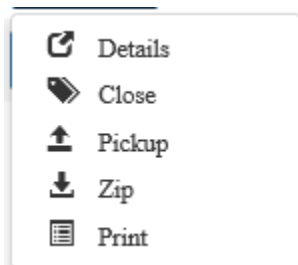
Detail: Provides shipping summaries for each shipment per carrier and service

Close: At the end of your ship date you can close your shipment per carrier. Once a shipment is closed modifications cannot be done in Sendmyshipment.com, you must contact the carrier.   All shipments are automatically closed at 12am every night

Pickup: Used to schedule a pickup request per carrier

Zip: To create a zip file of all the shipping documents for selected carrier

Print: To print all current shipments for selected carrier

Shipment Filters: allows for easy search options for shipments that have been created.

Details

Under the **details** all information enter for a shipment including a PDF of the label are available for easy access and reprinting. Each shipment will have an actions button to the right which contains the following information:
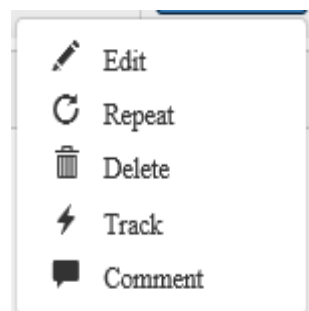
Edit: When a shipment is edited, the original tracking number will be deleted and a new tracking number will be generated once Shipped (the label with the old tracking number should be discarded if printed)

Repeat: When a shipment is repeated a second tracking number will be generated when Shipped.

Delete: Used to cancel a shipment from Sendmyshipment.com and the respective carrier, tracking label should be discarded

Track: The tracking status will update with the progress of the shipment

Comment: a note can be left per shipment

Pickup

Step 1:

Mandatory Field that must be filled to complete a Pickup Request

- The pickup location is defaulted, if the packages are at another location the address needs to be update accordingly
- **Pickup date:** for some carriers for ground shipments the pick date must be future dated
- Ready time and company close time
- The number of shipments, packages, and weight will auto populate if the pickup request is created under current shipments

Step 2:

This step will display the available dates and times available for a pick up based on the information inputted in step one. Simply click on **Request Pickup** beside your preferred pick up time.

Step 3:

The third step will provide the confirmation pickup number. This confirmation comes directly form the carrier's webserver.

All pickup request can be viewed under **Shipping List** - **Pickup List** found in the menu bar. To delete the pickup, click on the **Actions** button then cancel.

Search Shipment History

This section in very similar to the current shipments, the only difference is that these shipments are closed. All shipments that are closed manually are automatically at 12am will end up in the search shipment history.

Address Book

All address book entries can be found here. There are few ways to add entries to the address, directly form the ship screen which was mentioned above, manual entry or import a CVS file. In the Address book, by clicking **add** you can add individual manual entries. A dialogue box will appear to enter all information.

Mandatory Fields to complete a shipment

- Country
- Company
- Street Address
- City
- State/Province
- Zip/Posta
- Tel #

To import an address book, click on import and a dialogue box will pop up. From the dialogue box you can Download load the correct import file. Fill in the information and make sure the file is saved as CSV and upload the file.

Beside each entry there is an **Action** button that contains the following information:
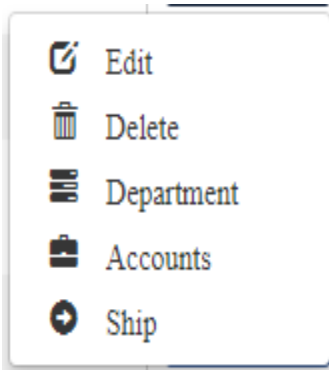
Edit: to make any modifications to the entry. Modifications can only be done if the status of the entry is User

Delete: to remove the recipient from the address book

Account: If the recipient has their own carrier account number, it can be entered here. This is used when the recipient is responsible for the payment of the shipment

Ship: when selected the recipient address will populate in the ship screen.

Shipping Preference

The shipping preference can be found under settings, a lot of your default settings are found here.

eAlerts

If a checkmark is present in this section that means on the Ship Screen under eAlerts whoever has been checked off will be defaulted to receive an eAlert for each sent shipment.

This is the same for the **Alert Events** if checked, the type of eAlerts sent will be defaulted for each sent shipment.

Use eAlerts for:
- ☑ Sender
- ☐ Recipient
- ☐ Broker
- ☐ Other

Alerts Events:
- ☑ Ship
- ☑ Exceptions
- ☑ Delivery

Label Size & Format

Selecting the **label size** and **format** is done here, the settings to install a thermal printer can also be found in this section. When placing a checkmark in **Use automatic printing functionality** the link to start the set-up process will be visible.

Default sender: default - SDI DEMO

☑ Use automatic printing functionality
We are unable to connect to QZ Tray plugin, please make sure it is running and you have restarted the browser after installing it

[Retry]

Labels size
- ○ Laser (8.5 x 11 inches)
- ● Thermal (4 x 6 inches)
- ○ Packing Slip (8.5 x 11 inches)

☐ Use weight scale integration

Labels format
- ● PDF
- ○ PNG
- ○ ASCII
- ○ DPL
- ○ EPL2
- ○ ZPLII

Installation is further explained in training or you can reach out to our support team for assistance.

Other Shipping Preferences

- Set a default Sender if there is multiple

- Setup printers, scales, automatic printing
- System is set to 3 commercial invoices for international shipments, this can be changed
- Default order for carrier rates can be set
- Default Rates sort mode to Cheapest or Fastest
- Default international products to Commodities or Documents

How to Step by Step

Delete a Shipment

1. Go to **SHIPPING LIST** then **CURRENT SHIPMENTS**
2. Click the arrow to the left-hand side of **TODAYS SHIPMENTS**
3. Find the carrier for the shipment you want to delete
4. Select **ACTIONS** button on the right then **DETAILS**
5. Find the shipment/tracking number you want to delete
6. Select the **ACTIONS** button then **DELETE**

(You can only delete shipments that are Open and in Current Shipments, if your shipment is closed you must call the carrier to delete your shipment)

Edit a Shipment

1. Go to **SHIPPING LIST** then **CURRENT SHIPMENTS**
2. Click the arrow to the left-hand side of **TODAYS SHIPMENTS**
3. Find the carrier for the shipment you want to edit
4. Select the **ACTIONS** button then **DETAILS**
5. Find the shipment/tracking number you want to edit
6. Select the **ACTIONS** button then **EDIT**
7. Your order will open on the ship screen to Edit
8. Edit the information you need to, then click **SHIP**
9. Your old tracking number will be deleted and you will receive a new tracking number for the shipment (please discard the old label if it was printed)

(You can only edit shipments that are Open and in Current shipments, if your shipment is closed you must call the carrier to delete your shipment and create a new shipment)

Repeat a Shipment

1. Go to **SHIPPING LIST** then **CURRENT SHIPMENTS**
2. Click the arrow to the left-hand side of **TODAYS SHIPMENTS**
3. Find the carrier for the shipment you want to edit
4. Select the **ACTIONS** button then **REPEAT**

5. Find the shipment/tracking number you want to repeat
6. Select the **ACTIONS** button then **REPEAT**
7. Your order will open on the ship screen
8. you can leave the information as is or modify it accordingly, then click **SHIP**
9. You will receive a NEW tracking number (Both the old and new tracking number are valid place the new label on the second parcel)

Create a Return Shipment

1. Click the **SENDER** field and change the sender details (contact, address, etc) to that of your customer (DO NOT change the sender code)
2. In the **RECIPIENT** field enter your address (Billing info does not need to change)
3. Enter the **PACKAGE** info to get a rate
4. Once you have a rate click on the **PICKUP TAB** in the rates section if you want to send the carrier to pick up the item
5. You also have the option to email the customer the labels by toggling **EMAIL LABELS** to green at the bottom of the screen
6. If not, click the label icon once you hit **SHIP** and save the label to your computer

Create A Return Shipment from Shipment History

1. Go to **SHIPPING LIST** then **SEARCH SHIPMENT HISTORY**
2. In the **TRACKING #** filter put the tracking number for the order you want to create a return for
3. Select the **ACTIONS** button beside the shipment
4. Click **RETURN**
5. Your order will open up in the ship screen
6. Enter in the **EMAIL ADDRESS** for the customer/client then click **ADD** and **CLOSE**
7. The **SENDER** field will auto populate with the address of the customer/client address. The **recipient** address will populate with your address
8. The package will autofill as well
9. In the **RATES** select the carrier and service
10. When **SHIP** is clicked, the labels will be email to the customer

(all autofill field can be edited)

Re-Print a Label

1. Go to **SHIPPING LIST** then **CURRENT SHIPMENTS**
2. Click the arrow to the left-hand side of **TODAYS SHIPMENTS**
3. Find the carrier for the shipment you want to re-print the labels
4. Select the **ACTIONS** button then **DETAILS**
5. Find the shipment/tracking number you want
6. Click on the **PDF** and reprint the label

Close Shipments

1. Go to **SHIPPING LIST** then **CURRENT SHIPMENTS**
2. Click the arrow to the left-hand side of **TODAYS SHIPMENTS**
3. Find the carrier for the shipment you want to close
4. Select the **ACTIONS** button then **CLOSE**

(all shipments close automatically at 12am if not closed manually)

Retrieve EOD Reports

1. Shipments must be closed to get the EOD report
2. Click on **SHIPPING LIST** then **EOD**
3. Choose the date and carrier you want the EOD for
4. Select **VIEW**
5. Based on the carrier you will have the options to print: The Shipment report, Summary report or the Manifest

Create a Pick-up Request from Today's Shipments

1. Go to **SHIPPING LIST** then **CURRENT SHIPMENTS**
2. Click the arrow to the left-hand side of **TODAYS SHIPMENTS**
3. Find the carrier for the shipment you want to close
4. Select the **ACTIONS** button then **PICKUP**
5. **Step 1** Verify the Pickup Location on the left has the correct address
6. Set you **READY TIME** and **COMPANY CLOSE TIME** by clicking on the red clock to the right
7. The number of shipment, packages and weight will auto populate based on your shipments
8. Click on **CHECK AVAILABILITY**
9. **Step 2** will confirm the available dates for a pickup
10. Select **REQUEST PICKUP** beside the date of your choosing
11. **Step 3** will provide you with your confirmed pick up label and pick number

Create a Pick-up Request for a Shipment Not in Today's Shipment

1. Go to **SHIPPING LIST** then **PICKUP LIST**
2. Click on **ADD NEW PICKUP**
3. Select the Carrier Account, Location and Service Type for the pickup then click **REQUEST PICKUP**
4. **Step 1** Verify the Pickup Location on the left has the correct address
5. Set you **READY TIME** and **COMPANY CLOSE TIME** by clicking on the red clock to the right
6. *Enter in the number of shipment, packages, and weight (it does not auto-populate like above)*
7. Click on **CHECK AVAILABILITY**
8. **Step 2** will confirm the available dates for a pickup
9. Select **REQUEST PICKUP** beside the date of your choosing
10. **Step 3** will provide you with your confirmed pick up label and pick number

Get Tracking Status for Individual shipment

1. Go to **SHIPPING LIST** then **SEARCH SHIPMENT HISTORY**
2. In the **SHIP DATE** filter put the date range you need
3. Click the top **ACTIONS** button beside the shipment you want to track
4. Click **TRACK**

Get Tracking Status for All Shipments at Once

1. Go to **SHIPPING LIST** then **SEARCH SHIPMENT HISTORY**
2. In the **SHIP DATE** filter put the date range you need
3. Click the top **ACTIONS** button to the right of **SHIPMENT FILTERS**
4. Click **TRACK ALL**

Add a Sender/Recipient to Address Book

1. Go to **ADDRESSBOOK** then click on **SENDER** or **RECEIPIENT**
2. To Add a single entry click **ADD NEW**
3. Mandatory fields to enter to create a shipment are
   a. Recipient ID
   b. Company (if you only have the recipient enter it here)
   c. Telephone number
   d. Country
   e. State
   f. City
   g. Address
   h. Postal Code
4. Click **SAVE**

Import an Address Book

1. Go to **ADDRESSBOOK** then click on **SENDER** or **RECEIPIENT**
2. Click on **IMPORT**
3. The import recipient should be set to **TAB DELIMITED**
4. Please reach out to us by email or Live Help and we can send you an Address Book import template
5. Your address book must be saved as **TAB DELIMITED**
6. Click on **BROWSE** to find your file then click **IMPORT**

Search for a shipment

1. Go to **SHIPPING LIST** then **SEARCH SHIPMENT HISTORY**
2. In the **SHIPMENT FILTERS** enter the information for the shipment(s) ie. Date range, tracking number ets…
3. Select **SEARCH**

(Only shipments that have been closed can be found here)

Set up Default eAlerts

1. Go to **SETTINGS** then **SHIPPING PREFERENCES**
2. Beside **USE eALERT** select who you want to receive the eAlert
3. Beside **ALERTS EVENT** select the type of alert you want to send
4. Click on **SAVE PREFERENCES** at the bottom of the screen

Setup Automatic Printing

1. Go to **SETTINGS** then **SHIPPING PREFERENCES**
2. Put a check mark beside **USE AUTOMATIC PRINTING FUNCTIONALITY**
3. A message is red will appear to download QZ click on the URL: https://ship.sendmyshipment.com/download/qz-tray.exe
4. Follow the steps on the screen to download QZ
5. Once QZ is downloaded click on **RETRY**
6. Select your labels printer and laser printer in the drop down
7. For **LABELS SIZE** click **Thermal (4 x 6)**
8. For **LABELS FORMAT** select **PDF**
9. If your label has a **DOC TAB** select the correct location of the doc tab (top or bottom)
10. Click **SAVE PREFERENCES** at the bottom of the screen